



Intergraph Smart® Completions User Guide

System Administrator

Version 2
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Preface

The user guide is intended for a “System Administrator” who would be responsible for provisioning the Best Practice solution on configuring, operation and maintenance of the CCMS database. The ‘System Administrator’ ensures implementation of CCMS solution and adheres to organizational values and efficiently manages the documentation and handover processes, throughout the project lifecycle.

A System Administrator should have the following know-how:

- Experience in setup and administration of Completions
- Develop and maintain CCMS configuration procedures
- Contribute to and maintain system standards
- Perform regular system monitoring, verifying the integrity and availability of information and key processes, reviewing system and application logs.
- Understand Engineering principals about the various disciplines (e.g. MECH, ELEC, INST, PIPING, CABLE, STRUCTURAL, CIVIL, DCS/PLC)
- Understand Control loops, tagging, device assignment and test profiles
- Able to “systemize” drawings to define “scope boundaries”
- Able to determine “custody transfer points/dates” to develop systemization skyline
- Have moderate knowledge of MS Word modification (e.g. formatting)
- Understand basic knowledge of importing XLS files to databases
- Have advanced knowledge of XLS reformatting (flatten out XLS files to import)

The user guide will cover the following topics and will enable the System Administrator to configure, administer and manage the various instances and projects within the database. The guide will cover:

- Creating Instances and Projects
- Global and Project configurations
- User Management
- Roles, Profiles and Rights Management

SECTION 1

Abbreviations, Terms and Definitions

1.1 - Abbreviations

Abbreviation	Description
CCMS	Completions and Commissioning Management System
SC	Smart Completions
COW	Carry over Work
DCS	Distributive Control System (e.g. soft points I/O)
FIC	Field Installation Checklist
ITR	Inspection and Test Record
JC	Job Card
LBS	Location Breakdown Structure
NOE	Notice of Energization
OBS	Organization Breakdown Structure
OEM	Original Equipment Manufacturer
PBS	Process Breakdown Structure (PBS) - Systemization
PCT	Project Control Task (e.g. P6 Activity)
PDF	Portable Document Format - Acrobat
PL	Punchlist
PO	Purchase Order
PR	Preservation Tasks
SF	Smart Forms (e.g. offline HTML complex test sheets)
T	Planned Tasks (e.g. FICs, ITRs, Loop Tests, Pack Tests)
TF	Test Form
TM	Task Model
WBS	Work Breakdown Structure
WP	Work Package

1.2 – Terms and Definitions

Term	Definition
Carry-Over-Work (COW)	Carry-Over-Work (COW) item is work that has not been completed at the fabricator/manufacturer and is the responsibility of that party to complete. Carry-Over-Work items will be recorded and tracked in the CCMS Database, as part of the Punchlist Manager module.
Commissioning	The phase of the project that transfers a facility from a construction site to an operational facility.

Term	Definition
Completions and Commissioning Management System (CCMS)	A database system that tracks Mechanical Completion, Pre-Commissioning and Commissioning activities and data, including Punchlisting.
Field Installation Checklist (FIC)	Also known as Mechanical Completion Check Records (MCCRs). FICs are detailed documents that allow essential data to be recorded in a standardized format, providing documentary evidence of mechanical completion activities.
Industrial Business Solutions	Software developer for Smart Completions-Completions and Commissioning Management System.
Inspection Test Record (ITR)	ITR is a detailed document that allows essential data to be recorded in a standardized format, providing documentary evidence of pre-commissioning activities.
Job Card	A collection of tasks and / or forms that are combined into a Job Card where they have common attributes, such as system / subsystem boundaries, project phase / stage and associated workgroup requirements.
Job Cards Manager	Designed to manage the assignment and administration of a collection of Job Cards.
Sub-System	The facility systems, as defined below, are further divided into sub-systems, where appropriate, in order to facilitate the Mechanical Completion, Function Testing, Commissioning and Handover of the entire Facility.
System	Process System – a test area or section defined by specific process application, pressure and/or temperature, or by specific hazards.
	Non-Process System – an infrastructure, such as buildings, structures, concreting and electrical and communications equipment.
Task / Planned Task	Individual FICs or ITRs that have been created for each asset that is required to be completed during different phases i.e. Fabrication, Construction, Pre-Commissioning and Commissioning.
Mechanical Completion (MC)	The state of the system when all civil, structural, concrete, piping, electrical, instrumentation and mechanical items have been installed as per the design documents and codes
Project	CAPEX or OPEX Project that is supported with the CCMS
Punchlist 'A'	Punchlist 'A' item prevents the sub-system or system from being Pre-commissioned, Commissioned or energized due to constraints on operability or safety of either PERSONNEL, EQUIPMENT or ENVIRONMENT.
Punchlist 'B'	Punchlist 'B' item can, by agreement, be rolled over to the next phase. 'B' items shall not prevent the safe operation of the equipment &/or system but represents incomplete work.
Punchlist 'C'	Punchlist 'C' item can be repaired and/or completed after handover but must be done before issuance of the Close-out Certificate (C6).
Pre-commissioning	The phase of the project that involves a set of checks to prove the system functionality and prepares the system for commissioning.
Work Package	A work package comprised of one or more tasks. Each task can identify specific person(s), tools, materials, safety requirements and supportive documentation. A work package is summarized in a simple go or no-go Job Card.
Work Package Manager	A Work Package manager is designed to manage the development, scheduling and execution of Work or Jobs.

SECTION 2

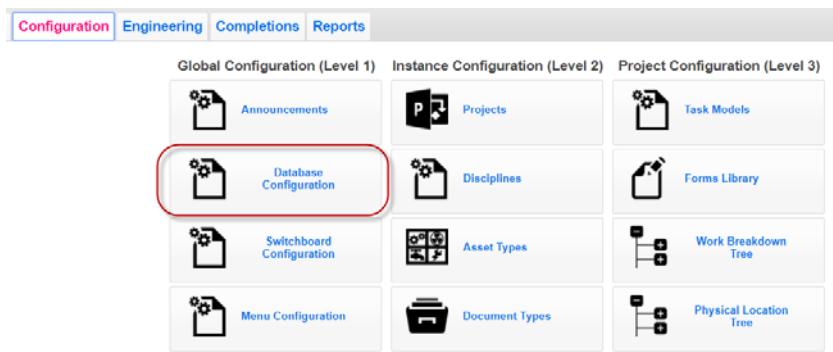
Database and Interface Configurations

2.1 – Database Configurations

System administrators are the only ones that can perform global database configurations. These changes are made via the CE interface in the vConfigurations module. The admin DOES NOT access the SQL database directly.

The intent of database configurations is to apply business rules for:

- Repository name
- Business Address info
- Default UI color theme
- Default Login of choice
- Default Language (locale - e.g. en-US)
- Toolbar Configuration
- Support email addresses
- SMTP Email Relaying
- Default Workflow notifications
- Default Expiration strategies (in days) for LOTO, JHA, Docs etc)

Step 1: Select Database Configuration From the Switchboard, navigate to the Configuration tab. Navigation: From the Menu: Select Configuration > Global Configuration > Database Configuration	 <p>The screenshot shows the CE Configuration Switchboard. At the top, there are tabs: Configuration (which is selected and highlighted in blue), Engineering, Completions, and Reports. Below the tabs is a grid of configuration items organized into three levels: Global Configuration (Level 1): Announcements, Database Configuration (with a red box around it), Switchboard Configuration, and Menu Configuration. Instance Configuration (Level 2): Projects, Disciplines, Asset Types, and Document Types. Project Configuration (Level 3): Task Models, Forms Library, Work Breakdown Tree, and Physical Location Tree.</p> <p>Figure: CE Configuration Switchboard</p>
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2.1.1 - Setting the Default Logos (if projects have not distinct logos)

Each project can have its own set of logos (e.g. client and project logo), however where a project does not have a logo CE will use the default database configured logos. There are 4 distinct logos, and each must be in .PNG format.

To upload the logos, select the 4 buttons highlighted below.

Note: Size of image must be 140 x 140 pixels.



Figure: CE Database Configuration – Uploading Logos

2.1.2 - Setting Default Support Email Address(s)

ProjectEMailAddress:

IBS forwarding email address for projects using SMTP (only needed when client mail server is not available to forward their emails)

- 1) Expire Reminders FROM.
- 2) Submittal Reminders FROM.
- 3) User Activity FROM (if missing support@ibs-partners.com)
- 4) TOP Package email FROM.

Configurations (8) Reports	
Configuration Field	Configuration Value
em	
CompletionsOnlyQEM	yes
CSSThemeChoice	flick
DocumentsUseMQC	no
EMailOnServer	project smtp
EnergyIsolationEMailAlways	18
EnergyIsolationEMailOnRole	4
ProjectEMailAddress	noreply@ibs-partners.com
SupportEMailAddress	support@ibs-partners.com

Figure: CE Configuration Switchboard

EMailOnServer:

- | | |
|--------------|---|
| smtp | Email generated on server using SMTP |
| local | Email generated on client email application |
| project smtp | Email generated on server using SMTP and ProjectEMailAddress (ex: noreply@ibs-partners.com) |
| notify smtp | No email generated in workflow. Use Notify button if available. |

	No email generated in workflow. notify local Use Notify button if available.
SupportEMailAddress	Support group email address. 1) User Reminders FROM. 2) User Password Reset FROM (if missing support@ibs-partners.com) 3) Cert server side email FROM.

2.1.3 - Setting Default Life-span (in days) for Passwords, Isolations, PTW

CE will come with a set of default expiration strategies for the different types of critical records, such as Safety Isolations, PTW, and password settings.

Example, if the client organization requires a password to expire every 3 months, then the Password Life Span would be set to 90 days.

Configuration Field	Configuration Value
LIF	
EnergyIsolationLifespanDays	1095
HIRALifespanDays	365
JHALifespanDays	730
MRALifespanDays	1095
PasswordLifespanDays	365
PermitToWorkLifespanDays	730

Figure: CE Configuration Switchboard

2.1.4 - Setting Toolbar Configuration

The menu toolbar allow configuration option requires 1 – 15 number entered.

By default CE will have a 15 which will display:

- Org chart button
- Switchboard button
- Dashboard button
- Notifications (my tasks)

Configuration Field	Configuration Value
TOOL	
MenuToolbarAllow	15

Figure: Tool Bar Config

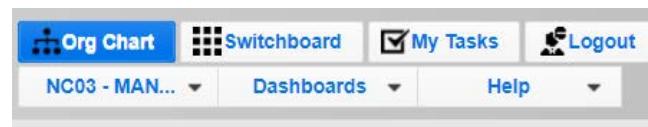


Figure: Example Toolbar Configuration

The dedicated CE system representative will send a CE Configuration XLS file. In this file, it will have the different configurations for the Toolbar.

The image to the right is what is used to configure what buttons are shown in the tool bar section (top right).

Example, if the client only wants to see the Switchboard and Dashboard only then the value would set to:

6

	A	B	C	D	E
1	MenuToolbarAllow				
2		Org Chart	Switchboard	Dashboard	My Tasks
3	1	X			
4	2		X		
5	3	X	X		
6	4			X	
7	5	X		X	
8	6		X	X	
9	7	X	X	X	
10	8				X
11	9	X			X
12	10		X		X
13	11	X	X		X
14	12			X	X
15	13	X		X	X
16	14		X	X	X
17	15	X	X	X	X

Figure: Tool Bar Configuration.

2.2 – Interface Configurations

An administrator is able to modify the OOB configuration of the Menu's and Switchboard. The sole intent of providing the admins this ability is so that each client can rearrange the module listing or buttons in a way that is more intuitive for the organizations users.

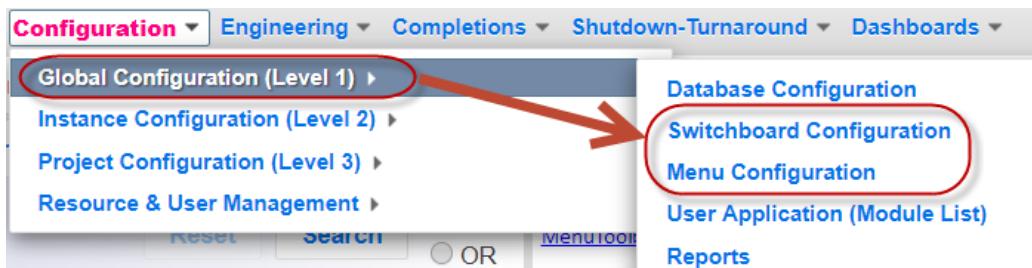


Figure: Accessing the Configuration Modules

2.2.1 - Switchboard Configuration

Switchboard configuration will allow an admin to move buttons around under a particular grouping and also relabel the text on any of the buttons. The switchboard modules are really the product suite within CE. The Switchboard Groups are how we would group specific modules in a column. Then the CE application is the actual application (when button is clicked) will load for the user.



Figure: Switchboard Configuration Items (module, group and application)

From Switchboard,
Select Configuration tab,
then Switchboard
Configuration

**Navigation: From the
Menu:**

Select Configuration >
Global Configuration >
Switchboard
Configuration

#	Group	Application	Manager Name	Switchboard Name (...
1	Preservation	vAssets_Preservation	Preservation, by Assets	Preservation, by Assets
2	Preservation	vInspectionNonCompliances	Preservation, by Tasks	Preservation, by Tasks
3	Planning	vAssets_TestForms	Tasks, by Assets	Tasks, by Assets
4	Planning	vLoops	Tasks, by Loops	Tasks, by Loops
5	Planning	vAssetPacksAssets	Tasks, by Vendor Packs	Tasks, by Vendor Packs
6	Planning	vAssetPacksLines	Tasks, by Pipe Packs	Tasks, by Pipe Packs
7	Planning	vAssetPacksCable	Tasks, by Cable Packs	Tasks, by Cable Packs
8	Planning	vAssetsCableDrums	Cable Drums	Cable Drums

Figure: Switchboard Configuration - Completions

Select the switchboard module (e.g. completions). A user can modify the OOB configuration by adjusting application associations by:

- Add new application
- Delete an application
- Rename button label
- Place application in group

Note: The application dropdown will show modules listed in vUserApplications

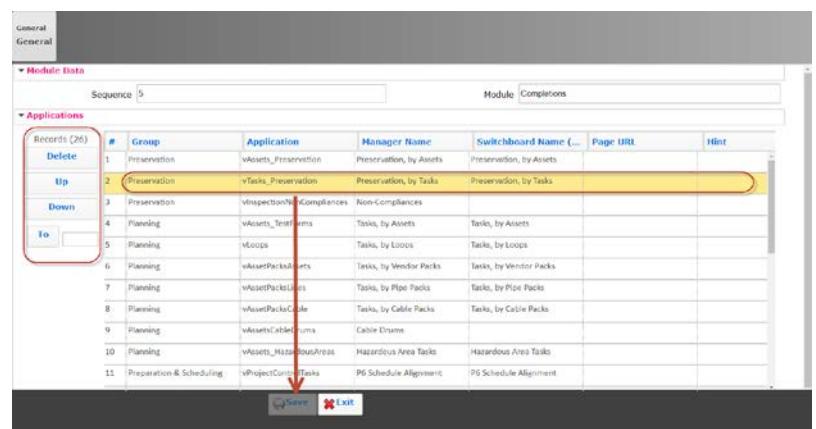


Figure: Edit Switchboard Tab (Buttons and Groupings)

To create a new module on the completions tab of the switchboard. Go to the bottom of the list, select:

- GROUP you want to put the button in
- APPLICATION, to direct user to.
- PAGE URL is very rarely needed and likely pointing to another software product.
- HINT is a popup if a user hovers their mouse over a button.

#	Group	Application	Manager Name	Switchboard Name (...)	Page URL	Hint
1	Preservation	vAssets_Preservation	Preservation, by Assets	Preservation, by Assets		
2	IT Accounts	vTasks_Preservation	Preservation, by Tasks	Preservation, by Tasks		
3	Operability Readiness	vInspectionNonCompliances	Non-Compliances			
4	Operations	vAssets_TestForms	Tasks, by Assets	Tasks, by Assets		
5	Performance Reports	vLoops	Tasks, by Loops	Tasks, by Loops		
6	Planning	vAssetPacksAssets	Tasks, by Vendor Packs	Tasks, by Vendor Packs		
7	Preparation & Scheduling	vAssetPackLines	Tasks, by Pipe Packs	Tasks, by Pipe Packs		
8	Preservation	vAssetPackCable	Tasks, by Cable Packs	Tasks, by Cable Packs		

Figure: Switchboard Group Configuration

2.2.2 - Menu Configuration

Switchboard configuration will allow an admin to move buttons around under a particular grouping and also relabel the text on any of the buttons. The switchboard modules are really the product suite within CE. The Switchboard Groups are how we would group specific modules in a column. Then the CE application is the actual application (when button is clicked) will load for the user.

