

# VENDOM

# User MANUAL



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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

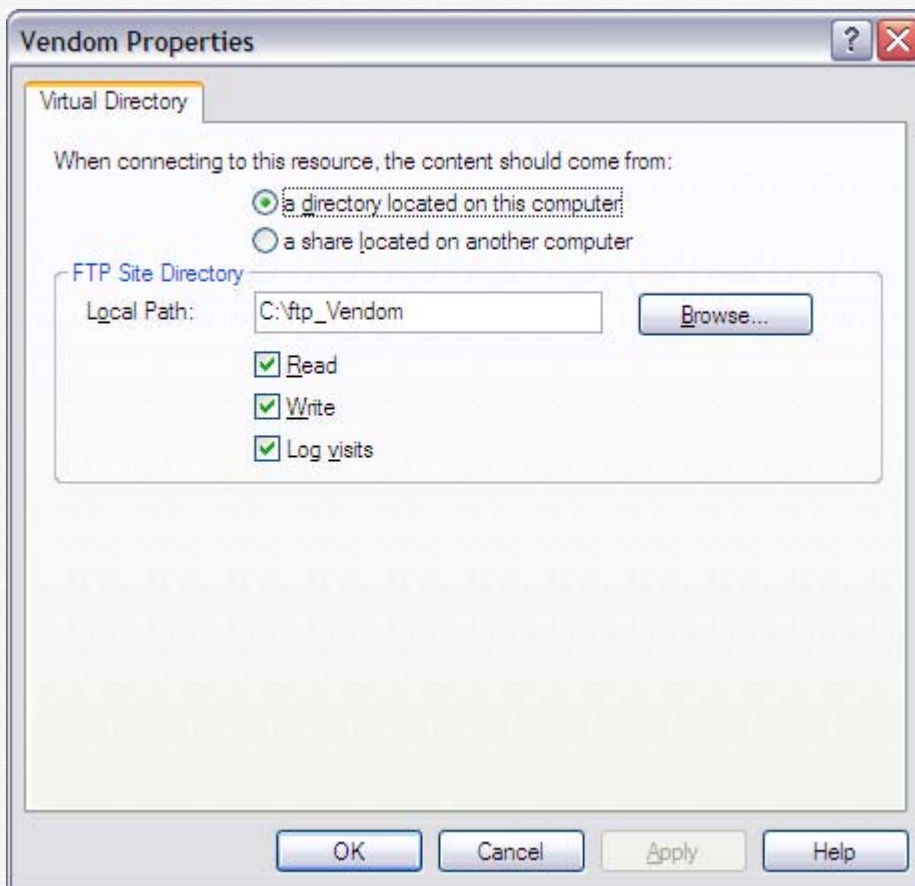
To install the program, create a directory on your local or network drive, and copy all the files and subdirectories there.

## 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).



## 2 Get started

### 2.1 Run the program

- From the Start Menu / VENDOM
- From the shortcut on the desktop  « VENDOM »

The following window will be displayed:



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



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 Number

### WATER TREATMENT

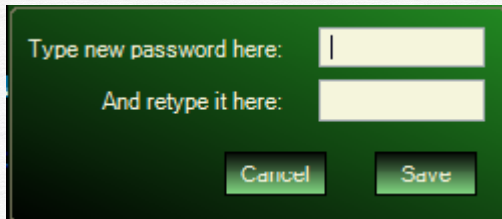
<input type="button" value="Doc. Register"/>	<input type="button" value="WorkFlow"/>	<input type="button" value="Doc. Progress"/>
<input type="button" value="Job Conf."/>	<input type="button" value="WF Reports"/>	<input type="button" value="To Do"/>
<input type="checkbox"/> Log FTP events	<input type="button" value="WF Tracking"/>	<input type="button" value="End"/>



## 2.3 Change your password

Click on the **Change Pass** button.

The following dialog will appear:

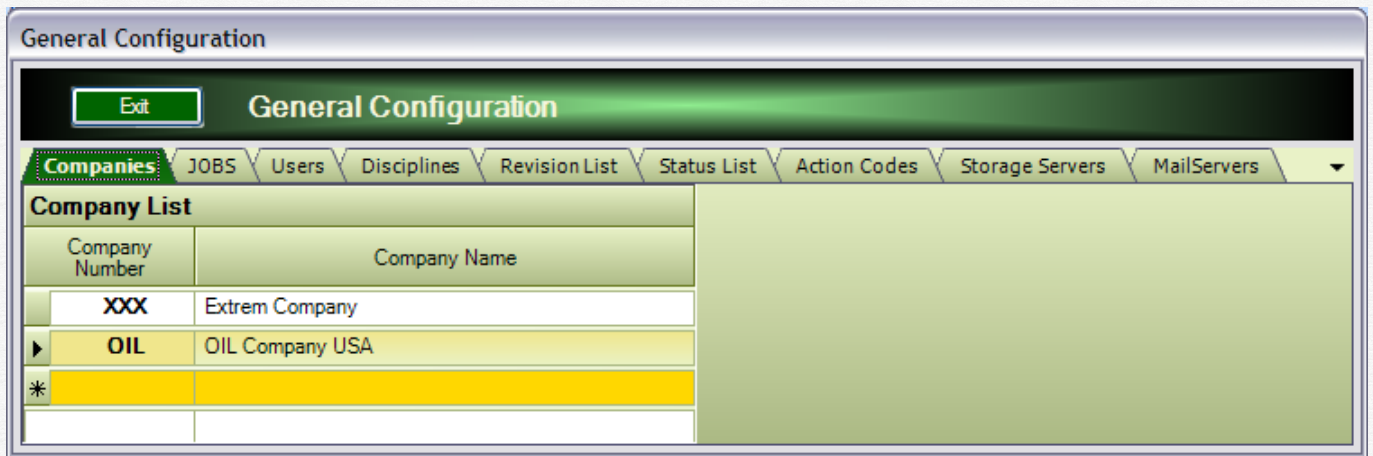


Type new password here:

And retype it here:

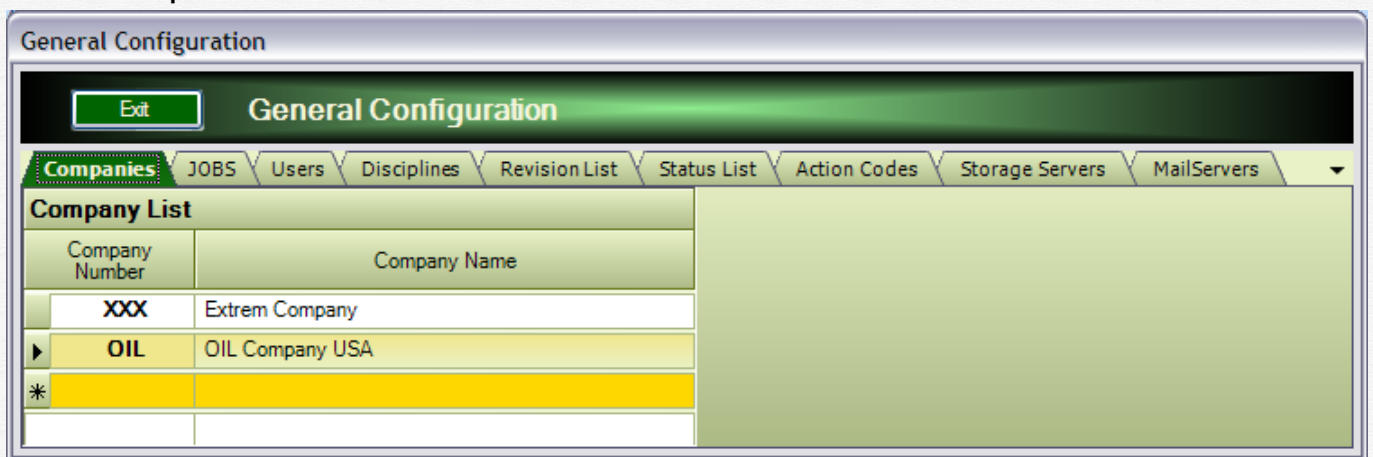
Enter the new password in the first box, type it again in the second for confirmation, and then click « **Save** » to record it in the database.

### 3 General Configuration



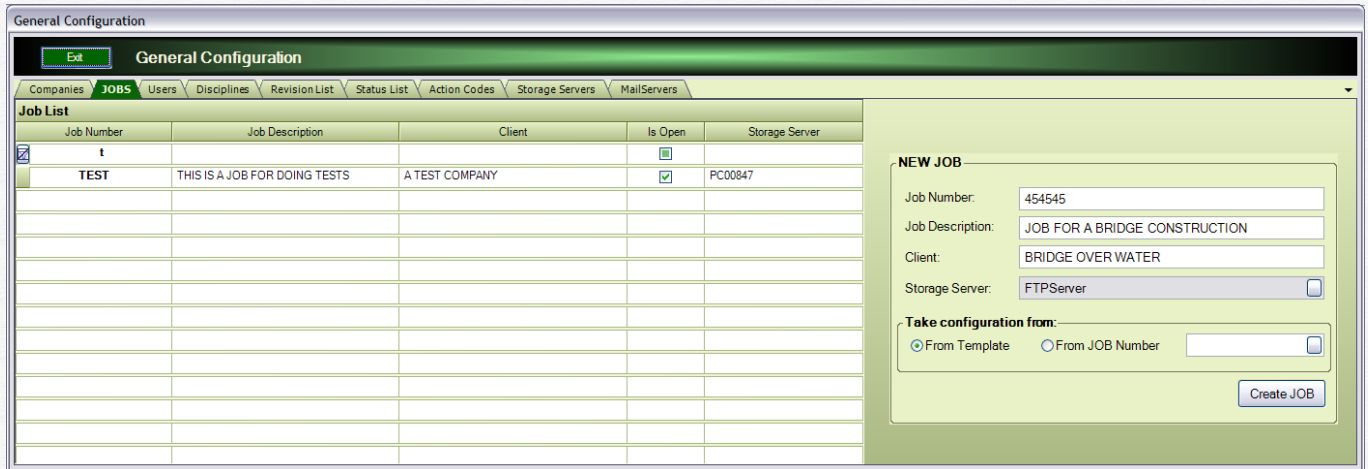
Several "tabs" will allow you to do the "General Configuration" of the application. Some of it will be copied to the "Job Configuration" when a new Job is created.

#### 3.1 Companies



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

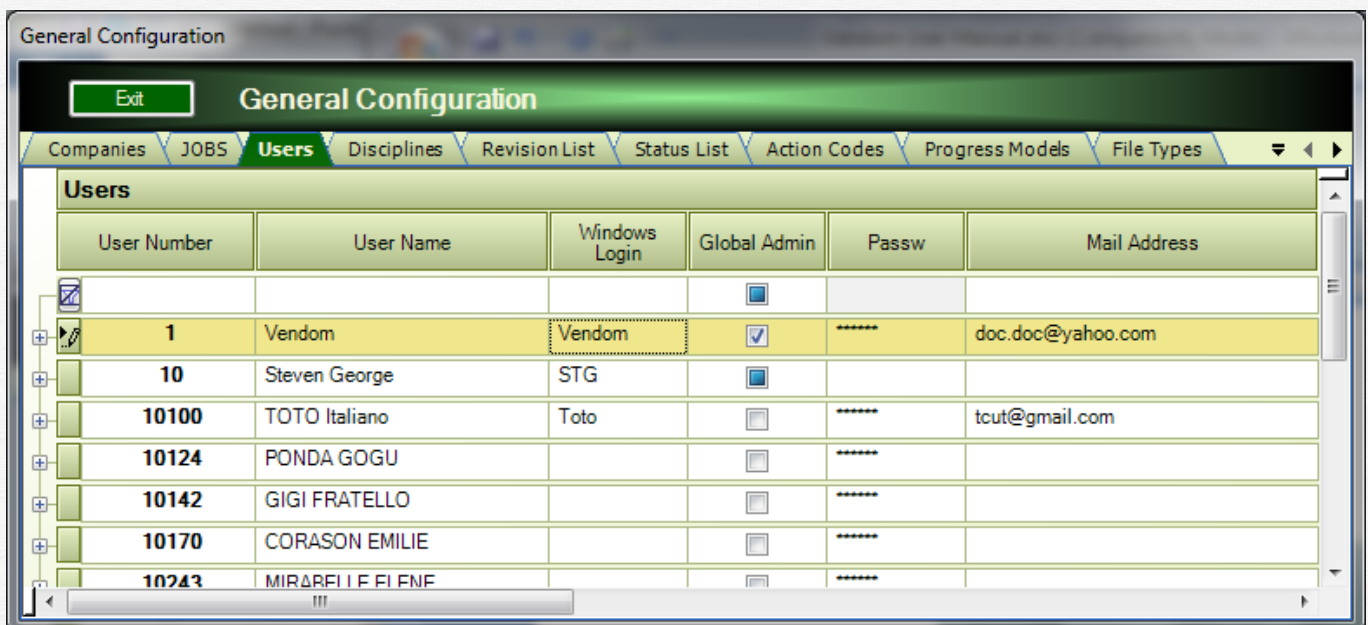


This window presents a list of jobs already existing in this application. A few information is needed for each job: the job number, description, and client and on what server are stored the document files. When a job is finished, a good practice is to “close” it (by un-checking the “Is Open” checkbox).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

### 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.

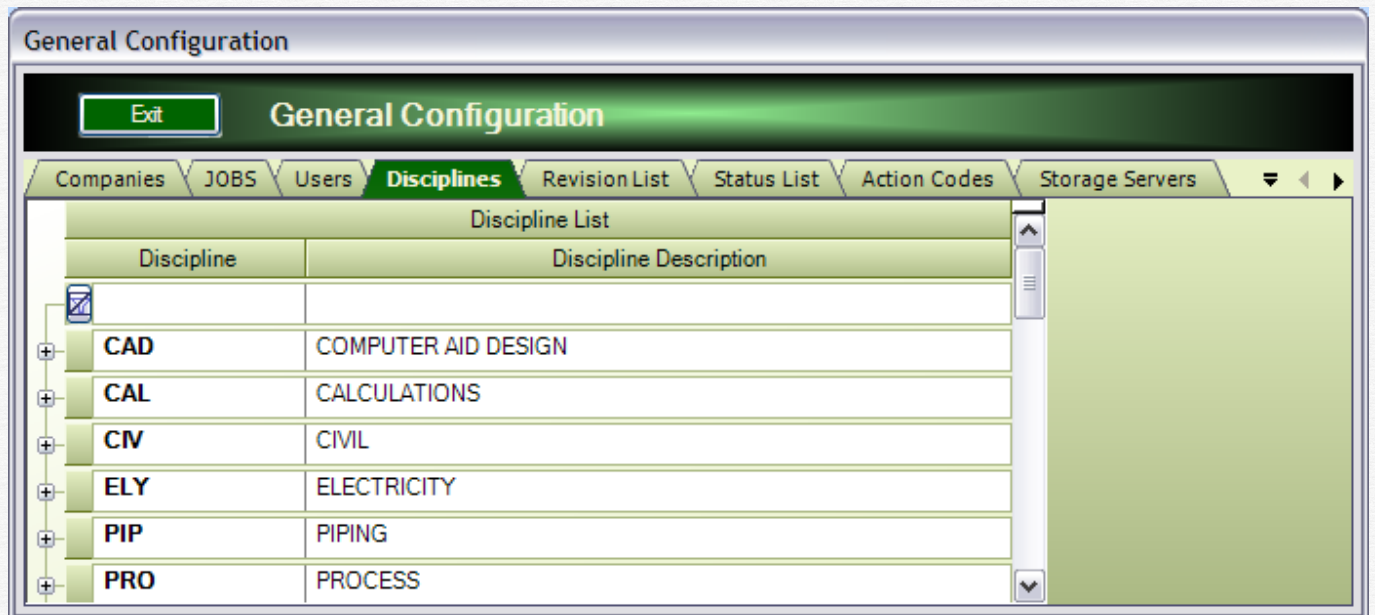
The Windows Login is used if the parameter "UseWindowsLogin" is set to TRUE. If so, this column should contain the "Windows Login" of the user.

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.

