VENDOM User Manual



VENDOM

-

Vendor and Engineering Document Management



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1 INSTALLATION GUIDE

1.1 Installation package

The installation package contains the following files:

- Application files a directory containing the following
 - FarPoint.CalcEngine.dll
 - FarPoint.Excel.dll
 - FarPoint.PDF.dll
 - FarPoint.PluginCalendar.WinForms.dll
 - FarPoint.Win.dll
 - FarPoint.Win.Spread.dll
 - Infragistics2.Excel.vxx.x.dll
 - Infragistics2.Shared.vxx.x.dll
 - Infragistics2.Win.Misc.vxx.x.dll
 - Infragistics2.Win.UltraWinDock.vxx.x.dll
 - Infragistics2.Win.UltraWinEditors.vxx.x.dll
 - Infragistics2.Win.UltraWinGrid.ExcelExport.vxx.x.dll
 - Infragistics2.Win.UltraWinGrid.vxx.x.dll
 - Infragistics2.Win.UltraWinSchedule.vxx.x.dll
 - Infragistics2.Win.UltraWinStatusBar.vxx.x.dll
 - Infragistics2.Win.UltraWinTabControl.vxx.x.dll
 - Infragistics2.Win.UltraWinToolbars.vxx.x.dll
 - Infragistics2.Win.UltraWinTree.vxx.x.dll
 - Infragistics2.Win.vxx.x.dll
 - SocketTools.FtpClient.dll
 - SocketTools.Interop.dll
 - System.Windows.Interactivity.dll
 - Vendom.application
 - Vendom.exe.config
 - Vendom.exe
 - Vendom.exe.manifest
 - XLS directory containing excel files needed by the program

To install the program, create a directory on your local or network drive, and copy all the files and subdirectories there.

1.2 Create the WEB site

- a) Create a directory on the web server, let's say "c:\webVendom". Create a "TEMP" subdirectory ("c:\webVendom\TEMP") and give "everyone" full control on it.
- b) Go to Internet Information Services and create a virtual directory (let's say "webVendom" that points to "c:\webVendom"
- c) Check on the directory security to allow anonymous access.

1.3 Create the FTP site (on the storage server)

a) Create a directory on the server disk, let's say "c:\ftp_Vendom".

- b) Create a user on the server, let's say
 - User Id = Vendom
 - User Password= VendomPassw be sure to check the "Password never Expires" box for this user
- c) Give this user Full-control for the storage directory "c:\ftp_vendom"
- d) Go to Internet Information Services and create a FTP virtual directory (called for ex. "Vendom") that points to the storage directory "c:\ftp_vendom).

ndom Propertie	5	?
îrtual Directory		
When connecting to	this resource, the content should come from:	
	a directory located on this computer a share located on another computer	
FTP Site Directory	<u></u>	18
Local Path:	C:\ftp_VendomBrowse	
	Read	_
and an a start of the start of	Write	
	✓ Log visits	

2 Get started

- 2.1 Run the program
- From the Start Menu / VENDOM .
- From the shortcut on the desktop Consumer Joo « VENDOM » •

The following window will be displayed:

	E VENDOM Vendor and Engineering Document Management
	User ID Password Login Logout
	Job Number
Version: 1.14.0.0	End

This window is intended to let you login/logout to the application, define general configuration, users and security, select a job and begin working with it.

2.2 Login / Logout

				- VENDOM Vendor and Engineering Document Management
	<		· .	
				User ID doccontrol
	Π	n		Password
-	U		•	General Conf. Login Logout Change Pass
				Job Number
Login as:	DOCC	ONTROL		End
Login as: Version: 1	DOCC4	ONTROL	1	Job Number

Enter your user ID or you name in the field « User ID », and then type your password.

To log in, please click on **« Login »** or press **« Enter »**. Click the **« Logout »** button to log out.

Click the **« End »** button to get out of the application.

The button « Change Pass » will always be visible.

Depending on your access rights, if you are a GLOBAL ADMINISTRATOR, the button **« General Conf. »** will become visible.

You can now type a Job Number in the "Job Number" field and type **« Enter »**or click on the **« GO »** button.

Depending on your the access rights to the selected job, other buttons will become visible, letting you access to the documents / workflow / reports ... for the job.

Job Num	ber 123456	GO
WATE		NT
Doc. Register	WorkFlow	Doc. Progress
Job Conf.	WF Reports	To Do
Log FTP events	WF Tracking	End

2.3 Change your password

Click on the Change Pass button.

The following dialog will appear:

Type new password	l here:	
And retype i	t here:	
	Cancel	Save

Enter the new password in the first box, type it again in the second for confirmation, and then click **« Save »** to record it in the database.

3 General Configuration

General Cor	Seneral Configuration								
Exit	Eta General Configuration								
Companies		JOBS $igvee$ Users $igvee$ Disciplines $igvee$ Revision List $igvee$ Stat	us List $ig<$ Action Codes $ig<$ Storage Servers $ig<$ MailServers $ig<$ $ig<$						
Company	List								
Company Number		Company Name							
XXX		Extrem Company							
OIL OIL Company USA									
*									

Several "tabs" will allow you to do the "General Configuration" of the application. Some of it will be copied to the "Job Configuration" when a new Job is created.

3.1 Companies

Gen	General Configuration								
	Ext General Configuration								
6	ompanies 🚺	IOBS $igvee$ Users $igvee$ Disciplines $igvee$ Revision List $igvee$ Stat	us List 🗸 Action Codes 🗸 Storage Servers 🗸 MailServers 🔪 👻						
Co	mpany List								
	Company Number	Company Name							
	XXX	Extrem Company							
OIL OIL Company USA									
*									

This is the place where you need to enter your company (companies) name. These companies will be copied to each new job when it is created and will automatically populate the list of companies that participate to the job (producing documents). Use the last row (yellow row) to enter a new company.

3.2 Jobs

6	Seneral Configuration							
	General Configuration							
Z	Companies JOBS Users	s \checkmark Disciplines \checkmark Revision List \checkmark Status Li	ist $ig<$ Action Codes $ig<$ Storage Servers $ig<$ I	1ailServers \				•
	Job List							
	Job Number	Job Description	Client	Is Open	Storage Server			
	t						NEW JOB	
	TEST	THIS IS A JOB FOR DOING TESTS	A TEST COMPANY	V	PC00847			
							Job Number:	454545
							Job Description:	JOB FOR A BRIDGE CONSTRUCTION
╟						-	Client:	BRIDGE OVER WATER
ŀ						-	Storage Server:	FTPServer
							Take configuratio	n from:
							 From Template 	OFrom JOB Number
╟						-		
								Create JOB
ŀ								

This window presents a list of jobs already existing in this application. A few information is needed for each job: the job number, description, and client and on what server are stored the document files. When a job is finished, a good practice is to "close" it (by un-checking the "Is Open" checkbox). All information for the jobs remains available for the users, but only in Read Only mode.

To create a new job:

- enter the job information in the right panel
- select a storage server from the list
- select if the job will take the configuration from the template or for another job (in this case type the job number in the corresponding box)
- click on the "Create Job" button. The job will be created and will be added to the job list.

nera	Configuration		-	_	-	And in Campson, numbers	
Exit General Configuration							
🛛 Companies 🗸 JOBS 🎽 Users 🔨 Disciplines 🔨 Revision List 🔨 Status List 🏹 Action Codes 🔨 Progress Models 义 File Types 🔪 📼 📢						$\left(\right)$	
Us	sers						
	User Number	User Name	Windows Login	Global Admin	Passw	Mail Address	
Ø							Ε
١,	1	Vendom	Vendom			doc.doc@yahoo.com	
	10	Steven George	STG				
	10100	TOTO Italiano	Toto			tcut@gmail.com	
	10124	PONDA GOGU					
	10142	GIGI FRATELLO					
	10170	CORASON EMILIE					
	10243				•••••	4	•
		Exit Companies JOBS Users JOBS User Number User Number 1 10 10100 10124 10142 10170 10243	Exit General Configuration Companies JOBS Users Disciplines User Number User Name User Number User Name 1 Vendom 10 Steven George 100 TOTO Italiano 10124 PONDA GOGU 10142 GIGI FRATELLO 10170 CORASON EMILIE 10243 MIRARELLE ELENE	General Configuration Exit General Configuration Companies \ JOBS \ Users \ Disciplines \ Revision List \ Status Users \ Disciplines \ Revision List \ Status User Number User Name Windows Login 1 Vendom Vendom 10 Steven George STG 100 TOTO Italiano Toto 10124 PONDA GOGU Image: Colspan="2">Colspan="2">Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Store Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2">Image: Colspan="2">Toto Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Image: Colspan="2">Colspan="2">Colspan="2"Colspan=	General Configuration Companies (JOBS) Users Disciplines (Revision List (Status List (Action Users)) User Number User Name Windows Login Global Admin 1 Vendom 1 1 Vendom 1 10 Steven George STG 1 100 TOTO Italiano Toto 1 10142 GIGI FRATELLO 1 1 10170 CORASON EMILIE 1 1 10243 MIRABELLE ELENE 1 1	Beral Configuration Companies V JOBS Vsers Disciplines V Revision List V Status List V Action Codes V Prog User Number User Name Windows Login Global Admin Passw Vser Number User Name Windows Login Global Admin Passw 1 Vendom Vendom Image: Company C	teral Configuration Companies JOBS Users Disciplines Revision List Status List Action Codes Progress Models File Types T Users Users User Number User Name Windows Login Global Admin Passw Mail Address User Number User Name Windows Login Global Admin Passw Mail Address 1 Vendom Vendom Image: Constraint of the status of the sta

3.3 Users

This is the window where the user list for all jobs is configured. You need to enter a User Id that has to be unique. An error will be displayed if it isn't. Then the user name, password and mail address.

The user Id and password are needed to login into the program.

The Windows Login is used if the parameter "UseWindowsLogin" is set to TRUE. If so, this column should contain the "Windows Login" of the user.

The mail address is needed if this user is in the distribution list of a job and needs to receive transmittals with documents by mail.

The "Global Admin." checkbox means, if checked, that this user has complete access rights to this application.

Use the last row (yellow row) to enter a new user.

3.4 Disciplines

Ge	General Configuration						
	Exit Ge						
	Companies V JOBS V U	Jsers Disciplines Revision List Status List Action Codes	Storage Servers 🔪 🔻 🖡				
		Discipline List					
	Discipline	Discipline Description					
Шг							
l i	CAD	COMPUTER AID DESIGN					
l	CAL	CALCULATIONS					
lle	⊢ CIV	CIVIL					
l i	ELY	ELECTRICITY					
Ð	PIP	PIPING					
þ	PRO	PROCESS					

Enter here a general list of disciplines. This list will be copied to each new job when it is created. It can then be customized for each job.

You need to enter a discipline code and a description.

For each discipline, you need to configure a least one "Document Type". Click on the + sign at the left to open a child window, as shown below:

Gene	ral Configuration		
	Exit G	eneral Configuration	
Cor	mpanies 🗸 JOBS 🗸 (Jsers Disciplines Revision List V Status List V Action Codes	Storage Servers 🔷 🔻 🕨
		Discipline List	
	Discipline	Discipline Description	
•	CAD	COMPUTER AID DESIGN	
•	CAL	CALCULATIONS	
¢-	CIV	CIVIL	
	Document Types		
	Document Type	Description	
	S	Scope Of Work	
	R	Requisitions	
	E	Requirements	
	-	Isometric	
	L	Layout	
			✓

Use the last line (yellow row) to enter a new "Document Type".

3.5 Revision List

Ge	neral Con	figuration			
	Exit	General Con	figuration		
	Companies	V JOBS V Users V Discipl	ines Revision List	Status List 🗸 Action Codes 🗸 Storage Servers 🔪 🔻 ୶	▶
R	evision L	ist			
	Revision	Description	Priority		
►	00	Revision 00	1		
	01	Revision 01	2		
	02	Revision 02	3		
*					

You can define here a list of revisions as you wish to be used in all your projects. You can customize this list for each project. Each time you change the revision for a document, the program will propose the one corresponding to this list. You can select the proposed one, or type another one.

3.6 Status List

Ge	neral Confi	guration						
	Exit	General Confi	guration					
	Companies	JOBS Users Discipline	es Revision List S	tatus List	Action Codes	\	₹ ()	
S	tatus List							
	Status	Description	Priority					
►	AA	Approved	1					
	AD	Approved for Design	2					
	AC	Approved for construction	3					
	AB	As Built	4					
	Р	For Procurement	5					
	V	Void	6					
*								

You can define here a list of statuses that can be used in all your projects. The list will be copied to each new project when it is created. It can then be customized for each project. The scope is to have a definite list of statuses throughout the project. Moreover, inside a project a status is also linked to a progress model for the documents, as we'll see later in this document.

3.7 Transmittal Actions

General Configura	ition		
Exit	General Configuration	_	
Companies JOE	35 VUsers VDisciplines VRevision	n List 🗸 Status	List Action Code
Action Codes			
Action Code	Description	Priority	Required Action
1	For Information	1	I
2	For Approval	2	A
3	For Comments	3	С
4	For Call for BID	4	I
▶ 5	For Purchase ORDER	5	I
6	For Construction	6	I
7	Last Issue	7	I
*			

You define here a list of action codes for people who receive documents through the transmittals.

These codes tell people what you expect them to do when they receive a document. The "Required Action" column is very important. It can contain only three values:

- I = for information no action is required from the receiver
- C = for comments the receiver is required to comment the document

- A = for Approval – the receiver is required to Approve the document.

For example, if one user receives a transmittal with a document where the action code is 1 or 4, it means it is for information, no further action is required. If the "Action Code" is 2, he needs to comment the document, and if the "Action Code" is 3, he will need to Approve / reject the document.

(See the "Work Flow" chapter for more information).

3.8 Progress models

Genera	I Configurat	ion		
	Exit	General Configuration		
Comp	panies 🗸 JOBS	5 \langle Users \langle Disciplines \langle Revision List \langle :	Status List 🗸 Act	ion Codes Progress Mode
Pro	ogress Mod	els		
Pro	ogress Model	Desc	ription	
⊕-▶	DD	Drawing		
₽_	PD	Process Documents		
	Progress Step	35		
	Step	Description	Progress (%)	Status
	1	First Issue	50	FI
ΙH	2	Approved for detailed design	70	AD
	3	Approved	100	AB
	*			
Dre	naross Mod	ale		
Pro	ogress Model	Desc	ription	
⊕- _	RD	Requisitions		
⊕ _	SD	Standard document		
*				

Use this window to configure "general" progress models to be used for automatic calculation of the document progress.

