



# How to Create a Material Tracking Checklist

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## DOCUMENT ACCESS

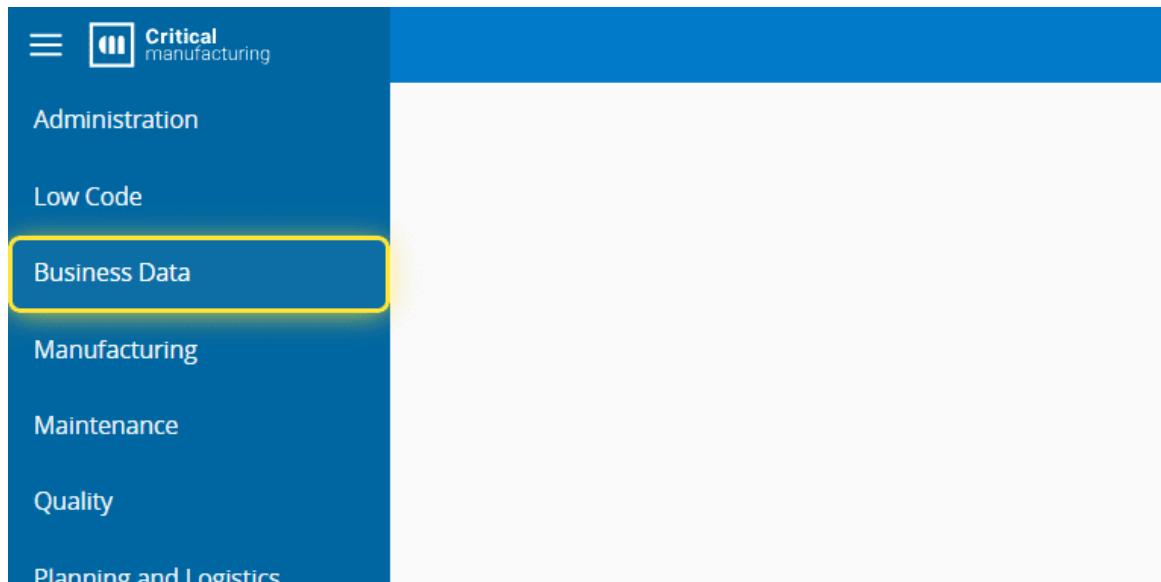
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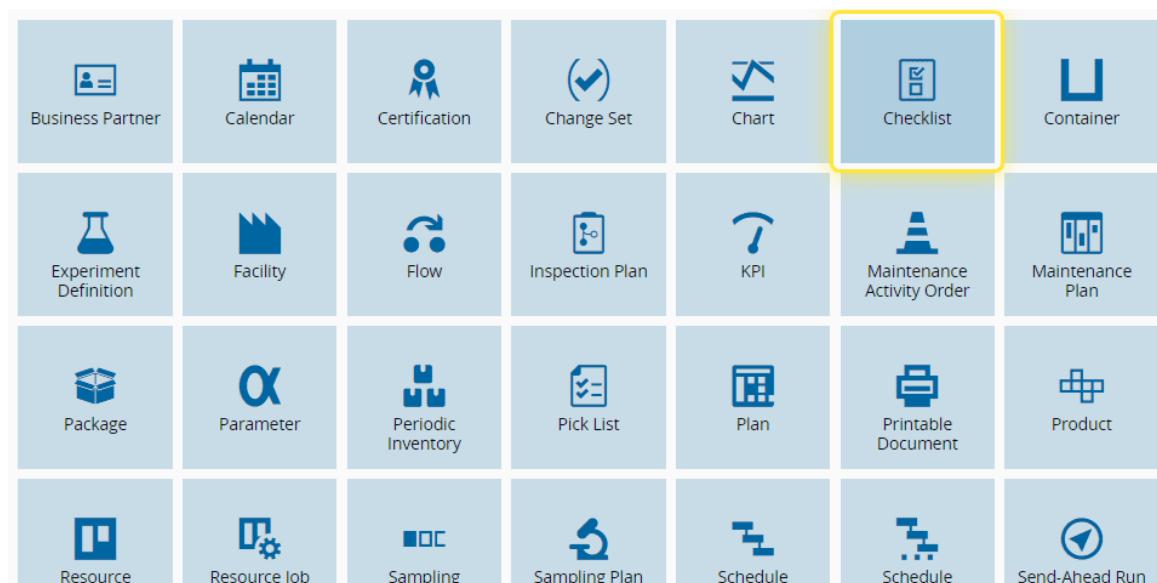
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## How to Create a Material Tracking Checklist