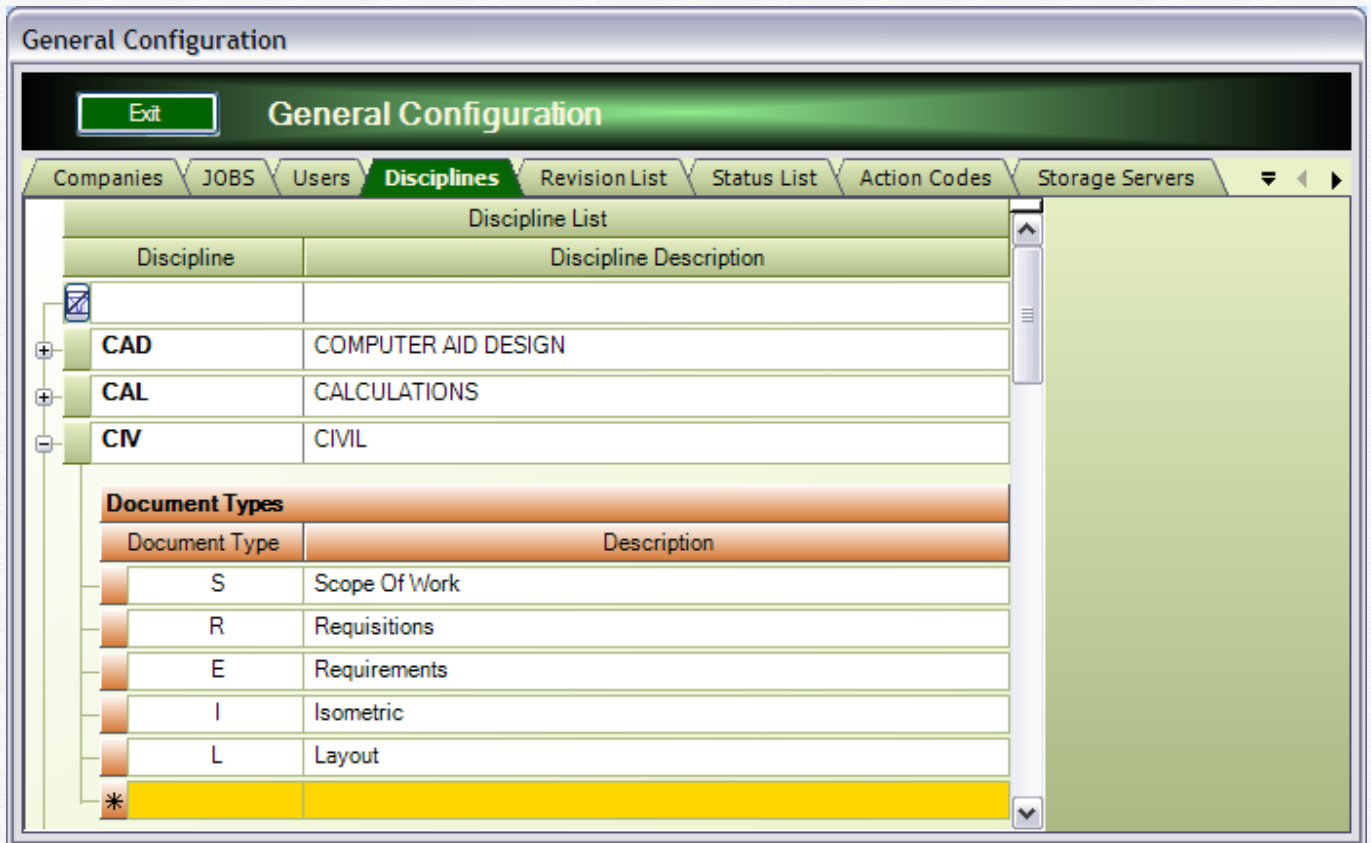
### 3.4 Disciplines



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.

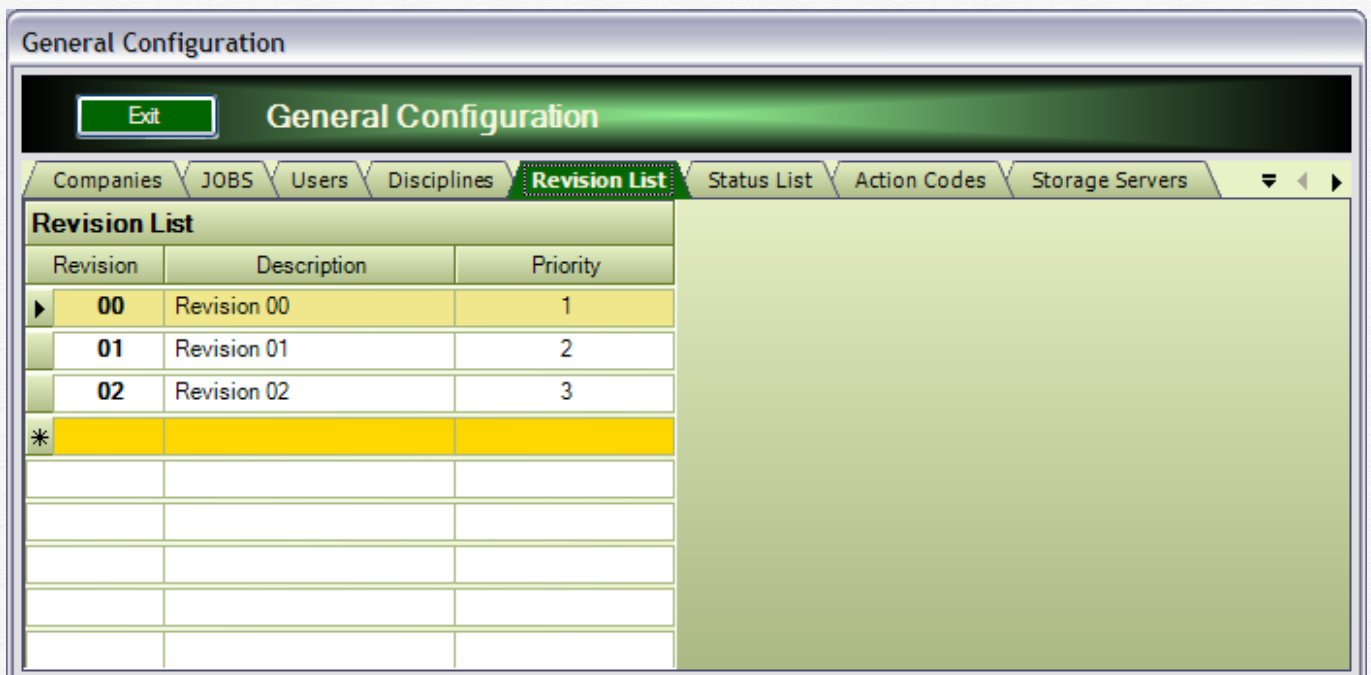
You need to enter a discipline code and a description.

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:



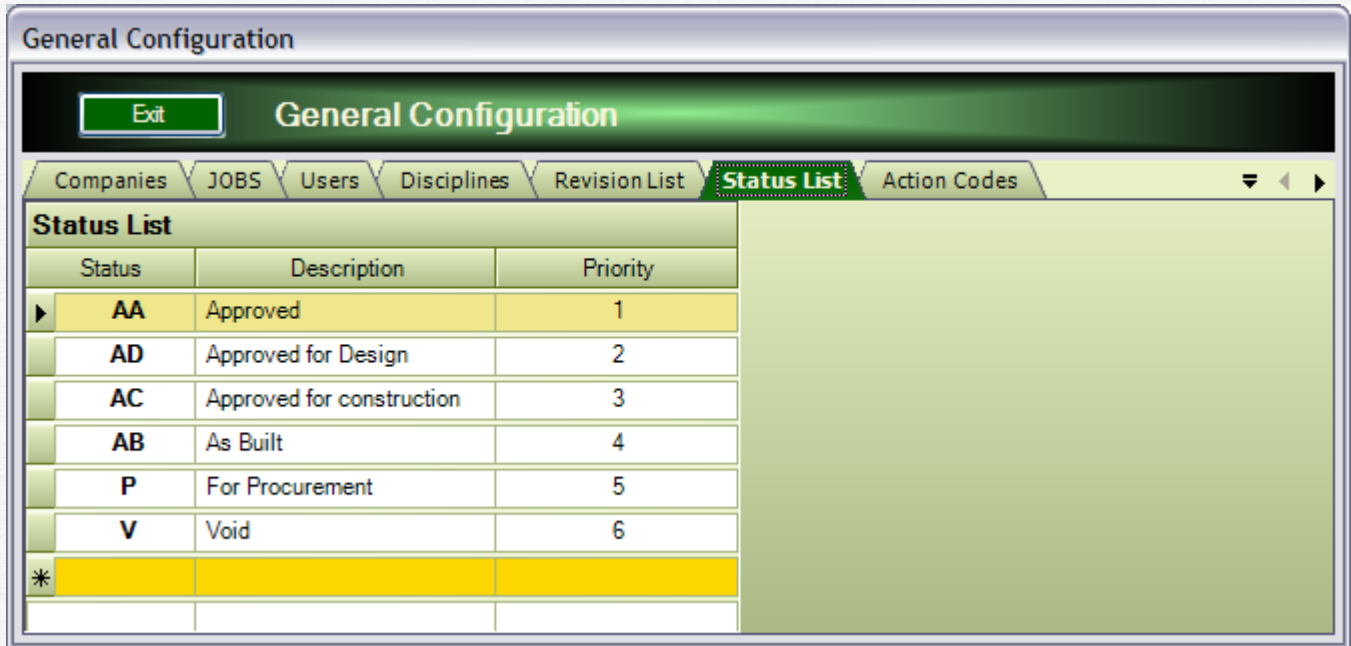
Use the last line (yellow row) to enter a new "Document Type".

### 3.5 Revision List



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



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

The screenshot shows a software window titled "General Configuration" with a sub-tab "Action Codes". The window contains a table with the following data:

Action Code	Description	Priority	Required Action
1	For Information	1	I
2	For Approval	2	A
3	For Comments	3	C
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

General Configuration

Exit General Configuration

Companies JOBS Users Disciplines Revision List Status List Action Codes **Progress Models**

**Progress Models**

Progress Model	Description
DD	Drawing
PD	Process Documents

**Progress Steps**

Step	Description	Progress (%)	Status
1	First Issue	50	FI
2	Approved for detailed design	70	AD
3	Approved	100	AB
*			

**Progress Models**

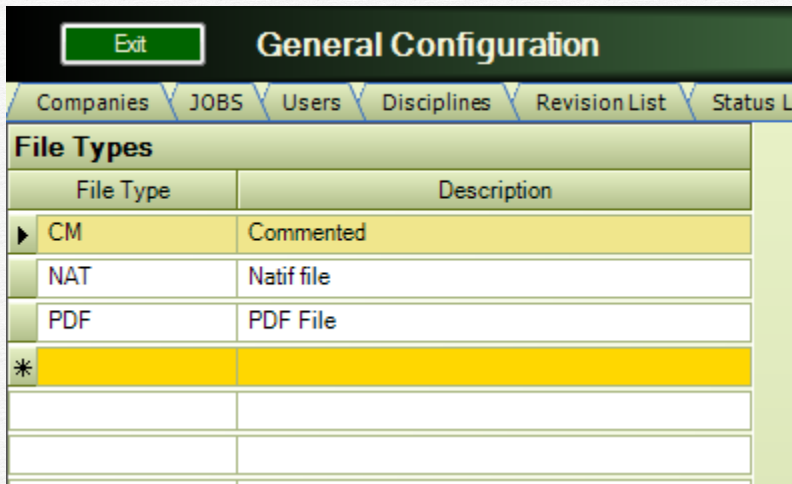
Progress Model	Description
RD	Requisitions
SD	Standard document
*	

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



The screenshot shows the 'General Configuration' window with the 'File Types' section selected. The table below lists the configured file types.

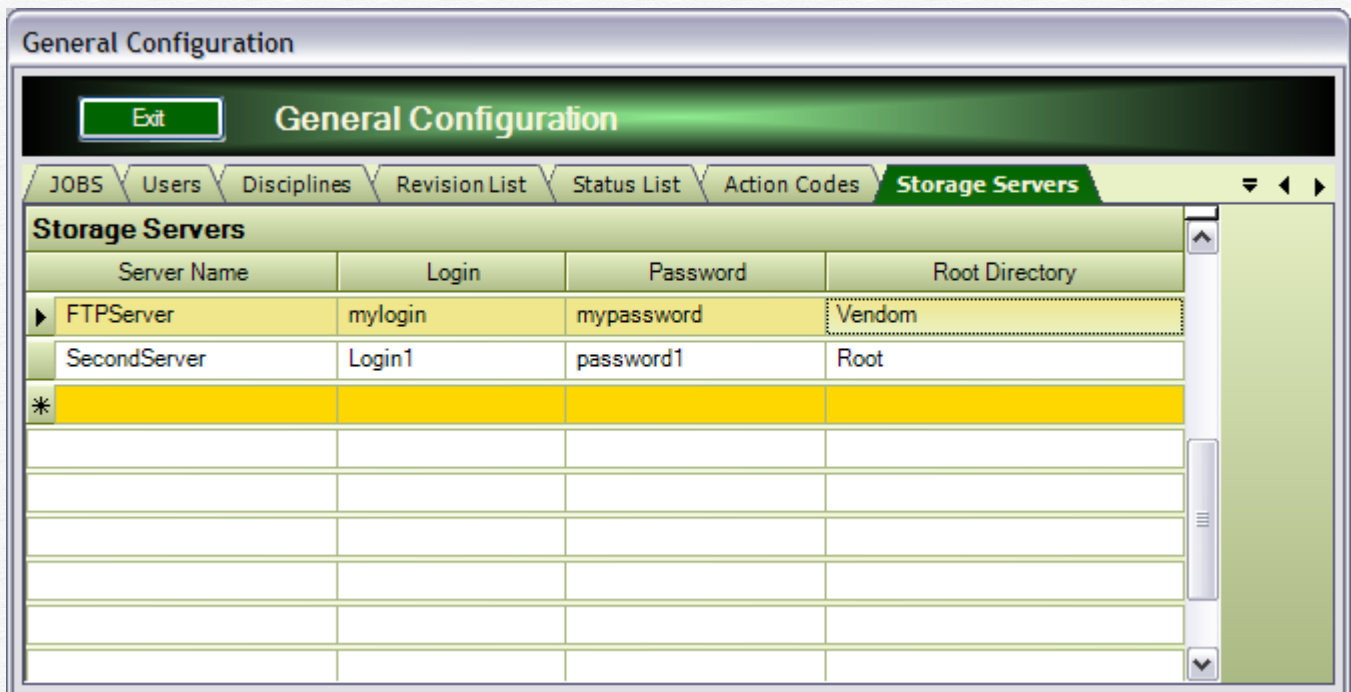
File Type	Description
CM	Commented
NAT	Natif file
PDF	PDF File
*	

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



The screenshot shows the 'General Configuration' window with the 'Storage Servers' section selected. The table below lists the configured 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

Server Name	Server Address	Mail Type	Enable SSL	Enable Credentials	User Login	User Password	Selected Server
CompanyServer	MailServer	SMTP	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>
Google	smtp.gmail.com	SMTP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	vendom.docmail	docmailpassw	<input type="checkbox"/>

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).

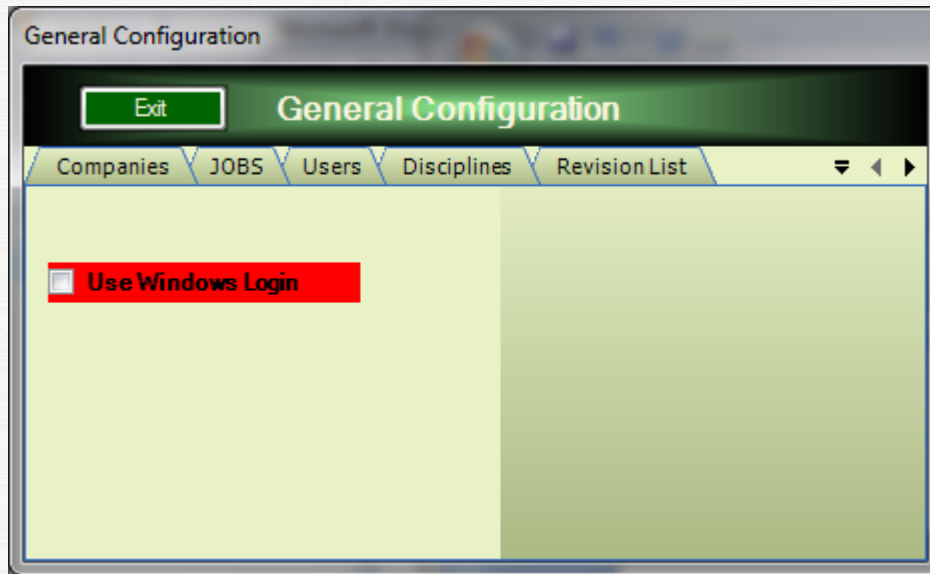
The evident solution would be to use the company mail server; see with your mail administrator for the necessary configuration. You'll probably need a fix IP address for the PCs that have to send mail, and a specific configuration on the server to accept SMTP mail from these PCs.