For each model, you define several steps, each step with a corresponding progress (%). The last column ("Status") makes the link between the progress step and the document status. It means that if a document uses this progress model (PD, for ex.), when it reaches the "AD" status, its progress will be automatically at 70%.

3.9 File Types

	Exit	General Configuration	
Γ	Companies 🗸 JOB!	5 \checkmark Users \checkmark Disciplines \checkmark Revision List \checkmark Stat	us L
Fi	ile Types		
	File Type	Description	
►	СМ	Commented	
	NAT	Natif file	
	PDF	PDF File]
*			
]
			1

You can define here a list of "File Types" that you use in all your project. The list will be copied to each new project when it is created.

It can then be customized for each project.

This list can be used to limit the user access by file type. Ex: give the users access only to "PDF" files and not to native "NAT" files.

3.10 Storage Servers

General Configuration				
Exit Gen	ieral Configura	tion		
JOBS Users Discipline	es V Revision List V	Status List \ Action Co	des Storage Servers	
Storage Servers			_	^
Server Name	Login	Password	Root Directory	
FTPServer	mylogin	mypassword	Vendom	
SecondServer	Login1	password1	Root	
*				
	-	·	·	
				~

The files attached to each document are stored on an FTP server. This server can be different for each job.

You define here a list of FTP servers. When a new job is created, you'll have to decide on which FTP servers will be stored the files for this job.

3.11 Mail Servers

	Exit Gene	eral Configuration						
	Companies 🗸 JOBS 🗸 Users	s 🗸 Disciplines 🗸 Revision List	🗸 Status List 🗸 Actio	n Codes 丫 Prog	gress Models	Storage Servers Mail	Servers	
м	ail Servers							
	Server Name	Server Address	Mail Type	Enable SSL	Enable Credentials	User Login	User Password	Selected Server
•	CompanyServer	MailServer	SMTP					
	Google	smtp.gmail.com	SMTP			vendom.docmail	docmailpassw	

You define here a list of mail servers. Only one will be used by the application to send mail, the "Selected Server" (where the "Selected Server" is checked).

The evident solution would be to use the company mail server; see with your mail administrator for the necessary configuration. You'll probably need a fix IP address for the PCs that have to send mail, and a specific configuration on the server to accept SMTP mail from these PCs.

If you have an internet connection, you can use Google mail. For this, you need to open an email address on Gmail, with an user login and a password (in this example, vendom.docmail and docmailpassw).

Other solution is to use one user's PC to send mail, provided the SMTP service is installed on the PC and the anti relay option is unchecked (see with your mail or network specialist).

If you click on the small button in the "server name" cell, the program will send a "PING" to the server, to check its availability. The response will be either "ping OK" or "Ping failed".

3.12 Parameters

General Configuration	14
Ext General Config	guration
Companies JOBS Users Disciplines	s 🗸 Revision List 🛛 🗢 🕇 🕨
Use Windows Login	
	/

You define here the type of login for the users.

If "UseWindowsLogin" is unchecked (false), then the user will log with the Id and Password defined in the program.

If "UseWindowsLogin" is checked (true), the user will be logged automatically. See also the information "Windows Login" in the User Configuration. This information should contain the same text as the user login for the computer.

4 Job Configuration

4.1 Job Contributors

Jot	o Configurati	on	
	Exit	Configuration for job: 123456 -	DOCUME
	ompanies 🚺	Disciplines 🗸 Revision List 🗸 Status List 🔪	≠ 4
C	ompany List		
	Company Number	Company Name	
	INEU	INTECO EUROPE	
	INUS	INTECO USA	
*			

Enter here the list of companies participating to this project. These are companies that produce documents for the project. You need at least one company here, your own company.

To enter a new company, use the last row (yellow row).

To delete a company, select the company line by clicking on the row header, then hit "Delete". If a company has documents, you cannot delete it.

4.2 Job Disciplines and document types

Job	Co	nfiguration				
		Exit C	onfiguration for job: 123456 - E	OCUMENT	MANAGEMEN	Г
<u> </u>	omp	oanies Discipline	es 🗸 Revision List 🗸 Status List 🗸 Action Co	des 🗸 Transmitta	al 🗸 Job Titles 🗸 User	s 🗸 Work Packages 🔪 🔻 🖡 🕨
	Dis	scipline List				
		Discipline	Discipline Description	Participate To Progress	FTP Directory Exists	Reset FTP connection
.	Þ	CAD	COMPUTER AID DESIGN			Check Directories
.		CAL	CALCULATIONS	Image: A start of the start	V	
.		CIV	CIVIL	V	V	Create Directories
.		ELY	ELECTRICITY		V	
.		PIP	PIPING	Image: A start of the start	V	
.		PRO	PROCESS	Image: A start of the start	v	
⊕ -		STR	STRUCTURAL	Image: A start of the start	V	
		DOC	Project Internal Documents	Image: A start of the start	V	
⊕-		XXX	Internal memos	 Image: A start of the start of		
	*					

This is the list of disciplines for the project. When the project is created, this list is completed with the "template disciplines", or it is taken from another project, depending on the choice you have made at the job creation (Configuration "From Template" or "From another job").

The list contains the following data:

- Discipline code
- Discipline description
- Participate to progress if this discipline is taken into consideration in the progress calculation
- FTP directory exists if the directory corresponding to this discipline was created on the storage server. When the job is created, all directories for the existing disciplines are also created.

If you add a new discipline, the directory to store documents for this discipline does not exist, and the corresponding cell appears in red. Click then on the "Create Directories" button, and it will be created.

It can happen that the connection to the storage server is temporarily lost due to network issues, and all this column appears in RED.

In this case, click first on "Reset FTP Connection" and then on "Check Directories". If there are still some disciplines in RED, click on "Create Directories".

For each discipline, you need to configure a least one "Document Type". Click on the + sign at the left to open a child window, as shown below:

b Conf	figuration				
	Exit C.	onfiguration for job [.] 123456 - 1	OCUMENT		
Compa	Discipling	v V Devisional lint V Statural lint V Action Co	daa V. Transmitte		Wark Parkages
Disc	cipline List				s \ Work Packages \ 👻 🕯
	Discipline	Discipline Description	Participate To Progress	FTP Directory Exists	Reset FTP connection
	CAD	COMPUTER AID DESIGN	V		Check Directories
	CAL	CALCULATIONS	V		
	CIV	CIVIL	V		Create Directories
D	ocument Types				
	Document Type	Description	Prog	ress Model	
-	E	Requirements		SD 🗸	
-		Isometric	DD	Drawing	
	L	Layout	PD	Process Documents	
	R	Requisitions	RD	Requisitions	
-	S	Scope Of Work	SD	Standard document	
*	÷				
Disc	cipline List				
	Discipline	Discipline Description	Participate To Progress	FTP Directory Exists	
-	DOC	Project Internal Documents	~	v	

Use the last line (yellow row) to add a new "Document type".

The last column, "Progress model" allows specifying the progress scenario for this type of document. You can select the progress model in the list (see Job Progress models later in this document for more details).

4.3 Job Revision List

Jo	Job Configuration									
	Exit Configuration for job: 123456 - DOC									
	Companies	Disciplines Revision L	ist Status List	₹ ₹ ▶						
R	evision L	ist								
	Revision	Description	Order							
▶	00	Revision0	1							
	01	Revision 1	2							
	02	Revision 2	3							
	03	Revision 3	4							
*										

If you wish to control the revision format and order, enter here the list.

When you then change one document revision, the system will propose one from this list. You can then select the proposed one, or type something else.

It is a good practice to have a list like this, to avoid having different types of revisions inside the same project (ex: some documents with revisions "00/01...", other documents with "A/B..." others with "A1/A2...").

It may also be a project request to name the revisions in a certain way, so you can implement this here.

4.4 Job Status list

Job Configuration											
Exit Configuration for job: 123456 - DOC											
Companies	Disciplines Revision List	Status List	. ≠ . • •								
Status List											
Status	Description	Order									
► AA	Approved	1									
AD	Approved for Design	2									
AC	Approved for construction	3									
AB	As Built	4									
Р	For Procurement	5									
V	Void	6									
*	-										

You can define here a list of statuses that can be used in the current project. The list was copied to the current project when it was created. You can modify the list to suit the project needs. The scope is to have a definite list of statuses throughout the project. Moreover, inside a project a status is also linked to a progress model for the documents, as we'll see later in this document.

Jol	b Configuration											
	Exit	Configuration for jol	b: 123456	- DOCUMEI	NT MANAG							
\square	Companies V Disciplines V Revision List V Status List V Action Codes 🗸 🗸 🗸 🕨											
A	ction Codes											
	Action Code	Description	Order	Required Action								
۲	1	For Information	1	I.								
	2	For Approval	2	Α								
	3	For Comments	3	С								
	4	For Call for BID	4	I								
	5	For Purchase ORDER	5	I								
	6	For Construction	6	I								
	7	Last Issue	7	I								
*												
Г												

4.5 Job Transmittal Actions

You define here a list of action codes for people who receive documents through the transmittals.

These codes tell people what you expect them to do when they receive a document. The "Required Action" column is very important. It can contain only three values:

- I = for information no action is required from the receiver
- C = for comments the receiver is required to comment the document

- A = for Approval - the receiver is required to Approve the document.

For example, if one user receives a transmittal with a document where the action code is 1 or 4, it means it is for information, no further action is required. If the "Action Code" is 2, he needs to comment the document, and if the "Action Code" is 3, he will need to Approve / reject the document.

(See the "Work Flow" chapter for more information).

4.6 Job Work Flow

4.6.1 Job Destinations

Job	Job Configuration											
	Ext Configuration for job: 123456 - DOCUMENT MANAGEMENT											
	Companies Disciplines Revision List Status List Action Codes Transmittal Job Titles Users Work Packages Progress Models = Destinations Transmittal sheet											
De	stination List											
	Destination	Destination Name	Trans. From - Prefix	Trans From - Suffix	Trans From Start Number	Trans. To - Prefix	Trans. To - Suffix	Trans. To Start Number				
	CLIENT	Client				ME>CLIENT -		20				
	INTERNAL	Internal				INT -						
*												

Typically, you exchange documents (send/receive) with several partners (client, internal, subcontractors, suppliers...).

Define in this list all the partners (destinations) for the document workflow.

For each destination, configure the following:

- Destination code
- Destination name
- Transmittal FROM Prefix a string to be put in front of the transmittal number (for transmittal FROM = that you receive)
- Transmittal FROM Suffix a string to be added at the end of the transmittal number (for transmittal FROM = that you receive).
- Transmittal TO Prefix a string to be put in front of the transmittal number (for transmittal TO = that you send). In this example, if the transmittal number to CLIENT is 54, it will be printed as:
 "ME→CLIENT 54"
- Transmittal TO Suffix a string to be added at the end of the transmittal number (for transmittal TO = that you send).
- Transmittal FROM/TO Start Number normally, first transmittal will have number 1, but you can specify here if you want it to begin at another number.

Job Configuration												
Eat Configuratio	Eat Configuration for job: 123456 - DOCUMENT MANAGEMENT → Excel											
Companies & Disciplines & Revision List & Status List & Action Codes Transmittal (Job Titles & Users & Work Packages & Progress Models & File Types & Data Description & Cestinations & Transmittal sheet												
All Destinations	Save											
Destination List Cuent Cuent Cuent INTERNAL - Internal	1 2 3 4 5 6 7	TRANSMITTAL FROM / TO Transmittal Number : Transmittal Date :	11 12 13 14 15 16 17									
	8 9 10 Please find enclosed the following documents:	18 19 20										
	Item Document Number Rev. Rev. [1 0 </th <th>Document Description Item Document Number 11 12 13 14 15 16 17 18 19 20 20 20</th> <th>Rev Date Docur</th>	Document Description Item Document Number 11 12 13 14 15 16 17 18 19 20 20 20	Rev Date Docur									
	Addressees T Act. Action b	Document Document te 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	Remarks									
	23 3 14 4 > >> Page 1											

4.6.2 Job Transmittal sheet

The transmittal sheet is a document that will contain the following information

- The document list 20 documents per page, 5 pages max.
- The receiver list people who receive the transmittal
- The distribution matrix who receives what

In the upper part, in the middle, the system will automatically print the transmittal number.

You can customize all the cells numbered from 1 to 20. For example you put your company name and address on the left, the client address on the right and the project information in the other cells.

Don't forget to "Save" when it is ready.

If "All Destinations" is checked, this configuration will be applied to all transmittals, no matter where they are sent.

If you want to customize by destination, click on the destination name in the list on the left on the screen and configure the transmittal for this destination.

4.7 Job Titles

Job Configuration										
Ext Configuration for job: 123456 - DOCUMENT MANAGEME										
Companies 🗸 Disciplines 🗸 Revision List 🗸 Status List 🗸 Action Codes 🗸 Transmittal 🔪 🛛 🖛 🖡										
Distribution Titles										
Title	Position (In the transmittal)									
GENERAL MANAGER	1									
Project Manager	2									
DOCUMENT CONTROL	3									
MECHANICAL ENGINEER	10									
ADMINISTRATION	20									
PROCESS ENGINEER	30									
IT SPECIALIST	40									
PROJECT SECRETARY	50									
*										

Define here in this list the titles for users that will receive documents via the transmittals. These titles identify the role of each person inside the project. The column "Position (in the transmittal)" specifies the display order of each title inside the transmittal ("General Manager" will appear first, then "Project Manager", then "Document Control", etc.)

4.8 Job User Groups

You can define several groups for the users. Users belonging to the same group will have same ownership rights on the documents. See "Document owner" later in this manual.

