

IsoTracker – Quick User’s Guide

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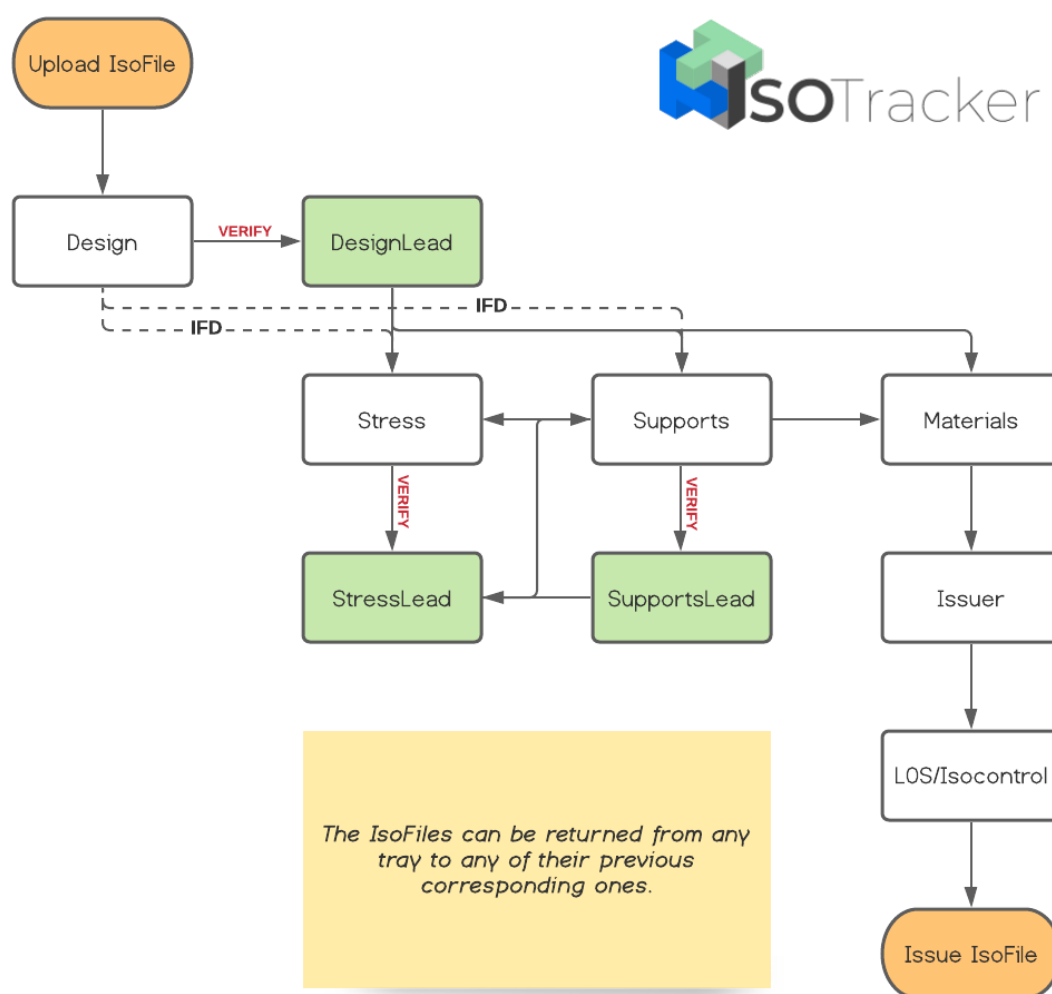
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1. ¿WHAT IS ISOTRACKER?

IsoTracker is an in-house tool that has been developed with the aim of digitalize the isometric workflow during the IFC or IFD phase between the different stakeholders whom take part within an isometric emission.

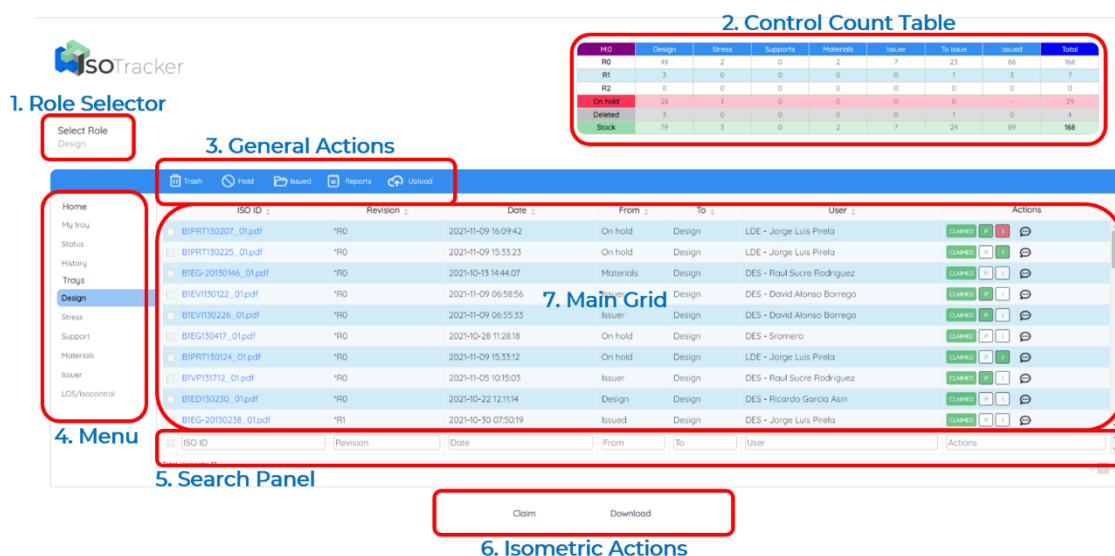
Different workflow has been set up depending on the phase of the project. Isometric navigates through the different disciplines (forward or backward) during its validation process.



