tBits Collabwrite - Engineering Document Control and Project Monitoring System

Overview of Project Configuration on tBits CollabWrite for IMP GROUP

Table of Contents Including List of Diagrams

List of BA's which can be used directly after exporting from previous project and importing into new project.

1. Task Tracking

2. Punch List

3. Extension of Time Request

4. Non Conformance Request

5. Site Instruction on IMP

6. Inspection and Test Plan

7. Hazard and Accident Incident Log

The only change which needs to be done in the above BA's is change the type value of Field called "Project". Give the value suiting to the current project.

List of BA's/Modules which needs configuration after exporting from previous project and importing into new project.

1. Document Control Module

2. Correspondence Module

3. Minutes of Meeting Module

4. Variation Order Request / FCN

5. Technical Query

6. Health and Safety Environment

Procedure to Configure Document Control Module

If the work flow is same as the previously configured project "FMG 2nd Outload Circuit SPF" DCM then we can replicate the same process for the upcoming projects with minimal changes.

Before replicating the process we have to make sure that the following things are done in tBits.
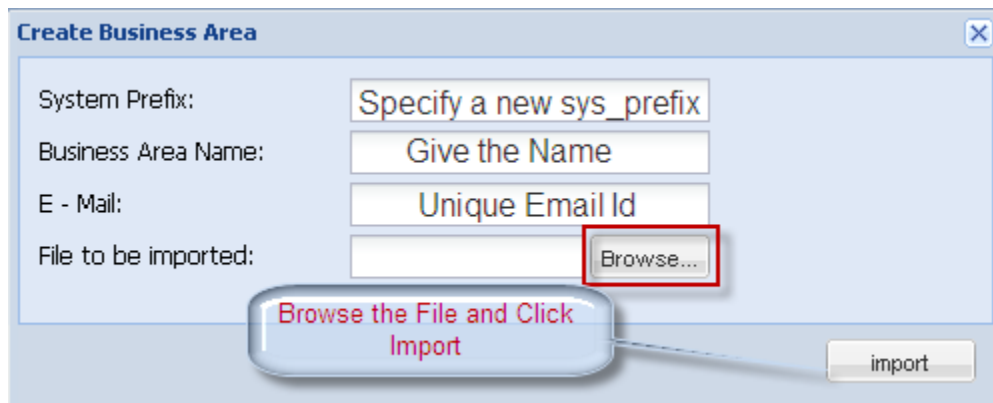
1. Import of all BA's related to Document Control from 2nd Outload Circuit Project

2. Naming Convention for prefix of BA [Sys_prefix]

3. Creation of Users [including the Doc Controller for Each BA]

4. Creation of Mailing Lists w.r.t to each BA [Follow Naming Convention]

5. Change in Display Name of fields/type in each BA after importing [If required]

Import of all the BA's related to Document Control.

1. Export all the BA's related to Doc Control from 2nd Outload Circuit SPF Project into the system.

[FMG_IMP,FMG_HERZOG,FMG_EPCM,FMG_OWNER.FMG_SITE,FMG_DTN,FMG_DTNApp]

2. Now import the BA's one by one from your system [.XML format]

Note : Sys_prefix and Name should not have any spaces or special characters except underscore(_)

Email Id of BA for IMP project should be sys_prefix followed by impgroup.com.au [**fmg_imp@impgroup.com.au**]

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Naming Convention for prefix of BA [Sys_prefix]

1. Generally we follow a naming convention for sys_prefix of BA , it starts with project code/name followed by name of BA.

[Eg: For Project "**C**hristmas **C**reek **L**ab **E**quipment" the sys_prefix of IMP BA is "**CCLE_IMP**"]

Creation of Users [including the Doc Controller for Each BA]

1. All the users related to this particular project should be created in tBits.

2. Mention their email id, firm code, firm address etc after creating the user in "All Users" Admin Panel.

3. Also a doc controller user login should be created for each of the BA.The purpose of this user is it updates the doc/dwg from one BA to other BA.

4. After creating add the doc controllers in all DCM BA's and give the Role of DTN System user

5. Usually DTN System User Role has all the permissions.

[Eg: Doc controller for IMP in DCM "**C**hristmas **C**reek **L**ab **E**quipment" is "**dc_ccle_imp**"]

Note : No Login name should have spaces and special characters except underscore and dot.

Creation of Mailing Lists w.r.t to each BA [Follow Naming Convention]

1. Create a Mailing List for each BA.

2. Add all the users who have access to this particular BA in this Mailing List.

3. In "Admin Panel", select the desired BA and click on BA users tab.Now add the mailing list in BA users and give the desired roles to the mailing list.

Note: Follow a Naming Convention for Mailing List so that a new administrator can easily understand to which BA the mailing list belongs to.

[Eg: The mailing list for IMP in   DCM "**C**hristmas **C**reek **L**ab **E**quipment" is "**aus_002_ccle_imp_dtn_users**"]

Change in Display Name of BA's/ fields /type in each BA after importing [If required]

1. After importing all the BA's, change the display name of BA's, fields and field types if required.

2. Currently we have 5 BA's each relating to a company and one of them is Vendor "HERZOG", Later in another project if Vendor becomes "NWSM" then first export the BA of Vendor- HERZOG and import the BA again by changing the BA name, display name, sys_prefix to "NWSM" ,"NWSM-VENDOR","CCLE_NWSM" respectively.

3. Now go to the BA and change the name of all the fields and types to "NWSM" where there was "HERZOG". Similarly with other BA's too

4. Type values should be mainly changed for field "**Originator**" in all BA's and for Field "**Recipient**" in DTN and DTNApp BA.