Job	Configuration	and the set								
	Ext Configuration for job: 123456 - WATER TREATMENT									
/ 0	Companies 🔨 Disciplines 🗸 Revisio	on List $ig ig $ Status List $ig ig $ Action Codes $ig ig $ Transmittal $ig ig $ Job	o Titles 🔰 User Groups 💦 🔍 🗮 🔸							
Us	er Groups									
	Group Code	Group Description								
	INEU-DOC	INEU Doc. controllers								
	INTERNAL_DOC	My doc controllers								
	INUS_DOC	INUS Doc. controllers								
*										
			1							

The data to configure for each group is:

- GroupCode a code that identifies the group
- GroupDescription the description of the group

4.9 Job Users

Jo	ab Configuration													
	Est Configuration for job: 123456 - DOCUMENT MANAGEMENT													
1	Companies 🗸 Disciplines 🔨 Revision List 🖞 Status List 🗸 Action Codes 🗸 Transmittal 🖞 Job Titles 🕽 Users 🕻 Work Packages 🗸 Progress Models 🗸 File Types 🗸 Data Description 🔪 🗾													
J	ob Users													
	User Number	UserName	Job Admin	Document List Access	Attached File Access	File Type List	Company List	Job Discipline List	Report List	Deliverabl es Only	Transmittal Access	Mail Address	Progress Access	Progress Snapshot D
Þ	100000	DOCCONTROL							•	V	WR	doc.doc@yahoo.fr		
	10100	TOTO Coutougno		WR	RO	•	•	•	•		RO	tcut@gmailcom	RO	
	10124	PONDA GOGU		RO	RO	PDF	•	•	•	V	RO	ponda.g@yahoo.com	WR	
	10142	GIGI FRATELLO		WR	WR	•	•	•	•		RO	gigi.fratello@mymail.com	NO	
	10170	CORASON EMILIE		WR	WR	•	•	CAD, CAL, CIV	•		RO	ecorason@yahoo.com	NO	
	10243	MIRABELLE ELENE		WR	WR	CM, PDF	INEU	DOC, ELY	•		RO	emira@mydomain.com	NO	
*														
ľ	<													>
Ľ	*1											1		

This is the list were you define the users who have access to this job and what kind of access they have. The job users can be taken from the general "Users" list, or you can define users only for this particular job.

The data to configure for each user is:

- Job Admin if a user is a "Job Admin", he has all access rights for the job.
 All other columns are ignored.
- Document List access define the access to the document register:
 - NO = no access
 - RO = Read Only access
 - WR = Read Write access can add, modify delete documents from the list
- Attached file access define the access to the files attached to documents:
 - NO = no access
 - RO = Read Only access
 - WR = Read Write access can attach or remove files to documents
- File Type List define the access by file types and depends on the "File Type List" that you defined for the project.
 - Put "*" to give access to all file types
 - Put the list of file types (separated by comma) if you want to limit the access only to these file types. You can also select in the list, see below:

ONDA GOGU	RO	RO	PDF	F	ile Type	5	Save
GIGI FRATELLO	WR	WR	•		Has	File Type	Description
ORASON EMILIE	WR	WR	•		Access	CH	Commented
1IRABELLE ELENE	WR	WR	CM, PDF			EC	Eor comment
				_		NAT	Native files
						PDF	PDE Files
						PDF	PDF Files

- Company List (see also "Job Companies") as there can be several companies producing documents for the job, you can limit the user access by company:
 - Put "*" to give access to all companies
 - Put the list of companies, separated by comma, if you want to limit the access to these companies. You can also select the companies from the list, see below:

0

MIRABELLE ELENE	WR	WR	CM, PDF	INEU) C	ompany	List	Save
						Has Access	Company Number	Company Name
					-		INEU	INTECO EUROPE
					-		INUS	INTECO USA

- Job discipline list define the access to documents by discipline:
 - Put "*" to give access to all disciplines
 - Put the list of disciplines, separated by comma, to which you want to give access. You can also select the disciplines from the list, see below:

	TOTO Coutougno	WR	RO	•	•	•		iscipline	e List	Save
	PONDA GOGU	RO	RO	PDF	•	•	V	Has	Discipline	Description
	GIGI FRATELLO	WR	WR	•	•	•	T	Access	Code	
							-		CAD	COMPUTER AID DESIGN
	CORASON EMILIE	WR	WR	•	•	CAD, CAL, CIV		<u></u>	CAL	CALCULATIONS
		\./D	1D	CM DDC	INCL	DOC FLY			CAL	CALCULATIONS
	MIRABELLE ELENE	WR	WR	CM, PDF	INEU	DUC, ELT			CIV	CIVIL
									DOC	Project Internal Documents
0									FIV	CLECTRICITY.

- Report List reserved for future use for the time being just enter "*"
- Deliverables Only check this box to limit the access only to documents that are marked as "Deliverable". Leave it unchecked to give access to all documents (deliverable or not).
- Can Extract Files check this box if this user will have the right to extract documents and attached files; leave it unchecked otherwise
 - Transmittal access define the workflow access
 - NO = no access
 - RO = Read Only access
 - WR = Read Write access can do transmittals and send them to users in distribution
- Mail address mail address for this job. A user can have a different mail address by job.
- Progress access access to document progress
 - NO = no access
 - RO = Read Only access
 - WR = Read Write access can modify progress list and document progress
- Progress snapshots can do progress snapshots for the job
- In distribution if checked, user is in the job distribution (receives transmittals)
- Title the user role in the project (see "Job Titles" earlier in this document). If a user is "In Distribution", this column is mandatory.

-

In Distribut	tion	Title		From							
✓		DOCUMENT CONTROL	INTERNAL								
		ECHANICAL ENGINEER	~	CLIENT							
v G	GENE	ERAL MANAGER									
P	rojec	ct Manager									
	DOCL	JMENT CONTROL									
M	IECH	CHANICAL ENGINEER									
_ A	DMI	NISTRATION									
E P	ROC	CESS ENGINEER									
11	T SPI	ECIALIST									
P	PROJ	JECT SECRETARY									

- From – the user belongs to what destination (See "Job destinations" earlier in this document). If a user is "In Distribution", this column is mandatory.

In Distribution	Title	From	
V	DOCUMENT CONTROL	INTERNAL	
V	MECHANICAL ENGINEER	CLIENT V	
Image: A start of the start	MECHANICA CLIENT	Client	
	PROCESS EL INTERNAL	Internal	
_	IT ODECLALICT	INTERNAL	

- User Group - the group the user belongs to (if needed). This information is used to manage document access (see "Document owner" later in this manual).

Use	User Group			
	•			
INEU-DOC	INEU Doc. controll			
INTERNAL_DOC	My doc controllers			
INUS_DOC	INUS Doc. controll			
	Use INEU-DOC INTERNAL_DOC INTERNAL_DOC INTERNAL_DOC			

- User1List, User2List, User3List, User4List, User5List - use these columns to define user access to documents based on the values of the optional data User1, User2, User3, User4, User5.

User1 List	User2 List	User3 List	User4 List	User5 List
XX-01, XX-02				
YY-01, YY-02	030, 040			
YY-03	001, 002			

Type the desired values in the respective cell, separated by comma, or select them in the list, as shown below:

U	User1 List Save					
	Has Access	Value	Description	C		
Ø						
Þ		XX-01	XX Group 01			
		XX-02	XX Group 02			
		YY-01	YY Group 01			
		YY-02	YY Group 02			
		YY-03	YY Group 03			

Check the desired values, then click on "Save".

If you click on the header checkbox, all the values will be checked / unchecked.

Important: You can select several rows, by clicking on the first row and then dragging the mouse or press "SHIFT" and then click on the last row you want to select, and then:

- press "T" (TRUE) or "Space" to check the "Has Access" cells for the selected rows

- press "F" (FALSE) to uncheck

U	User1 List Save					
	Has Access	Value	Description			
Ø						
		XX-01	XX Group 01			
	V	XX-02	XX Group 02			
	V	YY-01	YY Group 01			
►	V	YY-02	YY Group 02			
		YY-03	YY Group 03			

Also important: if you restrict the user access for example to 'XX-01, XX02' values in the User1List, the user will have access: - to all documents where the User1 value is either 'XX-01' or 'XX-02'

Vendom

- to all documents where the User1 value is empty (Null, Space, or several Spaces).

Of course, access to documents is also restricted by all other access limitations (by companies, disciplines, etc.)

4.10 Job Work Packages

Job Configuration		
Exit	Configuration for job: 123456 -	DOCUMEN
Companies Disc	iplines $ig ig$	₹ ()
Work Package Lis	st	
Work Package	Work Package Description	
▶ WP1	PROCESS DOCEMNTS	
WP2	PACKAGE NO 2	
*		

You can group documents by work packages. This will allow you to calculate the progress either by discipline or by work package. Work packages usually define the split of work and are frequently used for planning (ex in MS Project or Primavera).

4.11 Job Progress Models

Job	Job Configuration						
	Ext Configuration for job: 123456 - DOCUMENT MANAGEMEN						
/ Companies $igvee$ Disciplines $igvee$ Revision List $igvee$ Status List $igvee$ Action Codes $igvee$ Transmittal $igvee$ Job Titles $igvee$ Users							
	Prog	gress Mod	els				
	Prog	ress Model	Desc	ription			
⊕-	►	DD	Drawing				
þ-		PD	Process Documents				
	P	rogress Ste	08				
		Step	Description	Progress (%)	Status		
		1	First Issue	50	FI		
		2	Approved for detailed design	70	AD		
	-	3	Approved	100	AC		
	-*						
	Prog	jress Mod	els				
	Prog	ress Model	Desc	ription			
_		RD	Requisitions				
—		SD	Standard document				
	*						

Use this window to configure progress models for this job to be used for automatic calculation of the document progress.

For each model, you define several steps, each step with a corresponding progress (%). The last column ("Status") makes the link between the progress step and the document status. It means that if a document uses this progress model (PD, for ex.), when it reaches the "AD" status, its progress will be automatically at 70%.

4.12 Job File Types

J	Job Configuration						
	Exit Configuration for job: 123456 - DOCUMEN						
Ζ	Companies Disc	iplines 🗸 Revision List 🗸 Status List 🔪		= - + →			
	File Types		~				
	File Type	Description					
	► CM	Commented	≣				
	FC	For comment					
	NAT	Native files					
	PDF	PDF Files					
3	*		~				

You can define here a list of "File Types" that you use inside your project. This list can be used to limit the user access by file type. Ex: give the users access only to "PDF" files and not to native "NAT" files.
4.13 Job Data Description

Job Configuration			
Ext Configuration	for job: 12	23456 -	DOCUMENT MANAGE
Companies Disciplines Revision List	Status Lis	t Action	Codes 🗸 Transmittal 🔪 🖛 🕨
Data Description			
Col Name	Position	Visible	Header
ClientDocNumber	13		
ClientStatus	14		
ClientStatusDate	15		
NextRevisionDate	16		
ClientStatusComment	16		
ScheduleDate	17		
User1	18		
User2	19		
User3	20		
User4	21		
User5	22		

Several optional columns are at the user disposal and can be used in the project to store specific information.

Check the "Visible" cell if you want it to appear in the "Document Register" table. In the "Header" cell, type the meaning of this information, it will appear in the column header.

Change the "Position" field, if you want to change the position of this column in the Document Register.

4.13.1 Optional data Values

You can configure a list of possible values for the User1, Usr2, User3, User4, User5 optional data. These values can then be used to limit user access to documents (see Job Users earlier in this document).

To configure these values, proceed as shown below:

Optional	Data valı	les			
User1 🔘 Use	er2 🔘 User3				
er1 List					
Value		Description		-> Excel	
				Import from	
XX-01	XX Group 01			Document Register	
XX-02	XX Group 02				
YY-01	YY Group 01			Import from Excel	Get Import Model
YY-02	YY Group 02				
YY-03	YY Group 03				
	Optional User1 OUse er1 List Value XX-01 XX-02 YY-01 YY-02 YY-03	Value XX-01 XX Group 01 XX-02 XX Group 01 YY-01 YY Group 02 YY-03 YY Group 03	Value Description Value Description XX-01 XX Group 01 XX-02 XX Group 02 YY-01 YY Group 02 YY-03 YY Group 03	Value Description XX-01 XX Group 01 XX-02 XX Group 02 YY-01 YY Group 02 YY-03 YY Group 03	Optional Data values User1 User2 User3 User4 User5 et 1 List

Select the User list that you want to fill, by checking one of the radio buttons (User1, User2, ...), and then:

- add a new value enter the new value and description on the last line, then type Enter or click on another line.
- modify change the data in the desired row and then click on another row to save it
- delete select one or more rows, then click "Delete"

You can also:

Import the list from the "Document Register" if you already have entered values there.

Import the list from Excel, using the provided model, see below:

	0	ptional Data Values
Name	Value	Description
User1	001	User1 Val001
User1	002	User1 val 002
User2	001	User2 Value 001
User2	002	User2 Value 002
User2	003	User2 value 003

Document Register Exit Refresh Get Import Model Document List Extract Files VINEU - INTECO EUROPE Document List Company Discipline Document Revision Revision Date Revision Comment Status Deliverabl Document Number Document Description Status Date nents: 6262 Number of D INFU CAD 03 IN00--E-0063-001 CLASSIFICATION PLANS 70 - INCINERATO ΔD V 25/02/2009 Þ INFU CAD 03 IN00--E-0067-004 CLASSIFICATION PLANS 000 - MAINONTR ΔD 25/02/2009 V 02 REM-95 INFU CAD 03 ELECTRICAL SWITCHGEABONTROL AND 03/07/2009 P 10/08/2009 V 03 OIN00-00-E-0414-001 INEU CAD & Small Power Layout - 00/530 - Water Treat 01 14/02/2009 REM-2121 AD 14/02/2009 INEU CAD 03 IN00-00-E-0415-001 & Small Power Layout - 00/530 - Water Treat 01 14/02/2009 REM-2121 AD 14/02/2009 Cable Rack & Tray Layout - 601 -hemical Sto REM-2121 INEU CAD 03 🕥 IN00-01-E-0423-001 01 14/02/2009 AD 14/02/2009 INEU CAD 03 IN00-20-E-0426-001 620 -ondensate Airoolers (N) -able Back & Tr 01 14/02/2009 REM-4053 AD 14/02/2009 03 OIN00-20-E-0427-001 REM-2121 INEU CAD Cable Rack & Tray layout - 620 -ondensate A 01 14/02/2009 AD 14/02/2009 IN00-20-E-0428-001 REM-2121 INEU CAD 03 620 - Steam Boilers -able Rack & Tray layout 01 14/02/2009 AD 14/02/2009 IN00-20-E-0429-001 REM-2083 INEU CAD 03 620 - Steam Boilers -able Rack & Tray layout 02/02/2009 02/02/2009 01 AD INOD 20 E 0422 00. DEM 4051

5 Document Register

This is the window that shows the document list for the project. You can use this list to add, import, remove documents to the project, attach, remove files to documents, change revision and status, etc.

On the left pane of this window, there are two boxes, containing:

- The contributors list companies participating to the project
- The discipline list disciplines and doc types defined for this project

The list may show more or less items, depending on your access rights. On the right side, you have two panes:

- Document list show the list of documents, only the last revisions
- Extract files the list of documents (last revision / all revisions); in this list you can select documents to be extracted from the system to a separate directory on the network (including the attached files)

In the "Document Number" column, a small button indicates if the document has attached files or not:

	Company Number Discipline		Document Type	Document Number	Document Description	Revision	Revision Date
N	Number of Documents: 6263						
							-
	INEU	CAD	03	IN00E-0063-001	CLASSIFICATION PLANS 70 - INCINERATO		
	INEU	CAD	03	IN00E-0067-004	CLASSIFICATION PLANS 000 - MAINONTR		
	INEU	CAD	03	IN00E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02	03/07/2009
	INEU	CAD	03	IN00E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND	02	03/07/2009
	INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/2009
	INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/2009
	INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/2009
	INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/2009
		0.10		- 1100 00 E 0107 004			4.4100.0000

- Green button this revision of the document has attached files
- Red button this revision of the document has no attached file
- No button at all the document has no revision (was not issued yet), so no files can be attached to it.