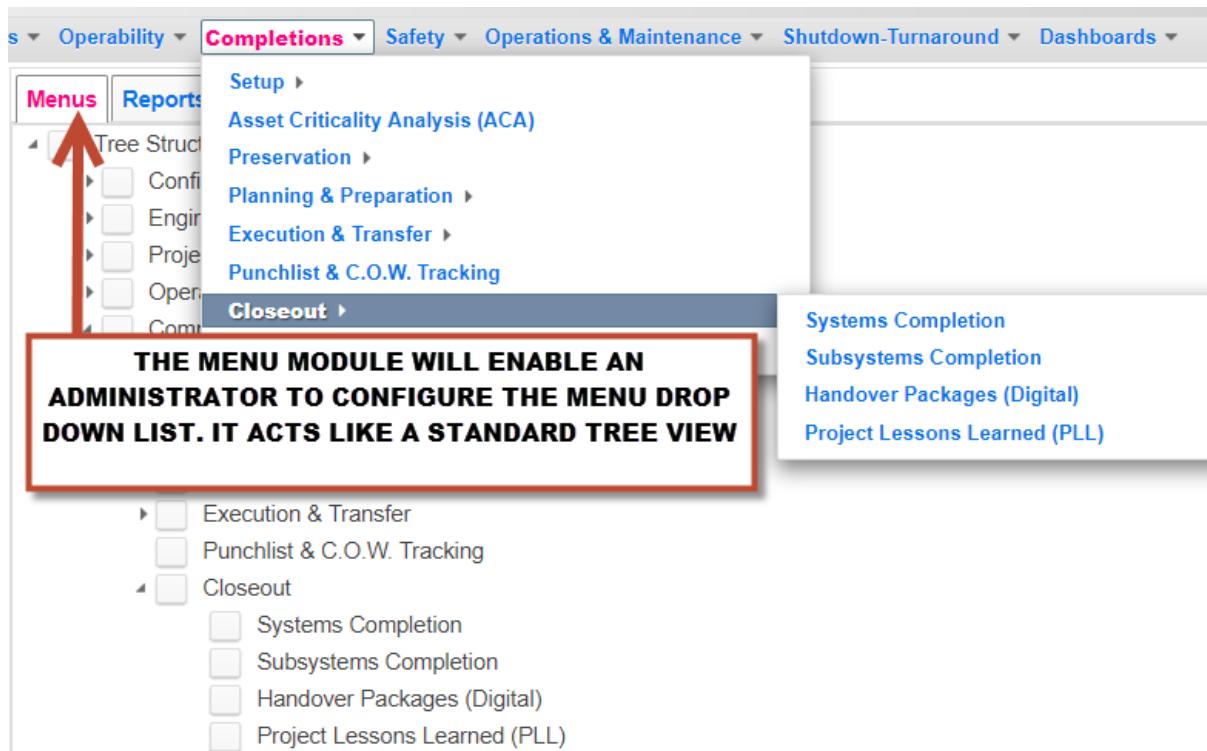


Figure: Menu Module

Select parent node you want to put in a child node (or link to application). It will show a “checkbox”. Press NEW. Enter in the items circled in RED.

This nesting order is (top to bottom):

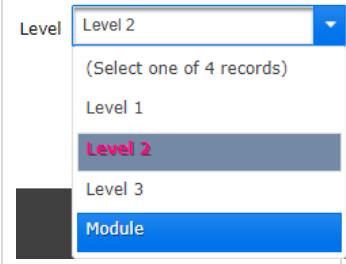
- Module
- Level 1
- Level 2
- Level 3

ENTER IN NAME OF THE TEXT YOU WANT IN THE DROPODOWN, SELECT THE APPLICATION IN DROPODOWN, IT WILL AUTO-POPULATE THE MENU PAGE (DO NOT CHANGE).

SELECT LEVEL IT WILL RESIDE IN MENU TREEVIEW, SEQUENCE # (TOP TO BOTTOM), THEN SELECT PARENT (WHERE IT WILL SIT IN TREE STRUCTURE)

Name	ENTER ANYTHING HERE!!	Application	vRFIs	Menu Page	vRFIs/index.htm
Level	Level 2	Sequence	b	Parent	Completions - Closeout

Figure: Menu Configuration



2.2.3 - User Applications – Setting Email Rules & Notification Log

This section will discuss how to configure what emails are sent out server-side and if they are placed into the notification center, notification log. The notification section of the notification center is intended to list all emails sent out based on context of the user.

For example, if a user is only responsible for approval / rejection of Punch list items, then they would see any email thread based on PLs requiring approval. It also has the ability to filter out approval email requests, based on the users “rights boundaries”, so if an administrator configures the emails to included rights boundaries restrictions, and the user is only associated with system 1, from systems 1-100 they would only see email notifications requiring approval for ONLY system 1.

The screenshot shows a list of notifications in a table format. The columns are Subject, Body, and Attachments. The Subject column lists various email addresses and their messages. The Body column contains detailed information about each message, such as 'Found Date: 10-May-2017' and 'Reported by: Glenn Boyko'. The Attachments column shows a file icon for 'PL-00123(jpt)'.

Subject	Body	Attachments
glenn.boyko@continuum-edge.com: Greg Adcock@ib-s-partners.com Punchlist: PL-00123 with a Priority of (4) Requires Acceptance Date: 5/10/2017 9:11:07 PM	Found Date: 10-May-2017 Reported by: Glenn Boyko Punchlist ID: PL-00123 open Description: 6.1. SCHEME CHECKING / LOOP TESTING COMPLETED? Workflow State: Submitted Originated On: 10-May-2017 02:08:22 PM By: Boyko, Glenn Submitted On: 10-May-2017 07:10:30 AM By: Boyko, Glenn	
glenn.boyko@continuum-edge.com Punchlist: PL-00137 with a Priority of (4) Requires Acceptance Date: 5/31/2017 10:26:27 PM		
greg.adcock@ib-s-partners.com Punchlist: PL-00140 with a Priority of (4) is Originated Date: 6/8/2017 1:57:22 PM		
greg.adcock@ib-s-partners.com Punchlist: PL-00140 with a Priority of (4) Requires Completion Date: 6/8/2017 2:02:49 PM		
yonfei.bell@originenergy.com.au CE Login: Your Account has been created. Date: 6/22/2017 12:11:03 AM		
greg.adcock@ib-s-partners.com; glenn.boyko@continuum-edge.com Punchlist: PL-00072 with a Priority of (4) is Closed Date: 6/30/2017 6:31:36 PM		
glenn.boyko@continuum-edge.com Punchlist: PL-00144 with a Priority of (4) Requires Completion Date: 7/3/2017 6:44:01 PM		
kane.bradke@continuum-edge.com CE Login: Your Account has been created. Date: 7/7/2017 2:11:22 PM		

Figure: Notification Center – Notification Section

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<p>From Switchboard: Select Configuration tab, select User Applications</p> <p>From Menu: Select Configuration > Global Configuration > User Applications</p> <p>Select “Punchlist” module from list, and press EDIT</p> <p>Select workflow Tab</p> <p>Select state to configure</p>	<p>An admin would query for the module/view they wish to modify the email notifications. As an example if an admin wants to modify the SMTP email methodology for Punchlist acceptance requests, they would:</p>
--	--

Figure: User Application Edit Form – Workflow Settings

Select promote or demotion state.

Select Notification Type (see table below for purpose of each option)

Note: Only modules with new workflow capabilities will be able to be configured as described above.

Figure: User Application Edit Form – Workflow State

Notification type is for emails you send.

Item	Functional Capability
Email(no selections)	Email dialog box lists people with rights, workgroups, others, but they are not pre-selected. So the user will need to tick the email checkboxes. An email is sent and logged.
Email(people selected)	The emails are pre-selected so the user can untick some of them or add new ones using the address book. An email is sent and logged.
Auto Send Email	The email dialog box is not shown, but the email is logged and can be seen in the notifications center. An email is sent and logged.
Notification Center(no sels)	Email dialog box lists people with rights, workgroups, others, but they are not pre-selected. So the user will need to tick the email checkboxes. No email is sent, but it is logged in the notification center.
Notification Center(sels)	The emails are pre-selected so the user can untick some of them or add

	new ones using the address book. No email is sent, but it is logged in the notification center.
Notification Center(Auto)	No email is sent, but it is logged in the notification center.
No Notifications	No email is sent nor logged.

SECTION 3

Project Setup and Configuration

3.1 – Core Configuration

System Administrators can setup and manage the Core Configuration of CCMS in the Configuration tab within the Switchboard.

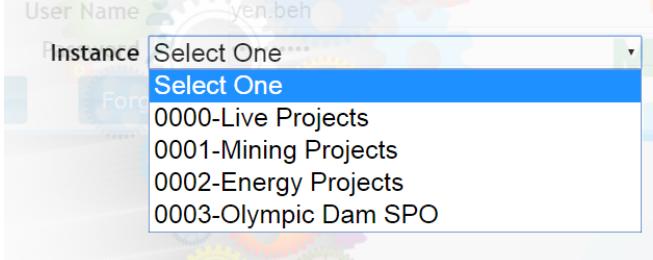
Configurations such as

- Creating and Managing Instances and Projects
- Disciplines
- Asset Types
- Documents
- Document Types
- Forms / Checksheets / Inspection Test Records
- Task Models
- Work Breakdown Tree (Project Phases and Stages – Custody Transfers)
- Physical Location Tree
- Systemization Tree (Commissioning systemization)
- Companies
- Resources and Users
- Role Profiles and Rights
- Much more

Tool Tip:

If you do not see a configuration (module/lookup table) in the tab, then select the GEAR icon in any module (bottom right) and type in the SC database table you are looking for.

CCMS is so configurable that it allows System Administrators to configure it to suit individual organization process. Please be aware that because each project is unique and different, this user guide serves as an overall guidance only. If you have any queries and detail specifications, please contact the support team.

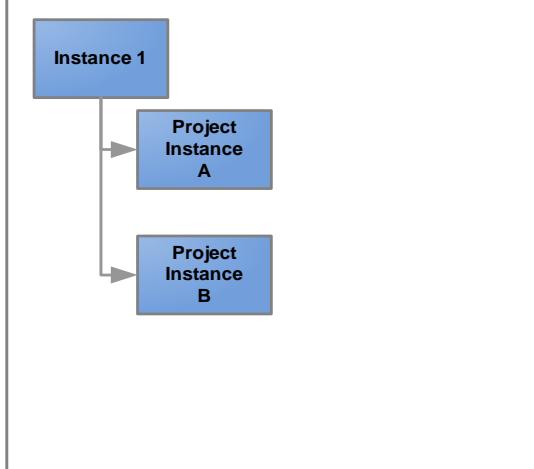
<p>Step 1: Goto CCMS URL given</p> <p>Enter login credentials and password. Press LOGIN.</p>	
<p>Step 2: Select the Instance</p> <p>Note: Users will only see instances if they are associated with any of the instances project(s). If a user is only associated with 1 project, then they will bypass and be redirected immediately to project.</p>	
<p>Step 3: Configuration Tab</p> <p>From the Switchboard, navigate to Configuration tab</p>	

3.2 – Instances and Project

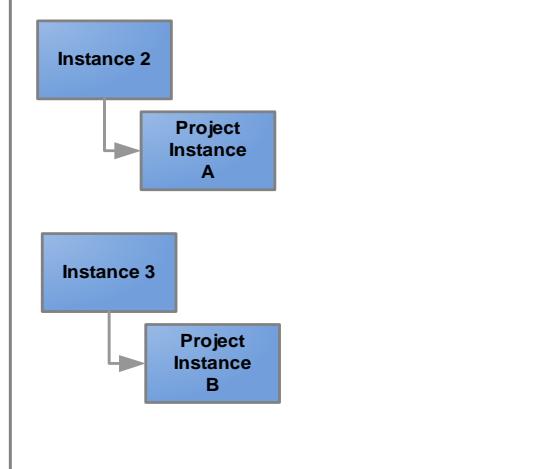
Depending on the project and contract requirements, CCMS allows the System Administrator the ability to create a single or multiple projects within an Instance; or creating multiple Instances for different projects. Diagram below shows the differences between the setup of company instances and projects

COMPANY INSTANCES AND PROJECTS

Instance with multiple projects



Instance per Project



Notes on Instance:

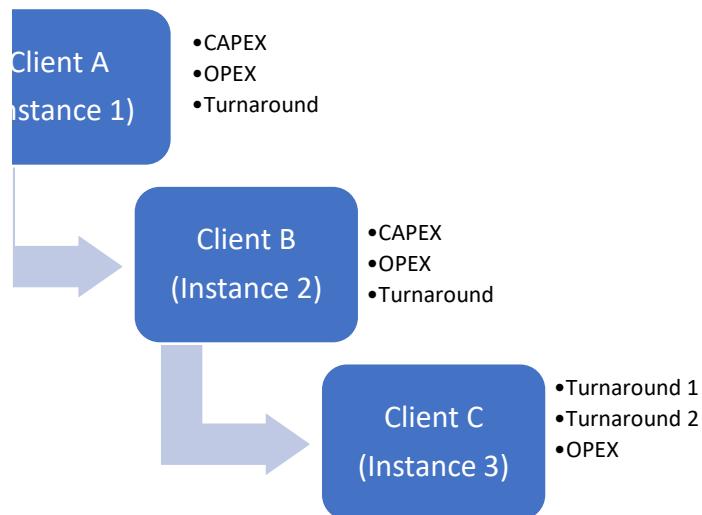
1. All projects in an instance will utilize the same look up tables, such as disciplines, asset types, workgroups, priorities etc. If Project B adds a new discipline, then Projects A, C & D will also have the new discipline.
2. The company instance will only allow one instance of an asset tag. This will allow a company to create an asset tag, and reference that exact tag (e.g. 100-PP-100) in multiple projects. If tag 100-PP-100 is assigned to Project B, then it cannot be created in any other project, only assigned to Project A, C, & D.
3. Resources and companies are not "instance" aware. We apply this rule so that the database does not have several "General Electrics" (e.g. GE, General Electric, General Electric Inc)
4. Once a project is created and assigned to an instance, it cannot be moved to another instance. It is important to set it up correctly initially. IBS is working to develop a stored procedure to handle reassignment, but later this year.

Notes on Project:

1. A project will be hidden from selection and login once it is flagged as "inactive". It can always be reactivated temporarily to view information.
2. Even if a project is inactive it can be queried for best practices and pulled into another active project using the project creation wizard.

3.2.1 – Setting Up Instances and Projects from an OO Perspective

A project uses the instance lookup tables, and their distinct configurations, specifically systemization, WBS, task models/task assignments, user assignments.



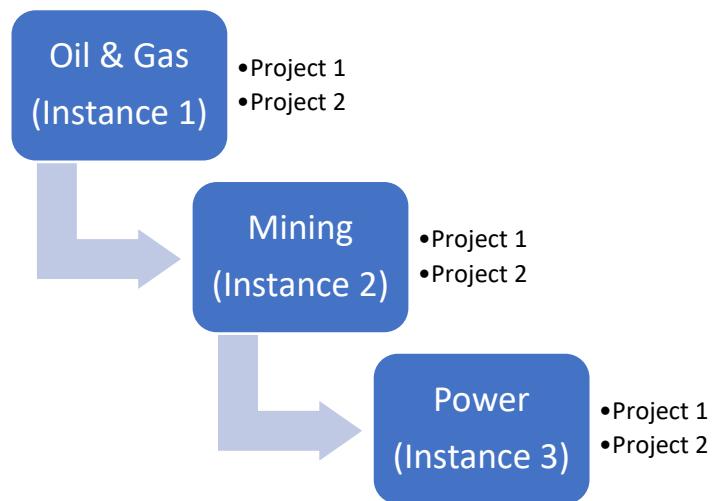
The best practice using this functionality is that you would setup say 1 instance for Coal. In the coal instance you would develop a template project for each site in their portfolio. So, if there is Site A, B, and C. You would have 3 template projects with their full systemization.

By doing this any future project, an admin would only need to create a new project, select the template project they want to select from existing systemization, and associated tags. By default CE would auto assign every tag in the system(s)/subsystem(s) selected to the new project. An admin would then go in and batch edit tags in the asset manager, and manually unassign those tags that should be excluded from the project. What is left, are only those systems/subsystems and tags associated with the scope. Then through the project creation wizard, you would pull in the best practices from a template project, specifically the task models/test forms, cert types, TOP types, TOC configuration etc. This would dramatically reduce the work pack development for any future project, as the tags are there, systemization is there, test profiles, certificates and TOPs.

If I were setting up BHP sites, I would create 1 database for BHPAUSTRALIA, then an instance for the different Business units (e.g. coal, IOP and OD). In those instances, I would create 1 CCMS Template project that has all the test forms, task models, certificate types, default WBS, and TOP configurations. This CCMS template project would not have any systemization or tags etc., only best practices. Then I would create 1 project for each site with its full systemization and tag breakdown. When a new project comes along, I would use the wizard to copy all the CCMS related best practices from the CCMS template project, then I would use the wizard again to pick and choose which systems/subsystems are in the scope of the project. If this was done, the actual work pack development would be very small, and the time would be spent on data integrity.

3.2.2 – Setting up Instances and Projects from an EPC Perspective

A project uses the instance lookup tables, and their distinct configurations, specifically systemization, WBS, task models/task assignments, user assignments.



The best practice using this functionality is that you would setup say 1 instance for Coal. In the coal instance you

3.2.3 - Project Creation Wizard

Step 1: Select Projects

From the Switchboard, navigate to the Configuration tab.

Navigation: Select Configuration tab > Projects



Figure: SC Configuration Switchboard

Step 2: Select New

Creating a new Project within the Projects Module.

Select NEW to create a new project.