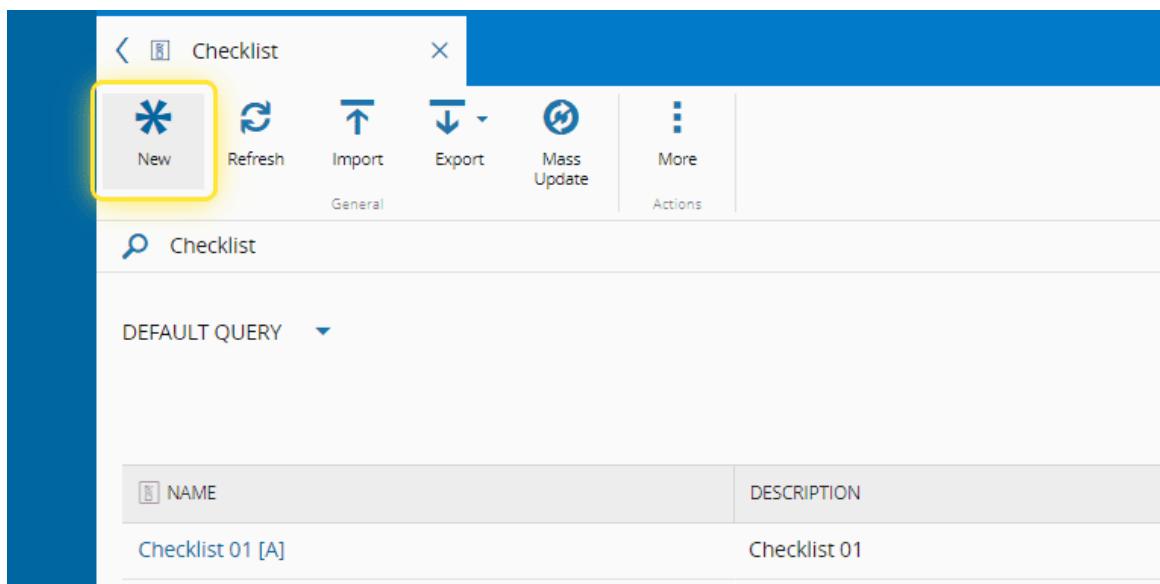
1. Go to the Business Data menu.



