Checklists

Export Markups list data to Excel to create fast and easy checklists.

Markups list: Track, sort and filter markups

The Markups list automatically tracks all annotations added to electronic P&IDs, including the author, date, time. This allows you to keep an accurate record of who added specific comments to the PDF, changed a particular valve's status and other detailed information.

You can **Sort** (A) through the Markups list by simply clicking on a column header, **Filter** (B) the Markups list to only view desired information, or use **Manage Columns** (C) to hide, unhide and reorder columns.
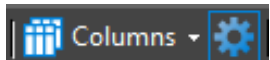
A

B

C

Custom Columns for Comprehensive Tracking

Revu's Custom Columns feature allows you to add detailed information to the Markups list. Create **Choice** columns to record things like valve pressure or pipe diameter by selecting values from a simple drop down menu. Or, add **Text** columns to track P&ID and work order numbers.
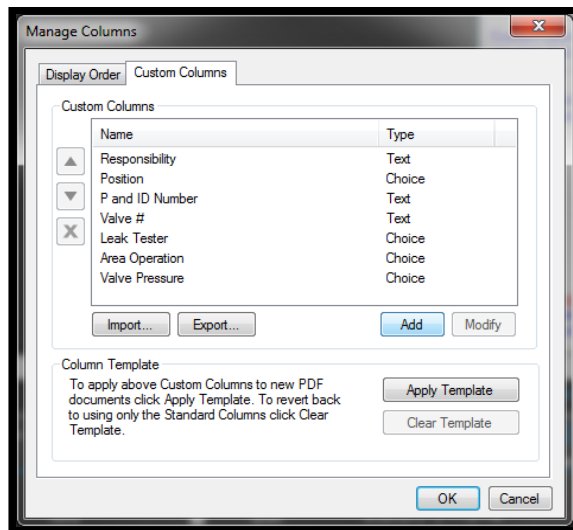
P and ID No.	ID No.	Leak Tester	Area Operation	Valve Pressure
DKO-S35-PPI-20234-001	1	sfinken	Off Shore	
DKO-S35-PPI-20234-001	3	mhurlbut	Off Shore	
DKO-S35-PPI-20234-001	2	kloomis	Off Shore	

Drop down menu:
0 psig
1000 psig
2000 psig
3000 psig
4000 psig
5000 psig

Create a Custom Column

Start by clicking the **Manage Columns** icon

Columns

in the Markups List. Select the **Custom Columns** tab, and then click **Add**.

Manage Columns

Display Order | Custom Columns

Custom Columns

Name	Type
Responsibility	Text
Position	Choice
P and ID Number	Text
Valve #	Text
Leak Tester	Choice
Area Operation	Choice
Valve Pressure	Choice

Import... | Export... | Add | Modify

Column Template

To apply above Custom Columns to new PDF documents click Apply Template. To revert back to using only the Standard Columns click Clear Template.

Apply Template | Clear Template

OK | Cancel

Then, select the type of Custom Column you want to add.

Add Column

Name:
Type: Text

Options

☐ Multiline

Default:

Type dropdown:
Checkmark
Choice
Date
Formula
Number
Text

OK | Cancel
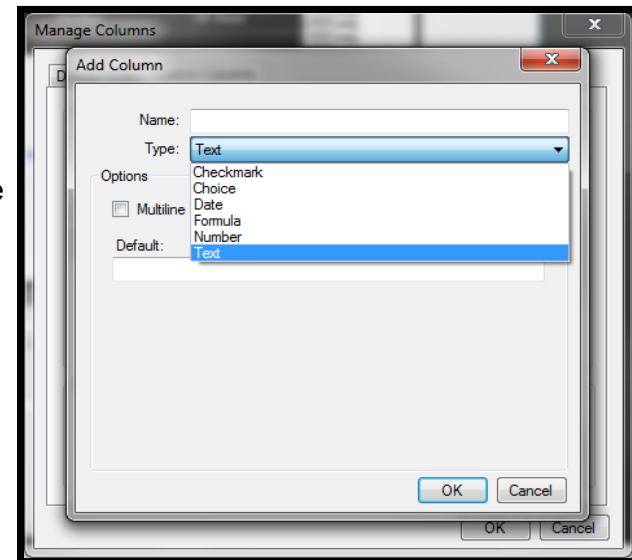
Text Column

When creating a custom Text column, simply name the header and click **OK**. You can also designate a **Default** for repetitive information such as P&ID Number.