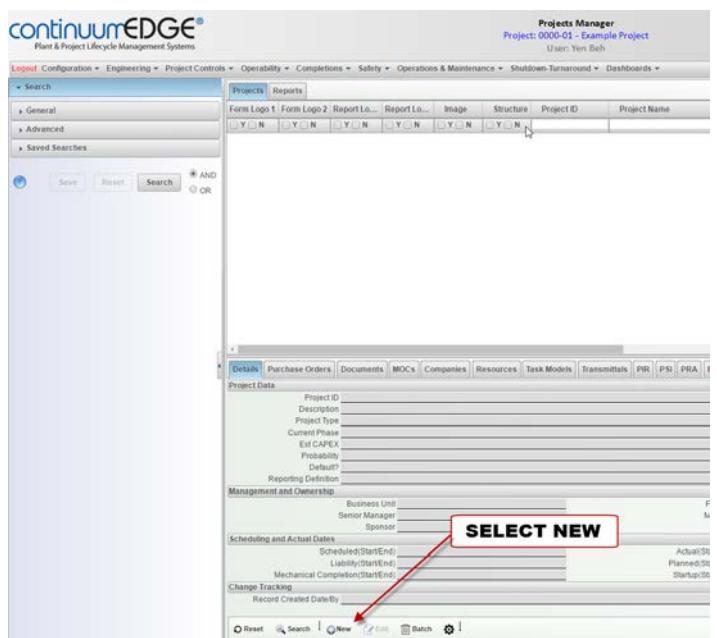


Figure: Projects Module

3.2.4 - Overview of Different Creation Methods

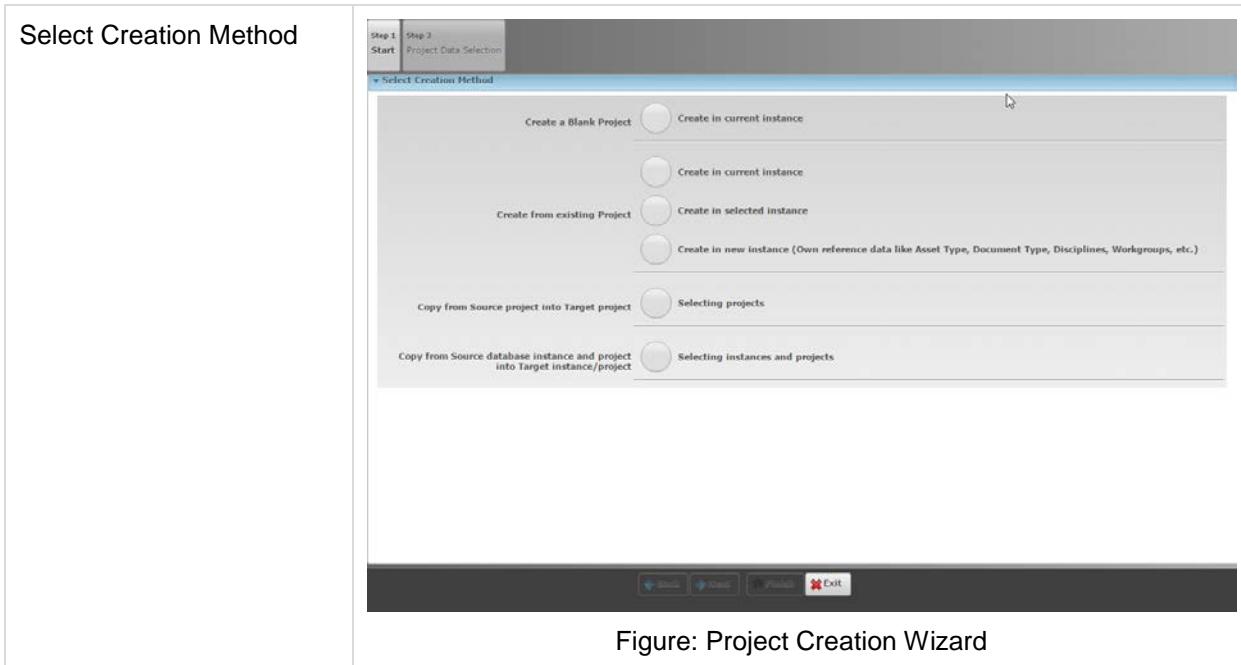


Figure: Project Creation Wizard

Creation Method – Instances and Projects		
Option 1: Create a Blank Project	Create in current instance	Creating a Project in the current Instance from afresh. Populate all applicable fields in the 'General' tab.
Option 2: Create from existing Project	Create in current instance	Allows user to create a Project in the CURRENT Instance and ability to replicate/transfer data from an existing Project. User selects the Project Data to be transferred: <ul style="list-style-type: none"> • General Data • Companies • Systemization • Control System Breakdown • Task Models • Resources • Locations
	Create in selected instance	Allows user to create a Project in ANOTHER Instance by replicating an existing Project.
	Create in new instance. (Own reference data like Asset Type, Document Type, Disciplines, Workgroups, etc.)	This is the most commonly used option. It allows the user to create a new Instance for a new Project. User can define the Instance related fields and Project Data to be carried over OR creating new fields and data for the Instance.
Option 3: Copy from Source project into Target project	Selecting projects	This option is used AFTER the new Project has been created and the user wants to transfer Project Data from an existing/established Project to the new Project.
Option 4: Copy from Source database instance and project into Target instance/project	Selecting instances and projects	This option is used AFTER the new Instance and Project have been created. This allows the user to transfer/replicate/assign data from existing/established Instances and Projects to this newly created Instance and Project.

Note:

- Options 1 and 2 are for **CREATING** new Instances and Projects.
- Options 3 and 4 are replicating/transferring data from an existing Instance or Project. Normally chosen after Option 1 or 2.

3.2.5 - Create a Blank Project in Current Instance

Step 1: Enter Project Data

Populate the fields and step through the Steps tab before Saving.
Select SAVE.

Notes:

- Required fields are identified with **RED** text.
- Business Unit and Program are unique per instance.
- If project has no specific project logos, it will use the default in “database configuration” module.

Step through all the Steps tab

Populate fields

Figure: Project Edit Form

3.2.6 - Copy from existing Project into Current Instance

Step 1: Select Project to Copy

Select the existing Project to replicate from.

Populate the required fields and select the Project Data to transfer to the new Project.

Select SAVE.

Select a Project to Copy

Populate required fields and select the Project Data to Transfer.

Figure: Project Wizard – Copy Project

3.2.7 - Copy from existing Project into Selected Instance

Step 1: Select Instance

Select existing Instance for the new Project to be allocated to.

Step 2: Select Project to Copy

Select Project Data tab and existing Project to replicate.

Populate the required fields and select the Project Data to transfer to the new Project.

Select SAVE.

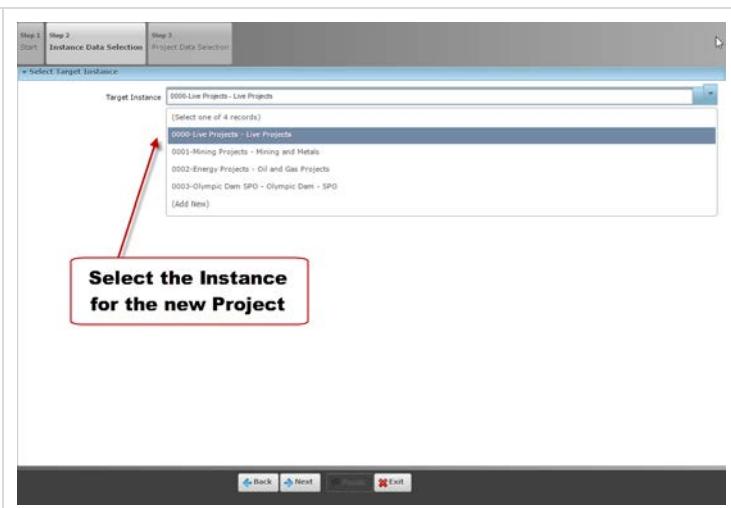


Figure: Project Wizard – Copy Instance

3.2.8 - Copy from existing Project into New Instance

Own reference data like Asset Type, Document Type, Disciplines, Workgroups, etc.

Step 1: Select Source Instance

Select an existing Instance for the new Instance to replicate. Enter in the new Instance name and description.

Step 2: Select “Items to copy”

checklists to copy to new instance

Press NEXT

Step 3: Select Existing Project to replicate.

Populate the required fields and select the Project Data to transfer to the new Project.

Select SAVE.

Notes:

1. Typical items that copied are resources, and task models (which will also reference test forms, test profiles etc).
2. Companies are across every instance. This is done so the database does not duplicate multiple companies (e.g. mfgs, vendors, which is also required for user activity reporting)

The screenshot shows the 'Project Wizard – Copy Instance' interface. It has three tabs at the top: 'Step 1 Start', 'Step 2 Instance Data Selection' (which is selected), and 'Step 3 Project Data Selection'. The main area is titled 'Select Source Company Instance'. It contains fields for 'Source Instance' (dropdown), 'Instance Name' (text input), 'Instance Description' (text input), and a section for 'Items to Copy' with dropdowns for 'General', 'Completions Related', 'Project Control Related', 'Tag Related', and 'Operability Related'. At the bottom right is a red box containing the text 'Select an Instance to copy'.

Figure: Project Wizard – Copy Instance

The screenshot shows the 'Project Wizard – Copy Project' interface. It has three tabs at the top: 'Step 1 Start', 'Step 2 Instance Data Selection', and 'Step 3 Project Data Selection' (which is selected). The main area is titled 'Select Source Project' and shows 'Source Project: 0000 - Template Project'. It contains fields for 'Project ID' and 'Project Name'. Below is a section for 'Project Data to Transfer' with checkboxes for 'General Data' (Yes/No), 'Companies' (Yes/No), 'Systemization' (Yes/No), 'Control System Breakdowns' (Yes/No), 'Task Models' (Yes/No), 'Resources' (Yes/No), and 'Locations' (Yes/No). A red box highlights the 'Select a Project to Copy' button. Another red box at the bottom contains the text 'Populate required fields and select the Project Data to Transfer.'.

Figure: Project Wizard – Copy Project

3.2.9 - Copy from Source project into Target project – Selecting Projects

Step 1: Select Source Project

Select an existing Project to copy information from (e.g. asset types)

Step 2: Select Target Project

Step 3: Select Source Project Data

Select SAVE.

Note: Task Models are the most common option selected for data transfer. System Administrator do not need to recreate Task Models manually for the new Project, hence, the time saving.

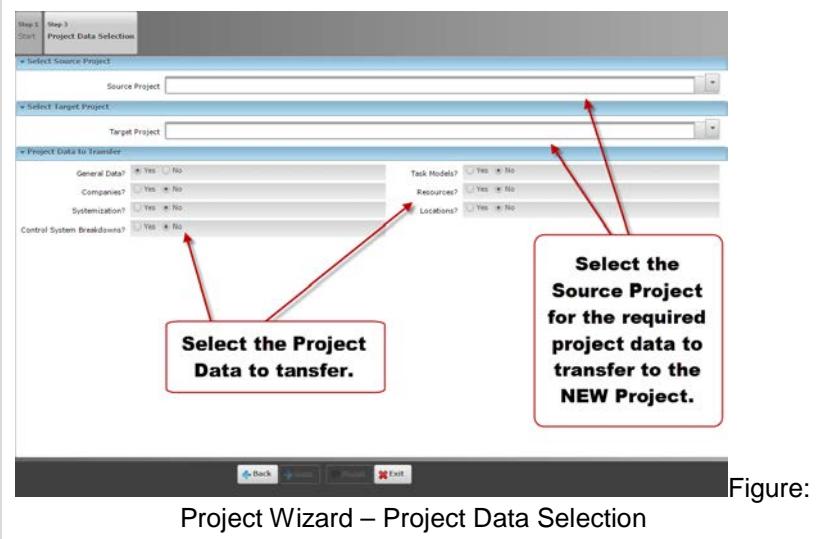


Figure:

Project Wizard – Project Data Selection

3.2.10 - Copy from Source database instance and project into Target instance/project

This option is used where an administration may do “as-needed” configuration updates of a target project. For example, when the admin originally setup a project the asset types were not pulled over, this option will allow them to add new asset types as needed without exporting and importing.

Step 1: Select Source / Target Instances

Select the Target Instance for items to be copied.

Step 2: Select Source / Target Projects

Select an existing Project to replicate and the Target Project for the Project Data to be transferred to

Step 3: Select Source Project Data

Select the Project Data to Transfer options.

Select SAVE.

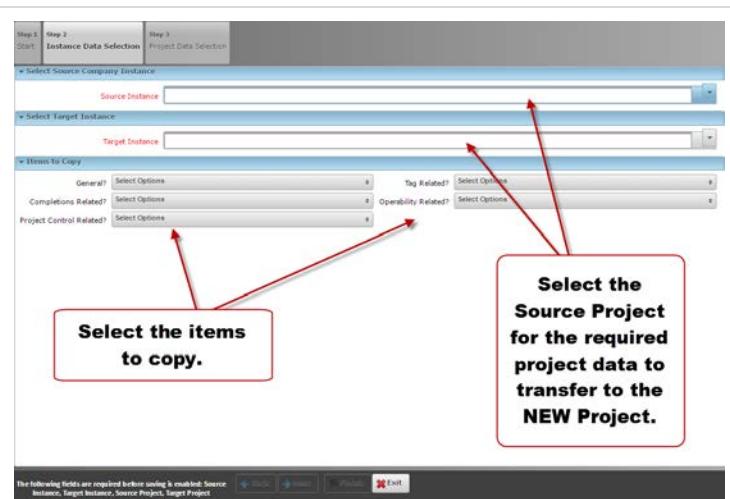
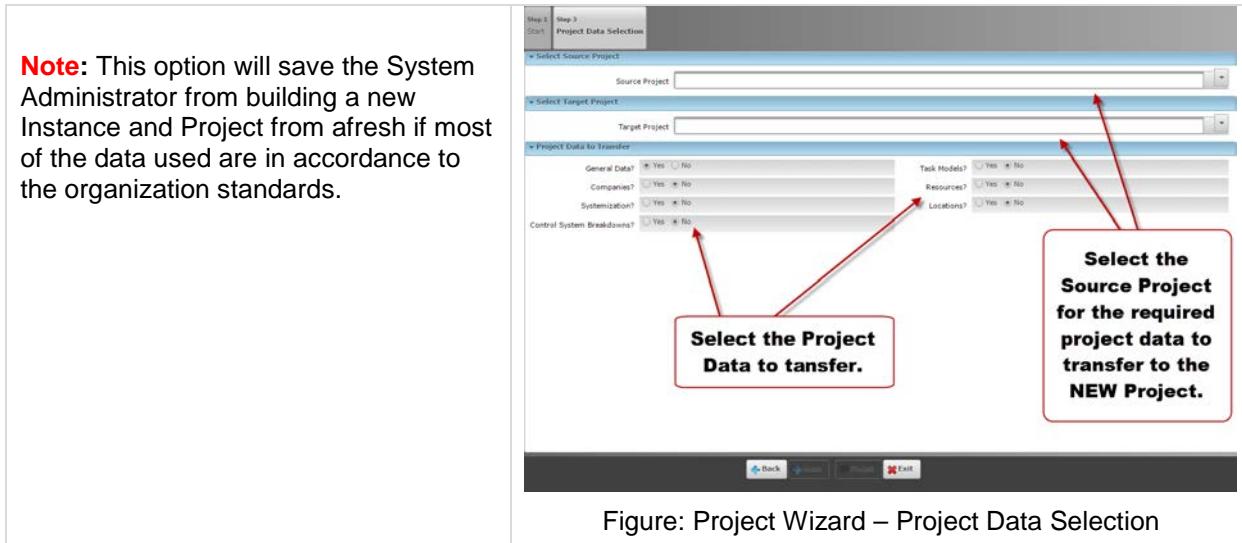


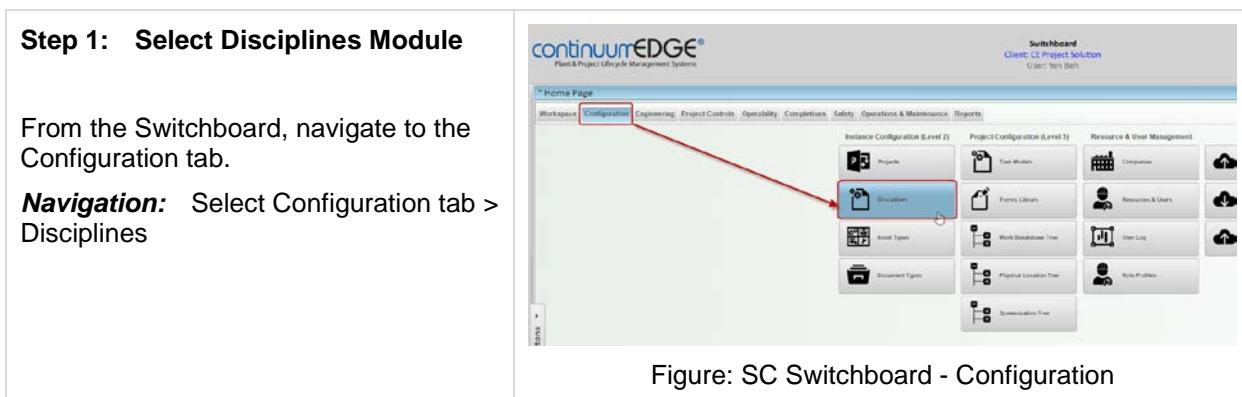
Figure: Project Wizard – Instance Selection



3.3 – Disciplines

By default, CCMS database would already have a predetermined set of disciplines. System Administrator can create, edit or delete disciplines in the Discipline Manager. Each discipline can be assigned against a subset eg. Cable can either be Electrical or Instrument.

Note: We recommend the cable schedule is imported as a CABLE discipline as that discipline exposes specific cable fields.



Step 2: Map Disciplines to SC internal Disciplines (if Req.)

Choose a discipline to Edit by selecting the EDIT button OR

Create a discipline by selecting the CREATE button.

In the Discipline Editor, System Administrator can assign the discipline as a subset to an internal SC mapped discipline. Disciplines can be applied Assets, Documents and Tasks.

Select SAVE to save record.

Name	Description	Electrical?	Mechanical?	Instrument?	Piping?	Cable?	ESD?	CF?	Structural?	Process?	Admin?
MSL	Electrical	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TELECOM	Telecommunications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DCS	DCS & PLC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PLC	Programmable Logic Controller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IMC	Instrument & Controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTM	Mechanical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MULTI	Multidiscipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PSA	Process Automation System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FLOW	Flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STRUCT	Structural	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WIRE	Wire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VENDE	Vendor Package Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure: Disciplines Edit Form

3.4 – Asset Types

The Asset Type configuration tool is designed to identify what additional specific information that is required for any asset tag assigned to that type. The Asset Type created do not just have the basic data/information entered but additional information for that asset type can be captured and triggering specific information about the Asset Tag to be entered.

Step 1: Select Asset Types Module

From the Switchboard, navigate to the Configuration tab.

Navigation: Select Configuration tab
> Asset Types



Figure: SC Switchboard – Asset Types

Step 2: Create/Edit Asset Type(s)

Select the NEW button to create a new asset type.

To edit an asset type, pick the asset type then select the EDIT button.