5.1 Filtering the document list

5.1.1 By selecting companies and disciplines

J											
🖃 🥅 Job Contributors	Documen	t List 🔰 Extract	Files								
	Documer	Document List									
	Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revisio				
	Number of	Documents: 62	62								
							-				
🖃 📝 Job Disciplines	▶ INEU	CAD	03	IN00E-0063-001	CLASSIFICATION PLANS 70 - INCINERATO						
CAD-COMPUTER AID DESIGN	INEU	CAD	03	IN00E-0067-004	CLASSIFICATION PLANS 000 - MAINONTR						
CIV-CIVIL	INEU	CAD	03	O IN00E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND	02	03/07/				
DOC-Project Internal Documents	INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/				
⊕ ·· ♥ ELY-ELECTRICTY ⊕ ·· ♥ PIP-PIPING	INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/				
PRO-PROCESS	INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/				
	INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02				
			-								

The document list displays documents corresponding to the selected companies and disciplines in the left panels. By checking/un-checking companies and disciplines, the document list will display those items corresponding to your selection.

5.1.2 By using the filter bar

The filter bar is the first line in the document list table. Type something in the filter cell and the list will display only elements containing this text in the corresponding column.

To clear the filter, click on the small button at the left of the filter row.

In the example below, if you type "PUB" in the filter cell corresponding to the "Document Number" and "DRAW" in the filter cell corresponding to the "Document Description", the list will show only documents where the document number contains "PUB" and the document description contains "DRAW".

E	Document List												
	Company Number Discipline		Document Type	Document Number	Document Description	Revision	Revision Date						
N	Number of Documents: 92												
				PUB	DRAW 💌		-						
	INEU	CAL	01	IN00-00-PUB-DI-5201-002	ISOMETRIC DRAWING FOR LINE NO. 6000-	01	04/02/2008						
	INEU	CAL	01	IN00-20-PUB-DI-0507-002	ISOM/TRIC DRAWING WN	01	22/02/2008						
	INEU	CAL	01	IN00-20-PUB-DI-0507-003	ISOMETRIC DRAWING 2-2"-C25-WN	01	22/02/2008						
	INEU	CAL	01	IN00-20-PUB-DI-0507-006	ISOMETRIC DRAWING FOR LINE 2	01	04/02/2008						
	INEU	CAL	01	IN00-20-PUB-DI-0507-007	ISOMETRIC DRAWING FOR LINE 300	01	04/02/2008						
	NEU	CAL	01	IN00-20-PUB-DI-0507-008	ISOMETRIC DRAWING FOR LINE NO. 450	01	04/02/2008						

Clear filter button

Filter row

5.2 Sorting the document list

To sort the list following one column, simply click on the column header. First sort will be ascending; next click will sort descending, and so on.

To sort the list following several columns, click on the first column header, then press "SHIFT" and click on the second column header, then the third, etc.

5.3 Add / modify document information

To add a new document, type the document data in the last row of the table (yellow row), as shown below:

Document	List					
Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revision Date
Number of D	ocuments: 626	3				
2						-
▶ INUS	CAD	03	SQ-BU-1189	Document from site	00	26/11/2009
*						

The mandatory data is:

- Company number
- Discipline
- Document type
- Document number must be unique throughout the project.

The rest of the columns can be filled in at a later moment. To save the new document, simply click on another row of the table.

To modify a document, simply modify the information in the desired cell, then click on another row to save the changes.

Note: Company Number, Discipline, Document type and Document number can be modified only by using "Special commands" (see "Special Commands" later in this document). Revision and Status modification also follow a special procedure (see "Revision" and "Status" paragraphs).

5.4 Import documents and files

You can import a document list from an excel file at any moment of the project. Click on the "Get Import Model" to have the corresponding excel file.

C) 🖬 🤊	- (°I -) ∓			ImportModel.xls [C	ompatibility Mo	ode] - Microsof	t Excel					- 0	х
	Home	e Insert	Page Layo	ut Formulas Data F	teview View Developer Acrob	at							0 - =	5 X
ľ	Kut Microsoft Sans * 8 * A ▲ A ▲ E = = Wrap Text						•	- 1		×	Σ AutoSum ↓ Fill ▼	· 🖅 🗥		
Pas *	te 🛷 Foi	rmat Painter	BIU	• 🖽 • 🙆 • 🛕 • 📄 🗮 🗮	📑 🗊 🗊 Merge & Center 👻 📱	🦻 - % , 🔝	Condition 50 Condition Formattin	nal Format Cell Ig * as Table * Styles *	Insert D	elete Format	🖉 Clear 🔻	Sort & Find & Filter ▼ Select ▼		
	Clipboa	rd 🕞		Font 🕞	Alignment	Number	G	Styles	(Cells	E	diting		
	A5	~ (•	f _x										×
	А	В	С	D	E	F	G	Н	1	J	K		L	-
1														
2														
3	Docun	nent List												
4	Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revision Date	Revision Comment	Deliverable	Status	Status Date	Status	Comment	
5														_
6														_
/														_
ð														
10														
11						-								
14 4	► ► Sh	neet1 🖓						4			1			
Read	ly 🛅											1 100% 🕞 —	-0(÷ .::

Fill this excel file with the list of documents, save it somewhere on your PC or the network, then import it by clicking on the "Import button".

The import procedure does the following:

- Reads the excel file until it reaches the first blank line
- For each document found in the excel file:

- o If the document does not exist in the system, it adds it
- o If the document exists, it updates:
 - The document description
 - Deliverable
 - Revision comment
 - Status comment
 - Participate to progress
 - Optional data User1, User2, User3, User4, User5, ClientDocNumber

It also displays a list of errors, such as:

- Document number too long (max 30 bytes).
- Incorrect discipline (the discipline code from the excel file does not exist in the system)
- Incorrect document type (the document type from the excel file does not exist in the system)

Export the Error List to Excel by clicking on the "-> Excel" button.

Importing files:

You can also import files that will be attached to the documents. For this, use the last columns of the import model:

File Directory : fill it with the name of the directory where the files to be imported are (ex: C:\TEMP or C:\TEMP\)

File1, File2... File5 - up to 5 files to be imported. Fill here only the file name, without the path (ex: Mydesign.pdf, TheBook.xls, etc.)

	A7	• () f _x								*		
	K	L	M	N	0	P	Q	R	S	-		
1												
2												
3					Files							
4	Status Date	Status Date Status Comment Participate Progress		Directory	File 1	File 2	File 3	File 4	File 5			
5												
6												
7												
8												
9												
10									1			
11									<u> </u>	-		
14	Sheet1					1 4						
Rea	dy								100% 🕞 🛛 🗸	÷ .::		

The following rules will be followed by the import procedure:

- if the document does not exist in the database, the document will be imported, then the files
- if the document exists in the database:
 - if the revision from the database is not the same as the revision in the excel file, the files are not imported
 - if the revision in the excel file is empty, the files are not imported
 - if the full name of one of the files to be imported (with the path) corresponds with the name of a file that was already attached to the document, the file is not imported **this is to avoid importing several times the same file.**

5.5 Export document list to Excel

button and the displayed list will be immediately

Click on the exported to excel.

-														
G		T GT .			123456_Export_63410822947	9218750.xls	[Compatibility	Mode] - Microsoft E	cel					- = X
	Ноще	Insert	PageLay	out Formulas Data	Review View Developer Acrobat) _ = x
	H K Cut		P	M A	R W L B						Σ AutoSum	• A- AA		
Ļ		w	Microsoft S	Sans • 10 • A A	Gen	eral				1	Eill -			
Pa	ite 🦪 For	mat Painter	BIU	I • 🖽 • 💁 • 🗛 • 📕 🖬	🗄 🗃 ோ 📴 Merge & Center 🕶 🛒	• % •	0 .00 Conditio	nal Format Cell	Insert I	Delete Forma	t 🖉 Clear 🕶	Sort & Find &		
	Clipboar	d G		Font 🕞	Alignment	Number	Ta T	Styles		Cells	02	Editing		
	Δ1	-	6	& Document List										×
	AI		0	JA Document List	-	-	0				12		14 N	
	A	B		U	E	F	G	н		J	ĸ	L	IVI IN	0
	Documer	11 LISI		1	İ	1	·							
2	Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revision Date	Revision Comment	Status	Deliverable	Status Date	Status Comment	ls Valid Finishe	Finish Dat
2	Number of	Documents:	6 263										9	_
4	INEU	CAD	03	IN00E-0063-001	CLASSIFICATION PLANS 70 - INCINERATOR A	F			AD	TRUE	25/02/2009		TRUE FALSE	_
5	INEU	CAD	03	IN00E-0067-004	CLASSIFICATION PLANS 000 - MAINONTROL	E			AD	TRUE	25/02/2009		TRUE FALSE	
6	INEU	CAD	03	IN00E-HB-0016-001	TRANSFORMER INTERCONNECTION BLOCK	02	03/07/2009	REM-95	P	FALSE	10/08/2009		TRUE FALSE	
7	INEU	CAD	03	IN00E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND M	0 02	03/07/2009	REM-95	P	TRUE	10/08/2009		TRUE FALSE	
8	INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatmen	t 01	14/02/2009	REM-2121	AD	TRUE	14/02/2009		TRUE FALSE	
9	INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatmen	t 01	14/02/2009	REM-2121	AD	FALSE	14/02/2009		TRUE FALSE	
10	INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	e r 01	14/02/2009	REM-2121	AD	TRUE	14/02/2009		TRUE FALSE	
11	INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray la	a 01	14/02/2009	REM-4053	AD	TRUE	14/02/2009		TRUE FALSE	-
14 4	→ > Sh	eet1 🖉	-					I 4			ш			▶ 1
Rea	dy 🎦											100	% 😑 🔍 🗸	
-		Carl and the second		and the second sec										

5.6 Document Information

- Company Number company that produced the document
- Discipline (6 bytes)
- Document type (6 bytes)
- Document number (30 bytes) must be unique throughout the project
- Document description (80 bytes)
- Deliverable (True / false)
- Revision (4 bytes)
- Revision date
- Revision comment (64 bytes)
- Status (4 bytes)
- Status date
- Status comment (64 bytes)
- Is Valid (True / False) false if the document is no longer needed in the project. You cannot delete documents that have revision history or traffic history.
- Is Finished (True/False) a bit indicating that the document is ready (no more revisions will come)
- Finished Date the date when it was finished
- Owner the document owner
- Owner Group the group the owner belongs to

5.7 Document owner

When a document is added to the document list, either by keying its information on the last line or by importing it from an Excel file, the following information will be added to it:

- Owner - the document owner: the user that added the document

- Owner Group - the group the "Owner" belongs to (if any).

The user access to modify a document, remove it, change its revision, add / remove files to it, is managed as follows:

- The Global Admin and Job Admin have access always

- Users who have "NO" or "RO" access to the document list cannot do any changes

- For users who have "RW" access to the document list:

- if "Owner" is empty they have access

- if they are the "Owner" they have access

- if they belong to the "Owner Group" they have access (if the "Owner Group" is not empty)

5.7.1 Change the document owner

The Global Admin or Job Admin can change the document owner. To do this, proceed as described below:

- In the "Document Register" window, click on the "Extract Files" tab

Document List Extract Files

- Display documents (filter by Job contributor, Discipline or filter bar)
- Select the documents that you want to change by checking the "Select" cell

		INEU	CAD	03	۲	IN00-01-E-0423-001
	V	INEU	CAD	03	۲	IN00-20-E-0426-001
		INEU	CAD	03	۲	IN00-20-E-0427-001
	V	INEU	CAD	03	۲	IN00-20-E-0428-001
		INEU	CAD	03		IN00-20-E-0441-001
۲	V	INEU	CAD	03	۲	IN00-50-E-4006-000
		INEU	CAD	03		IN00-50-E-4006-001

- Type the new owner number in the "New Owner" textbox (you can also select it in a list that is displayed when you click on the small button in the textbox"

New Owner:	Change Owner	

- Click on "Change Owner"

Note: You can select the whole displayed list by checking the checkbox in the header of the "Selected" column, see below:

•	Selected	Company Number	Discipline	Document Type	F	Document Number	
N	umber of Do	cuments: 6	262				
Z							
	V	INEU	CAD	03		IN00E-0063-001	C
	V	INEU	CAD	03		IN00E-0067-004	C
	V	INEU	CAD	03	۲	IN00-00-E-0414-001	8
	V	INEU	CAD	03	۲	IN00-00-E-0415-001	8
	V	INEU	CAD	03	۲	IN00-01-E-0423-001	0
	V	INEU	CAD	03	۲	IN00-20-E-0426-001	
	V	INEU	CAD	03	۲	IN00-20-E-0427-001	0

5.8 Revision

Click on the small button in the "Revision" column to display a context menu, as shown below:

INEU	CAD	03	IN00E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02 🔲	03/07/2009	REM-
INEU	CAD	03	IN00E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND	New Rev	vision	٩-١
INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	Revision	History	٨-:
INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	Restore Previous Revision		n 1-1
INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/2009	REM-
INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/2009	REM-

5.8.1 New Revision

Click on "New Revision" to change the revision of the document.

								1	_
	IN00E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02	03/07/20	009 RE	EM-95	P		
State Market	IN00E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND	🕞 Chan	ge Revi	ision —				-
N. LUCCOLO	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	Docume	nt					
	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	Number	r: INC	ЮE-HB-	-0016-001			
Statutes and	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	TF	RANSFO	RMERIN	NTERCONNECT	TION BLOC	ж	
N. CONTRACTOR	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	Current re	·	00		-		4
	IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A	Current re	evision.	02	REM-95			
STATISTICS OF	IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	New revis	sion:	03	✓ Revision 3			
	IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	Revision	date:	30/05	5/2010 💌			
	IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P							
Statute and	IN00-20-E-0441-001	20/730 - Raw/Firewater Tank	Change F	Rev.	Cancel				
	INIOD 20 E 0442 001	DO FUEL CELLE DELLOTER LEURA ELLE C	01	20/05/20	N10 DE	M DOCO	CI		

The program will suggest a new revision, depending on the current revision and on the "Revision List" configured for the job.