Add Column

Name: ID No.
Type: Text

Options

☐ Multiline

Default:

OK | Cancel
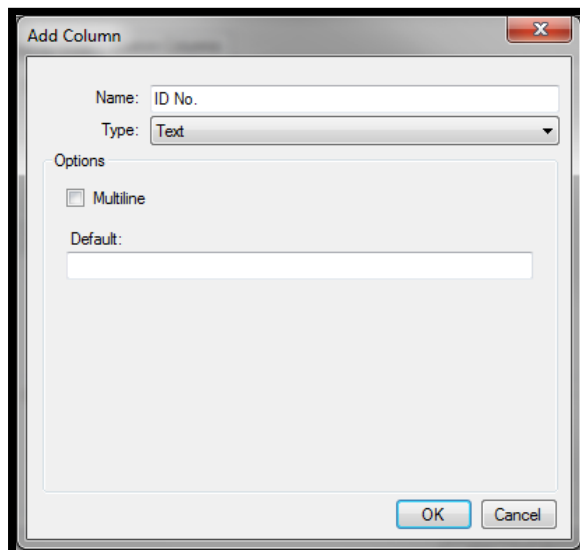
Choice Column

When creating a Choice column, click **Add** to manage the choice item options that are included in the column drop down menu.

Add Column

Name: Valve Pressure
Type: Choice

Options

Item	Subject	Number	Default
1000 psig		1000	

Import... | Format... | Add | Modify

OK | Cancel
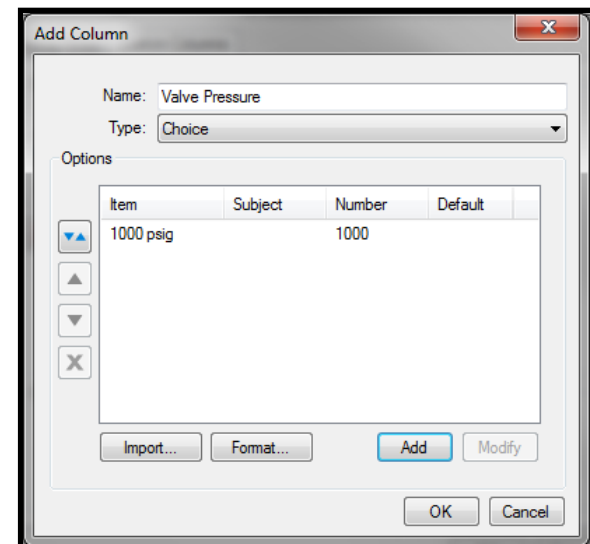
Export the Markups List to Create Checklists

To create checklists quickly and easily, click **Summary** in the Markups list and select **CSV Summary** to export the data to Excel.

	Summary ▾
	CSV Summary
	XML Summary
	PDF Summary
🖶	Print Summary

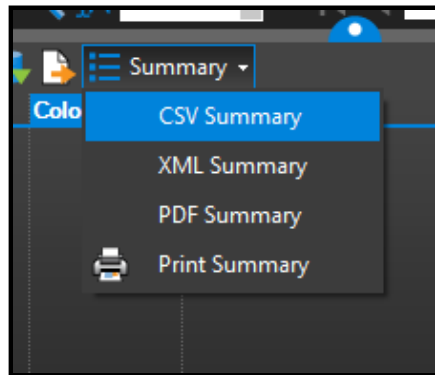|	A	B	C	D	E	F	G	H	I
1	Page	Lock	ID No.	P&ID No.	Status	Checkmark	Author	Date	Comments
2	Page 1	Locked	1	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:09	
3	Page 1	Locked	2	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:09	
4	Page 1	Locked	3	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:10	
5	Page 1	Locked	4	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:10	
6	Page 2	Locked	5	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/26/2012 11:01	
7	Page 2	Locked	6	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/26/2012 11:01	
8	Page 2	Locked	7	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/26/2012 11:02	
9	Page 2	Locked	8	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/26/2012 11:02	
10	Page 2	Locked	9	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/26/2012 12:17	
11	Page 2	Locked	10	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 15:05	
12	Page 2	Locked	11	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:09	
13	Page 2	Locked	12	DKO-S35-PPI-20234-001	None	Unchecked	dpark	9/27/2012 12:09	

Then, simply copy and paste the data into a template to create checklists such as Test Limit Isolation, Safety and System Depressurization, and more.

7.1.2   Primary Isolation Checklist (All the Listed Isolations to be in the Closed Position)

Location   :   **PLATFORM.**
Test Pack 1   :   **ONE.**

ID No.	P&ID No.	Description	Test 1 Date: 10/1/12		Test 2 Date: 10/8/12		Test 3 Date: 10/15/12	
			BB Solut.	Client	BB Solut.	Client	BB Solut.	Client
1	DKO-S35-PPI-20234-001							
2	DKO-S35-PPI-20234-001							
3	DKO-S35-PPI-20234-001							
4	DKO-S35-PPI-20234-001							
5	DKO-S35-PPI-20234-001							
6	DKO-S35-PPI-20234-001							
7	DKO-S35-PPI-20234-001							
8	DKO-S35-PPI-20234-001							