Note: Admins can “Batch Edit” a selection of asset types and would perform this function if a selection of asset types has the same configurations (e.g. any asset type that is a control valve would get the control valve data model).

The screenshot shows the Asset Types Manager interface. A red arrow points from the text "Select the NEW button to create new asset type OR pick the asset type and select the EDIT button to edit existing asset type." to a red box around the "New" button at the bottom left of the grid. Another red arrow points from the text to the "Edit" icon in the toolbar below the grid.

Step 3: Finalize Configuration

Select the NEW button for a new asset type, populate the mandatory fields that are highlighted in **RED** i.e. Asset Type, Asset Type Description and Discipline.

The Asset Type can be configured to expose Assets to other modules for capturing additional specifications and information.

Asset Manager – Tabs (this triggers additional tab information for that Asset with this Asset Type)

- Ground Report
- Electrical
- Calibration

Asset Manager – Checkboxes

- Confined Space
- Preservation
- Hazardous Areas
- Blind & Flange
- Control Narrative

Asset Manager – Checklists

- Lines Association

The screenshot shows the Asset Manager configuration dialog. It includes tabs for Step 1 (Asset Type), Step 2 (Task Models), Step 3 (Plants Where Used), and Step 4 (Documents). The Step 1 tab is active, showing fields for Asset Type (PP), Asset Type Description (Pump), Discipline (MECH), Asset Type Model (MechPump - Pump Data Model), Standard Code, Functional Code, and Asset Manager - Tabs (Grounding Report, Calibration Report). Below these are sections for Asset Manager - Checkboxes (Confined Space, Preservation, Hazardous Areas, Blind & Flange, Control Narrative) and Asset Manager - Checklists (Lines Association).

Note: An “Instance” will share the same asset types, so if several projects are in an instance, any changes to an asset type will change for all projects

<p>Select SAVE to save record.</p> <p>Tool Tip:</p> <p>In the Asset Tag Editor, System User will be able to access these additional tabs when the Asset Tag is assigned against that Asset Type.</p> <p>Example:</p> <p>If the Asset Tag is in a Hazardous Area and requires Preservation, just check the Boolean within the Asset Tag editor to activate these tabs.</p>	<p>Figure: Asset Type configures Asset Edit Form/Data</p> <p>Figure: Asset Type configures Asset Edit Form/Data</p>
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3.5 – Documents

The Document Types module manages a list of document types. After identifying a document's purpose, the System User can determine the appropriate document type. An easily recognizable document type increases a document's overall coherence and the system user's ability to filter it efficiently.

Note: An "Instance" will share the same document types, so if several projects are in an instance, any changes to a document type will change for all projects

Step 1: Select Document Types Module

From the Switchboard, navigate to the Configuration tab.

Navigation: Select Configuration tab > Document Types

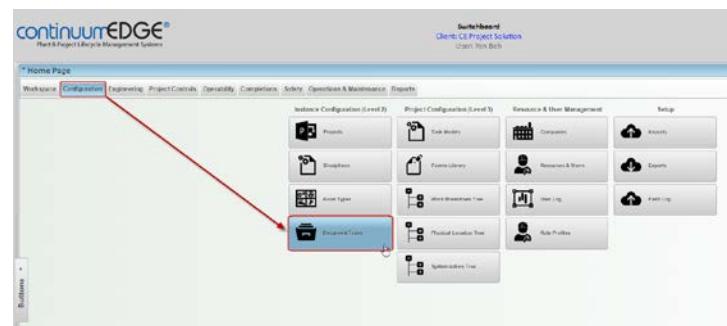


Figure: SC Switchboard – Document Types

Step 2: Create/Edit Document Type

Select the NEW button to create a new document type.

To edit a document type, pick the document type then select the EDIT button.

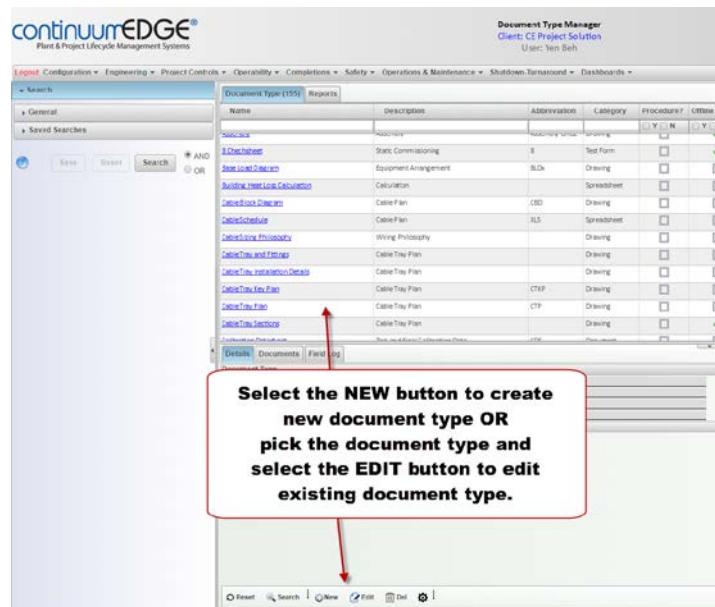


Figure: Document Types Module

Step 3: Configure Document Type

System Administrator can assign the Document Type to a specific category e.g. Drawing, Documents, Spreadsheet, Test Forms.

Booleans for the Document Type allows additional functionality of the document type:

- Is it a Procedure
- Can it be available offline on a mobile device?

Name	Cable Tray Sections	Description	Cable Tray Plan
Abbreviation		Category	Drawing - Drawing and Diagrams
Procedure?	<input type="radio"/> Yes <input type="radio"/> No	Offline Mobile?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Include In Line Segment Drawings?	<input type="radio"/> Yes <input type="radio"/> No	Controlled?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Lifespan(Days)			

Figure: Document Type Edit Form

Notes:

1. SC mobile solution will automatically pull down any document that is under 2-3MB, and has the "Offline Mobile" is set to yes.

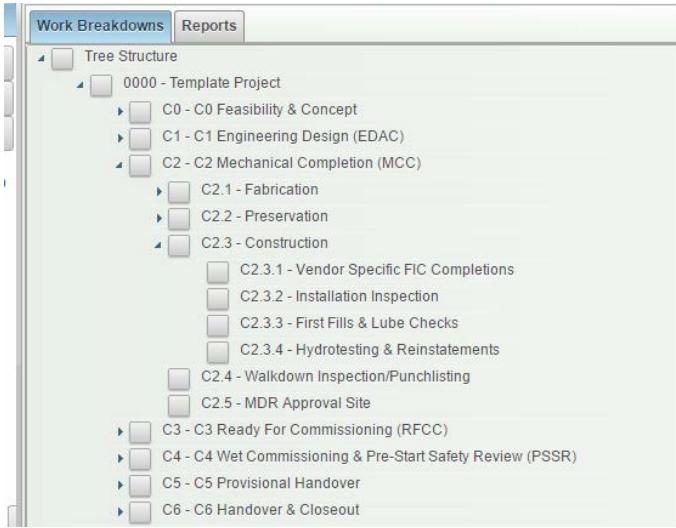
<ul style="list-style-type: none"> • Is it a Controlled Document? • Include In-Line Segment Drawings? <p>Select SAVE to save record.</p>	<p>2. If Controlled is set to yes, then any document of that type will now be treated as a control document and have workflow, version control and be limited on who can edit. Only select this if SC is going to be used as document control solution for a project.</p>
--	---

3.6 – Work Breakdown Structure (WBS)

A Work Breakdown Structure (WBS), in project management and system engineering, is a deliverable-oriented decomposition of a project into smaller components. In this case, projects are always based on Phases, Stages and Activities/Milestones (level 3).

SC utilizes the Project Control Tasks (PCT) module to import a P6 schedule and link to all CCMS planned tasks for automated progress reporting.

Note: The process for developing Project Work Breakdown Structure is outlined in the ‘Project Engineer – User Guide’.

Example WBS: A sample view of Work Breakdown Structure.	 <pre> graph TD A[Tree Structure] --> B[0000 - Template Project] B --> C[C0 - C0 Feasibility & Concept] B --> D[C1 - C1 Engineering Design (EDAC)] B --> E[C2 - C2 Mechanical Completion (MCC)] E --> F[C2.1 - Fabrication] E --> G[C2.2 - Preservation] E --> H[C2.3 - Construction] H --> I[C2.3.1 - Vendor Specific FIC Completions] H --> J[C2.3.2 - Installation Inspection] H --> K[C2.3.3 - First Fills & Lube Checks] H --> L[C2.3.4 - Hydrotesting & Reinstatements] H --> M[C2.4 - Walkdown Inspection/Punchlisting] H --> N[C2.5 - MDR Approval Site] E --> O[C3 - C3 Ready For Commissioning (RFCC)] E --> P[C4 - C4 Wet Commissioning & Pre-Start Safety Review (PSSR)] E --> Q[C5 - C5 Provisional Handover] E --> R[C6 - C6 Handover & Closeout] </pre>
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3.7 – Physical Location Structure

A Physical Location Breakdown Structure (LBS) is the logical and sequential layout of a plant or project by geographical locations. It is mainly broken into Plant, Process Area, Area and Locations (4 Tiers). It is a location-oriented decomposition which is heavily used for Operations and Maintenance perspectives. The Physical Location Breakdown Structure is used to identify specific ‘Areas’ and ‘Physical Locations’ used for costing against different geographical locations of a project, which is different from systemization where equipment may be downstream of equipment, but geographical (location) 10 km away.

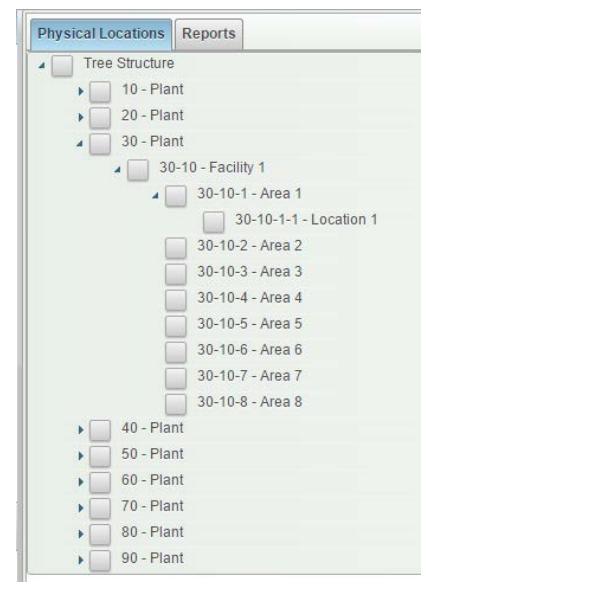
Physical Location Breakdown Structure is the backbone of location-based management. To get the greatest benefit for the project, all sub-contractors working on the same construction phase (e.g. superstructure or interiors) should agree on one Physical Location Breakdown Structure.

Notes:

1. The process for developing the Physical Location Breakdown Structure is outlined in the 'Project Engineer – User Guide'.
2. For a commissioning project, the LBS structure is not likely to be used.

Example LBS:

A sample view of Physical Location Structure.



3.8 – Systemization Tree

A Process Breakdown Structure / Systemization Tree is the logical and sequential layout of a process commissioning (e.g. refining). A Systemization Tree is broken down into Plant, Process Area, System and Subsystem. It is a process-oriented decomposition of up and downstream production systems.

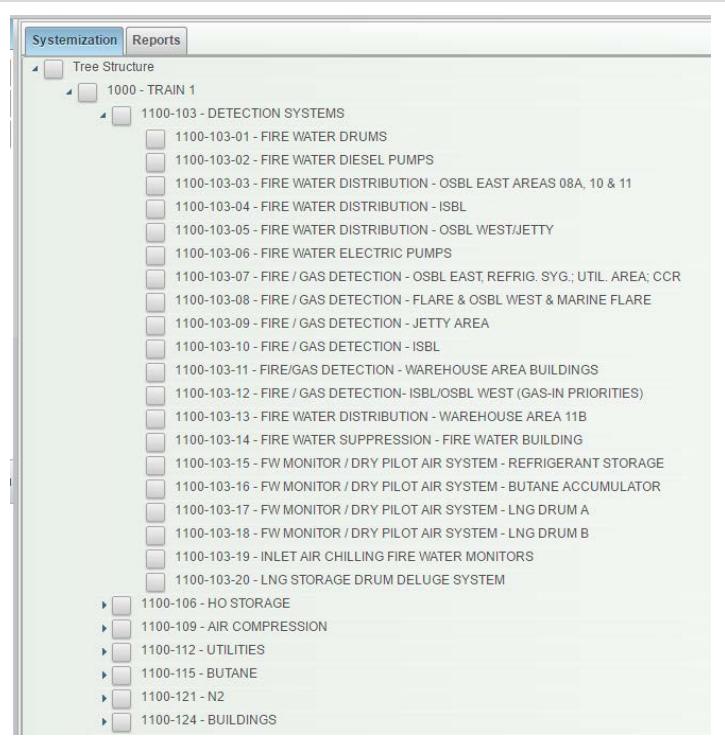
Systemization is used to support CCMS and used to break out the project into local plants, process areas, systems and subsystems. It also tracks the planned and actual transfer dates between the workgroups within a project, specifically the custody of systems / equipment.

The Process Breakdown Structure / Systemization Tree is a breakdown of equipment into major process systems. The systems are ordered to facilitate the planning, sequencing and control of completions and commissioning activities.

Note: The process for developing the Process Breakdown Structure / Systemization is outlined in the 'Project Engineer – User Guide'.

Example PBS:

A sample view of Systemization Tree Structure.



SECTION 4

Roles, Tole Profiles and Rights (User Application)

The setting up of roles, role profiles and rights is quite complex and configurable that a strict rule needs to be in place to achieve the appropriate separation of duties, e.g. the same user should not be allowed to create a punch item and to approve the punch item creation. **The role profiles and role configurations are database wide.**

If the System Administrator wants to create the Role Profiles, it is always best practice to define a role hierarchy for sharing access to records with certain rights / permissions. Each Role Profile in the hierarchy should represent the level of data access with rights / permissions.

When defining the Roles, Role Profiles and Rights, the following conventions are useful:

- System User = a person or resource
- Role = a function which defines access to specific modules
- Rights = a mode of access and action to the role for a specific module
- Role Profile = a group of roles defining the 'authority/access' levels

A System User can have multiple Roles OR Role Profiles.

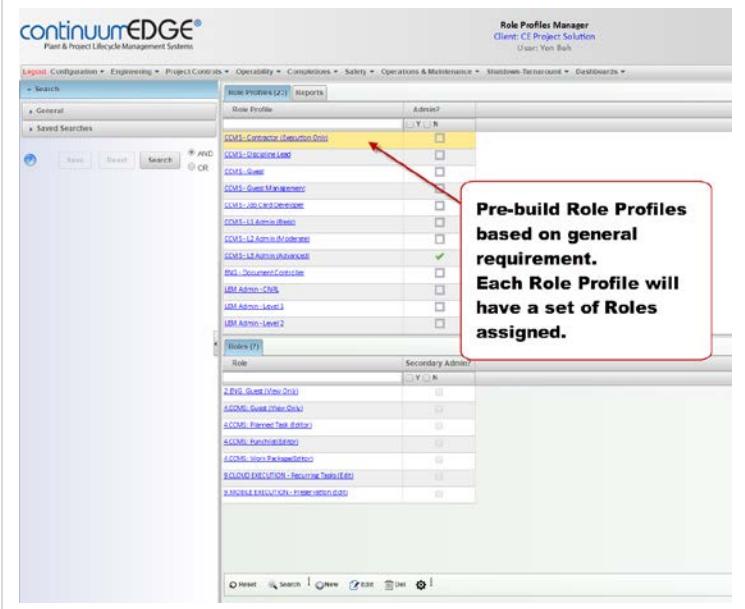
- A Role can have multiple System Users.
- A Role can have multiple Rights.
- A Role can have multiple Role Profiles.
- A Role Profile can have multiple Roles.

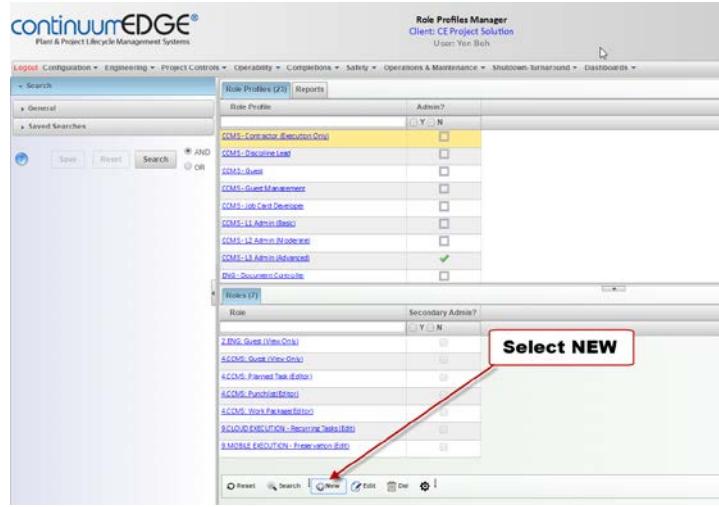
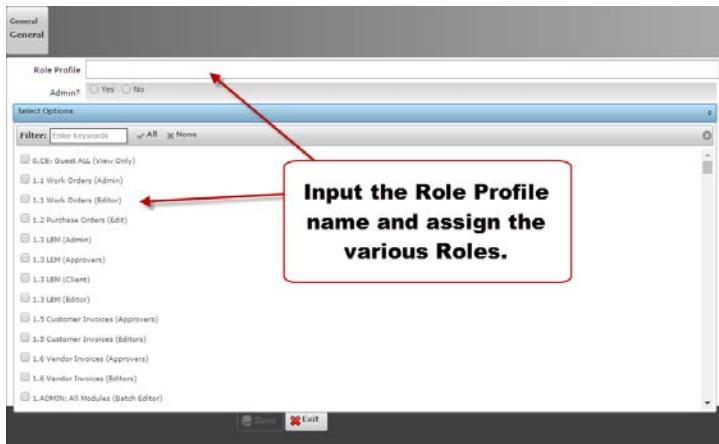
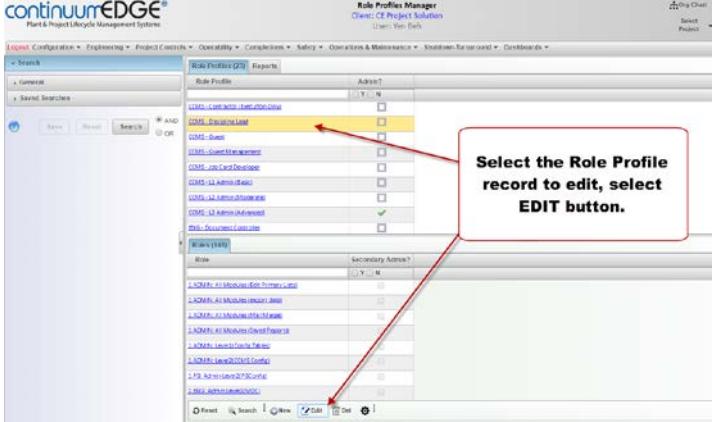
Although it's easy to confuse role profiles and rights / permissions sets with roles, both control two very different things. Roles primarily control a user's record-level access permissions against various modules. Although a role assignment isn't exactly required when we create a system user account.