When you agree with the new revision and the date, click on the "Change Rev." button to apply the change.

5.8.2 Revision History

Click on the "Revision History" item in the "Revision" menu to display the previous revisions of the document.

03	IN00E-HB-0016-001	ANSFORME	R INTERCONN	ECTION BLO 04	30/05/2010)	P	
03	Revision History							2
03	Document Number	Revision	Revision Date	Revision Comment	Status	Status Date	Status Comment	2
03	IN00E-HB-0016-001	03	30/05/2010	Revision 3	Р	10/08/2009		
03	IN00E-HB-0016-001	02	03/07/2009	REM-95	Р	10/08/2009		2
03								2
03								1
								ПЕ

5.8.3 Restore previous revision

You can go back to the previous revision of a document, by clicking on the "Restore Previous revision" item in the "Revision" menu.

5.9 Status

Click on the small button in the "Status" column to display the "Change Status" dialog, as shown below:

IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/200	9 REM-2121	AD 🗧		14/02/2009	
IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/200	🖃 Change St	atus			
IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/200	Document				
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/200	Number:	IN00-00-E-0414-	001		
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A	01	14/02/200	Small Pc	ower Layout - O	0/530 - V	Vater Treatmer	it
IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	01	14/02/200	Current status:	AD	[
IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	01	02/02/200	Current status.	AU			
IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P	01	14/02/200	New status:	AC 🚩	Approve	d for construction	
IN00-20-E-0441-001	20/730 - Raw/Firewater Tank			Status date:	30/05/2010) 🔽		
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray Layout -ross S	01	20/05/20*	Change Status	Cancel			
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - Diesel Stora	01	14/02/200					

The system will propose the new status, following the status list that you defined for the job, if any.

Changing the Status can also change the "Document Progress", if the document type is linked to a progress model (see "Progress Models" in the "Job Configuration" section of this document.

Click on "Change Status" to commit the change.

5.10 Attach/Remove files to documents

One of the most important things in a document control system is to attach files to documents.

To do this, click on the small button in the "Document Number" cell, then select "Add file to document" or "Add/Remove files" in the menu, as shown below:

INEU	CAD	03	IN00-00-E-0414-001 & Small Po	wer Layout - 00/530 - Water Treat
INEU	CAD	03	Add File to Document (Fast) (CTRL A)	er Layout - 00/530 - Water Treat
INEU	CAD	03	Add / Remove Files	& Tray Layout - 601 -hemical Sto

The first option will display a window to select the file and to attach it to the document:

Open							? 🔀
Look <u>i</u> n:	Contraction 00 Files		✓) 🧀	P	•	
My Recent Documents Desktop My Documents	 123456 import.: Acrobat_SDK_d Acrobat_SDK_d Acrobat_SDK_d Acrobat_SDK_v AcroJSGuide.pd AcroJSGuide.pd Air Companies.: CoreAPIOvervia CountryList.xls CountryList.xls My file.pdf distiller_api_refi Gifinfo.doc iac_developer_d Import.xls License.doc 	xls leveloper_faq.pdf loc_map_web_only.pdf werview.pdf whats_new.pdf if xls ew.pdf erence.pdf guide.pdf	MAISON.XL pdf_open_p SamplePDF(Welcome.do	S Jarama J1.pdf pdf	eters.p	odf	
My Network	File <u>n</u> ame: Files of <u>t</u> ype:	my file.pdf Doc Files(*.doc;*.pdf;*.x	ds)		*	(Open Cancel

Double-click on the selected file, or select it and click "Open". The selected file will be attached to the document. It will be copied on the "Storage server", in a directory corresponding to the project and to the discipline. Repeat the operation to add more files to the same document/revision.

The second option displays a window showing all attached files for this revision of the document:

Document Files								
Exit	All Revisions	Add File To Rev	Add File To Rev. 04			Reset FTP connection		
IN00E-HB-0016-001	TRANSFORMER	RINTERCONNECTION BLOCK DIAGRAM SU	BSTATION 3 /	Revision : 04				
Document Number	Revision	File Name	File Type	Comments	File Size (Kb)	Original File		
IN00E-HB-0016-001	04	IN00E-HB-0016-001100530062935!04!.pdf	PDF		31 711.7	C:\Acrobat Documentatio		
M00E-HB-0016-001	04	IN00E-HB-0016-001100530042236!04!.doc	NAT 🗸		13	C:\00Files\Welcome.doc		

To attach one more file to this revision of the document, click on the "Add file to rev." button. The same window as before will be displayed where you can select the file to be attached.

To display an attached file, double-click on its row.

You can also click on the small button in the "Document Number" cell, it will display the following menu:

ocument Files										
Ext All Revisions			Add File To Rev.		Reset FTP connection					
IN00E-HB-0016-001 TRANS	FORMER	RINTER	CONNECTION BLOCK DIAGRAM SUBST	ATION 3	/ Revision : 04					
Document Number	Revision		File Name	File Type	Comments	File Size (Kb)	Original File			
▶ IN00E-HB-0016-001	04	IN00E-	HB-0016-001100530062935!04!.pdf	PDF		31 711.7	C:\Acrobat Documentatio			
IN00E-HB-0016-001	Display P	File	HB-0016-001100530042236!04!.doc	NAT		13	C:\00Files\Welcome.doc			
	Downloa	ad File								
L	Remove	File								

- Display file will display the file same as double-click on the file row
- Download file will copy the file from the storage server to a directory of your choice
- Remove file will remove this file from this list. It will be removed also from the file server.

The field "File Type" allows selecting a file type for each file. You can select from the "File List" defined for the job (see "Job Configuration" section earlier in this document).

The "File type" is an important information, because it can be used to restrict user access to only a certain type of files (see "Job Users" configuration).

To Add/remove files for a previous revision of the document, proceed as follows:

- Display the revision history

IN00E-HB-0016-001	TRANSFORME	ER INTERCONN	ECTION BLO 04	30/05/201	0	P
Revision History						
Document Number	Revision	Revision Date	Revision Comment	Status	Status Date	Status Comment
IN00E-HB-0016-001	03	30/05/2010	Revision 3	Р	10/08/2009	
IN00E-HB-0016-001	02	03/07/2009	REM-95	Р	10/08/2009	

-

Double-click on the line corresponding to the revision you want

- The system will display the attached files for this revision, as shown below:

Vendom

Exit	All Revisions	Add File To Rev.	Add File To Rev. 02			Reset FTP connection		
IN00E-HB-0016-001	TRANSFORMER	RINTERCONNECTION BLOCK DIAGRAM SUB	STATION 3	/ Revision : 02				
Document Number	Revision	File Name	File Type	Comments	File Size (Kb)	Original File		
N00E-HB-0016-001	02	IN00E-HB-0016-001_100530114938_!02!.pdf	PDF		300.6	C:\00Files\Acrobat_S		

- Proceed as described earlier to add/remove/display files for this revision.

5.11 Work Flow history

INEU	CAD	03	IN00E-HB-0016-001 TRANSEC	RMER INTERCONNECTION BLO
INEU	CAD	03	Add File to Document (Fast) (CTRL A)	SWITCHGEARONTROL AND
INEU	CAD	03	Add / Remove Files	er Layout - 00/530 - Water Treat
INEU	CAD	03	Work Flow History	er Layout - 00/530 - Water Treat

Click on the small button in the "Document Number" cell, and then select "Work Flow History". The system will display all traffic for this revision of the document (where it was transmitted, what transmittal number, what date, etc.)

Work Flow History						
Document Number	Revision	Status	Trans. Number	Trans. Date	Destination	Direction
ESTDOC	P01		2	15/12/2005	BRC	то
ESTDOC	P01		16	16/03/2006	CLIENT	FROM

5.12 Special commands

5.12.1 Change document number

Click on the small button in the "Document Number" cell, and then select "Change document number".

INEU	CAD	03	IN00E-0063-001 CLASSI	FICATION PLANS 70 - INCINERATO
INEU	CAD	03	Add File to Document (Fast) (CTRL A)	TION PLANS 000 - MAINONTR
INEU	CAD	03	Add / Remove Files	MER INTERCONNECTION BLO
INEU	CAD	03	Work Flow History	SWITCHGEARONTROL AND
INEU	CAD	03	Change Document Number	er Layout - 00/530 - Water Treat

The following dialog will be displayed:

INEU	CAD	03	IN00E-HB-0016-00	01	INTERCONNECTION BLOCK DIAGRAM SU	
INEU	CAD	03	😑 Change Doo	cument	Number	1
INEU	CAD	03	Old Number:	IN00E-I	HB-0016-001	
INEU	CAD	03	INTERCON	NECTIO	N BLOCK DIAGRAM SUBSTATION 3	
INEU	CAD	03				Γ
INEU	CAD	03	New Number:	WWW-E	-HB-0016-001	F
INEU	CAD	03	Change Number	Cancel		
INEU	CAD	03		Canoor		ļ

Type the new document number in the corresponding box, and then click on "Change Number".

5.12.2 Change discipline and document type

Click on the small button in the "Document Number" cell, and then select "Change discipline and document type"

INEU	CAD	03	WWWE-HB-0016	-001	INTERCONNECTION BL	OCK DIAGRAM SU
INEU	CAD	03	🕞 Change Disci	pline and D	ocument Type	
INEU	CAD	03	Document			
INEU	CAD	03	Number:	WWWE-	HB-0016-001	
INEU	CAD	03	INTERCON	INECTION	BLOCK DIAGRAM	SUBSTATION 3
INEU	CAD	03	Current			
INEU	CAD	03	Discipline:	CAD	Doc. Type:	03
INEU	CAD	03				
INEU	CAD	03	New			
INEU	CAD	03	Discipline:		Doc. Type:	·
INEU	CAD	03				
INEU	CAD	03	Change	Cancel		

Select the new discipline in the list box, the select the new document type in the corresponding list box, and then click "Change".

5.12.3 Remove document

Click on the small button in the "Document Number" cell, and then select "Remove document".

The system will display a warning, depending on the history of the document.



Click "YES" if you still want to remove the document from the list.

You can also declare a document as no longer "Valid", by un-checking the "Is valid" field. The document will remain in the list, and it will shown in RED.

	1		1		1		1		
03	O IN00E-HB-0017-001	02	03/07/2009	REM-95	Р	V	10/08/2009		
03	IN00-00-E-0414-001	01	14/02/2009	REM-2121	AD	~	14/02/2009		~
03	IN00-00-E-0415-001	01	14/02/2009	REM-2121	AD		14/02/2009		v

5.12.4 Display all documents

If you are a global administrator or a job administrator, the "All Documents" option is available for you. If this option is checked, the program will display ALL documents, regardless of the selected companies / disciplines / document types. This option is useful when there may be documents in the database that are attached to a Company or Discipline or Document Type that are no longer in the left lists, available for selections.

	WorkFlow	All Doc	uments	Refresh	> Excel Import	Get Import Mode
	ocument l	ist Extract F	iles			
D	ocument	List				
(Company Number	Discipline 🛆	Document Type	Document Number	Document Description	Revision
Nu	umber of Do	ocuments: 626	0			
	INUS		02	41-149-3416	PAVING DRAWING AIROOLERS	00
	INUS		02	41-150-3317	CIVIL INSTALLATION DRAWINGS SG/PH/03	00
	INUS		02	41-150-3417	PAVING DRAWING SG/PH/03 , SG/PS/01	00
Þ		CAD	01	2002-0971-MM-AK-0002	Minutes of Meeting	00
		CAD	01	2002-0971-MM-AK-0003	Weekly Progress Report	00
		CAD	01	2002-0971-MM-BU-MC-0001	Macchi package - engineering meeting	00
	INEU	CAD	03	CH-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01
	INEU	CAD CAD CAD	01 01 03	 2002-0971-MM-AK-0003 2002-0971-MM-BU-MC-0001 CH-01-E-0423-001 	Weekly Progress Report Macchi package - engineering meeting Cable Rack & Tray Layout - 601 -hemical Sto	00 00 01

In the example above, there are 3 documents where the Company Number is empty and 3 other where the Discipline is empty. They will be displayed when you check the option "All Documents".

You can then do the necessary corrections for these documents (put the correct Company Number/ Discipline in the example above).

5.13 Extract files

If you are a Job administrator or a Global Administrator or you have the special right "Can Extract Files", you can extract a list of documents from the Vendom system, along with the associated files.

An Excel index will be produced, which contains the list of documents with the associated files, and a hyperlink to each extracted file. Clicking on the hyperlink will open the file.

	Document Lis	st Y Extrac	t Files						
	All Re	visions	Extract to dire	ctory: C	:\Ext	traction\123456	File Types:	Extract	
D	ocument L	ist							
⊽	Selected	Company Number	Discipline	Document Type	F	Document Number	Document Description	Revision	Re
Nu	imber of Do	cuments: 6	261						
							×		
		INEU	CAD	03		IN00E-0063-001	CLASSIFICATION PLANS 70 - INCINERATO		
		INEU	CAD	03		IN00E-0067-004	CLASSIFICATION PLANS 000 - MAINONTR		
Þ	V	INEU	CAD	03	۲	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	01	REM
	V	INEU	CAD	03	۲	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	REM
	V	INEU	CAD	03	۲	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	REM
	✓	INEU	CAD	03	۲	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	REM

To execute the extraction, proceed as following:

- Choose a directory where you want to put the extracted files. By default, the program proposes "C:\Extraction\pppp", where "pppp" is the project number.
- Choose the file type that you want to extract ("*" for all). You can select the file types by clicking on the small button on the right of the box, as shown below:

File Types:	PI	DF		Extract]
	Fi	le Type	S		Save
_		Select	File Type	Desc	ription
Documer			СМ	Commented	
			FC	For comment	
			NAT	Native files	
FICATION PL	►		PDF	PDF Files	
EICATION DI					

- Select the files that you want to extract, by checking the box at the left of the document list, see below:

Do	ocument L	ist					
¥	Selected	Company Number	Discipline	Document Type	F	Document Number	
Nu	mber of Do	cumen⁄s: 6	261				
		INEU	CAD	03		IN00E-0063-001	CLASSI
		INEU	CAD	03		IN00E-0067-004	CLASSI
Þ		INEU	CAD	03	۲	IN00-00-E-0414-001	& Small
	~	INEU	CAD	03	۲	IN00-00-E-0415-001	& Small
		INEU	CAD	03	۲	IN00-01-E-0423-001	Cable R
		INEU	CAD	03	۲	IN00-20-E-0426-001	620 -on
				I	-	I	i

- You can select / unselect the whole list by checking / un-checking the box located in the column header.
- When you are ready, click on the "Extract" button. The files will be extracted to the chosen directory, a subdirectory will be created for each discipline, and an Excel index will be created and displayed:

Home Insert Page Layout Formulas Data Review View Developer Acrobat Image Layout	3						1151_125450.81	is (compatibility)	wodej - wicros	STEEXCEL			-	
Arial *8 Aria *8 <th></th> <th>Home</th> <th>Insert</th> <th>Page La</th> <th>ayout Formulas</th> <th>Data</th> <th>Review</th> <th>View Develope</th> <th>r Acrobat</th> <th></th> <th></th> <th></th> <th>• •</th> <th>_ [</th>		Home	Insert	Page La	ayout Formulas	Data	Review	View Develope	r Acrobat				• •	_ [
Opboard G Font G Alignment G Number G Styles Cells Editing R1C1	Pas	A A	rial BI <u>I</u> U	• 8 • • •		= <mark>-</mark> »·	· = G	General ∰ • % • €.00	Conditional Formatting	Format as Table * S	Cell Styles *	× Σ × Α Z Sort Filter	& Find & Select •	
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6 Work Flow

6.1 Create a transmittal

Document and Pe	Tra	Exit	ismittal Documents	Transmitt	al Peopl	e										> Exc	el)	Prir	ıt							
pple List Trans														٦	R	AI	NS FROM	M : 1/	IT TO	T/	۱L					
mittal List										-	Trai	nsmi Tran	ittal Ismi	Nur ittal	nbei Date	r: ∋:										
		Please find end	osed the following	a documents																						
	[Item	Document Nu	mber		Rev.	Rev. Date				Do	cume	nt De	scripti	on				Iten	1		D	ocumer	nt Nun	ber	
	ł	1																	11	-						
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To create a new transmittal:

- Move the mouse over the "Transmittal List" tab. This action, will open the "Transmittal List", see below:

	• Tr	ans. TO	Trans. FROM	New Tr	ans.		
Destination List	Transmit	tals TO CL	IENT		/		
INTERNAL - Internal	Direction	Transmittal Number	Transmittal Date	Comment	ls Distributed	Distribution Date	D
	Number of	Transmittals:	0				
							Τ
							T

- This window will hide itself if the mouse pointer gets out of it. You can "block" this window by clicking on the "PIN" at the upper right corner of the window. Click again to UNPIN it and let it hide when you no longer need it.
- Select the "Destination" in the left box ("Destination List").
- Select the transmittal type (Trans. To or Trans. From)
- Click on the "New Trans." Button
- A new transmittal will be added to the transmittal list, see below:

	Edit WORK / BLOCKED TRANSMITTAL:
Trans. TO Trans. FROM New Trans.	mittal
Transmittals TO CLIENT	lefresh Save Remove people Remove docs.
Direction Transmittal Transmittal Comment Is Distribution Date Date	
Number of Transmittals: 1	/ENDOM
TO 21 20/04/2010 Image: 58	8, Main Street
	eu Verk
	ew fork
	23456 Water treatment project
	O Trans. TO Trans. FROM New Trans. Transmittals TO CLIENT Distribution Distribution Direction Transmittal Transmittal Number of Transmittals: 1 Image: Comment of the second

- The transmittal will also be shown in the "transmittal sheet" on the right side of the window.
- To display a transmittal, double-click on its line in the "Transmittal List"
- The new transmittal has the status "WORK" and also it is "BLOCKED" by the current user
- You can add a comment (in the "Comment" column) for this transmittal. This comment will be used to compose the mail "subject", when the transmittal will be distributed by mail.
- You can also specify how many days the receiving people will have to give their answers to this transmittal, by filling the "Action Before days" column:

Dir	rection	Transmittal Number	Transmittal Date	Comment	ls Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before days
Nur	nber of]	Fransmittals:	1						
									À
Þ	то	21	20/04/2010						10

6.2 Add documents to transmittal

0	Transmittal List						
ocu mer	۲	Tran	s. TO	🔿 Trans.	FROM	New Trans.	
it ani	□· Transmittal Destinations	Tra	ansmitt	als TO CLI	ENT		
d People	INTERNAL - Internal	Di	rection	Transmittal Number	Transmittal Date	Comment	D
<u>ĕ</u> .		Nu	mber of]	Transmittals:	1		
		Þ	TO	21	20/04/2010	Transmittal 21 for comm	Γ
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Move the mouse over the "Document and People List" tab, to open it:

Document and People List											
Document List People List											
Job Contributors INEU - INTECO EUROPE	All Revisions V Deliverables Only Add Docs.										
INUS - INTECO USA	Document	Document List									
	Selected	Company Number	Discipline	Document Type	F	Document Number	Document Description				
	Number of Do	cuments: 5	935								
Job Disciplines											
CAD-COMPUTER AID DESIGN		INEU	CAD	03	۲	IN00-00-E-0414-001	& Small Power Layout - 00/530 - W				
		INEU	CAD	03	۲	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -				
DOC-Project Internal Documents	▶ 🔽	INEU	CAD	03	۲	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -abl				
			1			I					

The list will contains documents corresponding to your selections with regard to the "Participants to project", "Discipline", "All Revisions", "Deliverables Only" and also the filters written in the filter bar.

One important box is the "Never sent TO", on the lower left side of the window:



If you check "Client", for ex., the list will display all documents and revisions that were never sent to the "CLIENT".

If you check more than one destination, the program will display documents that were never sent to any of the selected destinations.

Select the documents to be added to the transmittal by checking the "Selected" box on the left column of the list, and then click on the "Add Docs" button to add these documents to the displayed transmittal. You can also right-click on the document list, and then click on the displayed menu.

The documents will be added to the displayed transmittal, and the transmittal sheet will display them:

TO CLIENT	
Transmittal Number · ME>CLIENT - 0021	7878, KOLONIE
New York Transmittal Date : 20/04/2010	San Francisco, (
Please find enclosed the following documents :	Davis Darks
Please find enclosed the following documents : Item Document Number Rev. Date Document Description Item Document Number R 1 1000-005-0414-001 0.1 1400/2000 9 cmail Deward Lawork - 00/530 - Water Treatment 11	Rev Rev. Date
Please find enclosed the following documents : Item Document Number Rev. Rev. Date Document Description Item Document Number R 1 1000-00-E-041-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 11 Document Number R 2 1000-00-E-0415-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 11 Document Number R	Rev Rev. Date
Please find enclosed the following documents : Enclosed the following documents : Item Document Number Rev. Rev. Date Document Description Item Document Number Rev. 1 N00-00-E-0414-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 11 Document Number R 2 IN00-00-E-0415-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 12 3 IN00-01-E-0423-001 01 14/02/2009 Cable Rack & Tray Layout - 00/530 - Water Treatment 12	Rev Rev. Date
Please Find enclosed the following documents : Item Document Number Rev. Rev. Date Document Description Item Document Number R 1 IN00-00-E-0414-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 11 Intervent of the second	Rev Rev. Date
Please Find enclosed the following documents : Second and a conditional states and condites and a conditional conditional states and a cond	Rev Rev. Date
Please Enclosed the following documents : Intro-Document Number Rev. Rev. Date Document Description Item Document Number Rev. Rev. Date Document Description Item Document Number Rev. Rev. Rev. Date Document Description Item Document Number R 1 1000-00-E-041-001 01 14/02/2009 & Small Power Layout - 00/530 · Water Treatment 11	Rev. Date
Plasses Rev. Rev. Document Document Description Item Document Number Rev. Rev. Document Description Item Document Number Rev. Rev. Stall Power Layout - 00/530 - Water Treatment 11 Document Number Rev. Rev. Stall Power Layout - 00/530 - Water Treatment 11 Document Number R 1 N00-00-E-0415-001 01 14/02/2009 & Small Power Layout - 00/530 - Water Treatment 11 11 0	Rev. Date
Please Find enclosed the following documents : Image: Constraint of the following documents is in the following document is interval and the following document is interval a	Rev Rev. Date

The transmittal sheet displays 20 documents per page (numbered from 1 to 20), and it can go up to 5 pages (100 documents).

To remove documents from the transmittal, simply select then in the transmittal sheet, the click "Remove docs" button or right-click on the sheet and then click on the "Remove Documents" menu.

6.3 Select what files to send for each document

Tra	nsmitt	al 🍸 Transmittal Do	ocume	nts Transmitta	Peop	le \						
Tra	ısmit	tal ME>CLIE	Г - 00	21 TO CLIENT				Files on current transmittal for	selected	document		
⊡ S	lected	Document	Numbe	er Revi	sion	Document Description	Revision Date	IN00-00-E-0415-001 & Small	Power La	yout - 00/530 - Water Treatment /	Revision	: 01
Nun	ber of	Documents: 4						Document Number	Revision	Fil	e Name	
								Number of Files: 1				
		IN00-00-E-0414-0	01	0	1	& Small Power Layout - 00/530 -	14/02/2009	IN00-00-E-0415-001	01	IN00-00-E-0415-001_100530114954_!01!.doc		
►		IN00-00-E-0415-0	01	0	1	& Small Power Layout - 00/530 -	14/02/2009					
		IN00-01-E-0423-0	001	0	1	Cable Rack & Tray Layout - 601 -	14/02/2009			-		
		IN00-20-E-0426-0	00	0	1	620 -ondensate Airoolers (N) -abl	14/02/2009					
F		~							/			
									/			
								All stored files for selected dor	umont			
							/	IN00-00-E-0415-001 & Small		vout - 00/530 - Water Treatment	Dovision	01
							r.	Document Number	Revision	File Name	File Type	Commer
								Number of Files: 2	ricvision		r no Type	Commer
								▶ IN00-00-E-0415-001	01	IN00-00-E-0415-001100530114954!01!.doc	NAT	
								IN00	01	IN00-00-E-0415-001 100530114948 !01!.xls	NAT	

You can display a different view of the transmittal documents, by clicking on the "Transmittal Documents" tab.

This view shows the document list, on the left and, for each document:

- All stored files for this revision on the list at the right on the bottom.
- The files to be linked to this transmittal on the upper list on the right.

If you decide that not all stored files will be linked to this transmittal, select the desired ones in the right bottom list, and then add them to the transmittal (right click on the list, and then select "Add files..." in the displayed menu.

In the example above, the second document has two stored files, but only one of them will be linked to the transmittal.

If you don't specify what files to be linked to the transmittal documents, all stored files will be attached. The user who receives the transmittal will then be able to see all the files, depending on his access rights (that can be limited by "File Type").

6.4 Add people to transmittal

Move the mouse over the "Document and People List" tab, to open it, and then click on the "People List" tab:

Document List People List									
Destination List CLIENT - Client		Add People							
INTERNAL - Internal	Pe	eople List							
		Selected	Company	User Number	User Name	Title			
	Nu	imber of Pe	ople: 5						
		~	CLIENT	10100	TOTO Coutougno	GENERAL MANAGER			
		~	CLIENT	10142	GIGI FRATELLO	PROCESS ENGINEER			
		~	INTERNAL	100000	DOCCONTROL	DOCUMENT CONTROL			
	►		INTERNAL	10170	CORASON EMILIE	IT SPECIALIST			
		~	INTERNAL	10124	PONDA GOGU	MECHANICAL ENGINEER			

Select the people to be added to the transmittal by checking the "Selected" box on the left column, and the click on the "Add people" button. The selected people will be added to the transmittal and the documents already in the transmittal will be automatically distributed to ALL people:



You can change the distribution, by modifying the distribution panel: put 1 on the people line and the document column if you want the corresponding people to receive the corresponding document. Leave it blank if not.

What you have to specify now is what action you expect from each people and what is the dead line ("Action Before date") for this action.

Possible actions are displayed on the lower part of the transmittal sheet:

Action Codes				
1 / I For Information	3 / C For Comments	5 / I For Purchase ORDER	7 / I Last Issue	
2 / A For Approval	4 / I For Call for BID	6 / I For Construction		1

Type the corresponding action code and the date, as shown below:

	Addrossoos	т	Act	Action before						
	Addressees	1	ACL.	Date	1	2	3	4	5	6
1	GENERAL MANAGER									
2	TOTO Coutougno	1	2	10/05/2010	1	1	1	1		
3	DOCUMENT CONTROL									
4	DOCCONTROL	1	1		1	1	1	1		
5	MECHANICAL ENGINEER									
6	PONDA GOGU	1	3	10/05/2010	1	1	1	1		
7	PROCESS ENGINEER									
8	GIGI FRATELLO	1	2	10/05/2010	1	1				
9										

In this example:

- The user "TOTO ..." receives all 4 documents and has to "Approve" (code 2) them before the 10/05/2010
- The user DOCCONTROL receives all documents "For Information" (code 1). No action is required, so the date is not important
- The user "PONDA..." receives all 4 documents for "Comment" (code 3) and has to comment them before the 10/05/2010
- The user "GIGI ..." receives only the first 2 documents "For Approval" (code 2) and has to approve them before the 10/05/2010

Don't forget to "SAVE" these modifications by clicking the "Save" button. This button will blink RED every time a "Save" is needed.

6.5 Block / Unblock the transmittal

In a multi-user environment, if several users happen to work on the SAME transmittal, unpredictable results may occur. To avoid this, the first user who opens a transmittal will BLOCK it. The BLOCK action will prevent other users to do modifications on this transmittal. A BLOCKED transmittal appears in BLUE on the transmittal list, and the user who blocked it is shown in the column "Blocked By":

Т	ransmitt	als TO CLI	ENT								
Direction		Transmittal Number	unsmittal Transmittal Comment		ls Distribution Distributed Date		Distribution Type	Originator Trans. Number	Action Before days	Blocked By	
N	umber of 1	Fransmittals:	1								
Þ	TO	21	20/04/2010						10	DOCCONTROL	

The transmittal can be UNBLOCKED by the user who BLOCKED it or by the Job or Global administrators.