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



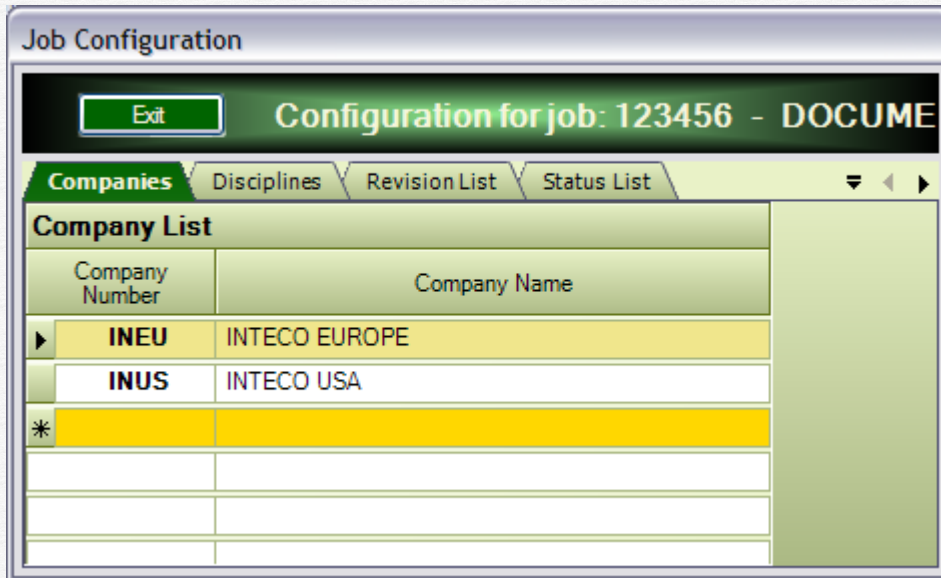
You define here the type of login for the users.

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

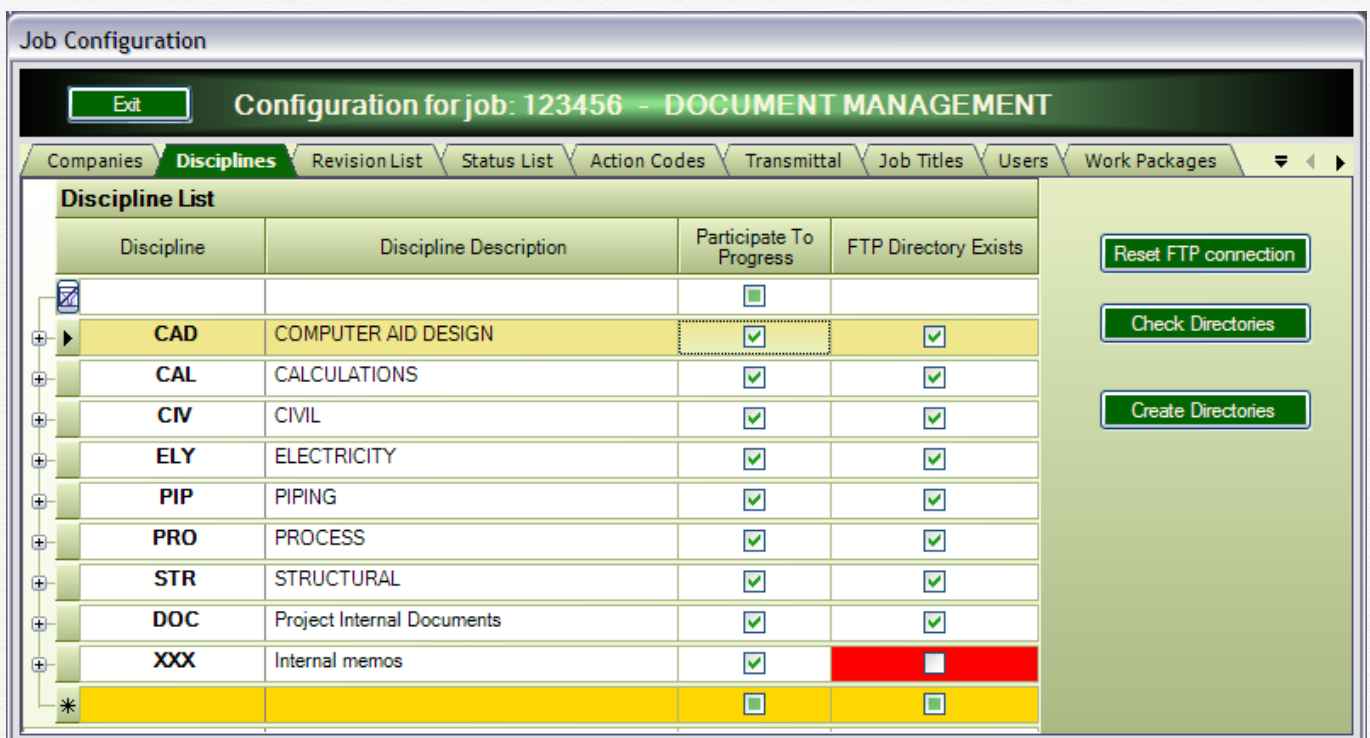


Enter here the list of companies participating to this project. These are companies that produce documents for the project. You need at least one company here, your own company.

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



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.

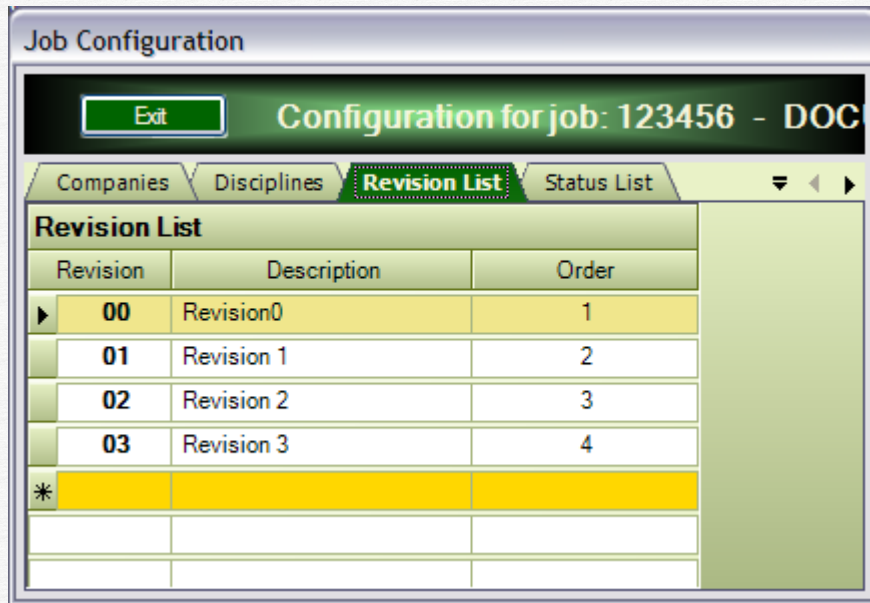
In this case, click first on "Reset FTP Connection" and then on "Check Directories". If there are still some disciplines in RED, click on "Create Directories".

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:

The screenshot shows the 'Job Configuration' window for 'Configuration for job: 123456 - DOCUMENT MANAGEMENT'. The 'Disciplines' tab is active, displaying a table with columns: Discipline, Discipline Description, Participate To Progress, and FTP Directory Exists. The table contains rows for CAD (COMPUTER AID DESIGN), CAL (CALCULATIONS), and CIV (CIVIL). To the right of the table are buttons for 'Reset FTP connection', 'Check Directories', and 'Create Directories'. Below the main table is a 'Document Types' section with columns: Document Type, Description, and Progress Model. A dropdown menu is open for the 'E' (Requirements) document type, showing a list of document types: DD (Drawing), PD (Process Documents), RD (Requisitions), and SD (Standard document). At the bottom, another 'Disciplines' table is visible with rows for DOC (Project Internal Documents) and ELY (ELECTRICITY).

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

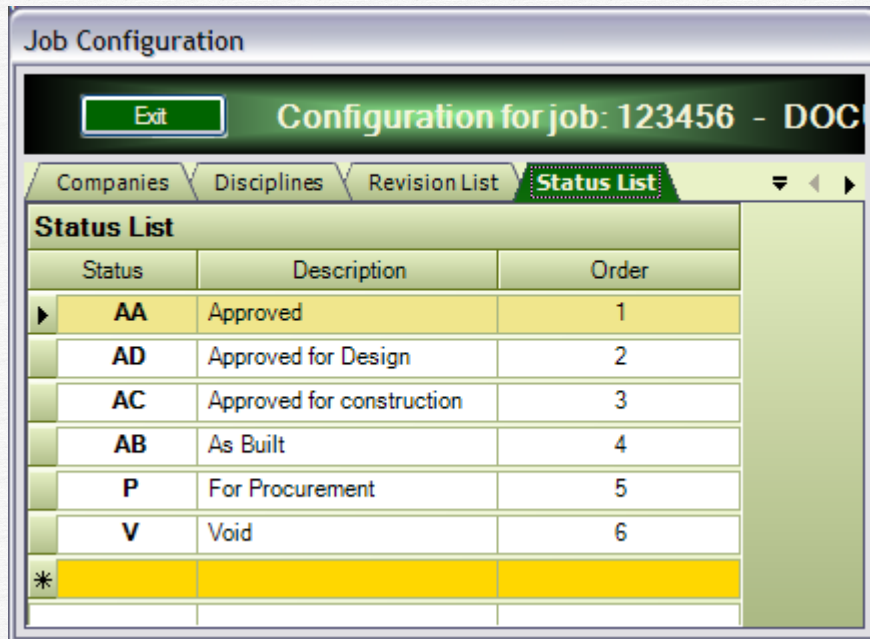


The screenshot shows a software window titled "Job Configuration" with a subtitle "Configuration for job: 123456 - DOC". There is an "Exit" button in the top left. Below the title bar are four tabs: "Companies", "Disciplines", "Revision List" (which is selected and highlighted with a dotted border), and "Status List". The "Revision List" tab contains a table with the following data:

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



The screenshot shows a software window titled "Job Configuration" with a sub-header "Configuration for job: 123456 - DOC". There is an "Exit" button in the top left. Below the header are four tabs: "Companies", "Disciplines", "Revision List", and "Status List" (which is selected and highlighted in green). The "Status List" tab contains a table with the following data:

Status	Description	Order
▶ AA	Approved	1
AD	Approved for Design	2
AC	Approved for construction	3
AB	As Built	4
P	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.



## 4.5 Job Transmittal Actions

Action Code	Description	Order	Required Action
1	For Information	1	I
2	For Approval	2	A
3	For Comments	3	C
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).

## 4.6 Job Work Flow

### 4.6.1 Job Destinations

Job Configuration

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

**Destination 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 -		
*							

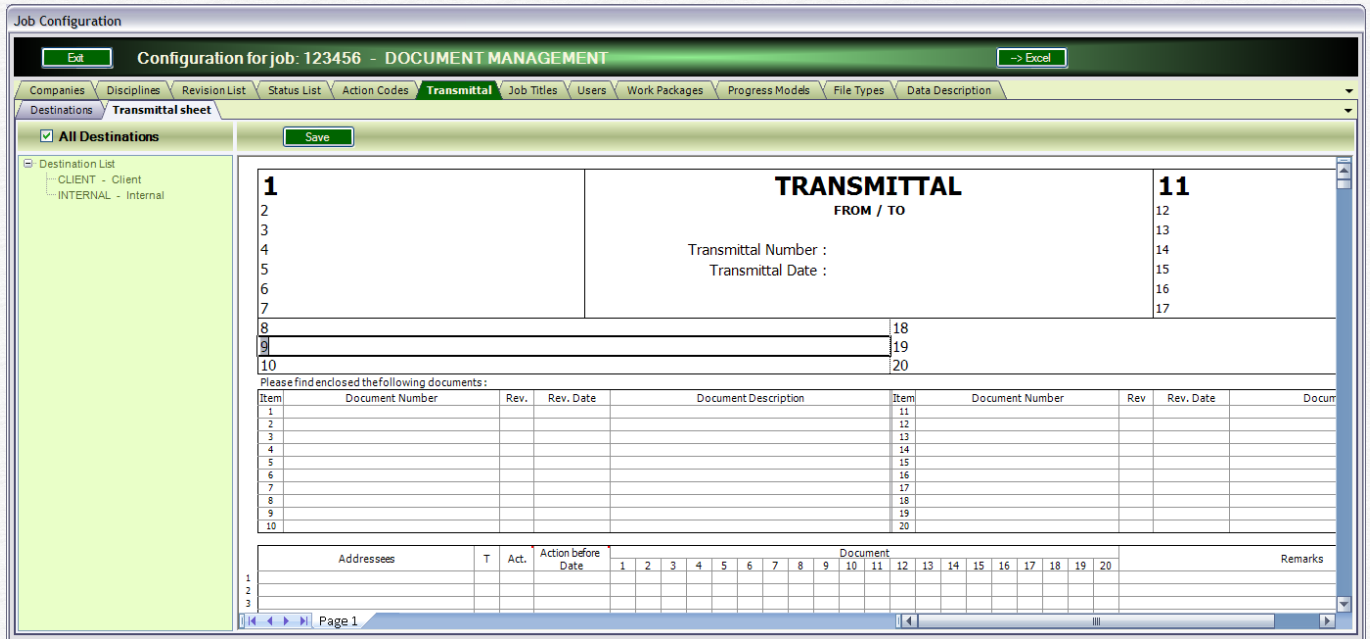
Typically, you exchange documents (send/receive) with several partners (client, internal, subcontractors, suppliers...).

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.