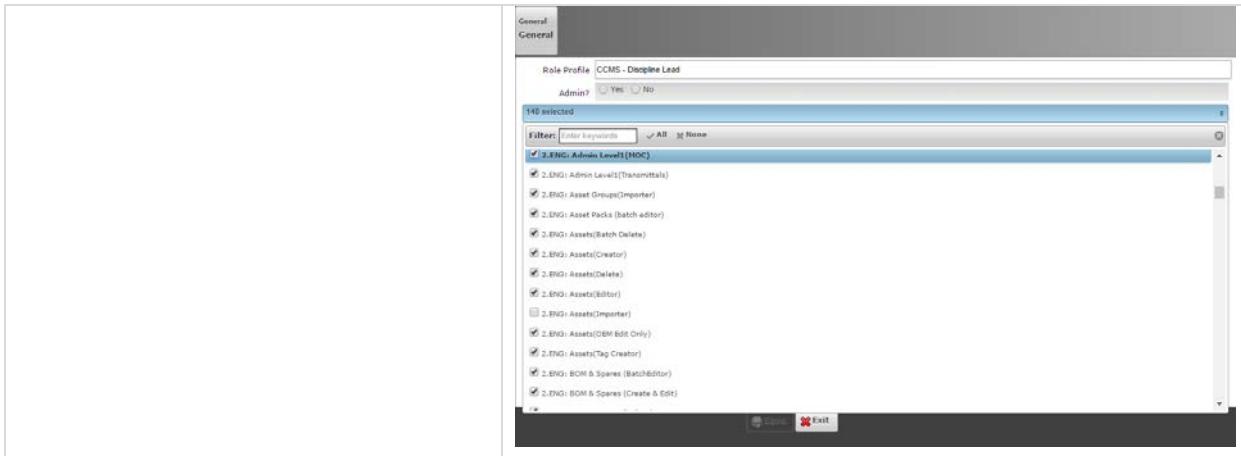
Role Profiles provides the system user record-level access permissions through role hierarchy and sharing rules which have been defined by the various Roles.

To help the System Administrator remember which controls what, remember: Roles control Records Permissions/Rights.

4.1 Role Profiles

Step 1: Select Role Profiles From the Switchboard, navigate to the Configuration tab. Navigation: Select Configuration tab > Role Profiles	 <p>Figure: SC Switchboard – Role Profiles</p>
Review OOB Profiles Create a new Role Profile by selecting the NEW button.	 <p>Pre-build Role Profiles based on general requirement. Each Role Profile will have a set of Roles assigned.</p>

<p>Step 2: Create New Profile</p> <p>Creating a new Role Profile within the Role Profiles Module.</p> <p>Select NEW</p>	<p style="text-align: center;">Figure: Role Profile Module</p> 
<p>Step 3: Assign Roles</p> <p>Populate the new Role Profile name and assign the required Roles.</p> <p>Select SAVE</p>	<p style="text-align: center;">Figure: Role Profile Module</p> 
<p>To Edit a Role Profile, pick the Role Profile requiring editing, select the EDIT button.</p> <p>Starts editing the Role Profile by assigning additional roles or unchecking the role to remove it.</p> <p>Select SAVE</p>	<p style="text-align: center;">Figure: Role Profile Edit Form (collection of roles)</p> 

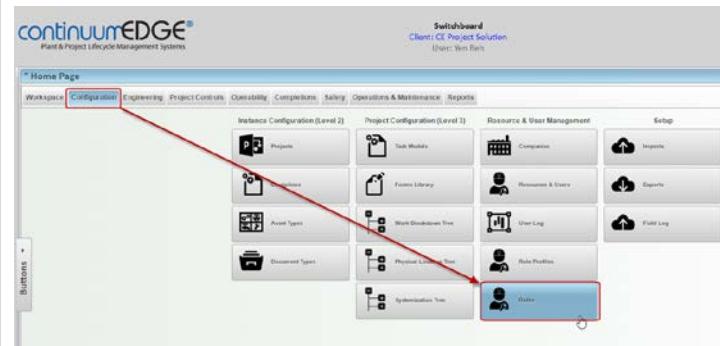


4.2 Roles

Step 1: Select Roles Module

From the Switchboard, navigate to the Configuration tab.

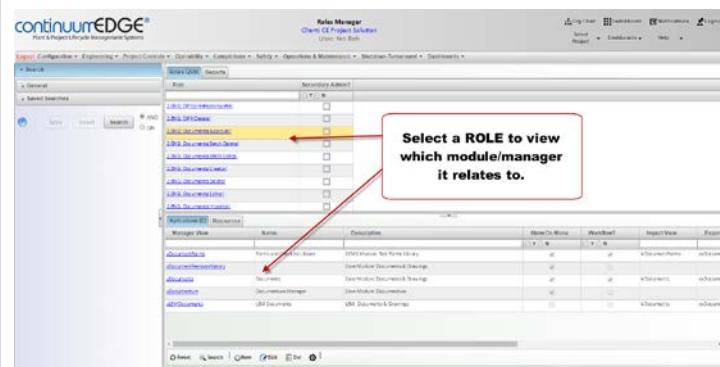
Navigation: Select Configuration tab
> Roles



Step 2: Create New Role

Select the Role record to view the various modules/managers assigned against it.

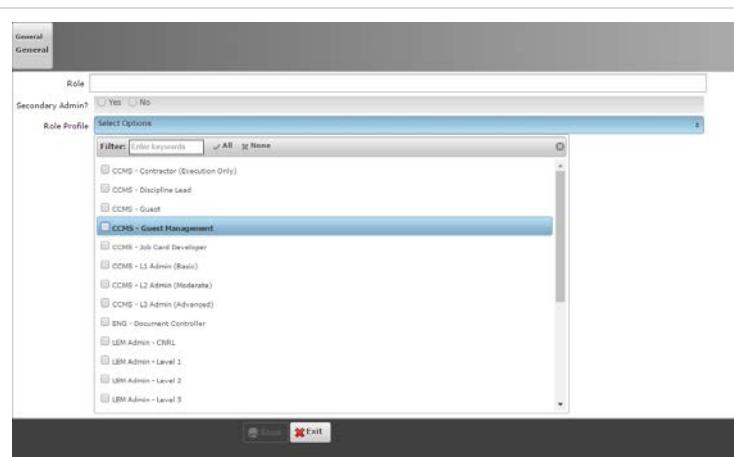
Select NEW button.



Step 3: Assign Role to Profile(s)

In the new Role record, populate the Role name and assign the associated Role Profiles against it.

Select SAVE



Note: The image to right is all performed in another module called vUserApplications. SC comes OOB with roles that will meet 98% of client needs where client admins can make minor adjustments to meet administrative requirements.

This module will list all views (SC Modules) where each view can be configured to allow specific roles to access (view, edit etc).

We recommend that “roles” are more granular, so that if you want to apply more granular rights it can be done, and is why SC comes OOB this way.

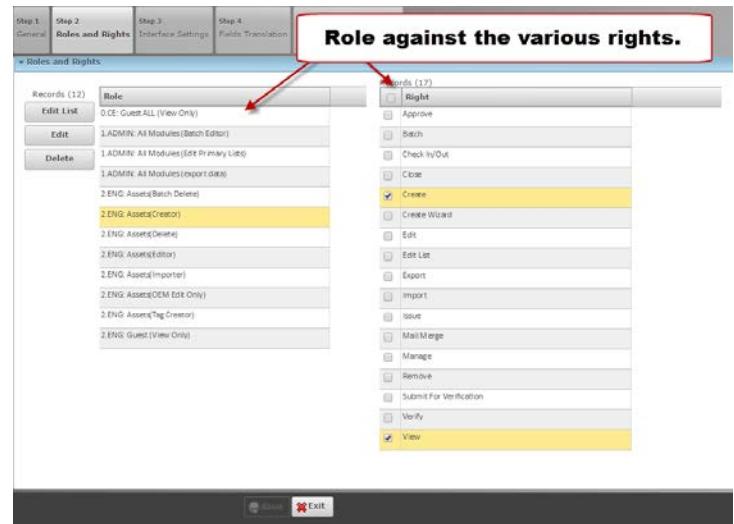


Figure: UserApplication Edit Form – Roles/Rights Tab

4.3 User Applications – Roles and Rights

The User Applications module allows the System Administrator to define the various Roles that primarily controls the user's record level access permissions in ALL the different modules/managers. The step by step guide below goes through all the tabs of the User Application Editor.

4.3.1 - Assigning Roles and Rights against a Module

Step 1: Select Menu

From the Switchboard, navigate to the Menu option.

Navigation: Switchboard > Menu



Figure: SC Switchboard – Access to Menu

Step 2: Select Config Menu

User will be directed to a module to expose the menu bar (normally Assets & Tags Manager).

Navigation: Configuration > Global Configuration (Level 1) > User Application (Module List)

Note: The global configurations are typically not found in the switchboard as they are meant for the most advanced administrators.

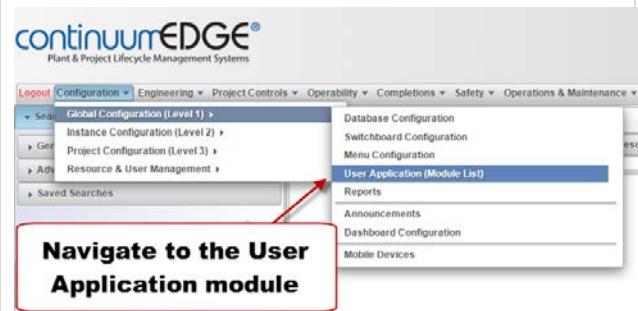


Figure: Configuration Menu – User Application

Step 3: Select Application

Select the SEARCH button to load the list of Modules.

Select any of the module to view the various assigned Roles.

System Administrator can type in the Module Name or Description field to search for a specific Module.

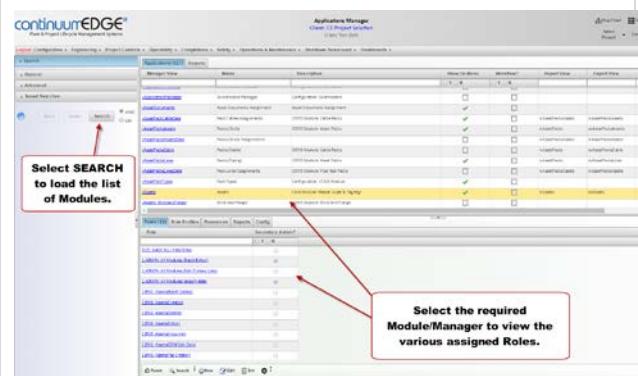


Figure: User Application Module

Roles, Tole Profiles and Rights (User Application)

There are about 400+ modules/managers in CCMS and it is confusing when looking for a specific module.

One easy way to accomplish this is by referring to the Module's web address. All the modules will begin with the letter 'v' within the web address.

E.g.

<https://www.yourproject-ccms.com/ORMS/Tools/Assets/index.htm>

Select module hyperlink to load the module for configuration.

Or

Select row, and press EDIT button.



Figure: How to Confirm Application Module

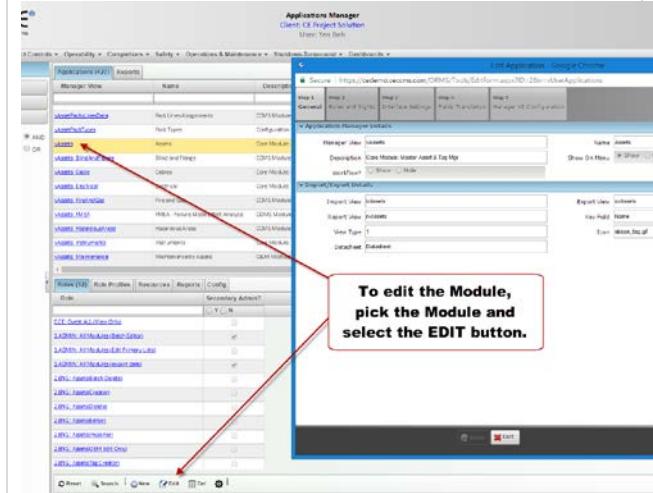


Figure: Edit Module Configuration

Step 4: Hide/Show Application & Workflow

The only item that an admin would change on this tab is HIDE/SHOW. Do NOT MODIFY anything else on this tab.

The 'Show On Menu' boolean allows the System Administrator to hide or show the module in the dropdown menu.

The 'Workflow?' boolean activates the workflow setup for the module i.e. the approval and completion process. This will be explained more in the Punchlist Manager example.

Figure: Application Edit Form – General Edit

Step 5: Configure Roles/Rights

The Roles and Rights tab is where the System Administrator can define and assign more roles with rights against the Module.

In this example, the 'ENG: Assets(Creator)' role have the Create and View rights within the 'Assets and Tags Manager', hence, any system users assigned with this Role can ONLY 'create' assets in this module.

Note: Most of the modules already have these predefined roles setup. The System Administrator of the new projects can fine tune it to suit their organizational needs.

Role	Right
D.CE: Guest ALL (View Only)	Approve
1.ADMIN: All Modules (Batch Editor)	Batch
1.ADMIN: All Modules (Edit Primary Lists)	Check In/Out
1.ADMIN: All Modules (export data)	Create
2.ENG: Assets(Batch Delete)	Create Wizard
2.ENG: Assets(Creator)	Edit
2.ENG: Assets(Editor)	Edit List
2.ENG: Assets(Importer)	Export
2.ENG: Assets(ITEM Edit Only)	Import
2.ENG: Assets(Tag Creator)	Manage
3.ENG: Guest (View Only)	Remove
	Submit it For Verification
	Verify
	View

Figure: Application Edit Form – Edit Role/Rights

Tool Tip:

To add a Role in this Module, select the EDIT LIST button to bring up the list of Roles.

Role	Right
D.CE: Guest ALL (View Only)	Approve
1.ADMIN: All Modules (Batch Editor)	Batch
1.ADMIN: All Modules (Edit Primary Lists)	Check
1.ADMIN: All Modules (export data)	Create
2.ENG: Assets(Batch Delete)	Create Wizard
2.ENG: Assets(Creator)	Edit
2.ENG: Assets(Editor)	Edit List
2.ENG: Assets(Importer)	Export
2.ENG: Assets(ITEM Edit Only)	Import
2.ENG: Assets(Tag Creator)	Manage
2.ENG: Guest (View Only)	Remove
	Submit it For Verification
	Verify
	View

Figure: Application Edit Form - Add Role(s)

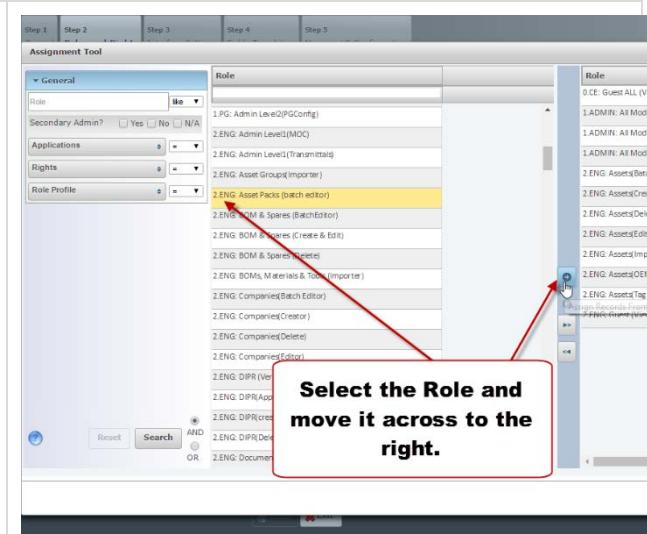
Roles, Role Profiles and Rights (User Application)

The 'Assignment Tool' will appear with filter/search functionality to view the list of Roles.

Roles on left side (available to assign), and on right side (already assigned).

System Administrator can just select the unassigned Role and select the  to move it to the right.

Once done, select the DONE button to return to the 'Application Editor'.



The screenshot shows the 'Assignment Tool' window. On the left, there is a search/filter section with fields for 'Role', 'Secondary Admin?', 'Applications', 'Rights', and 'Role Profile'. Below these are buttons for 'Reset', 'Search', and logical operators ('AND', 'OR'). A list of roles is displayed on the left, and a list of assigned roles is on the right. A specific role, '2.ENG Asset Packs (batch editor)', is highlighted with a yellow background and has a red arrow pointing to it. A red box with the text 'Select the Role and move it across to the right.' is overlaid on the interface, pointing towards the right pane where other roles like '2.ENG Assets (Batch Editor)' and '2.ENG Assets (Import)' are listed.