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2. INTERFACE

The *IsoTracker* overview presents the following screen:



The screenshot shows the IsoTracker interface with the following components labeled:

- 1. Role Selector:** A dropdown menu to select a role.
- 2. Control Count Table:** A table showing counts for various categories.
- 3. General Actions:** A set of icons for actions like Home, My tray, Status, History, Tray, Design, Stress, Support, Materials, Issuer, LOS/SpecialtyLead.
- 4. Menu:** A sidebar menu with options like Home, My tray, Status, History, Tray, Design, Stress, Support, Materials, Issuer, LOS/SpecialtyLead.
- 5. Search Panel:** A search bar with filters for ISO ID, Revision, Date, From, To, User, and Actions.
- 6. Isometric Actions:** A set of buttons for Claim and Download.
- 7. Main Grid:** A table displaying a list of items with columns for ISO ID, Revision, Date, From, To, User, and Actions.

	Design	Stress	Supports	Materials	Issuer	To Issuer	Issued	Total
R0	48	2	0	2	7	23	86	168
R1	3	0	0	0	0	1	3	7
R2	0	0	0	0	0	0	0	0
On hold	28	1	0	0	0	0	0	29
Deleted	3	0	0	0	0	1	0	4
Stock	79	3	0	2	7	24	89	168

ISO ID	Revision	Date	From	To	User	Actions
BIPRT130207_01.pdf	*R0	2021-11-09 16:09:42	On hold	Design	LDE - Jorge Luis Pirela	CLAIMED [1] [1] [1]
BIPRT130225_01.pdf	*R0	2021-11-09 15:33:23	On hold	Design	LDE - Jorge Luis Pirela	CLAIMED [1] [1] [1]
BIEG-20130146_01.pdf	*R0	2021-10-15 14:44:07	Materials	Design	DES - Raul Suarez Rodriguez	CLAIMED [1] [1] [1]
BIEV130122_01.pdf	*R0	2021-11-09 06:58:56	Design	Design	DES - David Alonso Barrego	CLAIMED [1] [1] [1]
BIEV130226_01.pdf	*R0	2021-11-09 06:55:33	Issuer	Design	DES - David Alonso Barrego	CLAIMED [1] [1] [1]
BIEG130417_01.pdf	*R0	2021-10-28 11:28:18	On hold	Design	DES - Sromero	CLAIMED [1] [1] [1]
BIPRT130124_01.pdf	*R0	2021-11-09 15:33:12	On hold	Design	LDE - Jorge Luis Pirela	CLAIMED [1] [1] [1]
BIVP131712_01.pdf	*R0	2021-11-05 10:15:03	Issuer	Design	DES - Raul Suarez Rodriguez	CLAIMED [1] [1] [1]
BIED130230_01.pdf	*R0	2021-10-22 12:11:14	Design	Design	DES - Ricardo Garcia Asin	CLAIMED [1] [1] [1]
BIEG-20130238_01.pdf	*R1	2021-10-30 07:50:19	Issued	Design	DES - Jorge Luis Pirela	CLAIMED [1] [1] [1]

1. **Role Selector** The main roles for IsoTracker are:

- DES Design
- LDE DesignLead
- STR Stress
- LST StressLead
- SUP Supports
- LSP SupportsLead
- MAT Materials
- ISS Issuer
- LOS SpecialtyLead

Each of these roles has its function defined by the workflow.

Users can select the appropriate role according to the assignment given by the SpecialtyLead. For example, a user can have within the project the role of Designer and that of the respective leader. However, there can also be users with only one role so the selector will only show their only role.

The users and roles are defined by the SpecialtyLead who will be able to add, edit and delete users / roles throughout the cycle.

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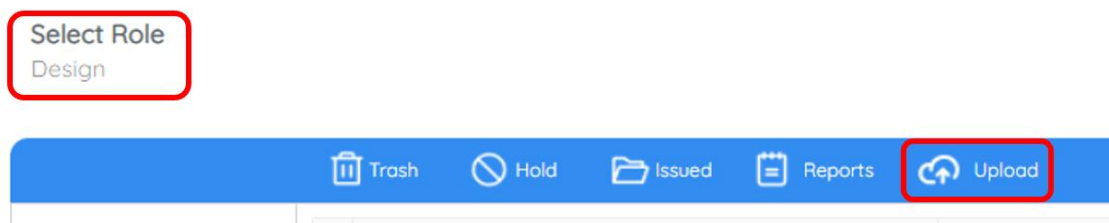
2. **Control Count Table** This table shows in real time the number of isometrics in each tray, hold and deleted as well as the revision they are in and their totals.
3. **General Actions** It shows general actions and shortcuts to specific functionalities.
4. **Menu** Access to global *IsoTracker* trays and views.
5. **Search Panel** Allows you to filter by columns and simultaneously to achieve the expected results.
6. **Isometric Actions** They are the buttons that perform actions on the isometric ones. The amount and functionality of these depends on the role and view where the user is working.
7. **Main Grid** Displays specific information for each isometric. For example, where it comes from, date of last update, user, individual actions, etc.