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

Configuration for job: 123456 - DOCUMENT MANAGEMENT

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

Configuration for job: 123456 - WATER TREATMENT

Companies Disciplines Revision List Status List Action Codes Transmittal Job Titles User Groups

User Groups	
Group Code	Group Description
INEU-DOC	INEU Doc. controllers
INTERNAL_DOC	My doc controllers
INUS_DOC	INUS Doc. controllers
*	

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

User Number	UserName	Job Admin	Document List Access	Attached File Access	File Type List	Company List	Job Discipline List	Report List	Deliverables Only	Transmittal Access	Mail Address	Progress Access	Progress Snapshot
100000	DOCCONTROL	<input checked="" type="checkbox"/>						*	<input checked="" type="checkbox"/>	WR	doc.doc@yahoo.fr		<input checked="" type="checkbox"/>
10100	TOTO Coutougn	<input checked="" type="checkbox"/>	WR	RO	*	*	*	*	<input checked="" type="checkbox"/>	RO	tcut@gmail.com	RO	<input checked="" type="checkbox"/>
10124	PONDA GOGU	<input checked="" type="checkbox"/>	RO	RO	PDF	*	*	*	<input checked="" type="checkbox"/>	RO	ponda.g@yahoo.com	WR	<input checked="" type="checkbox"/>
10142	GIGI FRATELLO	<input checked="" type="checkbox"/>	WR	WR	*	*	*	*	<input checked="" type="checkbox"/>	RO	gigi.fratello@mymail.com	NO	<input checked="" type="checkbox"/>
10170	CORASON EMILIE	<input checked="" type="checkbox"/>	WR	WR	*	*	CAD, CAL, CIV	*	<input checked="" type="checkbox"/>	RO	ecorason@yahoo.com	NO	<input checked="" type="checkbox"/>
10243	MIRABELLE ELENE	<input checked="" type="checkbox"/>	WR	WR	CM, PDF	INEU	DOC, ELY	*	<input checked="" type="checkbox"/>	RO	emira@mydomain.com	NO	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>

This is the list where 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:
  - o NO = no access
  - o RO = Read Only access
  - o WR = Read Write access – can add, modify delete documents from the list
- Attached file access – define the access to the files attached to documents:
  - o NO = no access
  - o RO = Read Only access
  - o 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.
  - o Put "\*" to give access to all file types
  - o 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:

PONDA GOGU	<input checked="" type="checkbox"/>	RO	RO	PDF	<input type="checkbox"/>
GIGI FRATELLO	<input checked="" type="checkbox"/>	WR	WR	*	
CORASON EMILIE	<input checked="" type="checkbox"/>	WR	WR	*	
MIRABELLE ELENE	<input checked="" type="checkbox"/>	WR	WR	CM, PDF	
	<input checked="" type="checkbox"/>				

Has Access	File Type	Description
<input checked="" type="checkbox"/>		
<input type="checkbox"/>	CM	Commented
<input type="checkbox"/>	FC	For comment
<input type="checkbox"/>	NAT	Native files
<input checked="" type="checkbox"/>	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:
  - o Put "\*" to give access to all companies
  - o 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:

Company List							Save
Has Access	Company Number	Company Name					
<input checked="" type="checkbox"/>	INEU	INTECO EUROPE					
<input type="checkbox"/>	INUS	INTECO USA					

- Job discipline list – define the access to documents by discipline:
  - o Put "\*" to give access to all disciplines
  - o 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:

Discipline List							Save
Has Access	Discipline Code	Description					
<input checked="" type="checkbox"/>	CAD	COMPUTER AID DESIGN					
<input checked="" type="checkbox"/>	CAL	CALCULATIONS					
<input checked="" type="checkbox"/>	CV	CIVIL					
<input checked="" type="checkbox"/>	DOC	Project Internal Documents					

- 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
    - o NO = no access
    - o RO = Read Only access
    - o 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
    - o NO = no access
    - o RO = Read Only access
    - o 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 Distribution	Title	From
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	DOCUMENT CONTROL	INTERNAL
<input checked="" type="checkbox"/>	MECHANICAL ENGINEER	CLIENT
<input checked="" type="checkbox"/>	GENERAL MANAGER	
<input checked="" type="checkbox"/>	Project Manager	
<input checked="" type="checkbox"/>	DOCUMENT CONTROL	
<input checked="" type="checkbox"/>	MECHANICAL ENGINEER	
<input type="checkbox"/>	ADMINISTRATION	
<input type="checkbox"/>	PROCESS ENGINEER	
<input type="checkbox"/>	IT SPECIALIST	
<input type="checkbox"/>	PROJECT 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
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	DOCUMENT CONTROL	INTERNAL
<input checked="" type="checkbox"/>	MECHANICAL ENGINEER	CLIENT
<input checked="" type="checkbox"/>	MECHANICAL ENGINEER	Client
<input checked="" type="checkbox"/>	PROCESS ENGINEER	Internal
<input type="checkbox"/>	IT SPECIALIST	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).

From	User Group
INTERNAL	
IT	INEU-DOC
INTERNAL	INTERNAL_DOC
IT	INUS_DOC
INTERNAL	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	<input type="checkbox"/> 030, 040	<input type="checkbox"/>		
YY-03	001, 002			

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

User1 List			Save
<input checked="" type="checkbox"/> Has Access	Value	Description	
<input checked="" type="checkbox"/>			
<input type="checkbox"/>	XX-01	XX Group 01	
<input type="checkbox"/>	XX-02	XX Group 02	
<input type="checkbox"/>	YY-01	YY Group 01	
<input type="checkbox"/>	YY-02	YY Group 02	
<input type="checkbox"/>	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

User1 List			Save
<input checked="" type="checkbox"/> Has Access	Value	Description	
<input checked="" type="checkbox"/>			
<input type="checkbox"/>	XX-01	XX Group 01	
<input checked="" type="checkbox"/>	XX-02	XX Group 02	
<input checked="" type="checkbox"/>	YY-01	YY Group 01	
<input checked="" type="checkbox"/>	YY-02	YY Group 02	
<input type="checkbox"/>	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:

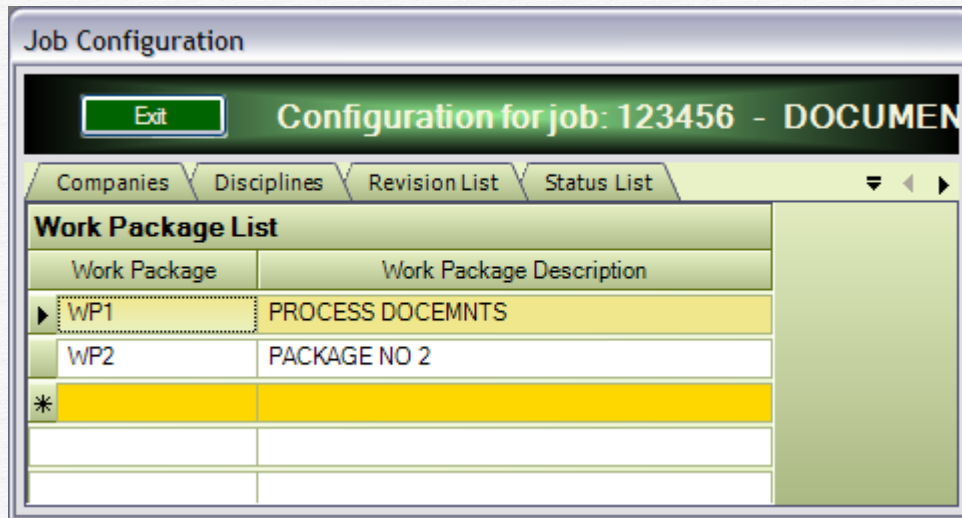
- to all documents where the User1 value is either 'XX-01' or 'XX-02'



*- 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



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 Configuration

**Exit** Configuration for job: 123456 – DOCUMENT MANAGEMENT

Companies Disciplines Revision List Status List Action Codes Transmittal Job Titles Users

**Progress Models**

Progress Model	Description
<b>DD</b>	Drawing
<b>PD</b>	Process Documents

**Progress Steps**

Step	Description	Progress (%)	Status
1	First Issue	50	FI
2	Approved for detailed design	70	AD
3	Approved	100	AC
*			

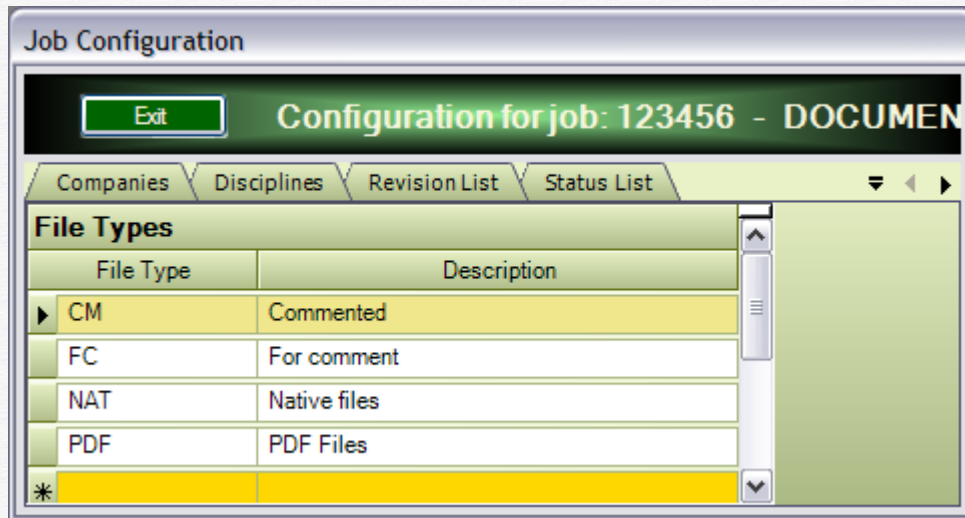
**Progress Models**

Progress Model	Description
<b>RD</b>	Requisitions
<b>SD</b>	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



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

Configuration for job: 123456 - DOCUMENT MANAGE

Companies Disciplines Revision List Status List Action Codes Transmittal

**Data Description**

Col Name	Position	Visible	Header
▶ ClientDocNumber	13	<input type="checkbox"/>	
ClientStatus	14	<input type="checkbox"/>	
ClientStatusDate	15	<input type="checkbox"/>	
NextRevisionDate	16	<input type="checkbox"/>	
ClientStatusComment	16	<input type="checkbox"/>	
ScheduleDate	17	<input type="checkbox"/>	
User1	18	<input type="checkbox"/>	
User2	19	<input type="checkbox"/>	
User3	20	<input type="checkbox"/>	
User4	21	<input type="checkbox"/>	
User5	22	<input type="checkbox"/>	

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, User2, 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:

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"

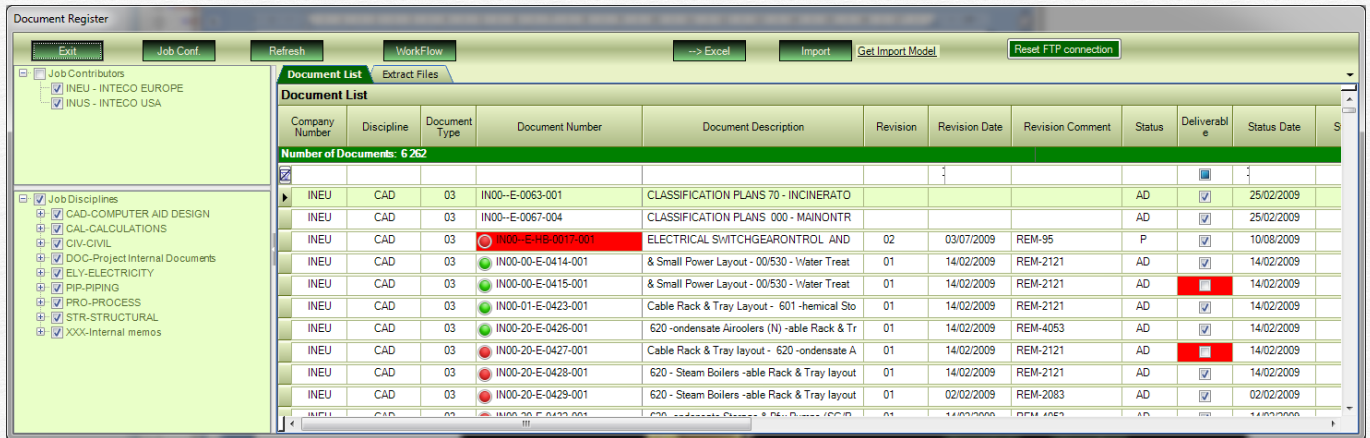
You can also:

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:

Optional 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

## 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
Number of Documents: 6 263						
INEU	CAD	03	IN00--E-0063-001	CLASSIFICATION PLANS 70 - INCINERATO		
INEU	CAD	03	IN00--E-0067-004	CLASSIFICATION PLANS 000 - MAINONTR		
INEU	CAD	03	 IN00--E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02	03/07/2009
INEU	CAD	03	 IN00--E-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

- 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

The screenshot shows the 'Document List' interface. On the left, there are two filter panels: 'Job Contributors' and 'Job Disciplines'. Under 'Job Contributors', 'INEU - INTECO EUROPE' and 'INUS - INTECO USA' are selected. Under 'Job Disciplines', several options are selected, including 'CAD-COMPUTER AID DESIGN', 'CAL-CALCULATIONS', 'CIV-CIVIL', 'DOC-Project Internal Documents', 'ELY-ELECTRICITY', 'PIP-PIPING', 'PRO-PROCESS', 'STR-STRUCTURAL', and 'XXX-Internal memos'. The main table shows a list of documents with columns: Company Number, Discipline, Document Type, Document Number, Document Description, Revision, and Revision Date. A status bar above the table indicates 'Number of Documents: 6 262'. One document is highlighted in red: IN00--E-HB-0017-001, ELECTRICAL SWITCHGEARONTRONL AND, Revision 02, dated 03/07/2008.

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".

The screenshot shows the 'Document List' interface with filter criteria applied. The 'Document Number' column contains the filter 'PUB' and the 'Document Description' column contains the filter 'DRAW'. The table shows a list of documents matching these criteria. A small button is visible at the left of the filter row. Red arrows point to this button and the filter row.

Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revision Date
<b>Number of Documents: 92</b>						
			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	ISOMETRIC DRAWING W/N	01	22/02/2008
INEU	CAL	01	IN00-20-PUB-DI-0507-003	ISOMETRIC DRAWING 2-2"-C25-W/N	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
INEU	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 Documents: 6 263						
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.

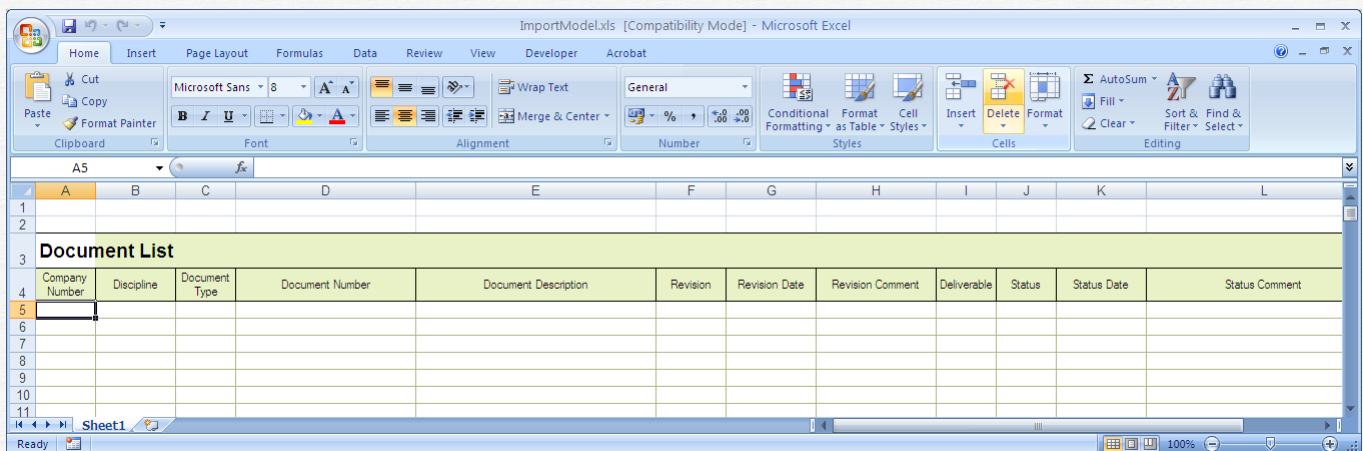
The rest of the columns can be filled in at a later moment. To save the new document, simply click on another row of the table.

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.



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:

- If the document does not exist in the system, it adds it
- 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.)

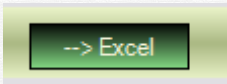
	K	L	M	N	O	P	Q	R	S
1									
2									
3	Files								
4	Status Date	Status Comment	Participate To Progress	Directory	File 1	File 2	File 3	File 4	File 5
5									
6									
7									
8									
9									
10									
11									

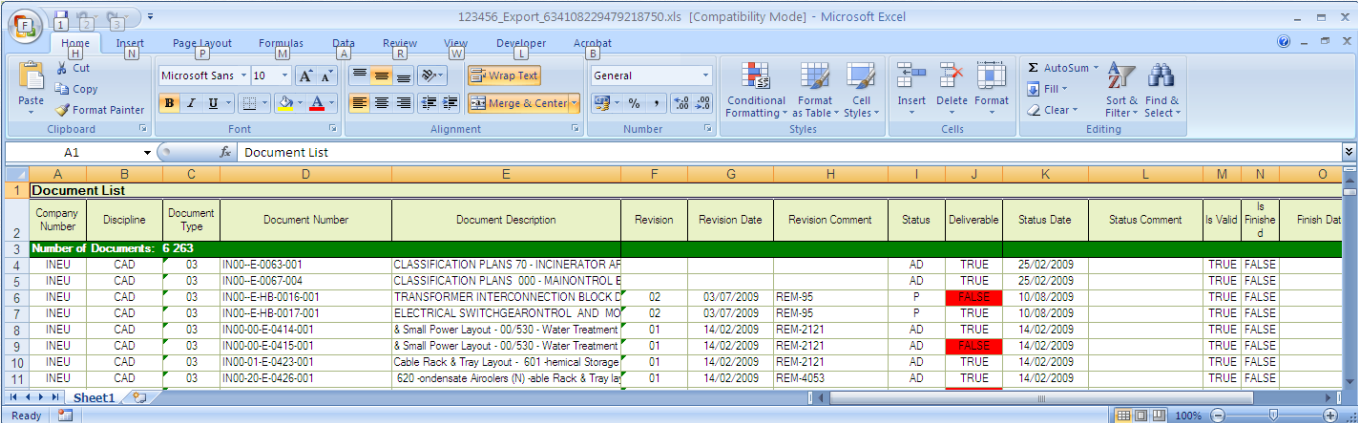
The following rules will be followed by the import procedure:

- 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



Click on the  button and the displayed list will be immediately exported to excel.