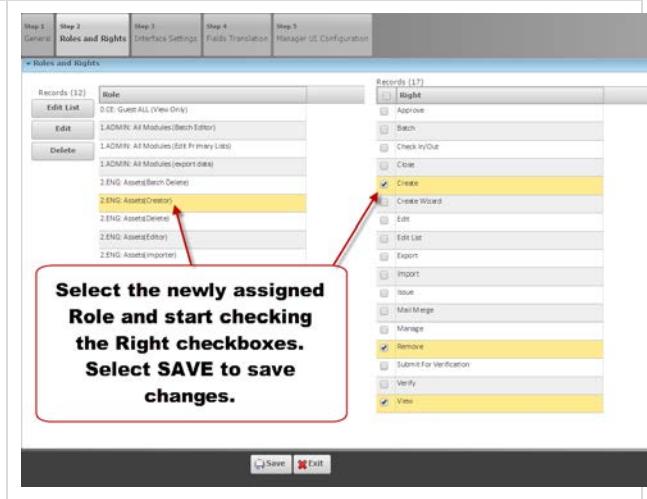
Figure: Application Edit Form - Assign Role(s)

In the 'Application Editor', the assigned Role will appear in the Role list.

Select the assigned Role to view the list of Rights. Select the rights for this role by checking the checkboxes.

Select SAVE

Note: Assigning which right to a role depends if the module has workflow and which states.



The screenshot shows the 'Application Edit Form' with the 'Step 2: Roles and Rights' tab selected. It displays two lists: 'Records (12)' on the left and 'Records (117)' on the right. The left list shows roles like '2.ENG Asset (Batch Editor)', '2.ENG Assets (Import)', and '2.ENG Assets (Delete)'. The right list shows rights like 'Approve', 'Batch', 'Check in/out', 'Close', 'Create', 'Create Wizard', 'Edit', 'Edit List', 'Export', 'Import', 'Issue', 'Mail Merge', 'Manage', 'Remove', 'Submit for Verification', and 'Verify'. A red box highlights the 'Create' checkbox under the rights list, with the text 'Select the newly assigned Role and start checking the Right checkboxes. Select SAVE to save changes.' overlaid.

Figure: Application Edit Form - Assign Rights to Role

4.3.2 - Configure Interface Settings against a Module

This section provides configuration to the ‘Settings/Configuration Gear’, System Administrator can create shortcuts to other configuration modules that are related to the working module, e.g. In the Assets and Tags Manager, the ‘Settings/Configuration Gear’ will show configuration for Asset Statuses, Asset Types, Disciplines, Pump Types, Cable Types and Class, etc.

Note 1: Edit Configuration Module List

Step 3 Interface Settings tab of the User Applications Editor defines the ‘Settings/Configuration Gear’ modules that are related to the main working module.

System Administrator can add or remove any modules to the existing list. Generally, it is setup to link Configuration Type Modules.

Select SAVE

From the module, select the ‘Gear’ icon to view the Configuration Managers Interface.

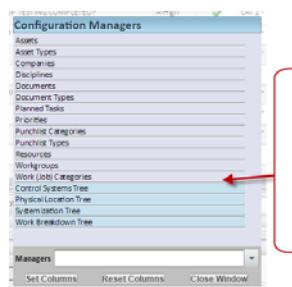
The Configuration Managers Interface would display a list of shortcuts to the required modules.

Select the Module to include in the Configuration shortcut.

By selecting the 'Gear' icon, it triggers Configuration Managers interface showing shortcuts to the related Modules.

The Break checkboxes allows the list to be separated by a different shade of colour. Mainly it is used to distinguish the different group of modules.

Select SAVE



The break is created by different colour shade grouping between the module list.

#	Application	Break
12	Workgroups	<input type="checkbox"/>
13	Work Job Categories	<input checked="" type="checkbox"/>
14	Control Systems Tree	<input type="checkbox"/>
15	Physical Location Tree	<input type="checkbox"/>
16	Systemization Tree	<input type="checkbox"/>

Figure: Setting Breaks in the Configuration Module List

The 'Interface Data' and 'Actions' sections are not available in this User Guide version. The new functionality is not available in this release.

#	Application	Break
8	Priorities	<input type="checkbox"/>
9	Punchlist Categories	<input type="checkbox"/>
10	Punchlist Types	<input type="checkbox"/>
11	Resources	<input type="checkbox"/>
12	Workgroups	<input type="checkbox"/>

4.3.3 - Configure Work-Flow settings against a Module

Depending on the project requirement, CCMS have the flexibility to allow the System Administrator to define and set the appropriate work-flow for every CCMS module.

By default, CCMS already have set standard workflows to several modules (to name a few) listed below:

- Documents & Drawings Manager
- Forms and Checklist Library Manager
- Punchlist & C.O.W Tracking Manager
- Job Cards and Work Packages Managers
- Resources and Users Manager
- Notice of Energization Manager

Step 1: Select Application

Select the Module to edit the Workflow settings.

e.g. vPunchlist – Punchlist and C.O.W Manager

Name	Description
vProjectStatusInvolvements	Project Status Involvements (PSI)
vProjectWeeklyReports	Project Weekly Reports (PMI)
vReportPackages	Project Report Packages
vPunchlist	Punchlist & C.O.W. Tracking
vResources	Resources
vResourceTimeSheets	Time & Timesheets
vRFIs	Project Commitments (RFIs, others)
vTaskModels	Task Models
vTaskModelEditor	Task Model Editor
vTPAs	Handover Packages (Digital)
vWorkPackages	Work Packages

Pick the Module and select EDIT.

Figure: Applications Module

Step 2: Edit Workflow

In the 'Application Editor', make sure the 'Show' boolean is checked for 'Workflow?'

By selecting 'Show', the 'Workflow Settings' tab will be activated.

Import View	vPunchlist	Export View	vPunchlist
Report View	vPunchlist	Key Field	PunchlistItem
View Type	8	Icon	shicon_punchlist.gif
Datasheet	Punchlist Datasheet		

Select the 'Show' boolean in 'Workflow?' to activate the 'Workflow Settings' tab.

Figure: Application Edit Form

The Workflow Settings tab provides the general setup within the module to go through a set of workflows for creating a record in the database.

Records (6)	#	State Status	Locked?	Required Fields	Locked Fields
Edit	1	Originated	<input type="checkbox"/>	ActionRequired	
Delete	2	Submitted	<input type="checkbox"/>	DisciplineSummaryPunchListCategorySummaryPunc	
Up	3	Accepted	<input type="checkbox"/>	ActionTaken	
Down	4	Completed	<input type="checkbox"/>		
To	5	Closed	<input checked="" type="checkbox"/>		
	6	Rejected	<input type="checkbox"/>		

Figure: Application Edit Form – Workflow Tab

Note 1: Allow Editing

Allow Editing (who/when) boolean allows the workflow to be edited against a record. This can be turn-off to prevent changes of the workflow log.

Figure: Application Edit Form - Allow Editing

If the 'Allow Editing' is 'YES', users with administrative rights can edit the who and when on the workflow log within the record editor. Screenshot shows the Punchlist Editor workflow.

Figure: Example of How "Edit Workflow" = Yes

If the 'Allow Editing' is 'NO', the workflow log cannot be edited or change. This is normally the preferred option.

Workflow Log:

Current State: Completed

Originated (Resource) Boyko, Glenn
Submitted (Resource) Boyko, Glenn
Accepted (Resource) Boyko, Glenn
Completed (Resource) Boyko, Glenn

(Date/Time) 31-Oct-2016 12:08:14 PM
(Date/Time) 31-Oct-2016 01:01:13 PM
(Date/Time) 31-Oct-2016 01:01:53 PM
(Date/Time) 03-Nov-2016 12:40:04 PM

If trigger is NO, workflow log details cannot be edited or changed.

Figure: Example of How "Edit Workflow" = No

Note 2: Use Workgroup & Responsible Company

The 'Use WorkGroup' and 'Use Responsible Company' options are to control accessibility of records editing.

If both the options are set to 'YES', this makes the record only editable to the assigned Workgroup and Company. A user from another workgroup or company would not be able to edit, complete, submit, etc. the record.

So, if user A is with Company ABC and tries to edit or complete a punch that has been assigned to Responsible Company XXX, user A will not be able to change or update the punch item.

Allow Editing (who/when) Yes No Use WorkGroup Yes No Use Responsible Company Yes No

Expiration Reminders? Yes No

Records (6)

#	State Status	Locked?	Required Fields	Locked Fields
1	Originated	<input type="checkbox"/>	ActionRequired	
2	Submitted	<input type="checkbox"/>		
3	Accepted	<input type="checkbox"/>		
4	Completed	<input type="checkbox"/>		
5	Closed	<input type="checkbox"/>		
6	Rejected	<input type="checkbox"/>		

The 'Use WorkGroup' and 'Use Responsible Company' manages accessibility of the record assigned to a Workgroup or Responsible Company.

In this example, the user is not the same company as per the assigned Punch item, hence, user do not have rights to edit

The action buttons and save button are

Figure: Example of How "Responsible Company" works

Note 3: Expiration Reminders

Expiration Reminders option is for modules that have 'Expiry Dates' inputs against its records.

If 'Expiration Reminders' is 'YES', input for 'Days Ahead' can be set.

Modules that have option to set Expiry Dates against its records will get email notifications if the 'Expiration Reminders' is set as 'YES'. SC will send a notification within the pre-set days before the Expiry Date is due on the records.

The screenshot shows the 'Workflow Settings' step of the 'Model Data' configuration. The 'Expiration Reminders?' checkbox is checked, and the 'Days Ahead' input field contains the value '2'. A callout box highlights this section with the text: "'Expiration Reminders' are for modules that have the option to input 'Expiry Dates' against its records."

The screenshot shows a document edit form with various fields. In the 'General' tab, the 'Expires' field is set to '2016-05-19'. A callout box highlights this field with the text: 'This document record has an expiration date, hence, an email notification will be sent out as per the pre-set days before the expiration date.'

Figure: Example Edit Form with Expiration Strategy

Step 3: Define Workflow States

The Workflow that appears in the 'Punchlist Editor' is setup from the 'User Applications Editor'.

System Administrator can change the workflow steps to be in accordance with the project requirements.

The standard workflows available in CCMS are:

- Originated
- Requested
- Prepared
- Submitted
- Issued
- Checked
- Accepted
- Approved
- Completed

The screenshot shows the 'Workflow Settings' step of the 'Model Data' configuration. A dropdown menu is open under the 'State Status' column for the 6th row, showing options like 'Rejected', 'Verified', 'Approved', etc. A callout box highlights this dropdown with the text: 'Setup the various workflow status. Select from dropdown.'

Figure: Application Edit Form –Select States

- Closed
- Verified
- Archived
- Rejected
- Revoked

Punchlist ID: PL-00005 Description: Init Punchlist Category: CAT 2 - Item may be completed anytime Discipline: ELEC - Electrical Priority: 2-B-Low Action Required: Test! Add As-Found Image Work Breakdown Association Project: 0000-01 - Example Project Phase: 1 - Startup Stage: Activity: Location Association Show: Process Physical Location Plant/By Process: 1000 - TRAIN 1 Process Area: 1100-103 - DETECTION SYSTEMS

Figure: Example Display of Workflow

Note 4: Locking State

The 'Locked' checkboxes option allows the locking of the 'Punchlist Editor' against any changes to the data fields once the workflow status has been achieved.

In this case, once the punch item reaches the 'Closed' status, the punch item is locked and no changes will be saved.

Records (6)	#	State Status	Locked?	Required Fields	Locked Fields
Edit	1	Originated	<input type="checkbox"/>	ActionRequired	
Delete	2	Submitted	<input type="checkbox"/>	DisciplineSummary	PunchlistCategorySummary
Up	3	Accepted	<input type="checkbox"/>	ActionTaken	
Down	4	Completed	<input type="checkbox"/>		
To	5	Closed	<input checked="" type="checkbox"/>		
	6	Rejected	<input type="checkbox"/>		

Figure: Setting Lock State

Punchlist ID: PL-00062 Description: 6. Orifice Diameter (Item Control Data Sheet) Punchlist Category: CAT 1 - Items to be completed before hand Punchlist Type: Item not secured - Item not secured Work Category: COMM - Commissioning Discipline: INST - Instrument & Controls Priority: 1-A-High Action Required: Add As-Found Image Work Breakdown Association Project: 0000-01 - Example Project Stage: 1 - Pre-commissioning Location Association Show: Process Physical Location Plant/By Process: 1000 - TRAIN 1 Process Area: 1100-103 - DETECTION SYSTEMS Subsystem: Asset Pack: Task ID: T-00003-0958 - Orifice Plate Specification Check Loop Name: Action Taken: Fixed Scheduling Data Responsible Workgroup: Construction Responsible Company: IBS - Industrial Business Solutions (IBS) Responsible Person: Record is locked and no changes will be saved. Workflow is locking record. Reopen Close Exit Email Punchlist

Figure: Example Locking State

Step 4: Define Required Fields

Required Fields can be set within each workflow state.

The 'Required Fields' will force the user to populate the identified mandatory fields before the record can be saved or progress to next state.

Records (#)	#	State Status	Locked?	Required Fields	Locked Fields
1		Originated	<input type="checkbox"/>	ActionRequired	
2		Submitted	<input type="checkbox"/>	DisciplineSummary;PunchListCategorySummary;Punc	
3		Accepted	<input type="checkbox"/>	ActionTaken	
4		Completed	<input checked="" type="checkbox"/>		
5		Closed	<input type="checkbox"/>		
6		Rejected	<input type="checkbox"/>		

Figure: Setting Required Fields

In this example, the Punch Item record is in the 'Submitted' workflow status. As per the 'User Applications' editor setup, there are mandatory fields to be populated before it can progress to the next workflow status.

The Punch Item editor will highlight the mandatory fields in RED.

Action Required	Priority (Name)
-----------------	-----------------

Figure: Example of Required Fields

As the Punch Item progressed to 'Accepted' stage, 'Action Taken' field is now the mandatory field for this Punch Item to be 'Completed'.

System Administrator can set the mandatory fields required in the 'User Applications' configuration for Punchlist & C.O.W Manager as required.

The screenshot shows the 'Punchlist ID PL-60005' and its status as 'Accepted'. A callout box highlights the 'Action Taken' field in the 'Action Required' section, stating: 'When the punch item progressed to 'Accepted' status, the 'Action Taken' is the mandatory field.'

Figure: Example Punchlist Workflow / Req. Fields

Note 5: Locking Fields

The 'Lock Fields' configuration lets the System Administrator choose which data fields to lock from editing as the records go through the workflows.

The screenshot shows the 'Workflow Settings' tab selected. A callout box highlights the 'Locked Fields' section, stating: 'Locked Fields allow specific data fields to be locked from editing at any workflow status.'

Figure: Setting Locking Fields

The ‘User Applications’ for ‘vPunchlist’ shows that when the record is at ‘Accepted’ state, data field for ‘Description’ will be locked from editing.

The difference between the ‘Locked?’ and the ‘Locked Fields’ configurations is:

- ‘Locked?’ – the WHOLE record data fields are locked from editing once that workflow state achieved.
- ‘Locked Fields’ – allows multiple SPECIFIC data fields to be locked from editing once that workflow state achieved.

Select SAVE

This Punch Item editor shows that the ‘Description’ field is locked from editing in the ‘Accepted’ state.

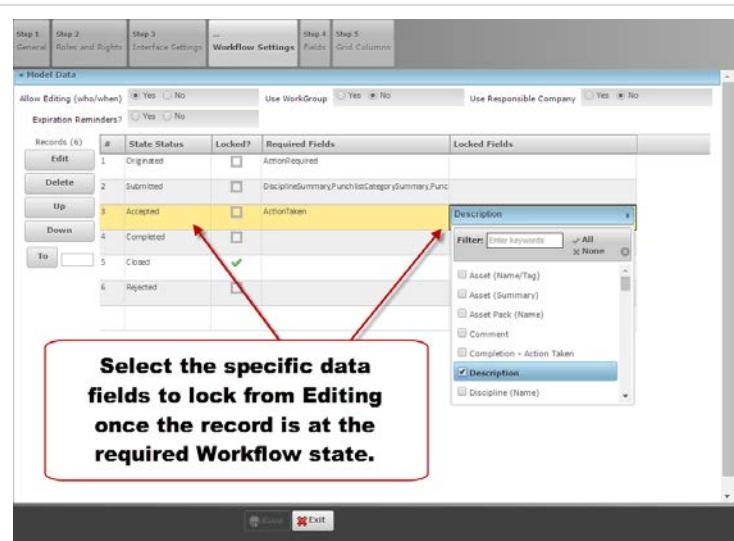


Figure: Setting Field Locks

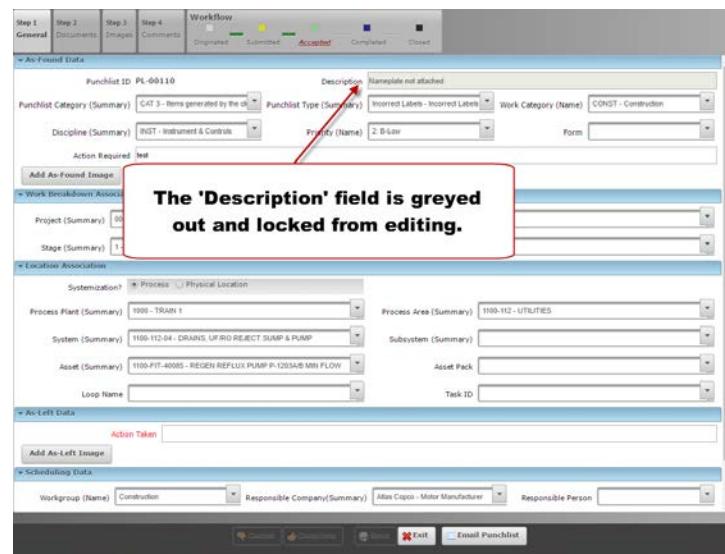


Figure: Example Lock Field

4.3.4 - Configure Fields settings against a Module

The 'Fields' tab in the 'User Applications' editor enable data fields to be hidden from the module interface if not required and renaming of the data fields description. Data fields description for import / export functionality can also be renamed.