2. Select the Checklist entity.

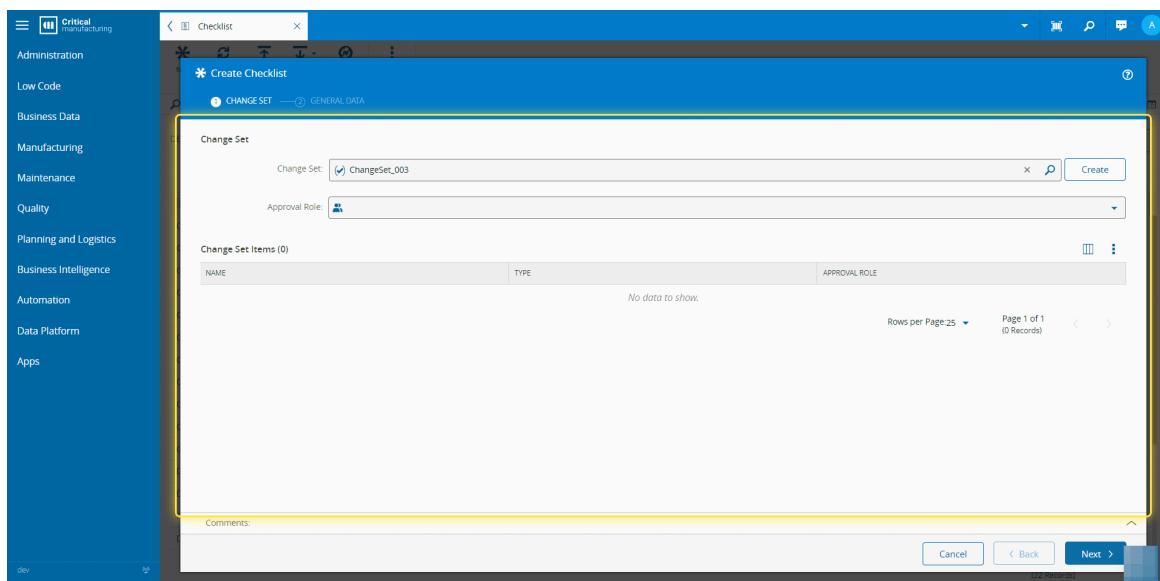


3. Select the New button.



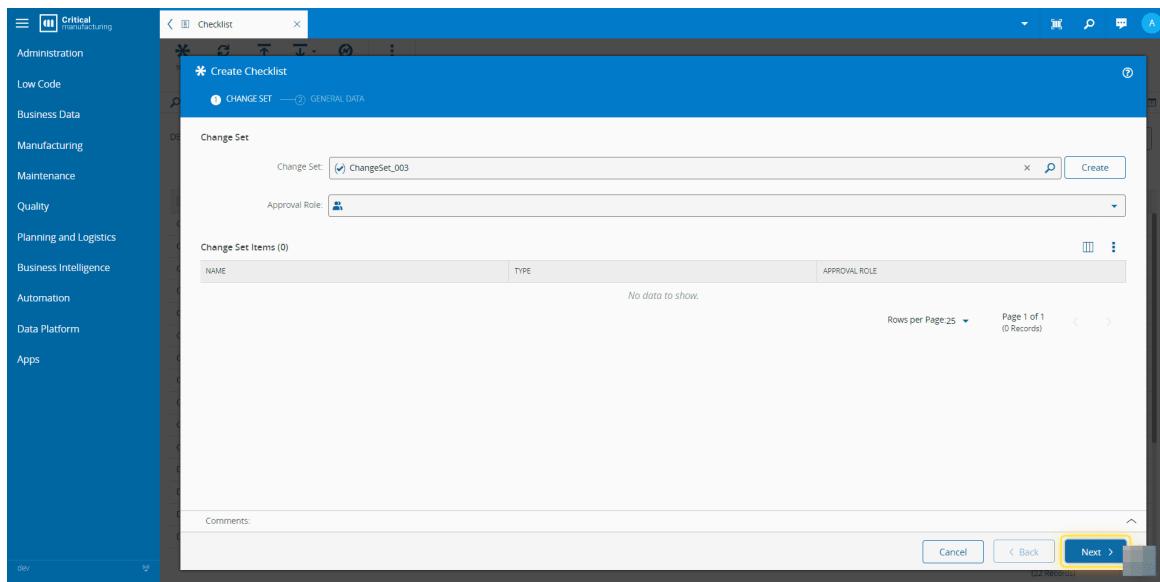
The screenshot shows the 'Checklist' page. At the top, there is a toolbar with several icons: 'New' (highlighted with a yellow box), 'Refresh', 'Import', 'Export', 'Mass Update', and 'More'. Below the toolbar is a search bar with the placeholder 'Checklist'. Underneath the search bar is a dropdown menu labeled 'DEFAULT QUERY'. The main area displays a table with two columns: 'NAME' and 'DESCRIPTION'. A single row is visible, showing 'Checklist 01 [A]' in the NAME column and 'Checklist 01' in the DESCRIPTION column.