Company Number	Discipline	Document Type	Document Number	Document Description	Revision	Revision Date	Revision Comment	Status	Deliverable	Status Date	Status Comment	Is Valid	Is Finished	Finish Date
<b>Number of Documents: 6 263</b>														
INEU	CAD	03	IN00-E-0063-001	CLASSIFICATION PLANS 70 - INCINERATOR AF				AD	TRUE	25/02/2009		TRUE	FALSE	
INEU	CAD	03	IN00-E-0067-004	CLASSIFICATION PLANS 000 - MAINCONTROLE				AD	TRUE	25/02/2009		TRUE	FALSE	
INEU	CAD	03	IN00-E-HB-0016-001	TRANSFORMER INTERCONNECTION BLOCK	02	03/07/2009	REM-95	P	FALSE	10/08/2009		TRUE	FALSE	
INEU	CAD	03	IN00-E-HB-0017-001	ELECTRICAL SWITCHGEARONTROL AND MO	02	03/07/2009	REM-95	P	TRUE	10/08/2009		TRUE	FALSE	
INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	REM-2121	AD	TRUE	14/02/2009		TRUE	FALSE	
INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	REM-2121	AD	FALSE	14/02/2009		TRUE	FALSE	
INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	REM-2121	AD	TRUE	14/02/2009		TRUE	FALSE	
INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray la	01	14/02/2009	REM-4053	AD	TRUE	14/02/2009		TRUE	FALSE	

## 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).

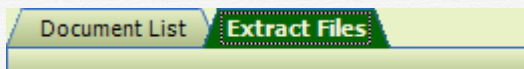
The user access to modify a document, remove it, change its revision, add / remove files to it, is managed as follows:

- 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



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

<input checked="" type="checkbox"/>	INEU	CAD	03		IN00-01-E-0423-001
<input checked="" type="checkbox"/>	INEU	CAD	03		IN00-20-E-0426-001
<input type="checkbox"/>	INEU	CAD	03		IN00-20-E-0427-001
<input checked="" type="checkbox"/>	INEU	CAD	03		IN00-20-E-0428-001
<input type="checkbox"/>	INEU	CAD	03		IN00-20-E-0441-001
<input checked="" type="checkbox"/>	INEU	CAD	03		IN00-50-E-4006-000
<input type="checkbox"/>	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")



- 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:

<input checked="" type="checkbox"/>	Company Number	Discipline	Document Type	F	Document Number
<b>Number of Documents: 6 262</b>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	INEU	CAD	03		IN00--E-0063-001
<input checked="" type="checkbox"/>	INEU	CAD	03		IN00--E-0067-004
<input checked="" type="checkbox"/>	INEU	CAD	03	<input checked="" type="radio"/>	IN00-00-E-0414-001
<input checked="" type="checkbox"/>	INEU	CAD	03	<input checked="" type="radio"/>	IN00-00-E-0415-001
<input checked="" type="checkbox"/>	INEU	CAD	03	<input checked="" type="radio"/>	IN00-01-E-0423-001
<input checked="" type="checkbox"/>	INEU	CAD	03	<input checked="" type="radio"/>	IN00-20-E-0426-001
<input checked="" type="checkbox"/>	INEU	CAD	03	<input checked="" type="radio"/>	IN00-20-E-0427-001

### 5.8 Revision

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

INEU	CAD	03	<input checked="" type="radio"/>	IN00--E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02	<input type="button" value=""/>	03/07/2009	REM-
INEU	CAD	03	<input type="radio"/>	IN00--E-HB-0017-001	ELECTRICAL SWITCHGEARONTRONL AND				
INEU	CAD	03	<input type="radio"/>	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat				
INEU	CAD	03	<input checked="" type="radio"/>	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat				
INEU	CAD	03	<input checked="" type="radio"/>	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01		14/02/2009	REM-
INEU	CAD	03	<input type="radio"/>	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01		14/02/2009	REM-

- New Revision
- Revision History
- Restore Previous Revision

#### 5.8.1 New Revision

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

<input checked="" type="radio"/>	IN00--E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	02	03/07/2009	REM-95	P	<input type="checkbox"/>
<input type="radio"/>	IN00--E-HB-0017-001	ELECTRICAL SWITCHGEARONTRONL AND					
<input type="radio"/>	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat					
<input checked="" type="radio"/>	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat					
<input checked="" type="radio"/>	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto					
<input type="radio"/>	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr					
<input type="radio"/>	IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A					
<input type="radio"/>	IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout					
<input type="radio"/>	IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout					
<input type="radio"/>	IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P					
<input type="radio"/>	IN00-20-E-0441-001	20/730 - Raw/Firewater Tank					

**Change Revision**

Document Number: **IN00--E-HB-0016-001**

**TRANSFORMER INTERCONNECTION BLOCK DIAGRAM SUBSTATION 2**

Current revision: **02** **REM-95**

New revision: **03** **Revision 3**

Revision date: **30/05/2010**

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	IN00--E-HB-0016-001	TRANSFORMER INTERCONNECTION BLO	04	30/05/2010	P	
<b>Revision History</b>						
03	Document Number	Revision	Revision Date	Revision Comment	Status	Status Date
03	IN00--E-HB-0016-001	03	30/05/2010	Revision 3	P	10/08/2009
03	IN00--E-HB-0016-001	02	03/07/2009	REM-95	P	10/08/2009
03						
03						

### 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	14/02/2009	REM-2121	AD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	14/02/2009
IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treat	01	14/02/2009					
IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/2009					
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/2009					
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A	01	14/02/2009					
IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	01	14/02/2009					
IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	01	02/02/2009					
IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P	01	14/02/2009					
IN00-20-E-0441-001	20/730 - Raw/Firewater Tank							
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray Layout -ross S	01	20/05/2009					
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - Diesel Stora	01	14/02/2009					

**Change Status**

Document Number: **IN00-00-E-0414-001**  
Small Power Layout - 00/530 - Water Treatment

Current status: **AD**

New status: **AC** Approved for construction

Status date: **30/05/2010**

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.

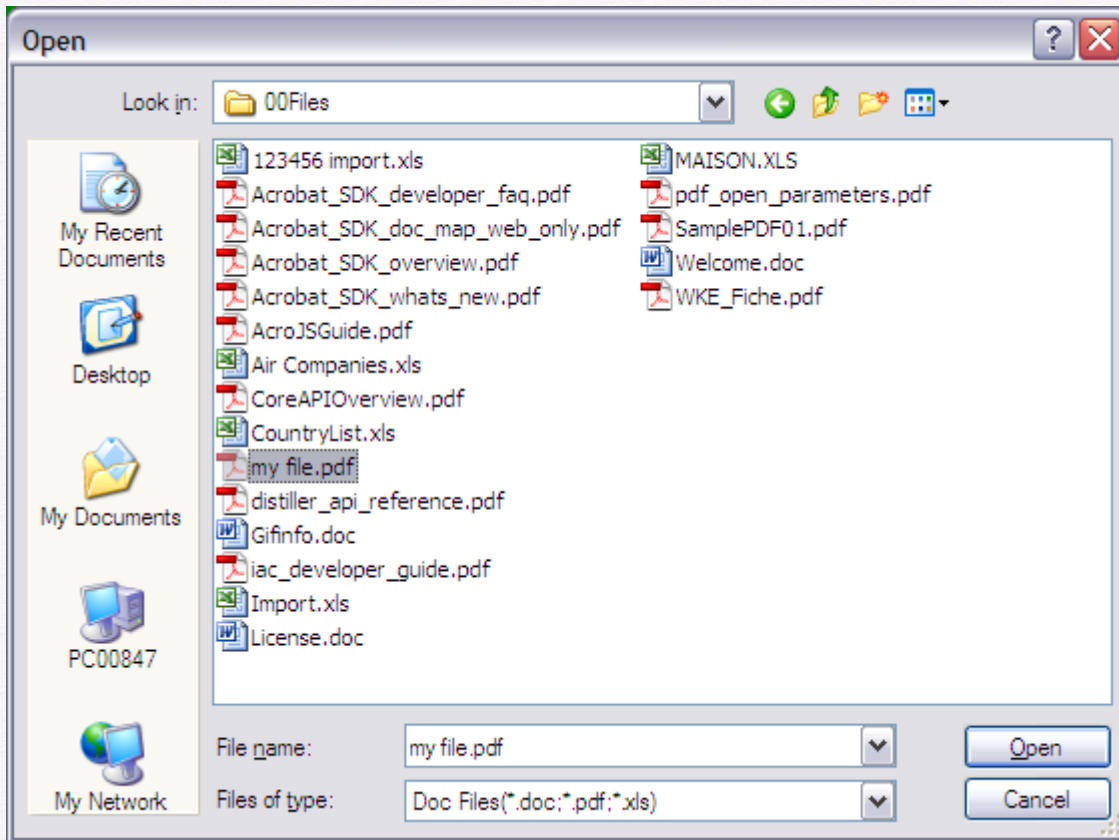
## 5.10 Attach/Remove files to documents

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:

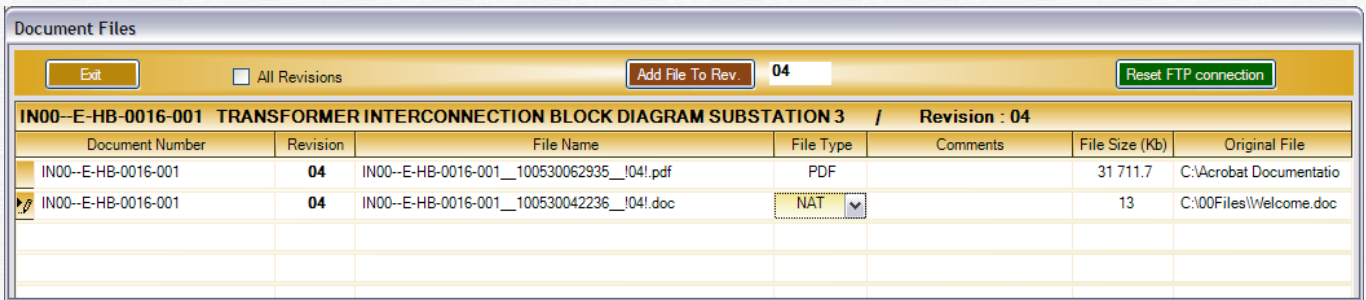
INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treat
INEU	CAD	03		er Layout - 00/530 - Water Treat
INEU	CAD	03		& Tray Layout - 601 -hemical Sto

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



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.

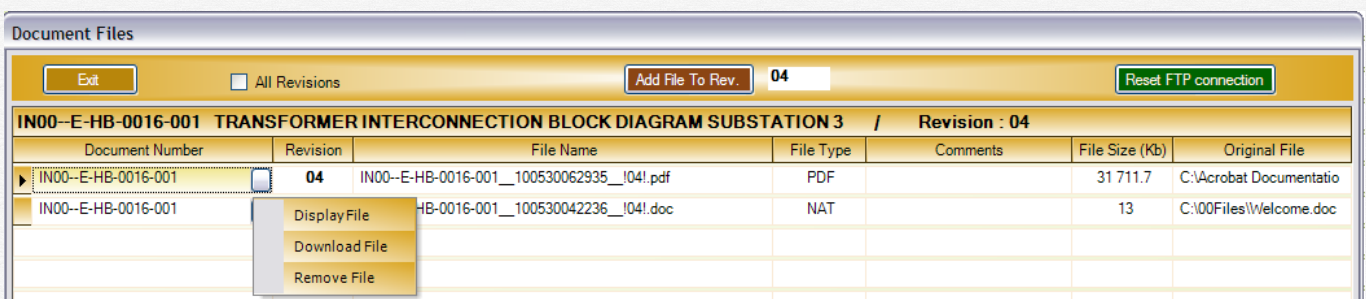
The second option displays a window showing all attached files for this revision of the document:



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:



- 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).

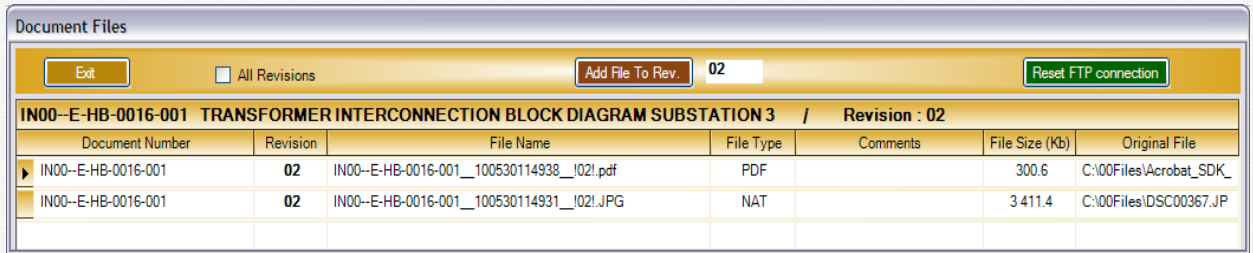
To Add/remove files for a previous revision of the document, proceed as follows:

- Display the revision history

Document Number	Revision	Revision Date	Revision Comment	Status	Status Date	Status Comment
IN00--E-HB-0016-001	03	30/05/2010	Revision 3	P	10/08/2009	
IN00--E-HB-0016-001	02	03/07/2009	REM-95	P	10/08/2009	

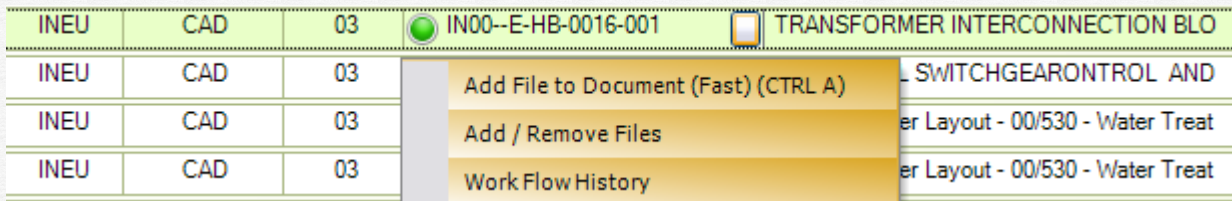
- Double-click on the line corresponding to the revision you want
- The system will display the attached files for this revision, as shown below:





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

### 5.11 Work Flow history



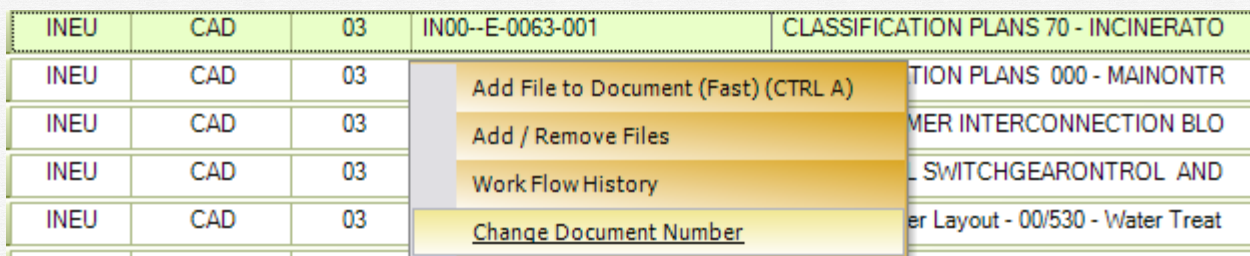
Click on the small button in the "Document Number" cell, and then select "Work Flow History". The system will display all traffic for this revision of the document (where it was transmitted, what transmittal number, what date, etc.)