To unblock a transmittal, click on the small button in the "Transmittal Number" cell, and then click on "Unlock transmittal" on the displayed menu:

Transmitt	tals TO CLI	ENT							
Direction	Transmittal Number	Transmittal Date	Comment	ls Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before days	Blocked By
Number of	Transmittals:	1							
▶ TO	21	20/04/2010						10	DOCCONTROL
	Display Tran	smittal							
	Unlock Trans	smittal							

6.6 Post / Un-post the transmittal

When a transmittal is finished and ready for distribution, you have to "POST" it. You have two ways to POST a transmittal:

1 – Click on the small button in the "Transmittal Number" cell, and the click "Post Transmittal" in the displayed menu

Trai	nsmitt	tals TO CLI	IENT							
Dire	ection	Transmittal Number	Transmittal Date	Comment	ls Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before days	Blocked By
Num	ber of	Transmittals:	1							
•	то	21	20/04/2010						10	DOCCONTROL
		Display Tran	nsmittal							
		Unlock Tran	smittal							
		POST Transr	mittal							

2 - Click on the "Status" button in the transmittal sheet window, and then select "Post Transmittal" in the displayed menu

Exit	WORK / BLOCKED	TRANSMITTAL:
Transmittal Tra	Block Transmittal	mittal People
Refresh	UnBlock Transmittal	people Remove docs.
	POST transmittal	

6.7 Distribute the transmittal

Once the transmittal is "POSTED", it can be distributed. A "SEND" button will become available, see below:

ansmittal Transmittal Documents Transmittal Peo	ople 🗸 SE	ND Transmittal	
Refresh		A	ctions Send -
VENDOM			TR
58, Main Street			Transmittal Numbe
New York			Transmittal Dat
123456 Water treatment project Please find enclosed the following documents :			
Item Document Number	Rev.	Rev. Date	Document Description
1 IN00-00-E-0414-001	01	14/02/2009	& Small Power Layout - 00/530 - Water Treatment
2 IN00-00-E-0415-001	01	14/02/2000	& Small Power Layout - 00/530 - Water Treatment

Click on it, and the following window will be displayed:

Г	ransmittal	│	ransmittal People 💙 SEND T	ransmittal									
	Send Transmittal Send Manually												
Se	Select People where you want to SEND the transmittal												
	Select	People Name	Department	MailAddress									
►	✓	TOTO Coutougno	GENERAL MANAGER	tcut@gmailcom									
	✓	DOCCONTROL	DOCUMENT CONTROL	doc.doc@yahoo.fr									
	✓	PONDA GOGU	MECHANICAL ENGINEER	ponda.g@yahoo.com									
	✓	GIGI FRATELLO	PROCESS ENGINEER	gigi.fratello@mymail.com									

Select the people to whom you want to send the transmittal, and then click on one of the 2 send buttons:

- "Send Transmittal" will send the transmittal by email. An excel file with the transmittal sheet will be added to the mail, and also a link to a web page where the transmittal can be seen. See here below the mail content:



- Link to the web page where the transmittal can be consulted, see below:

	Doc. N	umber:		Doc. Name	First Page Last Page Prev. Page	Next	Page Pa	ge: 0 / 0	E
	Trans. Number	Destination	Trans. Date	Document Number	Doc. Description	Rev.	Rev. Date	Status	Status
	21	TO CLIENT	20/04/2010	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02
\mathbf{h}	21	TO CLIENT	20/04/2010	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02
\mathbf{X}	21	TO CLIENT	20/04/2010	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	AD	14/02
\mathbf{X}	21	TO CLIENT	20/04/2010	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	14/02

- The transmittal is displayed. You can now click on the "Document Number" the display the attached files.

- All the transmitteds that this user received are available on this page.

- If you click on "My transmittals", all documents for all transmittals are displayed.

- Click on the destination "ex: TO CLIENT", only the documents for the transmittals sent TO this destination will be displayed.

- Click on one transmittal and only this transmittal documents will be shown.

- "Send Manually" will only declare the transmittal as "Distributed". Select this option if the transmittal was sent by other means than the email (send the paper documents by postal mail, for ex.)

Di	irection	Transmittal Number	Transmittal Date	Comment	ls Distributed	Distribution Date	Distribution Type
Nu	mber of	Transmittals:	1				
Z							
Þ	то	21	20/04/2010		• 🗹	30/04/2010	Manual
_							

6.8 Process the transmittal

If the user that receives the transmittal is required to do an ACTION (A= approve, C=Comment), then he has to respond to the transmittal before the specified deadline.

He can do it in two ways:

1) In the transmittal web page

Document Number	Doc. Description	Rev.	Rev. Date	Status	Status Date	Action Code	Action Before	Processed	Response Date	My Status	My Comment
00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010				
00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010				
00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	AD	14/02/2009	2 / For A	pproval (2010				
00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010				

The "Action Before Date" column will be RED if you did not process the document before the dead line.

The columns "Processed" will be RED for all unprocessed documents.

Click on the button in the "Action Code" column corresponding to a document. The following dialog will appear:

			×
	Document		
Doc. Number:	IN00-00-E-0415-001	Rev:	01
	& Small Power Layout - 00/530 - Water Treatment	t	
Comment:	(Enter your comments here below)		
I agree with	this document, so I approve it.		<u>^</u>
			~
			Save Comment
Approve	Reject		Close

Type your comments in the "Comment" box and then:

- Click on "Save Comments" to save your comments
- Click on "Approve" to approve the document and save your comments
- Click on "Reject" to say you don't agree with this document and save your comments.

The document will then be declared as processed, see below:

Document Number	Doc. Description	Rev.	Rev. Date	Status	Status Date	Action Code	Action Before	Processed	Response Date	My Status	My Comr
00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010				
00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	×	06/06/2010	Approved	I agree with this
00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010				
00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010				

The column "My Status" may contain:

o "Approved", if you approved the document

- o "Rejected", if you rejected it
- o "Commented", if you clicked on the "Save Comments" button.
- 2) In the Vendom program, if he has access to it. Click on the "To Do" button, on the first window:

My Transmittals	Transn	nittal	Documents										
- 10 - CLIENT	Trans. N	umber	Destination	Trans. Date	Document Number	Document Description	Revision	Revision Date	Status	Status Date	Action Code	Action before	Processed
0001 00,01,00	Number	ofDo	cuments: 4										
	2	21	TO CLIENT	20/04/2010	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	
	2	21	TO CLIENT	20/04/2010	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	V
	▶ 2	21	TO CLIENT	20/04/2010	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemic	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	
	2	21	TO CLIENT	20/04/2010	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rac	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	

The "Action Before Date" column will be RED if you did not process the document before the dead line.

The columns "Processed" will be RED for all unprocessed documents.

Click on the small button in the "Action Code" column corresponding to a document. The following dialog will appear:

🖃 My Resp	onse		
Document			
Number:	IN00-01-E-0423-001	Rev:	01
	Cable Rack Tray Layout - 601 -hemical Sto	rage	
Actio	n TO DO: A TO APPROVE / REJ	IECT	
This is my co	nment.		
			E.a.
Approve			EXIL

If the action to do is "A" = To Approve, the "Approve" and "Reject" buttons will be available. Enter your comment and then:

- Click on "Approve" to approve the document and save your comments

- Click on "Reject" to say you don't agree with this document and save your comments.

If the action to do is "C" = To comment, only the "Save Comments" button will be available.

The document will then be declared as processed, see below:

											and the second
Document Number	Document Description	Revision	Revision Date	Status	Status Date	Action Code	Action before	Processed	Response Date	My Status	My Comment
ber of Documents: 4											
~											
IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010				
IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	 Image: A start of the start of	06/06/2010	Approved	I agree with this docu
IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemic	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010	Image: A start of the start	06/06/2010	Approved	This is my comment.
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rac	01	14/02/2009	AD	14/02/2009	2/A	10/05/2010				

You have several ways to filter your "to do" list:

- ALL A C I □ Not Processed
 - "A" option will display only documents for approval (Action="A")
 - "C" option will display only documents "For Comments" (Action="C")
 - "I" option will display only documents "For Information" (Action="I")
 - "Not processed", if checked, will show only the documents that were not processed.

	_										
E-My Transmittals	Т	ransmittal [Documents								
= 10 - CLIENI	Т	rans. Number	Destination	Trans. Date	Document Number						
0021 20/04/2010 IId	N	umber of Documents: 4									
		21	TO CLIENT	20/04/2010	IN00-00-E-0414-001	& Sma					
	Þ	21	TO CLIENT	20/04/2010	IN00-00-E-0415-001	& Sma					
		21	TO CLIENT	20/04/2010	IN00-01-E-0423-001	Cable					
		21	TO CLIENT	20/04/2010	IN00-20-E-0426-001	620 -o					
				I	1						

- If you click on "My transmittals", all documents for all transmittals are displayed.
- Click on the destination "ex: TO CLIENT", only the documents for the transmittals sent TO this destination will be displayed.
- Click on one transmittal and only this transmittal documents will be shown.

7 Work Flow tracking

This window is useful for the document controller to see the status of the running workflows.

It shows who processed the documents in the transmittal, when this was done, and especially who is late in doing the requested actions (A= Approval, C=Comment required)

			and the second se		Autor						- Track		and the second second
People Name	Document Number	Document Description	Revision	Status	Code	Action before	Processed	Response Date	My Status	My Comment	Number	Trans. Date	Destination
Number of Documents: 35													
No.													
TOTO Coutougne	C100-2-301	Casa de Comanda	A		3/A	01/08/2011	10				48	17/12/2008	TO CUENT
TOTO Coutougno	C1555	Plan dimplantation	A	A	3/A	E1.06/2011					48	17/12/2008	TO CLIENT
TOTO Coutougno	C515-01-210	Plans Mise a la Terre 2	A		3/A	and the second s					48	17/12/2008	TO CUENT
TOTO Coutougno	C573-01-200	Cables	01	D	3/A	in aldered i					48	17/12/2008	TO CLIENT
TOTO Coutougno	C573-01-205	Plan d'eclairage 1	A		3/A	01/06/2011					48	17/12/2008	TO CLIENT
TOTO Coutougno	CVZZZ	Plan de zone 1	A	A	3/A	B1/06/2011					45	17/12/2008	TO CLIENT
TOTO Coutougno	SP10-01-205	Plan d'aire 1	A	с	3/A	el-aligere					48	17/12/2008	TO CLIENT
Popescu, Dorin	C100-2-301	Casa de Comanda	A		3/A	0106-2011					48	17/12/2008	TO CLIENT
Popescu, Donn	C1555	Plan d'implantation	A	A.	3/A	01/08/2011	12	17/08/2011	Rejected	I dort like it	48	17/12/2008	TO CLIENT
Popescu, Dorin	C515-01-210	Plans Mise a la Terre 2	A		For Approval	01/08/2011	2	17/08/2011	Approved	OK with this	48	17/12/2008	TO CLIENT
Popescu, Donn	C573-01-200	Cables	-01	D	3/A	1006-2011					48	17/12/2008	TO CLIENT
Popescu. Dorin	C573-01-205	Plan d'eclairage 1	A		3/A.	01/08/2011	100	17/08/2011	Approved		45	17/12/2006	TO CLIENT
Popescu, Dorin	CV222	Plan de zone 1	A	A	3/A	ALC: NO					42	17/12/2008	TO CLIENT
Popescu, Donn	SP10-01-205	Plan d'aire 1	A	C	3/A	01/00/2011					48	17/12/2008	TO CLIENT

The "Action Before Date" column will be RED if the document was not processed before the dead line.

The columns "Processed" will be RED for all unprocessed documents.

You have several ways to filter this list:

o"A" option will display only documents for approval (Action="A")

- o"C" option will display only documents "For Comments" (Action="C")
- o"I" option will display only documents "For Information" (Action="I")

o"Not processed", if checked, will show only the documents that were not processed.

TEST ALL Transmittals	Documents								
B FROM - A	People Name	Document Number	Document Description	Revision	Status	Action Code	Action before	Processed	Response Date
HTO - AK	Number of Documents: 6 155								
D FROM - ALL DEST									
⊕ TO – BRC	TOTO Coutougno	C100-2-301	Casa de Comanda	Α		3/A	01/08/2011		
TO - BRC / LTW	TOTO Coutougno	C1555	Plan d'implantation	А	Α	3/A	01/08/2011		
FROM - BRC / LTW	TOTO Coutougno	C515-01-210	Plans Mise a la Terre 2	A		3/A	01/08/2011		
TO - BUI	TOTO Coutougno	C573-01-200	Cables	01	D	3/A	01/08/2011		
-TO - CLIENT	TOTO Coutougno	C573-01-205	Plan d'eclairage 1	А		3/A	01/08/2011		
- 0048 - 17/12/2008	Mahammad HAKEEM	CAD -01	ssfdsCAD PID & Plot plan	P02	D				
	Mahammad HAKEEM	CCCRRR-01	jhjhfjfjfj	00	Р				
	TOTO Coutougno	CV222	Plan de zone 1	A	Α	3/A	01/08/2011		
-0042 - 24/10/2007 -	Mahammad HAKEEM	DODO14	rshrthsrthsrth	02					
- 0041 - 11/10/2007 -	Mahammad HAKEEM	RRR-01-000	TEST 1	01	Р				
- 0034 - 03/02/2007 -	TOTO Coutougno	SP10-01-205	Plan d'aire 1	А	С	3/A	01/08/2011		
- 0029 - 17/12/2005 - - 0029 - 17/12/2004 - Doc	Mahammad HAKEEM	XX-66-778899-WZ		02					
0028 - 16/12/2004 - Com	Mahammad HAKEEM	xxxx920-I-G-1-002	Spécification installation chantier	A01					

- If you click on "All transmittals", all documents for all transmittals are displayed.
- Click on the destination "ex: TO CLIENT", only the documents for the transmittals sent TO this destination will be displayed.
- Click on one transmittal and only this transmittal documents will be shown.

8 Work Flow reports

First, the program displays a window that you can use to select your options for the workflow reports by checking the corresponding checkboxes, such as:

Innworknowkeports					a mark room report					
Exit		All Rev	visions	Deliverable	s Only		Never Sent Reports	s> Excel		
Participants to project	Docu	iment L	ist							-
INUS - INTECO USA	🗹 Se	elected	Company Number	Discipline	Document Type	F	Document Number	Document Description	Revision Date	Re
	Numb	er of Do	cuments: 5	935						
E Q 123456 - WATER TREATMENT									1	
	Þ		INEU	CAD	03	۲	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	14/02/2009	
			INEU	CAD	03	۲	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	14/02/2009	
₩ PIP-PIPING			INEU	CAD	03	۲	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	14/02/2009	
			INEU	CAD	03	۲	IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	14/02/2009	
🖃 🔲 Destination List			INEU	CAD	03	۲	IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	02/02/2009	
CLIENT - Client			INEU	CAD	03	۲	IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P	14/02/2009	
E INTERNAL - Internal			INEU	CAD	03	۲	IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - Diesel Stora	14/02/2009	
			INEU	CAD	03	۲	IN00-40-E-0442-001	40 - Oily Water Sump	04/02/2009	
			INEU	CAD	03	۲	IN00-50-E-4003-000	60 - UT/PH/01 - UA - Location of holes for inte	20/05/2010	
		_			~~ III	-			0510010000	Þ

- one or more companies participating to project
- one or more discipline
- one or more destinations
- one or more documents

When your selection is ready, click on the "Reports" button and select the desired report, see below:

Exit	A	II Revisions	Deliverable	es Only		Never Sent	R	eports> Excel		
Job Contributors	Docum	ent List						Traffic by destination		
V INUS - INTECO USA	IV Selected Company Number Discipline Document Type F Document Numb Traffic by document and people									Revision Date
	Number	of Documents: 5	935					Traffic by people and document		
										-
Job Disciplines CAD-COMPUTER AID DESIGN		INEU	CAD	03	۲	IN00-00-E-0414-001		& Small Power Layout - 00/530 - W	ater Treat	14/02/2009

All reports are displayed directly in Excel.