4. Under the Change Set tab, select an existing Change Set or Create a new one.



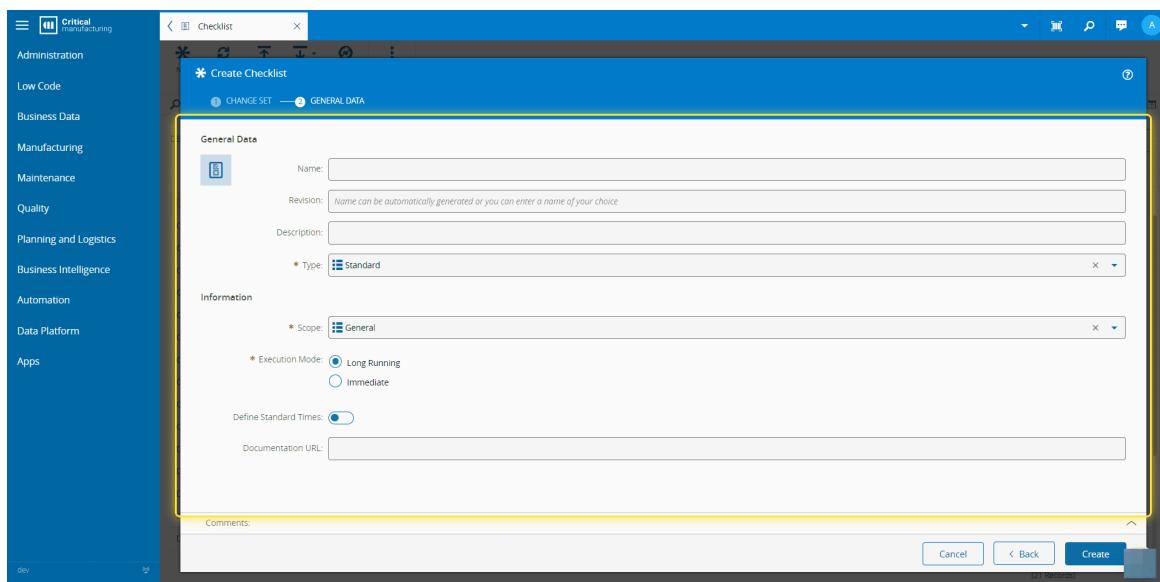
The screenshot shows the 'Create Checklist' dialog box. The 'CHANGE-SET' tab is selected. In the 'Change Set' section, a dropdown menu shows 'ChangeSet\_003' with a 'Create' button next to it. The 'Approval Role' dropdown is empty. Below that, the 'Change Set Items (0)' table is empty, showing 'No data to show.' At the bottom right of the dialog, there are buttons for 'Cancel', '< Back', and 'Next >'. The entire dialog box is highlighted with a yellow box.

5. Select the Next button.

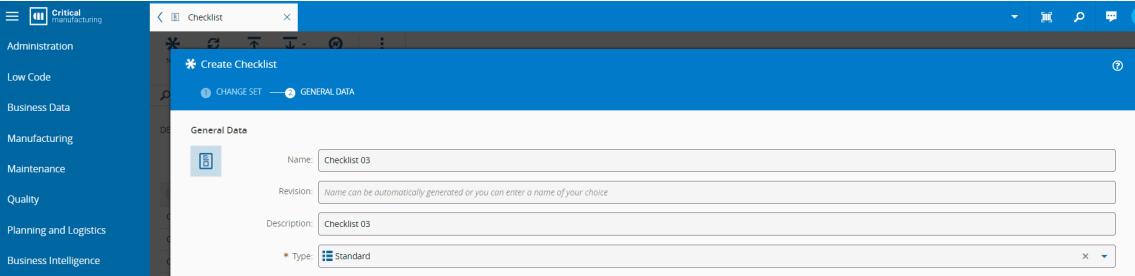


6. Under the General Data tab, complete the necessary fields.

For more information, see [Create Checklist - Critical Manufacturing Documentation Portal](#)



7. Select the Scope. In this example, we selected Material Tracking.



The screenshot shows the Critical Manufacturing software interface. On the left, a sidebar lists various modules: Administration, Low Code, Business Data, Manufacturing, Maintenance, Quality, Planning and Logistics, Business Intelligence, Automation, Data Platform, and Apps. The 'Manufacturing' module is currently selected. The main window is titled 'Checklist' and shows a 'Create Checklist' dialog. The dialog has a blue header bar with 'CHANGE SET' and 'GENERAL DATA' tabs. The 'GENERAL DATA' tab is active. It contains fields for 'Name' (Checklist 03), 'Revision' (Name can be automatically generated or you can enter a name of your choice), 'Description' (Checklist 03), and 'Type' (Standard). The 'Information' section includes fields for 'Scope' (General, ExceptionManagement, ExceptionControl, General, MaintenanceManagement, ManufacturingManagement, Manufacturing, MaterialFlow, ResourceFlow, ResourceFunding) and 'Execution Mode' (General, ExceptionManagement, ExceptionControl, General, MaintenanceManagement, ManufacturingManagement, Manufacturing, MaterialFlow, ResourceFlow, ResourceFunding). A 'Define Standard Times' section is present but empty. The 'Documentation URL' field is also empty. At the bottom, there is a 'Comments:' text area, a 'Cancel' button, a 'Back' button, a 'Create' button, and a 'Get records' link.