Note 1: Field Labels

The Fields tab enable data fields to be hidden from the module interface, and data fields description can be renamed to suit.

Field Name (Database)	Import/Export Field Description	Show on Editing?	Interface Field Description
PunchlistID	Description	<input checked="" type="checkbox"/>	Punchlist ID
PunchlistCategory	Punchlist Category (Name)	<input checked="" type="checkbox"/>	Description
PunchlistCategorySummary	Punchlist Category (Summary)	<input checked="" type="checkbox"/>	Punchlist Category (Name)
PunchlistType	Punchlist Type (Name)	<input checked="" type="checkbox"/>	Punchlist Type (Name)
PunchlistTypeSummary	Punchlist Type (Summary)	<input checked="" type="checkbox"/>	Punchlist Type (Summary)
JobCategory	Works Category (Name)	<input checked="" type="checkbox"/>	Current
WorkGroup	Workgroup (Name)	<input checked="" type="checkbox"/>	Non-Compliance (Name/ID)
Discipline	Discipline (Name)	<input checked="" type="checkbox"/>	Description
DisciplineSummary	Discipline (Summary)	<input checked="" type="checkbox"/>	Non-Compliance Type (Name)
Prints		<input checked="" type="checkbox"/>	Works Category (Name)
DueDate		<input checked="" type="checkbox"/>	Workgroup (Name)
		<input checked="" type="checkbox"/>	Discipline (Name)
		<input checked="" type="checkbox"/>	Discipline (Summary)
		<input checked="" type="checkbox"/>	Priority (Name)
		<input checked="" type="checkbox"/>	Due Date

Figure: Application Edit Form – User Defined Labels

In this instance, the 'Punchlist ID' field has been renamed to 'Punchlist Number' and 'Punchlist Category' field is now hidden from the Punchlist & C.O.W Manager.

Field Name (Database)	Import/Export Field Description	Show on Editing?	Interface Field Description
PunchlistID	Description	<input checked="" type="checkbox"/>	Punchlist Number
PunchlistCategory	Punchlist Category (Name)	<input type="checkbox"/>	Description
PunchlistCategorySummary	Punchlist Category (Summary)	<input type="checkbox"/>	Punchlist Category (Name)
PunchlistType	Punchlist Type (Name)	<input checked="" type="checkbox"/>	Punchlist Type (Name)
PunchlistTypeSummary	Punchlist Type (Summary)	<input checked="" type="checkbox"/>	Punchlist Type (Summary)
Discipline	Comment	<input checked="" type="checkbox"/>	Comment
DisciplineSummary	Non-Compliance (Name/ID)	<input checked="" type="checkbox"/>	Non-Compliance (Name/ID)
Prints	Description	<input checked="" type="checkbox"/>	Description
DueDate	Scheduling - Due Date	<input checked="" type="checkbox"/>	Due Date

Figure: Application Edit Form – User Defined Labels

As per the Punch Item interface, 'Punchlist ID' is now 'Punchlist Number' and 'Punchlist Category' is not shown.

Punchlist Number	PL-00110	Description	Nameplate not attached
Punchlist Type (Summary)	Installed Equipment - Required Labels	Work Category (Name)	CONSTR - Construction
Discipline (Summary)	INSTR - Instrument & Control	Priority (Name)	2-B-Low
Action Requested	Add As Found Image	Form	
Work Breakdown Association			
Project (Summary)	0000-01 - Example Project	Stage (Summary)	1 - Pre-commissioning
Location Association			
Process Plant	System	Area (Summary)	1100-112 - UTILITIES
Asset (Summary)	1100-FIT-40085 - REGEN REFLUX PUMP P-1203A/B MIN FLOW	System (Summary)	
		Asset Pack	

	Figure: Example User Defined Label																																																																																																						
<p>The 'Lookup?' checkboxes enable additional data to be added to the existing list of data field selections. E.g. If 'Discipline' field is checked, during import of data and 'MULTI' discipline is part of the import, it will be added to the discipline list database. 'MULTI' discipline will now appear in the discipline dropdown list.</p> <p>'Import / Export Field Description' can be renamed in this configuration.</p> <p>Select SAVE to save record changes.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Record ID</th> <th style="width: 10%;">Lookup?</th> <th style="width: 30%;">Field Name (Database)</th> <th style="width: 20%;">Import/Export Field Description</th> <th style="width: 10%;">Show on Editing?</th> <th style="width: 20%;">Interface Field Description</th> </tr> </thead> <tbody> <tr><td>1</td><td><input type="checkbox"/></td><td>PunchlistItem</td><td>Punchlist ID</td><td><input checked="" type="checkbox"/></td><td>Punchlist ID</td></tr> <tr><td>2</td><td><input type="checkbox"/></td><td>PunchlistDescription</td><td>Description</td><td><input checked="" type="checkbox"/></td><td>Description</td></tr> <tr><td>3</td><td><input type="checkbox"/></td><td>PunchlistCategory</td><td>Punchlist Category (Name)</td><td><input checked="" type="checkbox"/></td><td>Punchlist Category (Name)</td></tr> <tr><td>4</td><td><input type="checkbox"/></td><td>PunchlistCategorySummary</td><td>Punchlist Category (Summary)</td><td><input checked="" type="checkbox"/></td><td>Punchlist Category (Summary)</td></tr> <tr><td>5</td><td><input type="checkbox"/></td><td>PunchlistType</td><td>Punchlist Type (Name)</td><td><input checked="" type="checkbox"/></td><td>Punchlist Type (Name)</td></tr> <tr><td>6</td><td><input type="checkbox"/></td><td>PunchlistTypeSummary</td><td>Punchlist Type (Summary)</td><td><input checked="" type="checkbox"/></td><td>Punchlist Type (Summary)</td></tr> <tr><td>7</td><td><input type="checkbox"/></td><td>PunchlistComment</td><td>Comment</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>8</td><td><input type="checkbox"/></td><td>NonCompliance</td><td>Non-Compliance (Name/ID)</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>9</td><td><input type="checkbox"/></td><td>NonComplianceDescription</td><td>Description</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>10</td><td><input type="checkbox"/></td><td>NonComplianceType</td><td>Non-Compliance Type (Name)</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>11</td><td><input type="checkbox"/></td><td>WorkCategory</td><td>Work Category (Name)</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>12</td><td><input type="checkbox"/></td><td>WorkGroup</td><td>Workgroup (Name)</td><td><input checked="" type="checkbox"/></td><td></td></tr> <tr><td>13</td><td><input type="checkbox"/></td><td>Discipline</td><td>Discipline (Name)</td><td><input checked="" type="checkbox"/></td><td>Discipline (Name)</td></tr> <tr><td>14</td><td><input type="checkbox"/></td><td>DisciplineSummary</td><td>Discipline (Summary)</td><td><input checked="" type="checkbox"/></td><td>Discipline (Summary)</td></tr> <tr><td>15</td><td><input type="checkbox"/></td><td>Priority</td><td>Priority (Name)</td><td><input checked="" type="checkbox"/></td><td>Priority (Name)</td></tr> <tr><td>16</td><td><input type="checkbox"/></td><td>DueDate</td><td>Scheduling - Due Date</td><td><input checked="" type="checkbox"/></td><td>Due Date</td></tr> </tbody> </table> <p style="text-align: center; margin-top: 5px;">Applications saved successfully.</p>	Record ID	Lookup?	Field Name (Database)	Import/Export Field Description	Show on Editing?	Interface Field Description	1	<input type="checkbox"/>	PunchlistItem	Punchlist ID	<input checked="" type="checkbox"/>	Punchlist ID	2	<input type="checkbox"/>	PunchlistDescription	Description	<input checked="" type="checkbox"/>	Description	3	<input type="checkbox"/>	PunchlistCategory	Punchlist Category (Name)	<input checked="" type="checkbox"/>	Punchlist Category (Name)	4	<input type="checkbox"/>	PunchlistCategorySummary	Punchlist Category (Summary)	<input checked="" type="checkbox"/>	Punchlist Category (Summary)	5	<input type="checkbox"/>	PunchlistType	Punchlist Type (Name)	<input checked="" type="checkbox"/>	Punchlist Type (Name)	6	<input type="checkbox"/>	PunchlistTypeSummary	Punchlist Type (Summary)	<input checked="" type="checkbox"/>	Punchlist Type (Summary)	7	<input type="checkbox"/>	PunchlistComment	Comment	<input checked="" type="checkbox"/>		8	<input type="checkbox"/>	NonCompliance	Non-Compliance (Name/ID)	<input checked="" type="checkbox"/>		9	<input type="checkbox"/>	NonComplianceDescription	Description	<input checked="" type="checkbox"/>		10	<input type="checkbox"/>	NonComplianceType	Non-Compliance Type (Name)	<input checked="" type="checkbox"/>		11	<input type="checkbox"/>	WorkCategory	Work Category (Name)	<input checked="" type="checkbox"/>		12	<input type="checkbox"/>	WorkGroup	Workgroup (Name)	<input checked="" type="checkbox"/>		13	<input type="checkbox"/>	Discipline	Discipline (Name)	<input checked="" type="checkbox"/>	Discipline (Name)	14	<input type="checkbox"/>	DisciplineSummary	Discipline (Summary)	<input checked="" type="checkbox"/>	Discipline (Summary)	15	<input type="checkbox"/>	Priority	Priority (Name)	<input checked="" type="checkbox"/>	Priority (Name)	16	<input type="checkbox"/>	DueDate	Scheduling - Due Date	<input checked="" type="checkbox"/>	Due Date
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SECTION 5

Resources and System Users

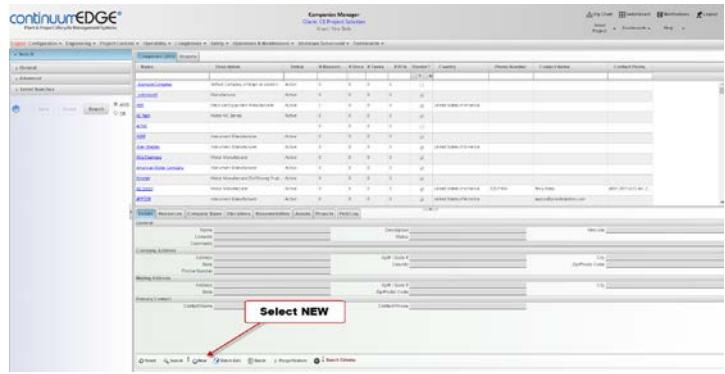
Resources created within CCMS are generally for responsibility assignment e.g. Punch Items. All resources need to be assigned against Projects and a Company.

Resource can be upgraded to a System User status; the System User will be provided with unique login credentials and assigned with Roles and Profiles. This allows the System User to access CCMS database for asset tag information, completion of check sheets and test records, completion of punch items, etc.

5.1 Companies

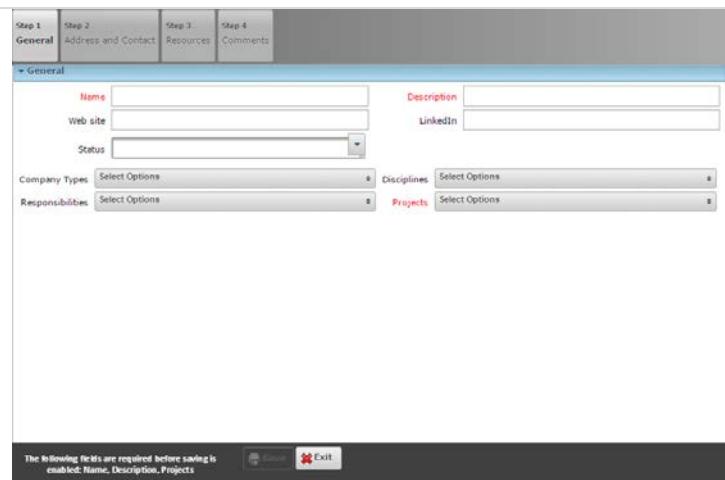
The ‘Companies’ module is required to populate so that vendors, supplier, manufacturer lists can be populated in reports, and assigned responsibilities in CCMS. One of the initial steps in setting up the database is to create a list of contractors, suppliers, and vendors, so that they can be allocated to tasks, cost items, contracts, punch items, reports, etc.

<p>Step 1: Select Companies</p> <p>From the Switchboard, navigate to the Configuration tab.</p> <p>Navigation: Select Configuration tab > Companies</p>	
<p>Figure: SC Switchboard – Companies Module</p>	

<p>Step 2: Create/Edit Company</p> <p>Select NEW</p> <p>All mandatory fields will be in RED and must be populated to enable the record being saved.</p> <ul style="list-style-type: none"> ‘Company Type’ is used to classify a company as a vendor, supplier, contractor, EPCM, or manufacturer. There are dropdowns to records that these. CCMS utilizes this classification to define which companies are displayed in various company centric dropdowns. ‘Disciplines’ assigned to a company is used for companies that are flagged as a ‘manufacturer’ 	
<p>Figure: Company Module</p>	

primarily for assets. If an asset is Mechanical, then it will list all manufacturers with the Mechanical discipline.

- ‘**Responsibility**’ assigned to a company is designed to define if a company is referenced in specific modules within the CCMS platform. E.g. If companies are assigned or associated with Punchlist, the dropdown list of Company in the Punchlist module will only show those companies that have this module assigned.

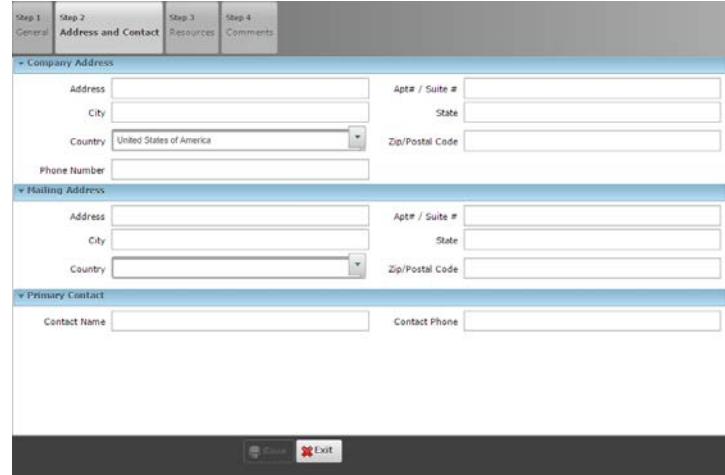


The screenshot shows the 'General' tab of the Company Edit Form. It includes fields for Name, Description, Web site, LinkedIn, Status, Company Types, Disciplines, Responsibilities, and Projects. A message at the bottom states: 'The following fields are required before saving is enabled: Name, Description, Projects.' Buttons for Save and Exit are at the bottom right.

Figure: Company Edit Form

The ‘Address and Contact’ tab allows the input of:

- Company Address
- Mailing Address
- Primary Contact



The screenshot shows the 'Address and Contact' tab of the Company Edit Form. It has three sections: 'Company Address', 'Mailing Address', and 'Primary Contact'. Each section contains fields for Address, Apt# / Suite #, City, State, Country, Zip/Postal Code, Phone Number, and Contact Name. Buttons for Save and Exit are at the bottom right.

Figure: Company Edit Form – Contact Details

The ‘Resources’ tab is designed to assign resources (e.g. contractors, employees, suppliers, etc.) to the company.

So, when assigning a task or punch item to a person, the user can pre-filter for a company with the list of associated resources and batch assign the tasks or punch items to the resource.

Select SAVE

Records (16)	Name	Title	Phone #	E-Mail address
	1 User_CCMIS	Commissioning - Instrument Technician	2507184315	Greg.Adcock@ibs-partners.com
	2 User_CCMIS	Pre-comm - Area Lead		Greg.Adcock@ibs-partners.com
	account_test	CCMS Admin (Level 1)		test.account@nowhere.com
	Adcock_Greg	Commissioning - Controls	801-283-1460	greg.adcock@ibs-partners.com
	Adcock_Kirk	Systems Engineer		kirk.adcock@ibs-partners.com
	Administrator_ITS	IS&T - Systems Analyst Sr.	011 + 801-283-1460;	support@its-partners.com
	API_SPO		9890E-W98728E0	
	Beth_Yeo	CCMS Admin (Level 3)		yen.beth@continuum-edge.com
	Bert_Mike	CCMS Admin (Level 3)		mkebert27@hotmail.com
	Brooke_Karen	Commissioning - Controls		ljbroadbroke@hotmail.com
	Doe_John	Construction - Safety Lead		yenmei.beth@or@inenergy.com.au

Figure: Company Edit Form – Resource Assignment

5.2 Create Resource and System User Accounts

5.2.1 - Create Resource

Step 1: Select Resources/Users

From the Switchboard, navigate to the Configuration tab.

Navigation: Select Configuration tab > Resources & Users



Figure: SC Switchboard – Resource/User Module

Step 2: Create/Edit Resource

Creating a new Resource within the Resources & Users Module.

Select NEW

Figure: Resource/User Module

A Resource will be assigned to Projects and a Company.

All mandatory fields will be in **RED** and must be populated to enable the record being saved. At a minimum a user should enter first and last name, email address, resource type (e.g. contractor), title (position) and associated company.

Figure: Resource/User Edit Form

Populate the fields in Step 1 General tab and proceed through the other Step tabs to populate:

- Step 2: Address and Contact
- Step 3: Credentials
- Step 4: Position & Workgroups
- Step 5: POs
- Step 6: Comments

Select **SAVE**

5.2.2 - Create System User

Step 1: Enter User Name ID

Create a system user by entering a username in the User ID field.

This will trigger additional fields and tabs to assign Roles, Right Boundaries, Password, etc.