8.1 Traffic by discipline

DOCUMENT TRAFFIC

Destination	Company	Discipline	Document Number	Description	Rev.	Rev. Date	Status	Trans. Number	Trans. Date
TO CLIENT - Client	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	21	20/04/2010
TO CLIENT - Client	INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	21	20/04/2010
TO CLIENT - Client	INEU	CAD	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	21	20/04/2010
		Y		& Small Power Lavout - 00/530 - Water	·				
TO INTERNAL - Internal	INEU	CAD	IN00-00-E-0414-001	Treatment	01	14/02/2009	AD	1	06/06/2010
TO INTERNAL - Internal	INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	1	06/06/2010
TO INTERNAL - Internal	INEU	CAD	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	1	06/06/2010

Selected Companies: "INEU", "INUS" Selected Disciplines: "CAD", 'CAL', 'CIV", 'ELY', 'P

8.2 Traffic by document and people Project: 123456 WATER TREATMENT

Selected Companies: 'INEU', 'INUS'

Selected Disc	iplines: 'CAD'	', 'CAL', 'CIV', 'ELY', 'PIP'								
Company	Discipline	Document Number	Description	Rev.	Rev. Date	Status	People	Trans. Number	Trans. Date	Destination
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	DOCCONTROL	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	GIGI FRATELLO	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	PONDA GOGU	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	TOTO Coutougno	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	CORASON EMILIE	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	DOCCONTROL	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	GIGI FRATELLO	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	PONDA GOGU	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	DOCCONTROL	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	PONDA GOGU	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	TOTO Coutougno	21	20/04/2010	TO CLIENT - Client
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	CORASON EMILIE	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	DOCCONTROL	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	GIGI FRATELLO	1	06/06/2010	TO INTERNAL - Internal
INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	PONDA GOGU	1	06/06/2010	TO INTERNAL - Internal

DOCUMENT TRAFFIC

8.3 Traffic by people and document *Project:* 123456 WATER TREATMENT

DOCUMENT TRAFFIC

Selected Companies: 'INEU', 'INUS' Selected Disciplines: 'CAD', 'CAL', '	CIV', 'ELY', 'PIP'		_		-					
People	Company	Discipline	Document Number	Description	Rev.	Rev. Date	Status	Trans. Number	Trans. Date	Destination
DOCCONTROL	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
DOCCONTROL	INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
DOCCONTROL	INEU	CAD	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
GIGI FRATELLO	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
PONDA GOGU	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
PONDA GOGU	INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
PONDA GOGU	INEU	CAD	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
TOTO Coutougno	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
TOTO Coutougno	INEU	CAD	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 - hemical Storage	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
TOTO Coutougno	INEU	CAD	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	21	20/04/2010	TO CLIENT - Client
CORASON EMILIE	INEU	CAD	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	1	06/06/2010	TO INTERNAL - Interna

9 Document progress

9.1 Progress calculation

Document progress calculation is based on the Progress models configuration, described earlier in this manual.

Progress for a document can be defined manually or calculated automatically. *Manual definition:*

Document Number	Document Description	Deliverable	Participate To Progress	Budget	Status	Status Date	Progress	Previous Progress	Step	Step Date	Revision	Revision Da	ate	
CH-01-E-0423-001	Cable Rack & Tray Layoussst - 6		V	50.00	SI	01/11/2012	75	50	2	01/11/2012	01	14/02/2009	9	F
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -abl	V	V		AB	04/11/2012	🖃 Cha	nge Prog	jress);	э	F
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -				AB	01/11/2012	Docum	ent				12	2	F
IN00-20-E-0428-001	620 - Steam Boilerssss -able Rac	V	V		AB	04/11/2012	Numb	er: CH	-01-E-0423	3-001			9	F
IN00-20-E-0429-001	620 - Steam Boilers -able Rack &	V			FI	04/11/2012	Cat	le Rack T	ray Layou	ussst - 601 -h	emical Sto	rage y	э 🛛	F
IN00-20-E-0432-001	620 -ondensate Storage & Bfw P	V	V		FI	04/11/2012	Current		0	0.1	•		9	F
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray La		V		FI	04/11/2012	Current	step.	2	Second	Issue	10	0	F
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - D	V	V		AD	14/02/2009	Current	progress:	75)5	э	F
IN00-40-E-0442-001	40 - Oily Water Sump	V	V		AD	10/02/2009	New ste	p:	3	 Approved 	l internally):	э	F
IN00-50-E-4003-000	60 - UT/PH/01 - UA - Location of h	V	V		AD	20/05/2010	New pro	gress:	85			10	0	F
IN00-50-E-4003-002	Location of Holes for MCT - 60 - U	V	V		AC	07/10/2008	Date of	change:	04/11	/2012 💌)5	э	F
IN00-50-E-4004-000	60 - UT/PH/02 - UA - Location of h	V	V		AD	20/05/2010						10	0	F
IN00-50-E-4004-002	Location of Holes for MCT - 60 - U	V			AC	29/09/2009	Change	Progress	Cance	el)5	э	F
IN00-50-E-4005-000	20/730-UT/PH/03 - Location of hol				AD	20/05/2010					01	20/05/2010	0	F

In the progress window, click on the small button in the "Step" column or on the "Progress" column on the desired document.

The system will propose the new step and the new progress corresponding to this step. You can also manually modify the "New Step" or the "New Progress". (if the "New Step" is blank, the system will consider that only the progress has changed, the Step remains the same as before) Click on "Change Progress" to commit the changes.

Automatic calculation:

In the document register window, click on the small button in the "Status" column to display the "Change Status" dialog, as shown below:

IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/2009 REM-2121 AD 2 14/02/2009
IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/200 Change Status
IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/200 Document
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/200 Number: IN00-00-E-0414-001
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A	01	14/02/200 Small Power Layout - 00/530 - Water Treatment
IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	01	14/02/200
IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	01	02/02/200 AD
IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P	01	14/02/200 New status: AC M Approved for construction
IN00-20-E-0441-001	20/730 - Raw/Firewater Tank		Status date: 30/05/2010 💌
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray Layout -ross S	01	20/05/20 ⁻
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - Diesel Stora	01	14/02/20(

The system will propose the new status, following the status list that you defined for the job, if any.

Changing the Status will also change the "Document Progress", if the document type is linked to a progress model (see "Progress Models" in the "Job Configuration" section of this document.

Click on "Change Status" to commit the change.

9.2 Progress snapshots

The program allows you to record the progress situation at a certain moment (weekly, monthly, etc). This enables you to visualize the progress evolution from one period to the other.

To take a snapshot of the progress, click on the "Snapshot" button in the "Document Progress" widow. The program will display:

Exit			
PREVIOUS	SNAPSHOT	CURRENT	SNAPSHOT
Number:	34	Number:	35
Date:	10/04/2010	Date:	20/08/2011 -
			Take SnapShot

For the current snapshot, select the desired date (by default it is the current date), and then click "Take Snapshot".

All progress reports will display the "Current progress" and the last 9 snapshots (see examples below).

9.3 Progress reports

9.3.1 Progress by discipline

Project:	123456 Water Tre	atmen	t															
			DO	CUME	ENT PF	ROGRE	SS B	Y DISC		E								
Selected Compa	nies:																	
Selected Discipl	ines:																	
		Cur	rent: 23/10/20	11		19/01/2007			18/11/2006			20/10/2006			20/09/2006			20/08
Discipline	Description	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Bu
PIP	Piping	98.6	18 839	+ 5.7	92.9	18 752	+ 17.1	75.9	18 001	+ 4.5	71.4	17 892	+ 2.5	68.9	17 766	+ 2.8	66.1	16
QUA	Quality Assurance, Quality Control & Certification	85.9	1 088	+ 2.7	83.2	1 088	+ 1.	82.2	1 098	+ 0.2	82.	1 098	+ 1.3	80.7	1 053	- 0.1	80.8	!
PRO	Process	99.9	4 892	+ 2.9	97.	4 983	+ 0.9	96.	4 884	+ 0.1	96.	4 873	- 0.	96.	4 812	+ 1.	95.1	4
TEL	Telecommunications	99.3	900	+ 7.5	91.8	800	+ 2.7	89.1	766	+ 5.3	83.9	700		83.9	700	+ 0.6	83.2	
MAT	Materials & corrosion	100.	300		100.	300		100.	300		100.	300		100.	300	+ 13.3	86.7	
MISC	Miscellaneous																	
TOTAL JOB:		98.44	78 742	+ 10.3	88.1	75 604	+ 7.	81.1	71 613	+ 1.7	79.4	70 840	+ 1.7	77.8	67 961	+ 1.8	76.	64

9.3.2 Progress by work package

		Cur	rent: 18/08/20	11		19/01/2007			18/11/2006			20/10/2006			20/09/2
Work Package	Description	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Bud
WP1	Work Package 1	98.4	78 082	+ 10.3	88.1	75 604	+ 7.	81.1	71 613	+ 1.7	79.4	70 840	+ 1.7	77.8	67 9
WP2	Work Package 2	100.	660	+ 11.9	88.1	75 604	+ 7.	81.1	71 613	+ 1.7	79.4	70 840	+ 1.7	77.8	67 9
TOTAL JOB:		98.44	78 742	+ 10.3	88.1	151 208	+ 7.	81.1	143 227	+ 1.7	79.4	141 679	+ 1.7	77.8	135

10 Log FTP Events

You can follow the FTP events by checking the "Log FTP Events" box, see below:



The log file will be created in the TEMP directory (usually C:\Temp), and the file name is "Vendom_FTPEvents.txt".

11 Log of Actions

Vendom allows the logging of user actions.

Only the Global Administrator has the right the Enable/Disable logging of actions. To do so, on the first page, click on the "General Conf." button, and the select "Journal".



Check the "Log Actions" checkbox to enable logging of actions. Uncheck it to disable logging.

When this checkbox is green and checked, logging is enabled.

When it is red and unchecked, logging is disabled.

This "Log Action" data is recorded in the database the moment it is changed by the administrator. It is read from the database by all running Vendom programs, every

10 minutes. So, it will take a maximum of 10 minutes for this information to propagate to all running Vendom programs.

Here are the list of actions that are recorded, grouped by area:

Area	Recorded Action					
Security	Log In / Log Out of users					
JobConfiguration	All changes in Job Configuration are recorded					
Document List	Delete Document					
	Change Document Number					
	Change Revision					
	Change Status					
	Change Company Number					
	Change Discipline and File type					
	Import Documents					
	Extract Documents					
	Attach File					
	Remove attached file					
	Change Owner					
WorkFlow	SendTransmittal					

To see the log of actions for all jobs, go to "General Conf." and select "Journal" tab. To see the log of actions for the current job, go to "Job Conf." and then select "Journal" tab.

20010	in (must row only	7%J									
11	Job Number	Action Date	User Id	User Name	Area	Action	Action Long Description	Document Number	Revision	File Name	Original File Name
RE		-	22	80	12	EC .	EL	<u>1</u> 2	80	<u>A.</u>	LEI L
	123456	17/06/2012 09:42:37	100000	DOCCONTROL	DocumentList	ChangeOwner	New Owner is: 10124 / Group, GR1	1N00-20-E-0432-00			
	123456	17/06/2012 09:42:37	100000	DOCCONTROL	DocumentList	ChangeOwner	New Owner is: 10124 / Group: GR1	IN00-20-E-0429-00			
	123456	17/06/2012 09:42:37	100000	DOCCONTROL	DocumentList	ChangeOwner	New Owner is: 10124 / Group: GR1	IN00-20-E-0428-00			
	123456	17/06/2012 05:38:34	100000	DOCCONTROL	JobConfiguration	UserGroups_New	New User Group was added: GR				
1	123456	17/06/2012 09:38:30	100000	DOCCONTROL	JobConfiguration	UserGroups_New	New User Group was added. GR1				
	123456	17/06/2012 09:38:13	100000	DOCCONTROL	DocumentList	ChangeOwner	Owner was changed to: 10124 in owner group	IN00-20-E-0432-00			
1	123456	17/06/2012 09:38:13	100000	DOCCONTROL	DocumentList	ChangeOwner	Owner was changed to: 10124 m owner group	IN00-20-E-0429-00			
	123455	17/06/2012 09:38:13	100000	DOCCONTROL	DocumentList	ChangeOwner	Owner was changed to: 10124 in owner group	1N00-20-E-0428-00			
	123456	17/06/2012 09:06:31	100000	DOCCONTROL	Workflow	SendTransmittal	Transmittal: 21 TO Destination: CLIENT was sent by mail				
10	123456	17/06/2012 08:54:30	10124	PONDA GOGU	DocumentList	ExtractDocuments	Extraction of several documents				
	123456	17/06/2012 08:50:25	10142	GIGI FRATELLO	DocumentList	AttachFileToDocument	New file attached to document	IN00-20-E-0427-00	02	IN00-20-E-0427-001_120617085025_102t.doc	C/Acrobat Documentation/eula.doc
	123456	17/06/2012 08:50 18	10142	GIGI FRATELLO	DocumentList	RenoveFileFromDocument	File was removed from document	IN00-20-E-0427-00	02	IN00-20-E-0427-001_120617084951_102t.pdf	C Vicrobat Documentation/Acrobal_SDK_developer_fag.
	123456	17/06/2012 08:50:04	10142	GIGI FRATELLO	DocumentList	AttachFileToDocument	New file attached to document	IN00-20-E-0428-00	01	IN00-20-E-0428-001_120617085004_1011.pdf	C:\Acrobat Documentation\Acrobat_SDK_whats_new.pdf
1	123456	17/06/2012 08:49:52	10142	GIGI FRATELLO	DocumentList	AttachFileToDocument	New file attached to document	IN00-20-E-0427-00	02	IN00-20-E-0427-001_120617084951_102f.pdf	C \Acrobat Documentation\Acrobat_SDK_developer_fea
	123456	17/06/2012 08:46:37	10124	PONDA GOGU	DocumentList	ChargeCompany	From Old Company: INEU To New Company: INUS	IN00-55-E-1116-00			
_											

Use the power filter bar to select the desired user / Area / Action. Export the list to Excel for further analysis.

History is kept for the last 100 days.