8. Optionally, enable the Define Standard Times property by setting it to True if you wish to configure a specific duration for each Checklist item.

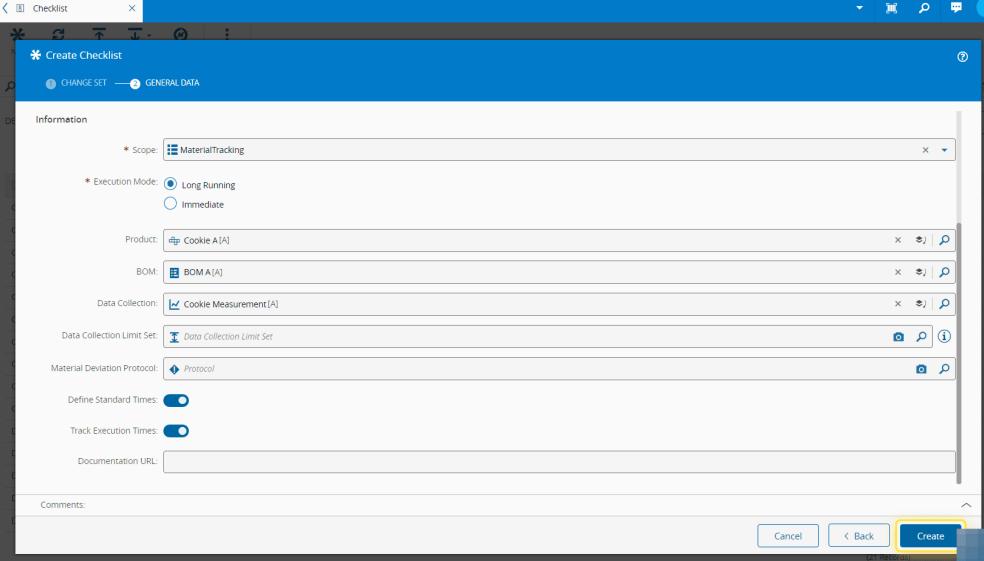
Product:	<a href="#">COOKIE A [A]</a>
BOM:	 BOM A [A]
Data Collection:	 Cookie Measurement [A]
Data Collection Limit Set:	 Data Collection Limit Set
Material Deviation Protocol:	 Protocol
Define Standard Times:	<input checked="" type="checkbox"/>
Track Execution Times:	<input type="checkbox"/>
Documentation URL:	

9. If Define Standard Times is enabled, you can also set the Track Execution Times property to True.

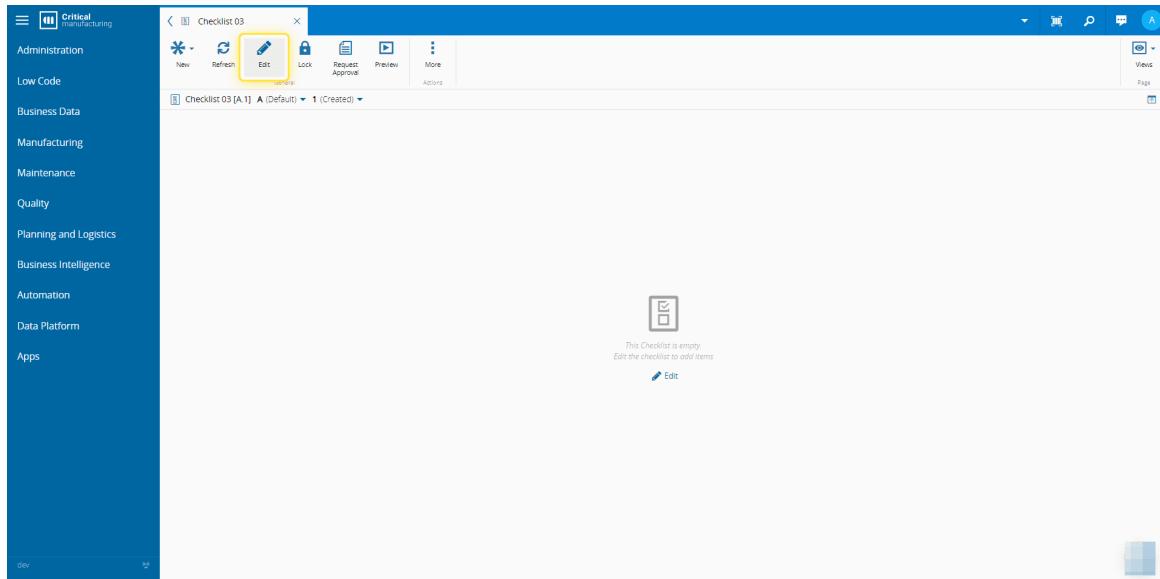
This allows you to monitor compliance with the defined durations for each **Checklist** item.