Figure: Making a Resource a User

Note 1: Req. Boundaries?

The Right Boundaries tab allows the System Administrator to manage which Area / Systemisation / Phase that the System User can access.

THIS IS OPTIONAL.

Figure: User Edit Form – Boundary Selection

Step 2: Assign Profiles/ Roles

System Administrator can assign the various Role Profiles and Roles in the Roles tab. This gives the System User the level of rights within CCMS.

Note: Please refer to the Roles and Role Profiles section for guide.

Figure: User Edit Form – Role Profile Assignment

Step 3: Send User Email

Return to Step 1 General tab.

Populate the New Password and Confirm Password fields.

Then select RESET PASSWORD button, this will automatically save the record and a notification will appear.

The Password Expires field will automatically populated. It will show a day behind the current date. This will force the System User to change their provided password during the initial login.

Figure: User Edit Form – Setting Initial Password

Select EMAIL USER to send an email notification to the System User with the CCMS web address and login credentials.

The screenshot shows the 'User Edit Form' with the 'Step 2' tab selected. In the 'Workflow Message' section, there is a button labeled 'Email New User'. A red box highlights this button with the instruction: 'Select the EMAIL USER button to send an email to the System User with login credentials.'

Figure: User Edit Form – Email New User

In the Email Notification, check the email address box.

If necessary, System Administrator can CC the email to others as well.

Select the Show Address Book checkbox if more recipients are required.

Select CREATE EMAIL.

The screenshot shows the 'User Edit Form' with the 'Step 2' tab selected. A modal dialog box titled 'Notification/E-Mail Editor' is open. It shows a 'To:' field with 'johndoe@energygreen.com.au' and a 'Subject:' field with 'CE Login: Your Account has been created.' Below these, there is a 'Message:' area and a 'Reply:' area with the system user's details. A red box highlights the 'Create E-Mail' button at the bottom right of the dialog. Another red box highlights the 'Show Address Book' link in the dialog, with the instruction: 'Select the email address that's been assigned against the system user account.'

Figure: User Edit Form – Send Email to User

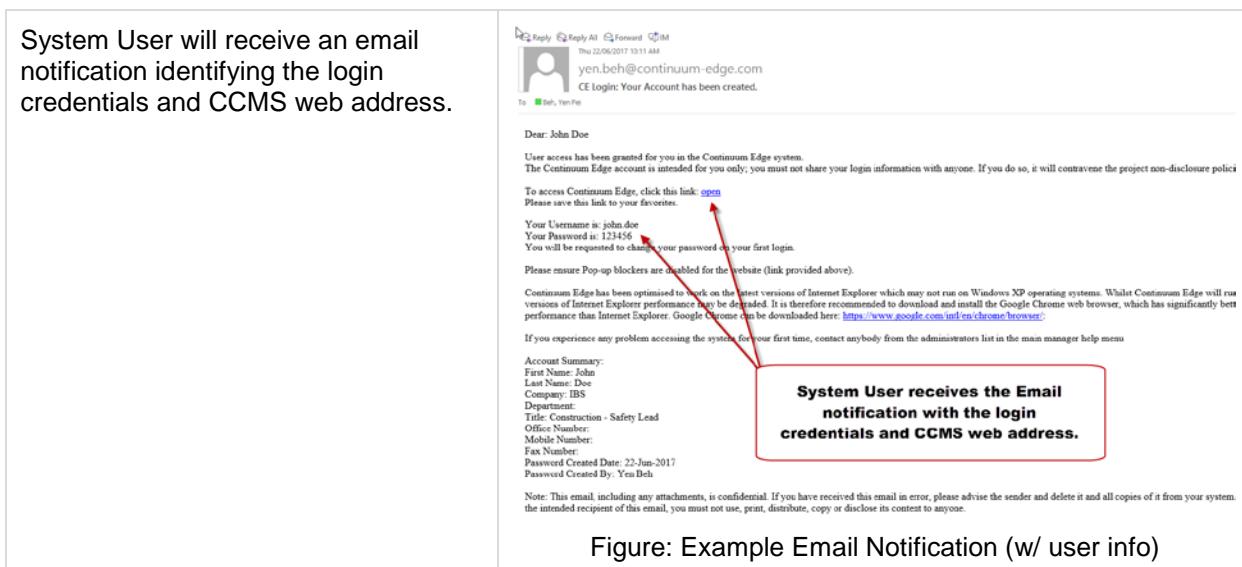


Figure: Example Email Notification (w/ user info)

5.3 Reset User Password by System Administrator

Step 1: Reset User Password <p>In the Resources and Users Manager, filter / search for the System User that requires password reset.</p> <p>Select EDIT.</p> <p>Note: If the user has logged in within the last 30 days, and has just forgot their password, they can go to login page and press FORGOT password. SC will send a temporary password via Email.</p>	<p>Select the System User to EDIT.</p>
--	---

Figure: Resource/User Module

Step 2: Enter New Temp Password

In the Resource and User Editor, check that the Status is ACTIVE.

Enter the temporary password in both New Password and Confirm Password fields.

Select RESET PASSWORD.

Notification of password has been reset will appear, select OK.

Figure: User Edit Form – Reset Password

Step 3: Email Temp Password

Select EMAIL USER and RESET PASSWORD to generate the email notification to the System User.

Figure:

User Edit Form – Send New Password

5.4 Reset User Password by System User

Step 1: User Changes Password

In the Switchboard, System User can change password from the HELP dropdown.

Select the HELP dropdown to view the options.

Select CHANGE PASSWORD.

Figure: Access Help - Forgot Password /Reset

Enter the new password and select CHANGE.

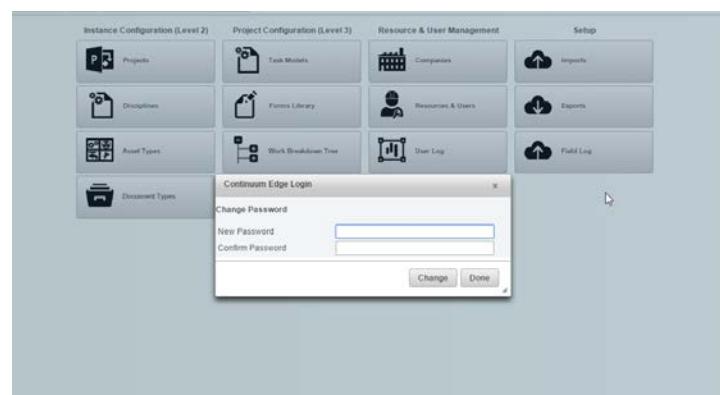


Figure: User Changing their own Password

5.5 Forgot Password in the Login Page

If the System User forgets their password, select the 'FORGOT' button.

This will prompt the system user to enter the email address used to create their account.

A password reset email will be sent to the system user.

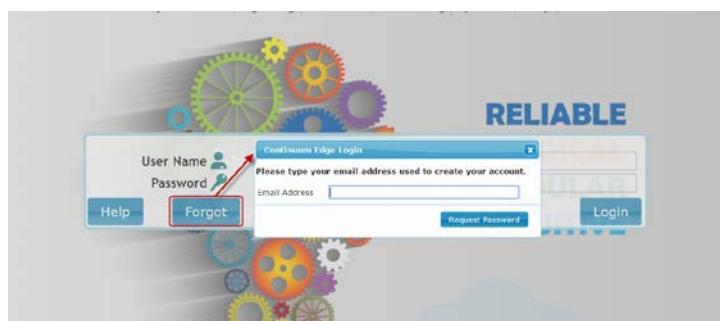


Figure: Login Page – User Request Temp Password

5.6 Designate User as “Support”

The local Project CCMS Administrator can configure and upgrade System Users to be the contact user for CCMS support before escalating to Vendor Support. System Administrators can provide General support such as create users, reset passwords, instruction guide, etc.

Go to the Resources & Users Module, and select the system user to EDIT.

In the System User editor, go to the 'Roles' tab, in the 'Support Settings' option, select 'YES' for 'Help Admin?' and populate the 'Help Title' field.

The 'Help Admin?' option will set the trigger to the system user be the contact person in the 'HELP' menu.

Select SAVE to save record.

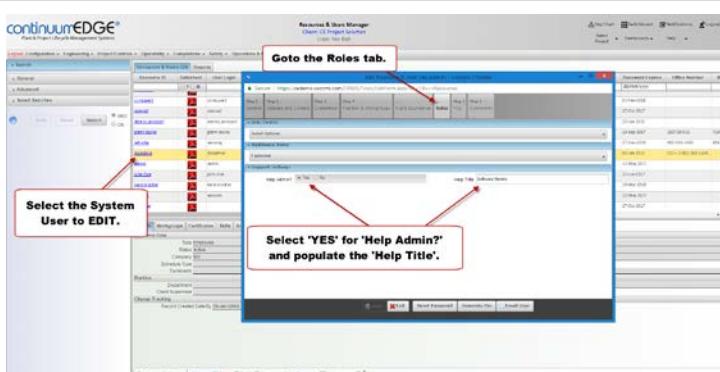


Figure: Defining a Support User in Help Menu

System Users who need support can select the 'HELP' dropdown and select 'Request Support'.

A 'Support List' notification will appear, select the 'Send Mail' hyperlink to send an e-mail to the CCMS Support team.

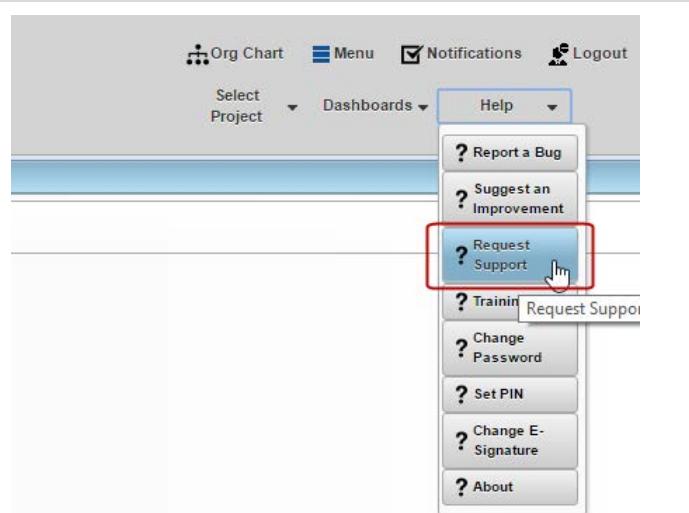


Figure: Requesting Support from Menu

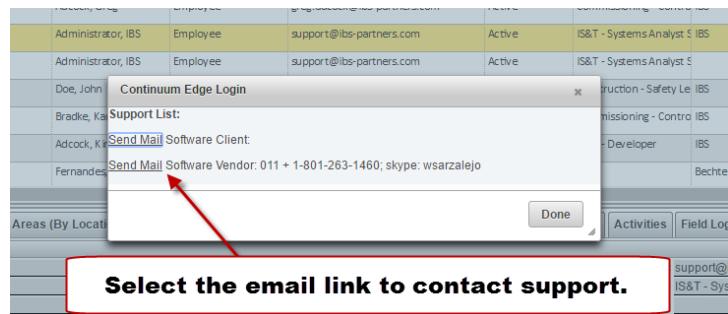


Figure: Sending Support Email Request

If the System User requires support from the Login page, select the 'Help' button and the 'Support List' contacts will appear. Select the 'Send Mail' hyperlink to request for support.

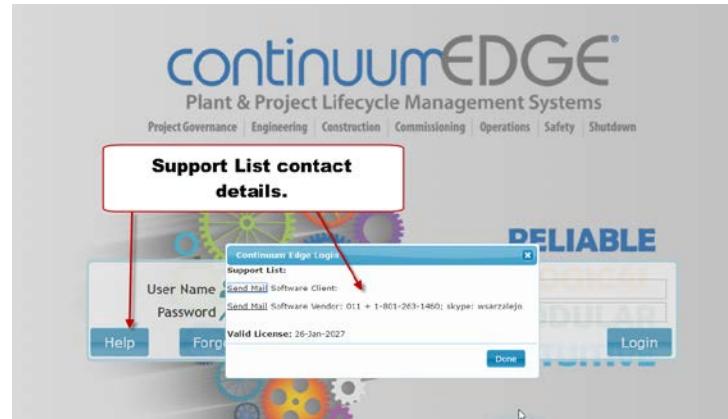


Figure: Accessing Help from Login Page

SECTION 6

Announcements

System Administrator can publish Announcements to system users when they login to their CCMS project database. This can be used for publicizing project accomplishments, new releases, systems being energized etc.

The setup of making an announcement is outlined below.

Step 1: Select Announcements

From the Switchboard, navigate to the Menu option.

Navigation: Switchboard > Menu



Figure: SC Switchboard - Announcements

Step 1: Select Announcements (optional method)

Select the Configuration dropdown menu and navigate to Announcements option.

Navigation: Configuration > Global Configuration (Level 1) > Announcements

Note: Please check with CCMS Support team in regards with the location of the Announcements module as it is different for every project database.

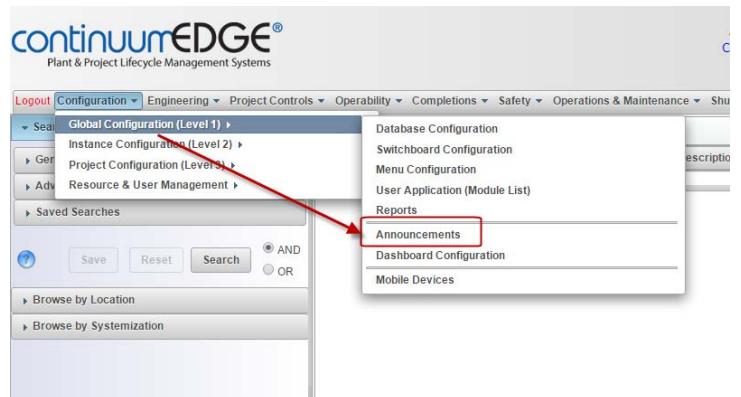


Figure: SC Menu - Announcements

Step 2: Create New Announcement

Select NEW to create a new Announcement or EDIT to edit an existing announcement in the database system.

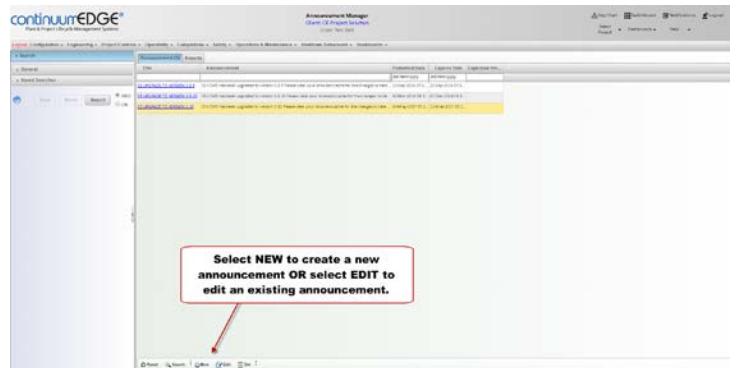


Figure: Announcements Module

Step 3: Edit Announcement

In the Announcement Editor:

- Icon dropdown list sets the appearance size of the announcement.
- Title of the announcement.
- Announcement Text box editor allows user to edit and customize the fonts.
- Published and Expires Dates can be set for the announcement.
- Announcements can be managed for different Projects, Workgroups and Role Profiles, hence, not ALL users will get announcements that are not related to them.

Figure: Announcement Edit Form

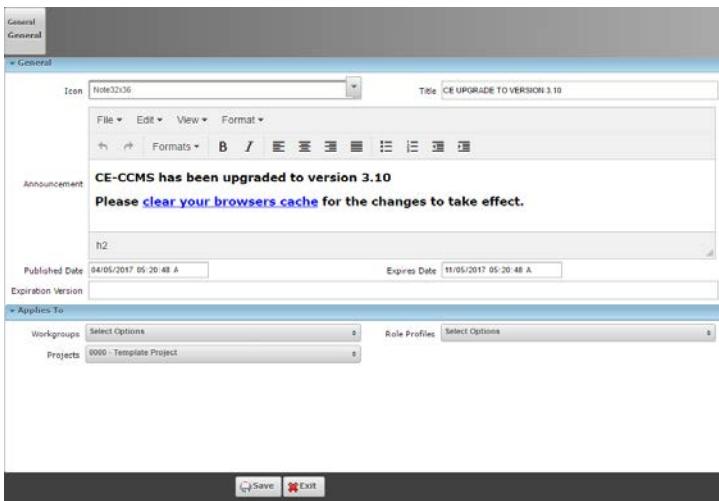
<p>After populating the Announcements Editor</p> <p>Select SAVE</p>	
---	--

Figure: Announcement Edit Form - RTF

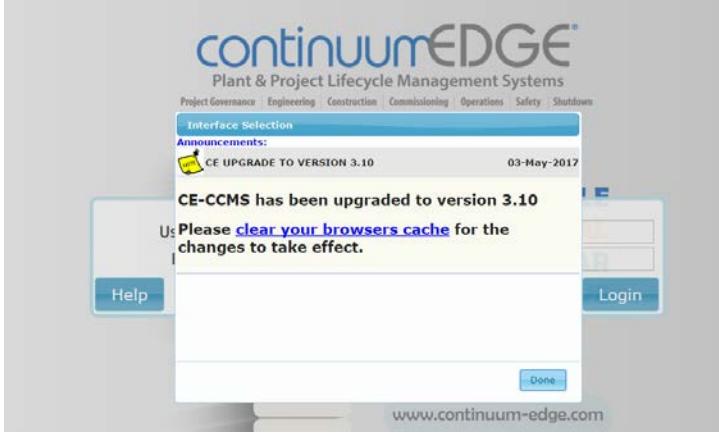
<p>The specified Announcement appearing when the System User logs in to their CCMS project database.</p> <p>Note: Announcements are also made available in the Notification Dashboard for every user.</p>	
--	---

Figure: Example Announcement upon User Login