3. GETTING STARTED

The first step in the cycle is to upload the isometric files. These must be in PDF format. It is also possible to upload their corresponding attachments in the same interface as long as the name is the same as the isometric one.

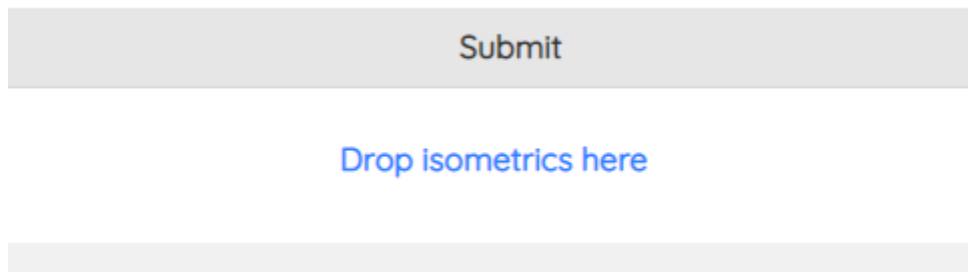
The role that has the ability to perform this action is the Designer (Design).

In *General Actions* panel, click Upload

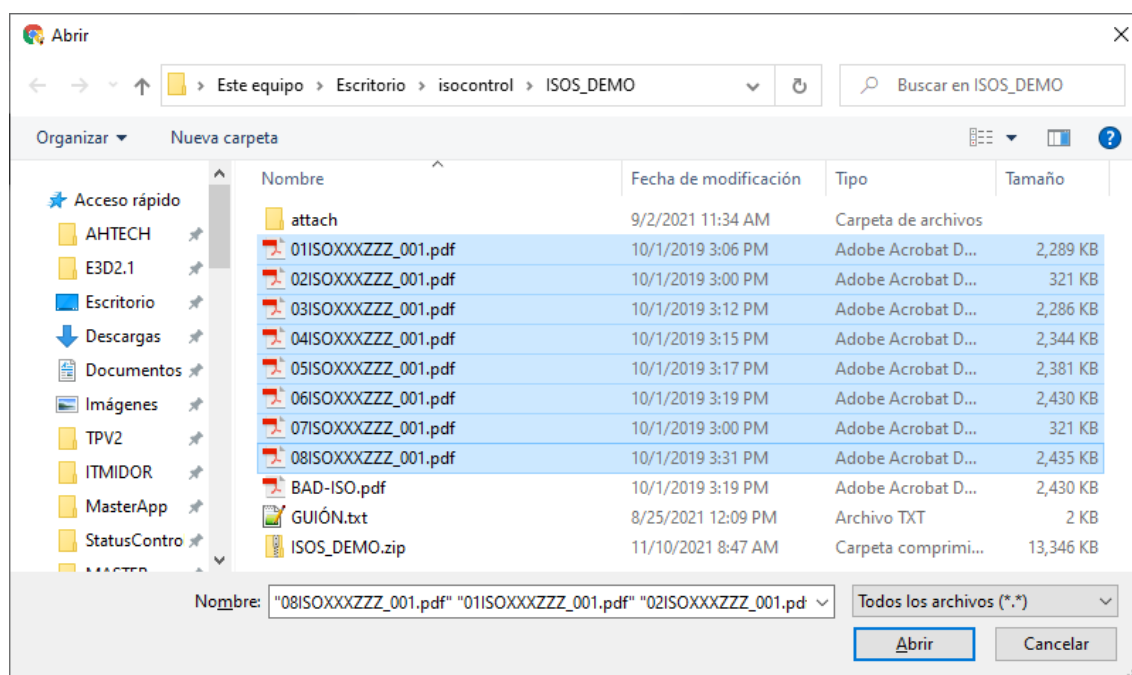


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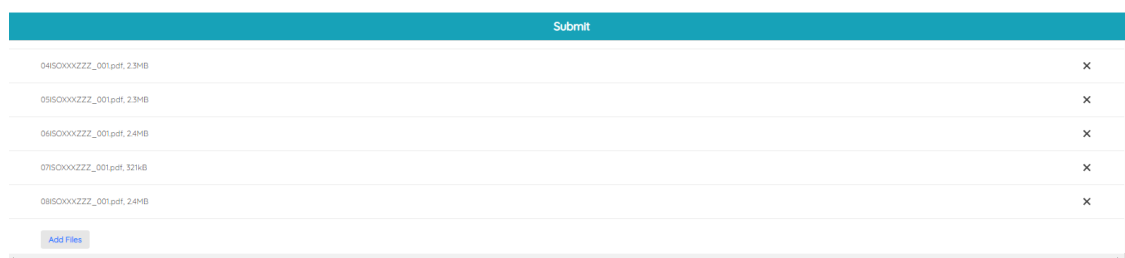
and will find the following screen:



Click on **Drop isometrics here** and the Windows Explorer will be displayed (or just drag the files.)