BOM:	 BOM A [A]
Data Collection:	 Cookie Measurement [A]
Data Collection Limit Set:	 Data Collection Limit Set
Material Deviation Protocol:	 Protocol
Define Standard Times:	<input checked="" type="checkbox"/>
Track Execution Times:	<input checked="" type="checkbox"/>
Documentation URL:	<input type="text"/>

10. Select the Create button.

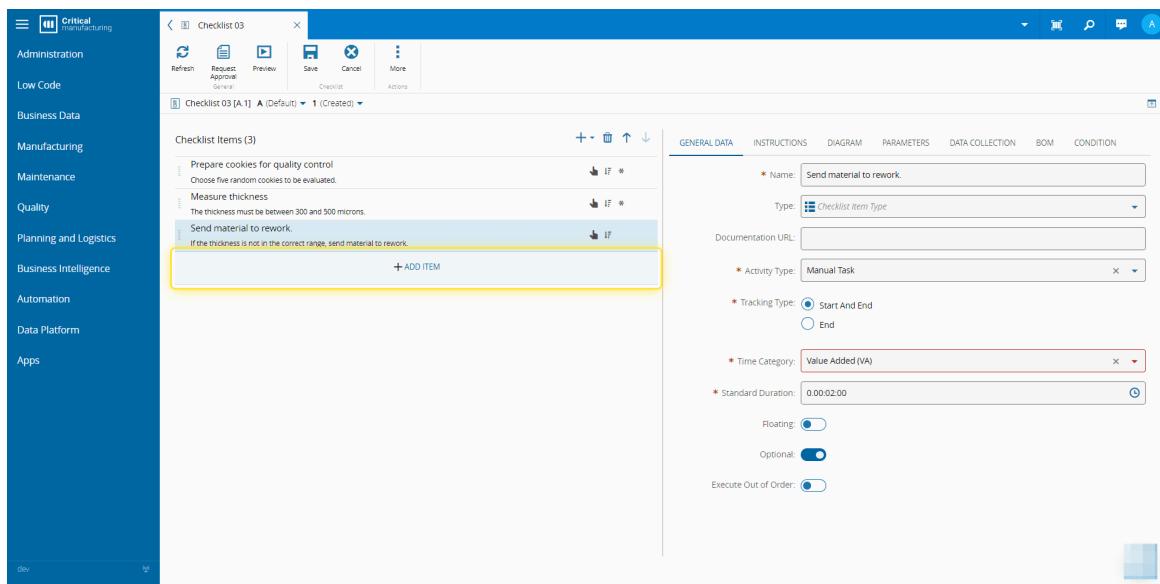


11. Select the Edit button.

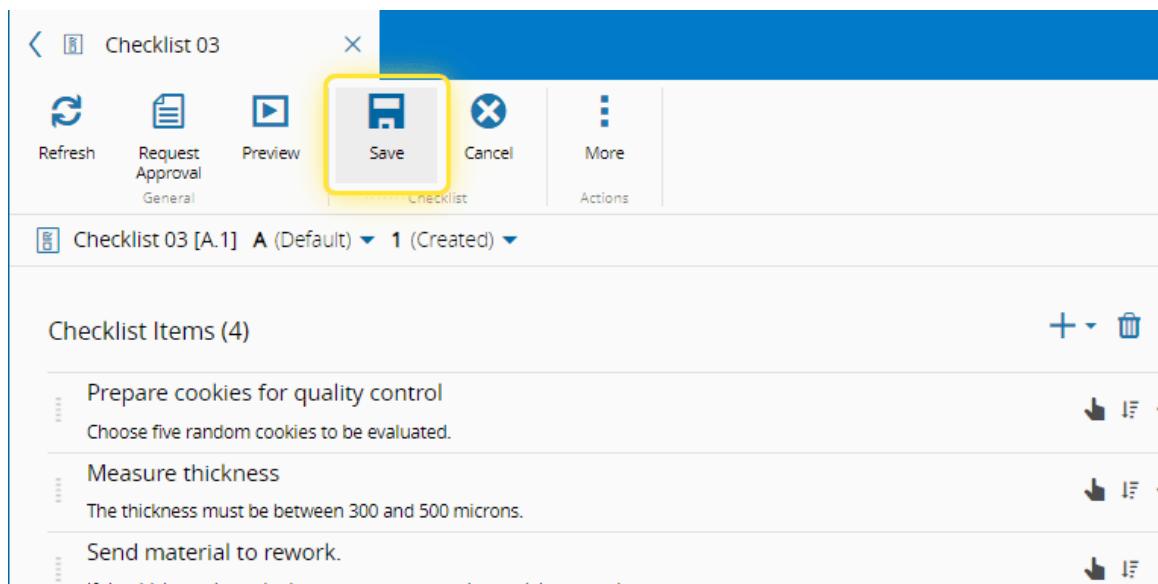


## 12. Select the Add Item button to add tasks to your Checklist.

Depending on the selected configurations, add items to your Checklist, and complete the necessary fields on the right panel.



## 13. Once you are finished, Save the Checklist.



Checklist 03

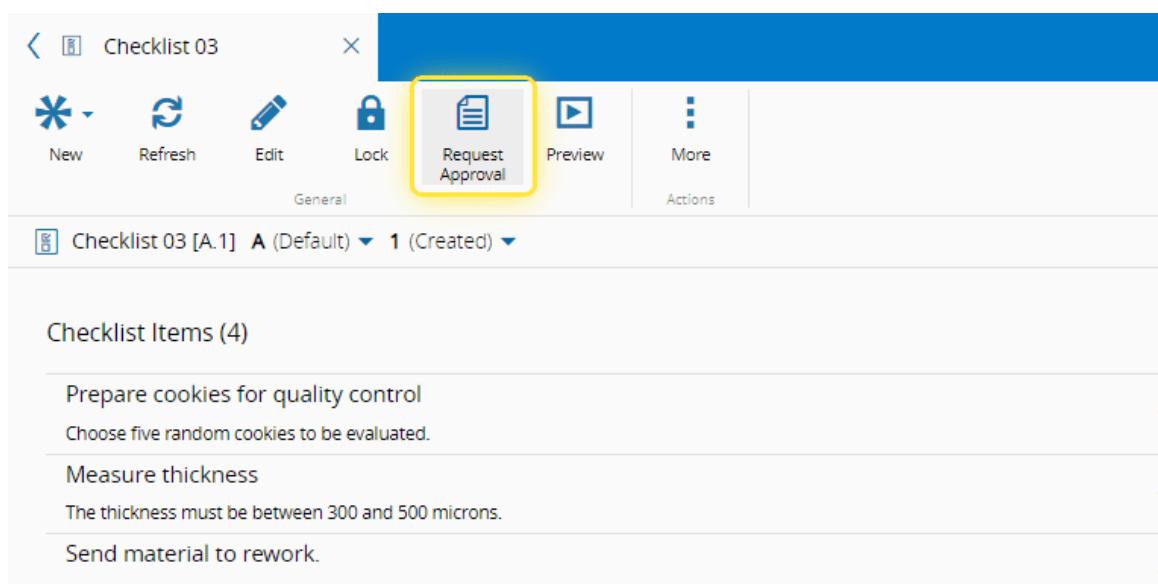
Save

Checklist Items (4)

- Prepare cookies for quality control
- Choose five random cookies to be evaluated.
- Measure thickness
- The thickness must be between 300 and 500 microns.
- Send material to rework.

If the thickness is not in the correct range, send material to rework.

14. The final step is to Request Approval to make the Checklist effective.



Checklist 03

Request Approval

Checklist Items (4)

- Prepare cookies for quality control
- Choose five random cookies to be evaluated.
- Measure thickness
- The thickness must be between 300 and 500 microns.
- Send material to rework.

If the thickness is not in the correct range, send material to rework.



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