Work Flow History						
Document Number	Revision	Status	Trans. Number	Trans. Date	Destination	Direction
TESTDOC	P01		2	15/12/2005	BRC	TO
TESTDOC	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".



The following dialog will be displayed:

INEU	CAD	03	<input checked="" type="radio"/> IN00--E-HB-0016-001	INTERCONNECTION BLOCK DIAGRAM SU
INEU	CAD	03	<b>Change Document Number</b>	
INEU	CAD	03	Old Number: <input type="text" value="IN00--E-HB-0016-001"/>	
INEU	CAD	03	INTERCONNECTION BLOCK DIAGRAM SUBSTATION 3	
INEU	CAD	03	New Number: <input type="text" value="WWW--E-HB-0016-001"/>	
INEU	CAD	03	<input type="button" value="Change Number"/> <input type="button" value="Cancel"/>	

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"

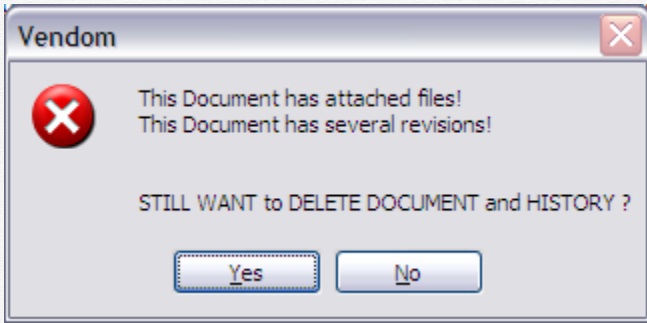
INEU	CAD	03	<input checked="" type="radio"/> WWW--E-HB-0016-001	INTERCONNECTION BLOCK DIAGRAM SU
INEU	CAD	03	<b>Change Discipline and Document Type</b>	
INEU	CAD	03	Document Number: <input type="text" value="WWW--E-HB-0016-001"/>	
INEU	CAD	03	INTERCONNECTION BLOCK DIAGRAM SUBSTATION 3	
INEU	CAD	03	<b>Current</b>	
INEU	CAD	03	Discipline: <input type="text" value="CAD"/>	Doc. Type: <input type="text" value="03"/>
INEU	CAD	03	<b>New</b>	
INEU	CAD	03	Discipline: <input type="text" value=""/> <input type="button" value="v"/>	Doc. Type: <input type="text" value=""/> <input type="button" value="v"/>
INEU	CAD	03	<input type="button" value="Change"/> <input type="button" value="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.

03	IN00-E-HB-0017-001	02	03/07/2009	REM-95	P	<input checked="" type="checkbox"/>	10/08/2009	<input type="checkbox"/>
03	IN00-00-E-0414-001	01	14/02/2009	REM-2121	AD	<input checked="" type="checkbox"/>	14/02/2009	<input checked="" type="checkbox"/>
03	IN00-00-E-0415-001	01	14/02/2009	REM-2121	AD	<input type="checkbox"/>	14/02/2009	<input checked="" type="checkbox"/>

#### 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 Documents Refresh --> Excel Import Get Import Mode

Document List Extract Files

**Document List**

Company Number	Discipline	Document Type	Document Number	Document Description	Revision
<b>Number of Documents: 6 260</b>					
			41-149-3416	PAVING DRAWING AIROOLERS	00
			41-150-3317	CIVIL INSTALLATION DRAWINGS SG/PH/03	00
			41-150-3417	PAVING DRAWING SG/PH/03 , SG/PS/01	00
	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

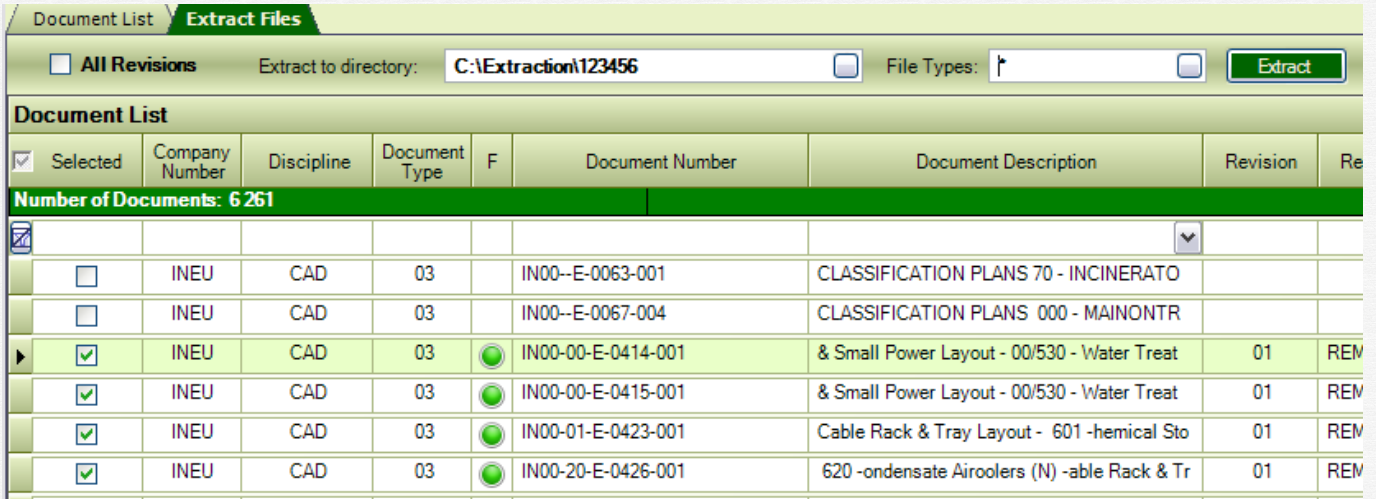
In the example above, there are 3 documents where the Company Number is empty and 3 other where the Discipline is empty. They will be displayed when you check the option "All Documents".

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

### 5.13 Extract files

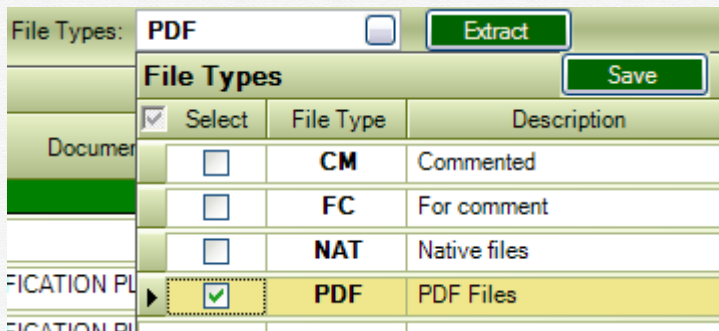
If you are a Job administrator or a Global Administrator or you have the special right "Can Extract Files", you can extract a list of documents from the Vendum system, along with the associated files.

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.



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:



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

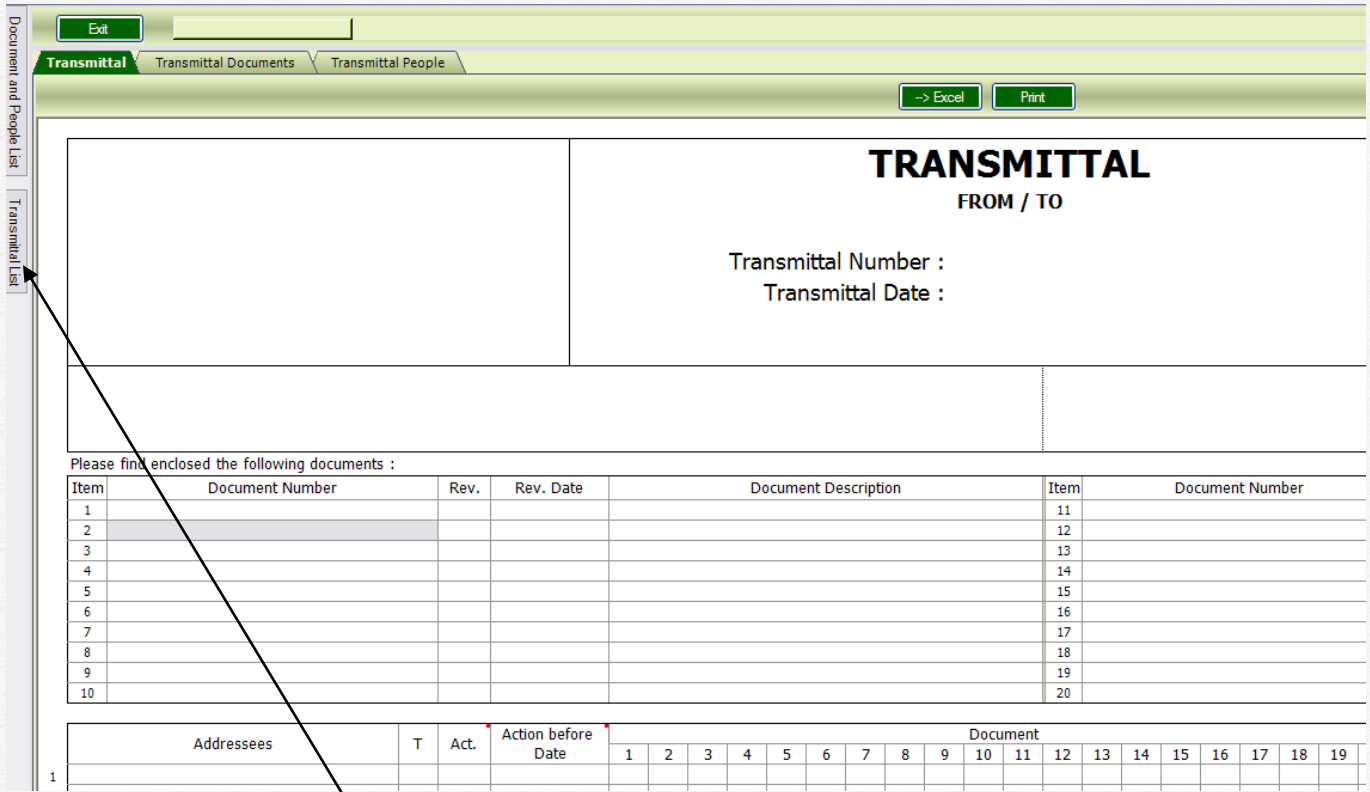
Document List						
<input checked="" type="checkbox"/>	Selected	Company Number	Discipline	Document Type	F	Document Number
<b>Number of Documents: 6 261</b>						
<input checked="" type="checkbox"/>						
<input type="checkbox"/>		INEU	CAD	03		IN00--E-0063-001
<input type="checkbox"/>		INEU	CAD	03		IN00--E-0067-004
<input checked="" type="checkbox"/>		INEU	CAD	03	<input checked="" type="radio"/>	IN00-00-E-0414-001
<input checked="" type="checkbox"/>		INEU	CAD	03	<input checked="" type="radio"/>	IN00-00-E-0415-001
<input checked="" type="checkbox"/>		INEU	CAD	03	<input checked="" type="radio"/>	IN00-01-E-0423-001
<input checked="" type="checkbox"/>		INEU	CAD	03	<input checked="" type="radio"/>	IN00-20-E-0426-001

- 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:

Project: 123456 DOCUMENT MANAGEMENT						
Originator Company	Discipline	Doc. Type	Document Number	Document description	Revision	Document Files
INEU	CAD	03	IN00-00-E-0414-001	& Small Power Layout - 00/530 - Water Treatment	01	<a href="#">IN00-00-E-0414-001_100530062918_011.pdf</a>
INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	<a href="#">IN00-00-E-0415-001_100530114948_011.xls</a>
INEU	CAD	03	IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water Treatment	01	<a href="#">IN00-00-E-0415-001_100530114954_011.doc</a>
INEU	CAD	03	IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Storage	01	<a href="#">IN00-01-E-0423-001_100530115006_011.JPG</a>
INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	<a href="#">IN00-20-E-0426-001_100606095549_011.doc</a>
INEU	CAD	03	IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	<a href="#">IN00-20-E-0426-001_100606095511_011.pdf</a>

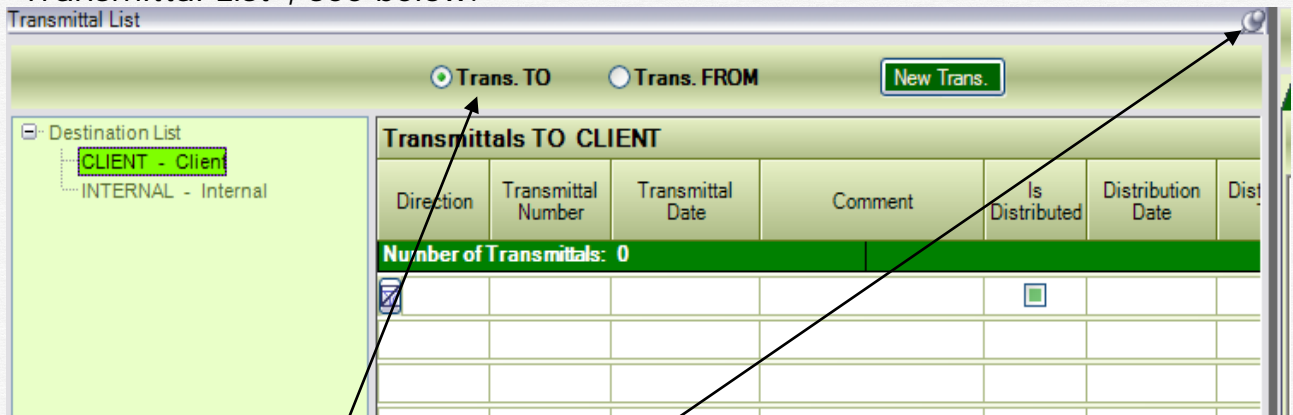
## 6 Work Flow

### 6.1 Create a transmittal

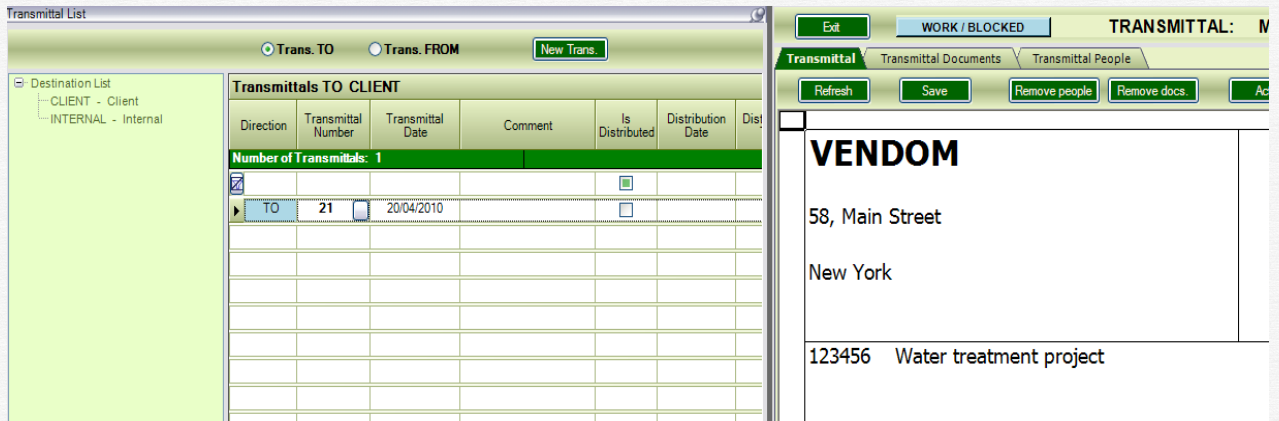


To create a new transmittal:

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



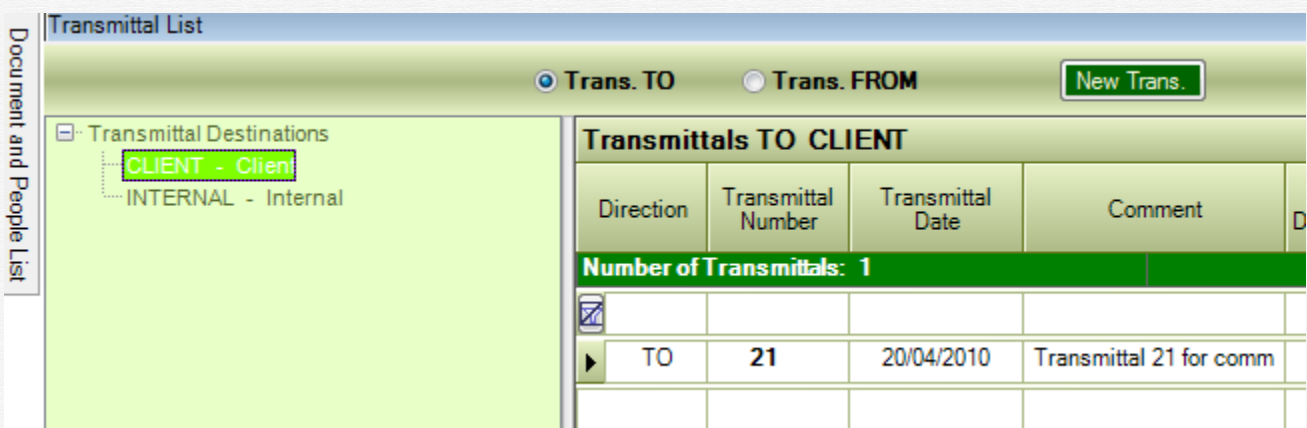
- This window will hide itself if the mouse pointer gets out of it. You can "block" this window by clicking on the "PIN" at the upper right corner of the window. Click again to UNPIN it and let it hide when you no longer need it.
- Select the "Destination" in the left box ("Destination List").
- Select 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:



- 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:

Direction	Transmittal Number	Transmittal Date	Comment	Is Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before ... days
<b>Number of Transmittals: 1</b>								
<input checked="" type="checkbox"/>				<input type="checkbox"/>				
▶ TO	21	20/04/2010		<input type="checkbox"/>				10

## 6.2 Add documents to transmittal



Move the mouse over the “Document and People List” tab, to open it:

The list will contain 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:



Transmittal Transmittal Documents Transmittal People

Refresh Save Remove people Remove docs Actions -> Excel Print

<b>VENDOM</b> 58, Main Street New York	<b>TRANSMITTAL</b> TO CLIENT Transmittal Number : <b>ME--&gt;CLIENT - 0021</b> Transmittal Date : <b>20/04/2010</b>	<b>INTECO</b> 7878, KOLONIE S San Francisco, CA
123456 Water treatment project		First phase

Please find enclosed the following documents :

Item	Document Number	Rev.	Rev. Date	Document Description	Item	Document Number	Rev.	Rev. Date
1	IN00-00-E-0414-001	01	14/02/2009	& Small Power Layout - 00/530 - Water Treatment	11			
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 - 601 -hemical Storage	13			
4	IN00-20-E-0426-001	01	14/02/2009	620 -ondensate Aircoolers (N) -ableRack & Tray layout	14			
5					15			
6					16			
7					17			
8					18			
9					19			
10					20			

Addresssees	T	Act.	Action before Date	Document																			
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1																							
2																							

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 them in the transmittal sheet, then 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

Transmittal Transmittal Documents Transmittal People

Transmittal ME-->CLIENT - 0021 TO CLIENT

Selected	Document Number	Revision	Document Description	Revision Date
<b>Number of Documents: 4</b>				
<input type="checkbox"/>	IN00-00-E-0414-001	01	& Small Power Layout - 00/530 -	14/02/2009
<input checked="" type="checkbox"/>	IN00-00-E-0415-001	01	& Small Power Layout - 00/530 -	14/02/2009
<input type="checkbox"/>	IN00-01-E-0423-001	01	Cable Rack & Tray Layout - 601 -	14/02/2009
<input type="checkbox"/>	IN00-20-E-0426-001	01	620 -ondensate Aircoolers (N) -abl	14/02/2009

**Files on current transmittal for selected document**

IN00-00-E-0415-001 & Small Power Layout - 00/530 - Water Treatment / Revision : 01

Document Number	Revision	File Name
<b>Number of Files: 1</b>		
IN00-00-E-0415-001	01	IN00-00-E-0415-001__100530114954__I01!.doc

**All stored files for selected document**

IN00-00-E-0415-001 & Small Power Layout - 00/530 - Water Treatment / Revision : 01

Document Number	Revision	File Name	File Type	Comment
<b>Number of Files: 2</b>				
IN00-00-E-0415-001	<input type="checkbox"/>	01	IN00-00-E-0415-001__100530114954__I01!.doc	NAT
IN00-00-E-0415-001	<input type="checkbox"/>	01	IN00-00-E-0415-001__100530114948__I01!.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:



Select the people to be added to the transmittal by checking the "Selected" box on the left column, and then 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:

Please find enclosed the following documents :

Item	Document Number	Rev.	Rev. Date	Document Description	Item	Document Number
1	IN00-00-E-0414-001	01	14/02/2009	& Small Power Layout - 00/530 - Water Treatment	11	
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 - 601-hemical Storage	13	
4	IN00-20-E-0426-001	01	14/02/2009	620 -ondensate Airoolers (N)-able Rack & Tray layout	14	
5					15	
6					16	
7					17	
8					18	
9					19	
10					20	

Addressees	T	Act.	Action before Date	Document																
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<b>GENERAL MANAGER</b>																				
TOTO Coutougnno		1		1	1	1	1													
<b>DOCUMENT CONTROL</b>																				
DOCCONTROL		1		1	1	1	1													
<b>MECHANICAL ENGINEER</b>																				
PONDA GOGU		1		1	1	1	1													
<b>PROCESS ENGINEER</b>																				
GIGI FRATELLO		1		1	1	1	1													

Document list      People List      Distribution

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	

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

	Addressees	T	Act.	Action before Date							
					1	2	3	4	5	6	
1	<b><u>GENERAL MANAGER</u></b>										
2	TOTO Coutugno	1	2	10/05/2010	1	1	1	1			
3	<b><u>DOCUMENT CONTROL</u></b>										
4	DOCCONTROL	1	1		1	1	1	1			
5	<b><u>MECHANICAL ENGINEER</u></b>										
6	PONDA GOGU	1	3	10/05/2010	1	1	1	1			
7	<b><u>PROCESS ENGINEER</u></b>										
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”:

Transmittals TO CLIENT									
Direction	Transmittal Number	Transmittal Date	Comment	Is Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before ... days	Blocked By
Number of Transmittals: 1									
<input type="checkbox"/>				<input checked="" type="checkbox"/>					
▶ TO	21	20/04/2010		<input type="checkbox"/>				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:

Transmittals TO CLIENT									
Direction	Transmittal Number	Transmittal Date	Comment	Is Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before ... days	Blocked By
Number of Transmittals: 1									
<input type="checkbox"/>				<input checked="" type="checkbox"/>					
▶ TO	21	20/04/2010		<input type="checkbox"/>				10	DOCCONTROL
	<div style="border: 1px solid gray; padding: 2px;"> <span>Display Transmittal</span>  <span>Unlock Transmittal</span> </div>								

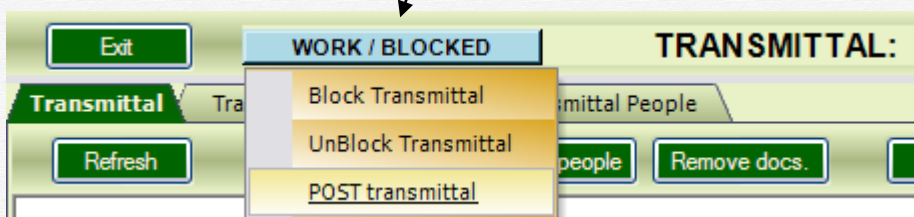
### 6.6 Post / Un-post the transmittal

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 then click "Post Transmittal" in the displayed menu

Transmittals TO CLIENT									
Direction	Transmittal Number	Transmittal Date	Comment	Is Distributed	Distribution Date	Distribution Type	Originator Trans. Number	Action Before ... days	Blocked By
Number of Transmittals: 1									
<input type="checkbox"/>				<input checked="" type="checkbox"/>					
▶ TO	21	20/04/2010		<input type="checkbox"/>				10	DOCCONTROL
	<div style="border: 1px solid gray; padding: 2px;"> <span>Display Transmittal</span>  <span>Unlock Transmittal</span>  <span>POST Transmittal</span> </div>								

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



### 6.7 Distribute the transmittal

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

Transmittal Documents Transmittal People **SEND Transmittal**

Refresh Actions **Send**

**VENDOM** **TR**

58, Main Street  
New York

Transmittal Number  
Transmittal Date

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	14/02/2009	& Small Power Layout - 00/530 - Water Treatment

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

Transmittal Transmittal Documents Transmittal People **SEND Transmittal**

Send Transmittal Send Manually

**Select People where you want to SEND the transmittal**


<input checked="" type="checkbox"/>	Select	People Name	Department	MailAddress
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>		TOTO Coutougn	GENERAL MANAGER	tcut@gmailcom
<input checked="" type="checkbox"/>		DOCCONTROL	DOCUMENT CONTROL	doc.doc@yahoo.fr
<input checked="" type="checkbox"/>		PONDA GOGU	MECHANICAL ENGINEER	ponda.g@yahoo.com
<input checked="" type="checkbox"/>		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:

Click ON this link to visualize the current transmittal

<http://localhost/web/Vendom/MyTransmittals.aspx?Subject=Transmittal&JobNumber=123456&JobDescription=WATER+TREATMENT&TransNumber=21&Destination=CLIENT&Direction=TO&TransDate=20%2F04%2F2010&UserNumber=10100>

 Trans\_06062010124854.xls  
81K [View as HTML](#) [Open as a Google spreadsheet](#) [Download](#)

- Attached file containing the transmittal sheet
- Link to the web page where the transmittal can be consulted, see below:

123456 - WATER TREATMENT									
Doc. Number:		Doc. Name:		First Page	Last Page	Prev. Page	Next Page	Page: 0 / 0	
Trans. Number	Destination	Trans. Date	Document Number	Doc. Description		Rev.	Rev. Date	Status	Status
21	TO CLIENT	20/04/2010	<a href="#">IN00-00-E-0414-001</a>	& Small Power Layout - 00/530 - Water Treatment		01	14/02/2009	AD	14/02/2009
21	TO CLIENT	20/04/2010	<a href="#">IN00-00-E-0415-001</a>	& Small Power Layout - 00/530 - Water Treatment		01	14/02/2009	AD	14/02/2009
21	TO CLIENT	20/04/2010	<a href="#">IN00-01-E-0423-001</a>	Cable Rack & Tray Layout - 601 -hemical Storage		01	14/02/2009	AD	14/02/2009
21	TO CLIENT	20/04/2010	<a href="#">IN00-20-E-0426-001</a>	620 -ondensate Aircoolers (N) -able Rack & Tray layout		01	14/02/2009	AD	14/02/2009

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

Transmittals TO CLIENT						
Direction	Transmittal Number	Transmittal Date	Comment	Is Distributed	Distribution Date	Distribution Type
Number of Transmittals: 1						
<input type="checkbox"/>				<input type="checkbox"/>		
<input checked="" type="checkbox"/>	TO	21		<input checked="" type="checkbox"/>	30/04/2010	Manual

- Transmittal Is Distributed    Distribution Date    Distribution Type

### 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
<a href="#">00-00-E-0414-001</a>	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			
<a href="#">00-00-E-0415-001</a>	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			
<a href="#">00-01-E-0423-001</a>	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	AD	14/02/2009	2 / For Approval	10/05/2010	<input type="checkbox"/>			
<a href="#">00-20-E-0426-001</a>	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			

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**

---

**Comment:** (Enter your comments here below)

I agree with this document, so I approve it.

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 Comment
<a href="#">00-00-E-0414-001</a>	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			
<a href="#">00-00-E-0415-001</a>	& Small Power Layout - 00/530 - Water Treatment	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input checked="" type="checkbox"/>	06/06/2010	Approved	I agree with this
<a href="#">00-01-E-0423-001</a>	Cable Rack & Tray Layout - 601 -hemical Storage	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			
<a href="#">00-20-E-0426-001</a>	620 -ondensate Airoolers (N) -able Rack & Tray layout	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			

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:

Transmittal Documents												
Trans. Number	Destination	Trans. Date	Document Number	Document Description	Revision	Revision Date	Status	Status Date	Action Code	Action before	Processed	
Number of Documents: 4												
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	<input type="checkbox"/>	<input type="checkbox"/>
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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>
21	TO CLIENT	20/04/2010	IN00-20-E-0426-001	620 -ondensate Airrollers (N) -able Rac	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>	<input type="checkbox"/>

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 Response**

Document  
 Number: **IN00-01-E-0423-001** Rev: **01**  
**Cable Rack Tray Layout - 601 -hemic Storage**

Action TO DO: **A** **TO APPROVE / REJECT**

This is my comment.

Approve    Reject    Exit

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:

Document Number	Document Description	Revision	Revision Date	Status	Status Date	Action Code	Action before	Processed	Response Date	My Status	My Comment
Number 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	<input type="checkbox"/>			
IN00-00-E-0415-001	& Small Power Layout - 00/530 - Water	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	06/06/2010	Approved	This is my comment.
IN00-20-E-0426-001	620 -ondensate Airrollers (N) -able Rac	01	14/02/2009	AD	14/02/2009	2 / A	10/05/2010	<input type="checkbox"/>			



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



- "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.

**My Transmittals**

- TO - CLIENT
  - 0021 - 20/04/2010 - Tra

Transmittal Documents					
Trans. Number	Destination	Trans. Date	Document Number		
<b>Number of Documents: 4</b>					
<input type="checkbox"/>					
21	TO CLIENT	20/04/2010	<input checked="" type="radio"/> IN00-00-E-0414-001	& Smal	
21	TO CLIENT	20/04/2010	<input checked="" type="radio"/> IN00-00-E-0415-001	<input type="checkbox"/>	& Smal
21	TO CLIENT	20/04/2010	<input checked="" type="radio"/> IN00-01-E-0423-001	Cable I	
21	TO CLIENT	20/04/2010	<input checked="" type="radio"/> IN00-20-E-0426-001	620 -o	

- 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)

People Name	Document Number	Document Description	Revision	Status	Action Code	Action before	Processed	Response Date	My Status	My Comment	Trans. Number	Trans. Date	Destination
Number of Documents: 39													
TOTO Coutouguo	C100-2-301	Casa de Comanda		A		3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	C1555	Plan d'implantation		A	A	3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	C515-01-210	Plans Mise a la Terre 2		A		3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	C573-01-200	Cables	01	D		3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	C573-01-205	Plan d'eclairage 1		A		3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	CV222	Plan de zone 1		A	A	3/A	01/08/2011				48	17/12/2008	TO CLIENT
TOTO Coutouguo	SP10-01-205	Plan d'aire 1		A	C	3/A	01/08/2011				48	17/12/2008	TO CLIENT
Popeescu, Dorin	C100-2-301	Casa de Comanda		A		3/A	01/08/2011				48	17/12/2008	TO CLIENT
Popeescu, Dorin	C1555	Plan d'implantation		A	A	3/A	01/08/2011		17/08/2011	Rejected	48	17/12/2008	TO CLIENT
Popeescu, Dorin	C515-01-210	Plans Mise a la Terre 2		A		For Approval	01/08/2011		17/08/2011	Approved	48	17/12/2008	TO CLIENT
Popeescu, Dorin	C573-01-200	Cables	01	D		3/A	01/08/2011				48	17/12/2008	TO CLIENT
Popeescu, Dorin	C573-01-205	Plan d'eclairage 1		A		3/A	01/08/2011		17/08/2011	Approved	48	17/12/2008	TO CLIENT
Popeescu, Dorin	CV222	Plan de zone 1		A	A	3/A	01/08/2011				48	17/12/2008	TO CLIENT
Popeescu, Dorin	SP10-01-205	Plan d'aire 1		A	C	3/A	01/08/2011				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:



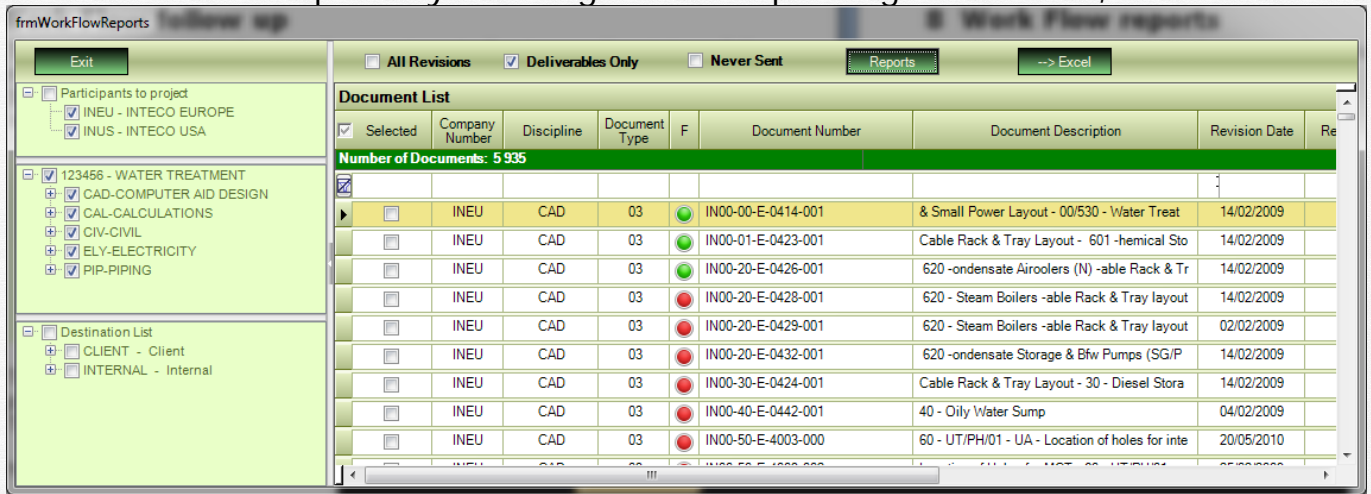
- o "A" option will display only documents for approval (Action="A")
- o "C" option will display only documents "For Comments" (Action="C")
- o "I" option will display only documents "For Information" (Action="I")
- o "Not processed", if checked, will show only the documents that were not processed.