The selected isometrics and attachments will appear in the view.



At this point, more isometrics or attachments can be added, individually canceled due to an error or simply Submit to load.

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IsoTracker has a complex system for each isometric in order to prevent two or more users from working on the same file and to avoid inconsistencies in the database. Therefore, each user can work on an isometric while making the respective claim. If an isometric is claimed, its selection will be disabled.

In summary, to start working on an isometric, it is necessary to make a Claim on it and access it through MyTray.

When a designer uploads one or more isometrics this will be automatically claimed by him.

Once the isometrics have been correctly inserted in *IsoTracker*, the designer will be able to see the uploaded isometrics in the main tray. To work with them, the designer must go to MyTray. All this through the menu:

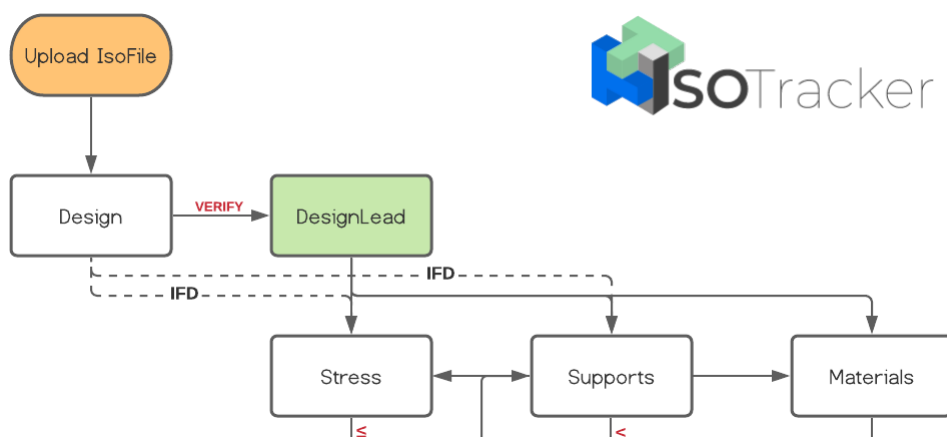


4. ON MYTRAY

The individual functions and buttons of MyTray depend on the role that is assigned or selected. In the case of the designer (Design) in an IFC cycle, he can only download the master file, carry out the corresponding procedures, upload the master with changes and attachments to *IsoTracker* and send it to the design leader to verify.

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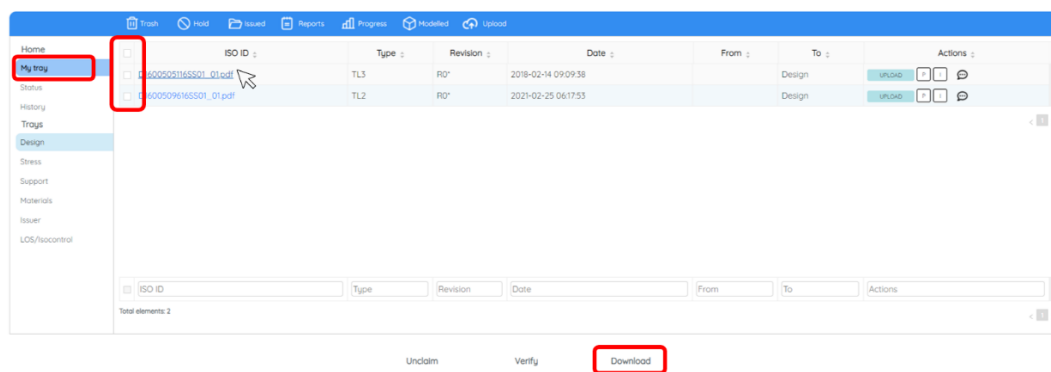
If the project cycle is in IFD, the designer can go to stress or supports as required: (See dotted lines (IFD) in the following image)



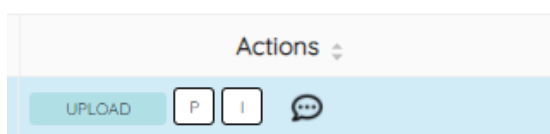
5. DOWNLOAD OVERVIEW

To exemplify the process, only the master download is performed. However, you can download all the isometrics and attachments simultaneously or just the master. If you want to download simultaneously, select the isometrics and click the download button. You will get a .zip file with the content.

The master can be opened and downloaded only by clicking on the name-link of the isometric:



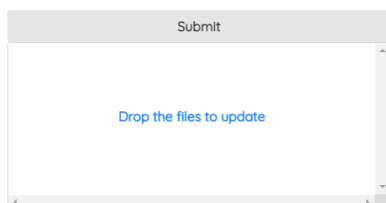
Once the master is updated according to requirements, you can upload through the UPLOAD button found in the actions column. With this you can also include attachments with any extension as long as they have the same name as the isometric.



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Clicking **UPLOAD** will display a window like the following:

D1600505116SS01_01



*****WARNING!***** This action will replace the current(s) file(s). Take appropriate cautions.
If you are not sure of this action, click cancel and contact your supervisor.

Cancel

Click on **Drop the files here** and the Windows Explorer will be displayed (or just drag the files.) *The yellow warning in the window indicates that the files are being replaced. However IsoTracker performs an automatic backup of the previous file.*

IMPORTANT: It has been described in previous lines that the attachments must contain the same name as the isometric. However, there is an exception to this rule and it is when it is required to upload the clean isometric, that is, the one that is extracted directly from the 3D tool without any comments and / or modifications.

To upload this file, it needs to have a .pdf extension like the master, only that in its name you must add -CL. For example, if the isometric is called isofile001.pdf, the clean file must be isofile001-CL.pdf. To upload this file, follow the steps explained in '**DOWNLOAD OVERVIEW**'.

6. SEND TO VERIFY

As described in previous lines in an IFC cycle, verification by the design leader is mandatory. To do this, select the isometrics to be verified and click the Verify button:

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ISO ID	Type	Revision	Date
<input checked="" type="checkbox"/> D1600505116SS01_01.pdf	TL3	R0*	2018-02-14 09:09:
<input checked="" type="checkbox"/> D1600509616SS01_01.pdf	TL2	R0*	2021-02-25 06:17:

Total elements: 2

Unclaim **Verify**

Once the action is carried out, the option to cancel the verification will appear in yellow. This gives the possibility of backing down in case of incorrectly selecting an isometric:

Actions

CANCEL VERIFY P I

At this point, the SpecialtyLead will be able to claim the isometric file. Once this is done, there will be no possibility of cancellation.

The DesignLead must go to the 'Design' tray to select the isometrics and make the claim (only on the isometrics with PENDING status):

Select Role
DesignLead

ISO ID	Type	Revision	Date	From	To	User	Actions
<input checked="" type="checkbox"/> D1600505116SS01_01.pdf	TL3	*R0	2021-11-10 13:10:49	Design	DES - Super		Cancel P I
<input checked="" type="checkbox"/> D1600509616SS01_01.pdf	TL2	*R0	2021-11-10 13:10:49	Design	DES - Super		Cancel P I

Total elements: 2

Claim Delete Download

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Once claimed, from the 'Design' tray, the status of the isometrics will go to CLAIMED, indicating in the User column who has it in use and the acronyms indicating the respective role.

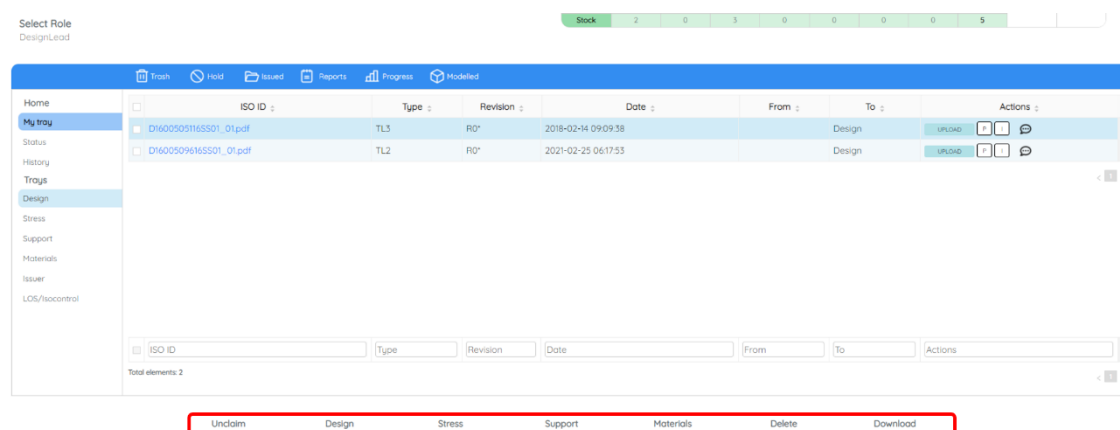
User	Actions
LDE - Super	CLAIMED P I
LDE - Super	CLAIMED P I

Next and if required, the DesignLead must follow the steps indicated by the flow and the instructions described above from the On MyTray point.

The DesignLead can send to Stress, Support or Materials (as indicated in the workflow) as well as return to 'Design' for possible correction. Also remove / cancel the isometric if the DesignLead considers it or simply Unclaim in case of considering an error. **NOTE: Unclaim applies to all roles.**

Select Role
DesignLead

Stack 2 0 3 0 0 0 0 5



The screenshot shows the 'MyTray' section with a table of isometrics. The table has columns: ISO ID, Type, Revision, Date, From, To, and Actions. Two items are listed:

ISO ID	Type	Revision	Date	From	To	Actions
D1602050916SS01_01.pdf	TL3	R0*	2018-02-14 09:09:38		Design	UNCLAIM P I
D1602050916SS01_01.pdf	TL2	R0*	2021-02-25 06:17:53		Design	UNCLAIM P I