People Name	Document Number	Document Description	Revision	Status	Action Code	Action before	Processed	Response Date
Number of Documents: 6155								
TOTO Coutouguo	C100-2-301	Casa de Comanda		A		3/A	01/08/2011	
TOTO Coutouguo	C1555	Plan d'implantation		A	A	3/A	01/08/2011	
TOTO Coutouguo	C515-01-210	Plans Mise a la Terre 2		A		3/A	01/08/2011	
TOTO Coutouguo	C573-01-200	Cables	01	D		3/A	01/08/2011	
TOTO Coutouguo	C573-01-205	Plan d'eclairage 1		A		3/A	01/08/2011	
Mahammad HAKEEM	CAD-01	ssfdsCAD PID & Plot plan		P02	D			
Mahammad HAKEEM	CCCRRR-01	jhhjffff		00	P			
TOTO Coutouguo	CV222	Plan de zone 1		A	A	3/A	01/08/2011	
Mahammad HAKEEM	DODO14	rshrthsrth		02				
Mahammad HAKEEM	RRR-01-000	TEST 1		01	P			
TOTO Coutouguo	SP10-01-205	Plan d'aire 1		A	C	3/A	01/08/2011	
Mahammad HAKEEM	XX-66-778899-WZ			02				
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.

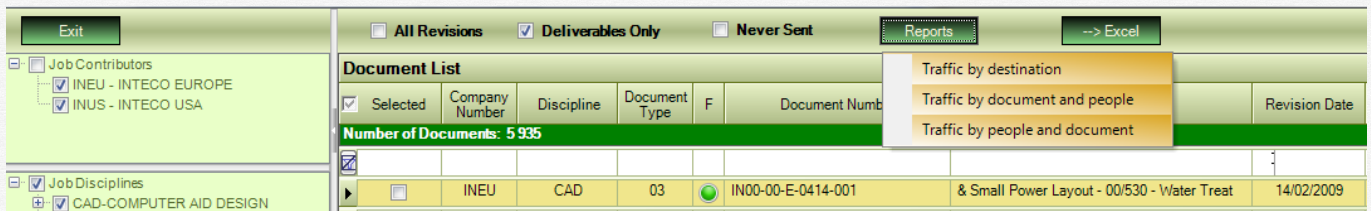
## 8 Work Flow reports

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:



- 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:



All reports are displayed directly in Excel.

### 8.1 Traffic by discipline

DOCUMENT TRAFFIC									
Selected Companies: 'INEU', 'INUS'									
Selected Disciplines: 'CAD', 'CAL', 'CM', 'ELY', 'PIP'									
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
TO INTERNAL - Internal	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 - 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

## 8.2 Traffic by document and people

**Project: 123456 WATER TREATMENT**

### DOCUMENT TRAFFIC

Selected Companies: 'INEU', 'INUS'  
 Selected Disciplines: '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

## 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 - Internal

## 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 Date
CH-01-E-0423-001	Cable Rack & Tray Laysusst - 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	50.00	SI	01/11/2012	75	50	2	01/11/2012	01	14/02/2009
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -abl	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AB	04/11/2012						
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AB	01/11/2012						
IN00-20-E-0428-001	620 - Steam Boilerssss -able Rac	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AB	04/11/2012						
IN00-20-E-0429-001	620 - Steam Boilers -able Rack &	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		FI	04/11/2012						
IN00-20-E-0432-001	620 -ondensate Storage & Bfw P	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		FI	04/11/2012						
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray La	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		FI	04/11/2012						
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AD	14/02/2009						
IN00-40-E-0442-001	40 - Oily Water Sump	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AD	10/02/2009						
IN00-50-E-4003-000	60 - UT/PH/01 - UA - Location of h	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AD	20/05/2010						
IN00-50-E-4003-002	Location of Holes for MCT - 60 - U	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AC	07/10/2008						
IN00-50-E-4004-000	60 - UT/PH/02 - UA - Location of h	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AD	20/05/2010						
IN00-50-E-4004-002	Location of Holes for MCT - 60 - U	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AC	29/09/2009						
IN00-50-E-4005-000	20/730-UT/PH/03 - Location of hol	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		AD	20/05/2010					01	20/05/2010

**Change Progress**

Document Number: CH-01-E-0423-001  
Cable Rack Tray Laysusst - 601 -hemical Storage

Current step: 2 Second Issue

Current progress: 75

New step: 3 Approved internally

New progress: 85

Date of change: 04/11/2012

Change Progress Cancel

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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	14/02/2009
IN00-01-E-0423-001	Cable Rack & Tray Layout - 601 -hemical Sto	01	14/02/2009					
IN00-20-E-0426-001	620 -ondensate Airoolers (N) -able Rack & Tr	01	14/02/2009					
IN00-20-E-0427-001	Cable Rack & Tray layout - 620 -ondensate A	01	14/02/2009					
IN00-20-E-0428-001	620 - Steam Boilers -able Rack & Tray layout	01	14/02/2009					
IN00-20-E-0429-001	620 - Steam Boilers -able Rack & Tray layout	01	02/02/2009					
IN00-20-E-0432-001	620 -ondensate Storage & Bfw Pumps (SG/P	01	14/02/2009					
IN00-20-E-0441-001	20/730 - Raw/Firewater Tank							
IN00-20-E-0443-001	20-Fuel Gas-Cable Rack&Tray Layout -ross S	01	20/05/2010					
IN00-30-E-0424-001	Cable Rack & Tray Layout - 30 - Diesel Stora	01	14/02/2009					

**Change Status**

Document Number: IN00-00-E-0414-001  
Small Power Layout - 00/530 - Water Treatment

Current status: AD

New status: AC Approved for construction

Status date: 30/05/2010

Change Status Cancel

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

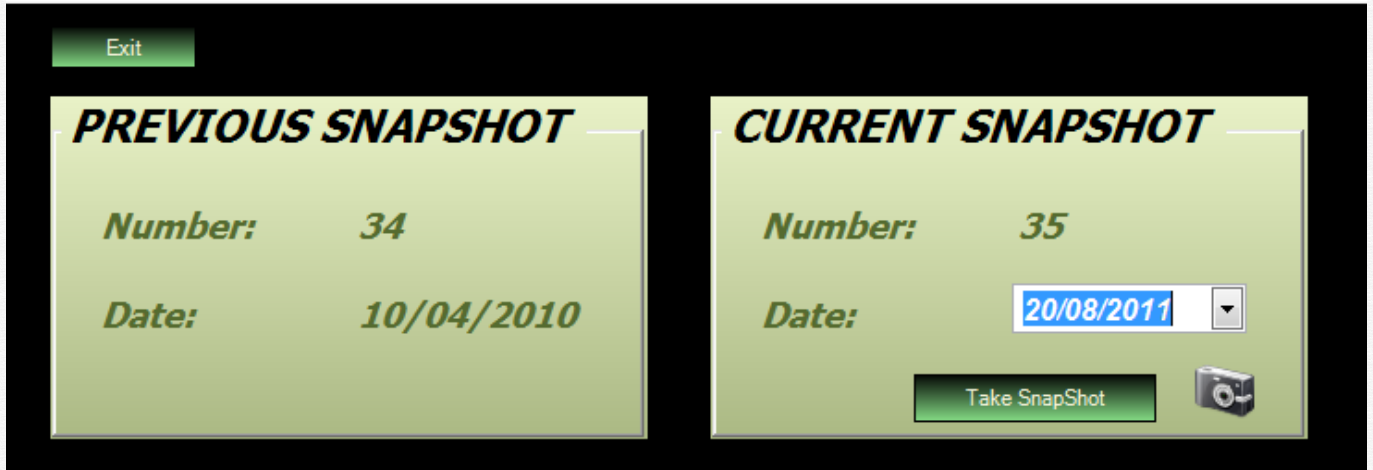
Changing the Status will also change the "Document Progress", if the document type is linked to a progress model (see "Progress Models" in the "Job Configuration" section of this document).

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:



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 Treatment**

#### DOCUMENT PROGRESS BY DISCIPLINE

Selected Companies:

Selected Disciplines:

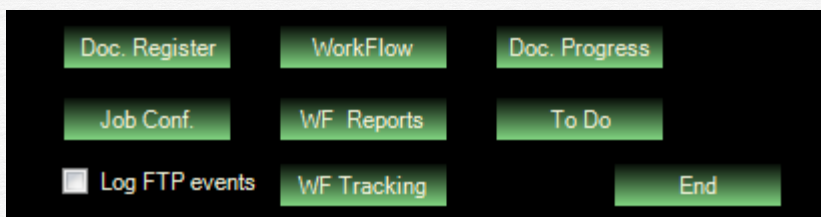
Discipline	Description	Current: 23/10/2011			19/01/2007			18/11/2006			20/10/2006			20/09/2006			20/08/2011	
		Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Budget	Diff.	Progress (%)	Bu
PIP	Piping	98.6	18 839	+ 5.7	92.9	18 752	+ 17.1	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																	
<b>TOTAL JOB:</b>		<b>98.44</b>	<b>78 742</b>	<b>+ 10.3</b>	<b>88.1</b>	<b>75 604</b>	<b>+ 7.</b>	<b>81.1</b>	<b>71 613</b>	<b>+ 1.7</b>	<b>79.4</b>	<b>70 840</b>	<b>+ 1.7</b>	<b>77.8</b>	<b>67 961</b>	<b>+ 1.8</b>	<b>76.</b>	<b>64</b>

### 9.3.2 Progress by work package

Work Package	Description	Current: 18/08/2011			19/01/2007			18/11/2006			20/10/2006			20/09/2006	
		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 5
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 5
<b>TOTAL JOB:</b>		<b>98.44</b>	<b>78 742</b>	<b>+ 10.3</b>	<b>88.1</b>	<b>151 208</b>	<b>+ 7.</b>	<b>81.1</b>	<b>143 227</b>	<b>+ 1.7</b>	<b>79.4</b>	<b>141 679</b>	<b>+ 1.7</b>	<b>77.8</b>	<b>135</b>

## 10 Log FTP Events

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

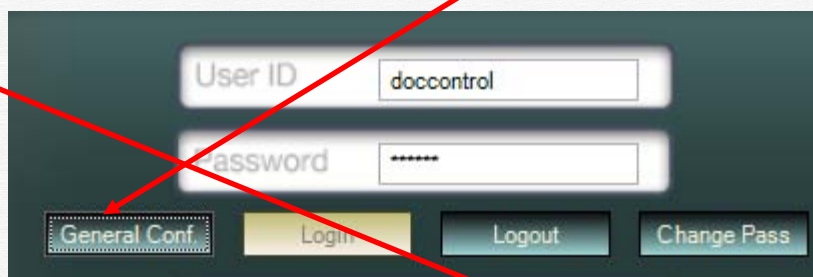


The log file will be created in the TEMP directory (usually C:\Temp), and the file name is "Vendum\_FTPEvents.txt".

## 11 Log of Actions

Vendum 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".



Journal (last 100 days)									
Job Number	Action Date	User Id	User Name	Area	Action	Action Long Description	Document Nu		
123456	17/06/2012 09:06:31	100000	DOCCONTROL	Workflow	SendTransmittal	Transmittal; 21 TO Destination: CLIENT was			
	17/06/2012 09:04:46	100000	DOCCONTROL	Security	UserLogin	Login for user: 100000 DOCCONTROL			

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 Vendum programs, every

10 minutes. So, it will take a maximum of 10 minutes for this information to propagate to all running Vendor programs.  
 Here are the list of actions that are recorded, grouped by area:

Area	Recorded Action
<b>Security</b>	Log In / Log Out of users
<b>JobConfiguration</b>	All changes in Job Configuration are recorded
<b>Document List</b>	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
<b>WorkFlow</b>	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.

Journal (last 100 days)												
Job Number	Action Date	User Id	User Name	Area	Action	Action Long Description	Document Number	Revision	File Name	Original File Name		
123456	17/06/2012 09:42:37	100000	DOCCONTROL	DocumentList	ChangeOwner	New Owner is: 10124 / Group: GR1	IN00-20-E-0423-00					
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-0429-00					
123456	17/06/2012 09:38:34	100000	DOCCONTROL	JobConfiguration	UserGroups_New	New User Group was added: GR1						
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-0423-00					
123456	17/06/2012 09:38:13	100000	DOCCONTROL	DocumentList	ChangeOwner	Owner was changed to: 10124 in owner group:	IN00-20-E-0429-00					
123456	17/06/2012 09:38:13	100000	DOCCONTROL	DocumentList	ChangeOwner	Owner was changed to: 10124 in owner group:	IN00-20-E-0429-00					
123456	17/06/2012 09:06:31	100000	DOCCONTROL	WorkFlow	SendTransmittal	Transmittal: 21 TO Destination: CLIENT was sent by mail						
123456	17/06/2012 08:54:30	10124	PONDA GOGU	DocumentList	ExtractDocuments	Extraction of several documents						
123456	17/06/2012 08:50:26	10142	GIGI FRATELLO	DocumentList	AttachFileToDocument	New file attached to document	IN00-20-E-0427-00	02	IN00-20-E-0427-001_120617084951_02.doc	C:\acrobat Documentation\acrobat_sdk_developer_faqs		
123456	17/06/2012 08:50:18	10142	GIGI FRATELLO	DocumentList	RemoveFileFromDocument	File was removed from document	IN00-20-E-0427-00	02	IN00-20-E-0427-001_120617084951_02.pdf	C:\acrobat Documentation\acrobat_sdk_developer_faqs		
123456	17/06/2012 08:50:04	10142	GIGI FRATELLO	DocumentList	AttachFileToDocument	New file attached to document	IN00-20-E-0429-00	01	IN00-20-E-0429-001_120617085004_011.pdf	C:\acrobat Documentation\acrobat_sdk_developer_faqs		
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_02.pdf	C:\acrobat Documentation\acrobat_sdk_developer_faqs		
123456	17/06/2012 08:46:27	10124	PONDA GOGU	DocumentList	ChangeCompany	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.