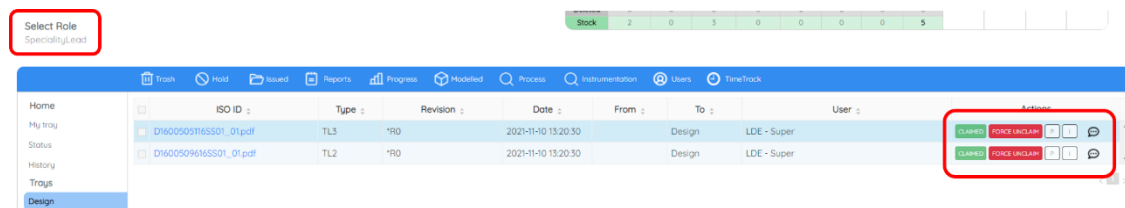
Below the table, there is a navigation bar with buttons: Unclaim, Design, Stress, Support, Materials, Delete, and Download. The 'Unclaim' button is highlighted with a red box.

All roles except the SpecialtyLead work similarly based on the flow dictated by the loop (IFD / IFC), so this guide will assume that you have understood everything up to this point. Next, a jump will be made to the SpecialtyLead to see its functions and its power to issue.

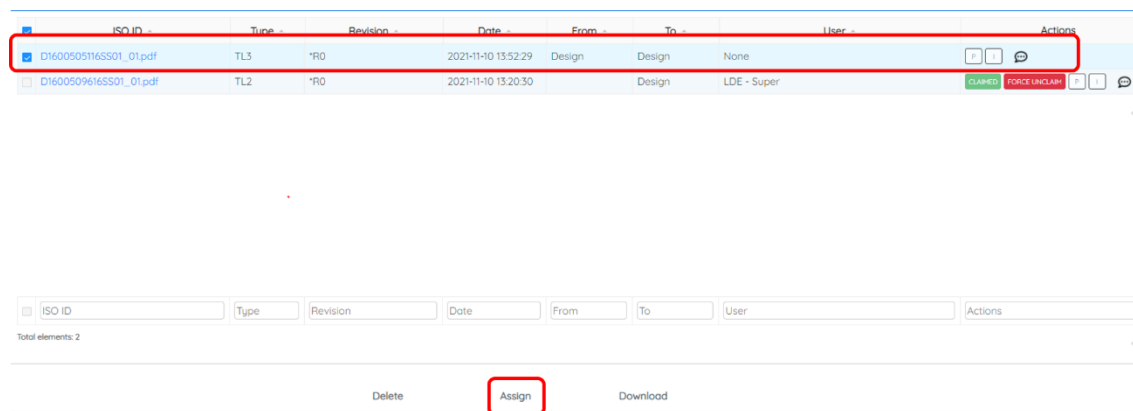
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7. SPECIALTY-LEAD

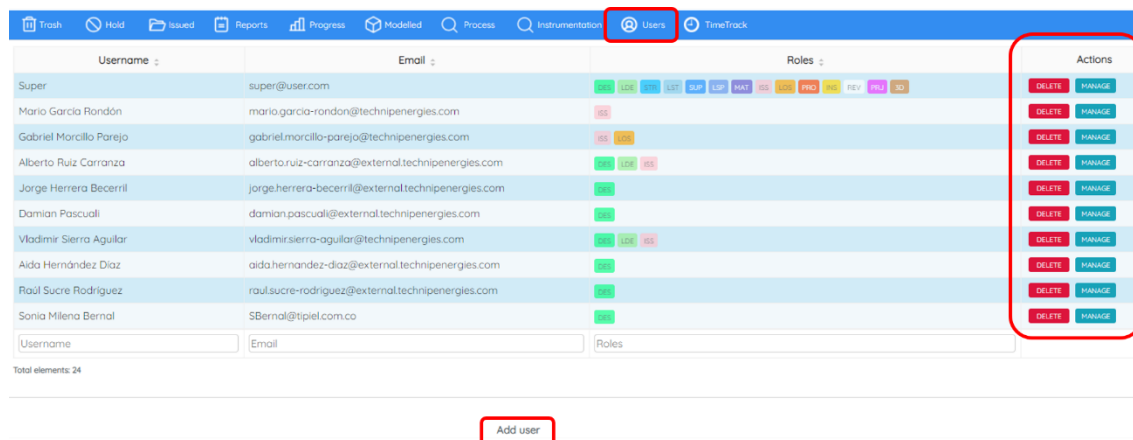
It has special powers. For example, he can remove an isometric claim from any tray:



Assign isometrics that are not claimed:

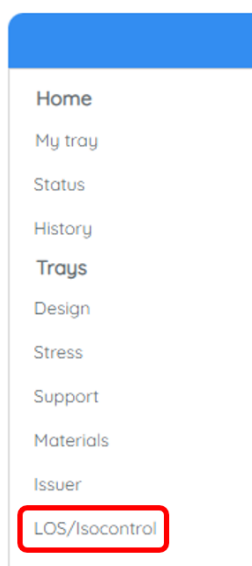


Manage users:

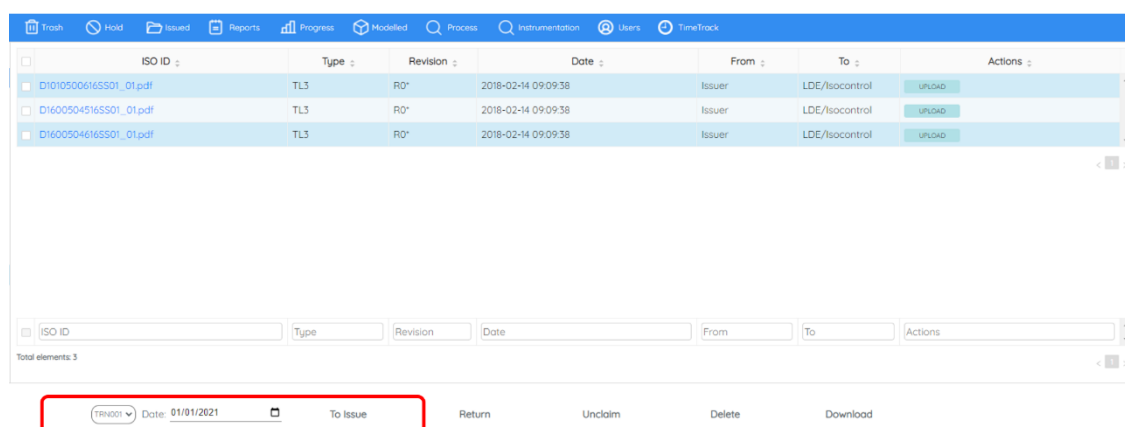


As was briefly detailed, the SpecialtyLead is the person who can and should emit the isometrics and this can be done only from its 'LOS/Isocontrol' tray which is located in the last position.

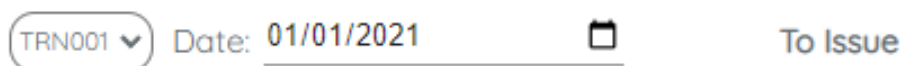
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As a SpecialtyLead, claiming the isometrics of the aforementioned tray and making a jump to MyTray, the following view is shown:



In addition to the basic functions, you can especially see a dropdown, a DatePicker and the button To Issue:



The drop-down indicates the server folder in which the broadcast isometric will be stored. These are directories ranging from TRN001 to TRN100. This amount gives the project the freedom to classify the broadcasts as it is considered and then be able to physically access these broadcasts according to the directory and date selected.

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Next, the emission of the three available isometrics will be carried out. Two to TRN001 and one to TRN002 considering any date:

TRN001

Trash Hold Issued Reports Progress Modelled Search			
<input type="checkbox"/>	ISO ID	Type	Revision
<input checked="" type="checkbox"/>	D1010500616SS01_01.pdf	TL3	R0*
<input checked="" type="checkbox"/>	D1600504516SS01_01.pdf	TL3	R0*
<input type="checkbox"/>	D1600504616SS01_01.pdf	TL3	R0*

<input type="checkbox"/>	ISO ID	Type	Revision
--------------------------	--------	------	----------

Total elements: 3

TRN001
Date: 10/11/2021
To Issue

NOTE: The revisions as indicated in the Revision column of the image above have a legend. If they are Rn* it means that they are next to be issued in revision n. If they were as Rn (without the asterisk) it means that it has been issued in revision n.

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When you click on To Issue they disappear from the tray leaving for this example the one that will be issued to TRN002:

TRN002

<input checked="" type="checkbox"/>	ISO ID ↕	Type ↕	Revision
<input checked="" type="checkbox"/>	D1600504616SS01_01.pdf	TL3	R0*

<input type="checkbox"/>	ISO ID	Type	Revision
--------------------------	--------	------	----------

Total elements: 1

TRN002 ▼

Date: 01/01/2021

To Issue

To access the view of issued isometrics, click on Issued in the general actions panel:

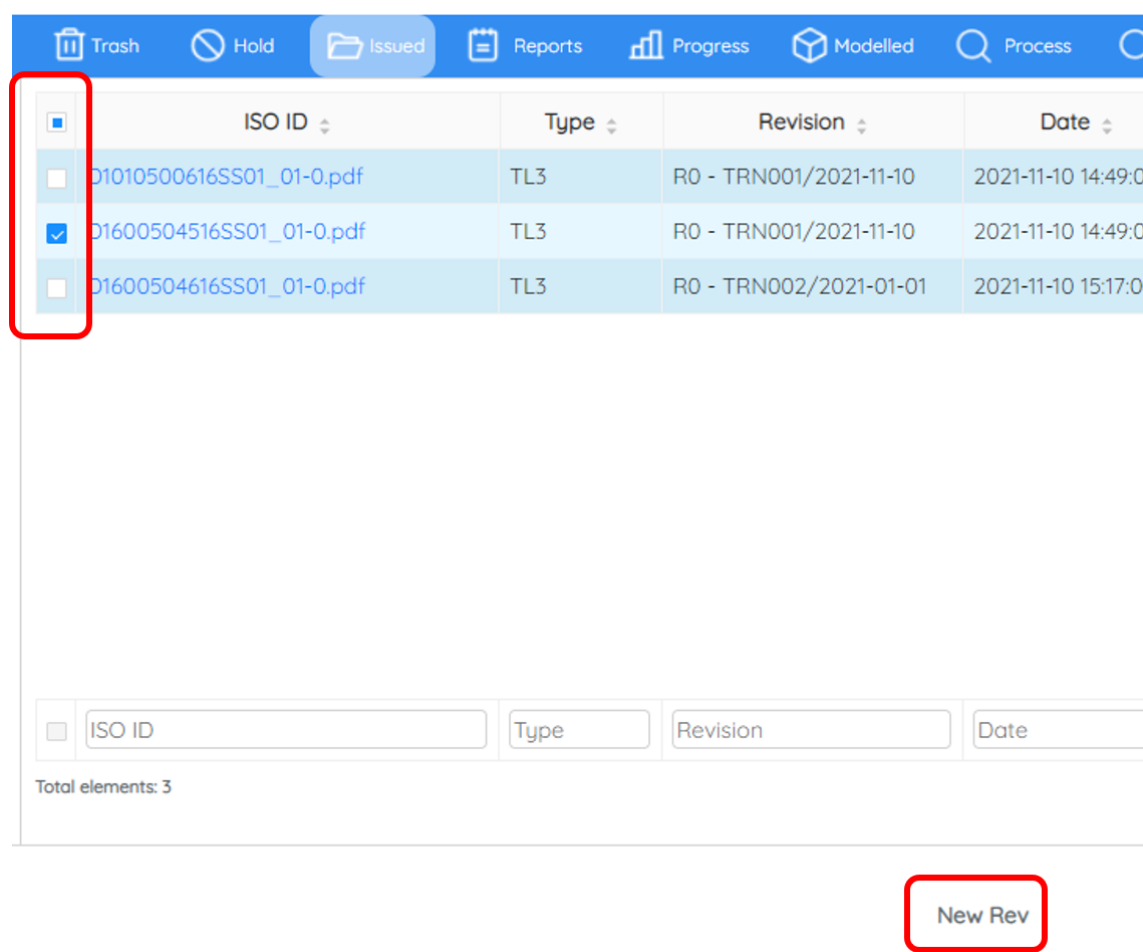
<div> Trash Hold Issued Reports Progress Modelled Process Instr </div>				
<input type="checkbox"/>	ISO ID ↕	Type ↕	Revision ↕	Date ↕
<input type="checkbox"/>	D1010500616SS01_01-0.pdf	TL3	R0 - TRN001/2021-11-10	2021-11-10 14:49:05
<input type="checkbox"/>	D1600504516SS01_01-0.pdf	TL3	R0 - TRN001/2021-11-10	2021-11-10 14:49:05
<input type="checkbox"/>	D1600504616SS01_01-0.pdf	TL3	R0 - TRN002/2021-01-01	2021-11-10 15:16:25

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As you can see, the two isometrics issued in TRN001 R0 and with the selected date and also one isometric in TRN002 R0 appear.

New Revision

If the SpecialtyLead considers that an Isometric should come out in a new revision, from the same Issued view, it will have to select and click on the New Rev button:



The screenshot shows the 'Issued' view in IsoTracker. At the top, there is a navigation bar with icons for Trash, Hold, Issued (selected), Reports, Progress, Modelled, and Process. Below this is a table with the following columns: ISO ID, Type, Revision, and Date. Three rows are visible, all with Type 'TL3' and Revision 'R0'. The first two rows are for TRN001 and the third is for TRN002. The first row is selected, indicated by a blue checkmark in the first column. Below the table, there is a search bar with fields for ISO ID, Type, Revision, and Date. At the bottom right, there is a 'New Rev' button, which is highlighted with a red box.

ISO ID	Type	Revision	Date
01010500616SS01_01-0.pdf	TL3	R0 - TRN001/2021-11-10	2021-11-10 14:49:0
01600504516SS01_01-0.pdf	TL3	R0 - TRN001/2021-11-10	2021-11-10 14:49:0
01600504616SS01_01-0.pdf	TL3	R0 - TRN002/2021-01-01	2021-11-10 15:17:0

Total elements: 3

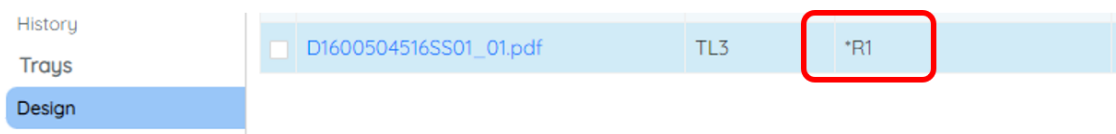
New Rev

Once this action has been carried out, notice how the R (Revision) appears highlighted in green in the actions column of the selected isometric. It means that the isometric has been returned to Design to start the process again but revision 0 (R0) is already done.



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In the Design tray, you will be able to see said isometric in R1* that is, this isometric has already been emitted in R0 and is about to come out in R1:



You can also see this next revision in the Control Count Table:

	Design	Stress	Supports	Materials	Issuer	To issue	Issued	Total
R0	2	0	0	0	0	0	3	5
R1	1	0	0	0	0	0	0	1
R2	0	0	0	0	0	0	0	0
On hold	0	0	0	0	0	0	-	0
Deleted	0	0	0	0	0	0	0	0
Stock	3	0	0	0	0	0	3	5