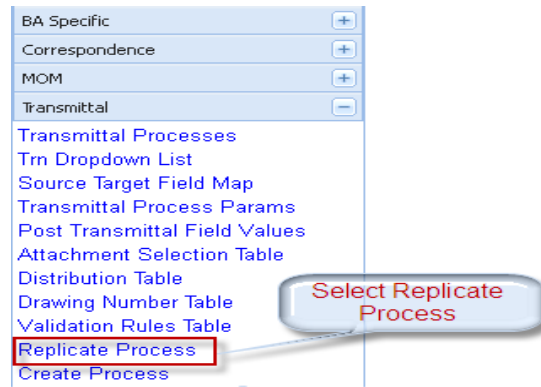**Replicating Previous Project Transmittal Configuration to New Project.**

As the Work flow is same for both the Projects "FMG 2nd Outload Circuit SPF" and "Christmas Creek Lab Equipement" im replicating the configuration of former to the latter and it includes the following steps.
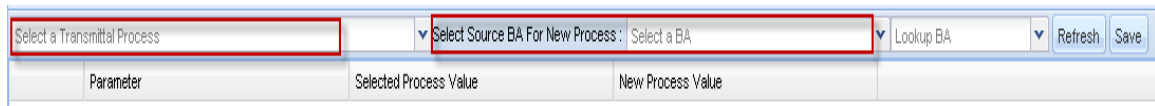
a. Click on "Transmittal" button in Administration Panel
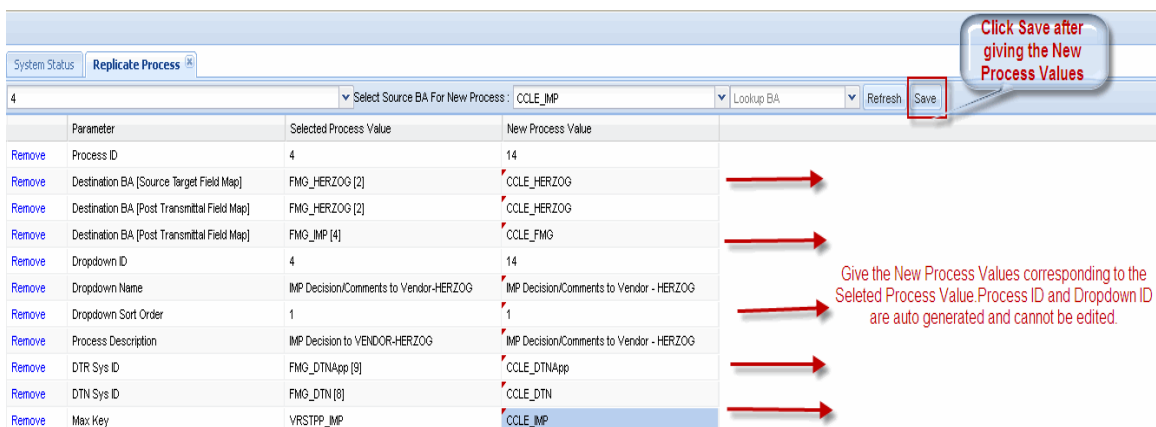

Screen Shot 1

b. Select "Replicate Process"

BA Specific	+
Correspondence	+
MOM	+
Transmittal	−

Transmittal Processes
Trn Dropdown List
Source Target Field Map
Transmittal Process Params
Post Transmittal Field Values
Attachment Selection Table
Distribution Table
Drawing Number Table
Validation Rules Table
Replicate Process
Create Process

Select Replicate Process

Screen Shot 2

c. Select a Transmittal Process which needs to be replicated and also Select the Source BA for New Process

| Select a Transmittal Process | ∨ | Select Source BA For New Process : | Select a BA | ∨ | Lookup BA | ∨ | Refresh | Save |
| | Parameter | | Selected Process Value | | New Process Value | | | |

Screen Shot 3

d. After the selection,you get three colums Parameter,Selected Process value, New process Value.

e. By Comparing the Selected Process Values give the Corresponding New Process Values and Click Save.

Click Save after giving the New Process Values

System Status	Replicate Process						
4		∨ Select Source BA For New Process :	CCLE_IMP	∨ Lookup BA	∨ Refresh	Save	
	Parameter	Selected Process Value	New Process Value				
Remove	Process ID	4	14				
Remove	Destination BA [Source Target Field Map]	FMG_HERZOG [2]	CCLE_HERZOG				
Remove	Destination BA [Post Transmittal Field Map]	FMG_HERZOG [2]	CCLE_HERZOG				
Remove	Destination BA [Post Transmittal Field Map]	FMG_IMP [4]	CCLE_FMG				
Remove	Dropdown ID	4	14				
Remove	Dropdown Name	IMP Decision/Comments to Vendor-HERZOG	IMP Decision/Comments to Vendor - HERZOG				
Remove	Dropdown Sort Order	1	1				
Remove	Process Description	IMP Decision to VENDOR-HERZOG	IMP Decision/Comments to Vendor - HERZOG				
Remove	DTR Sys ID	FMG_DTNApp [9]	CCLE_DTNApp				
Remove	DTN Sys ID	FMG_DTN [8]	CCLE_DTN				
Remove	Max Key	VRSTPP_IMP	CCLE_IMP				

Give the New Process Values corresponding to the Seleted Process Value.Process ID and Dropdown ID are auto generated and cannot be edited.

Screen Shot 4

f. Replication of Process is successfully done.

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**g. Similarly replicate the other processes based on Work Flow.**

Changes which needs to be done after replicating the process

After successful replication of process,few changes have to be done in mainly two tables

1. Transmittal Process Params

2. Post Transmittal Field Values

Transmittal Process Params

1. Select Transmittal in Admin Panel

2. Select Transmittal Process Params under Transmittal
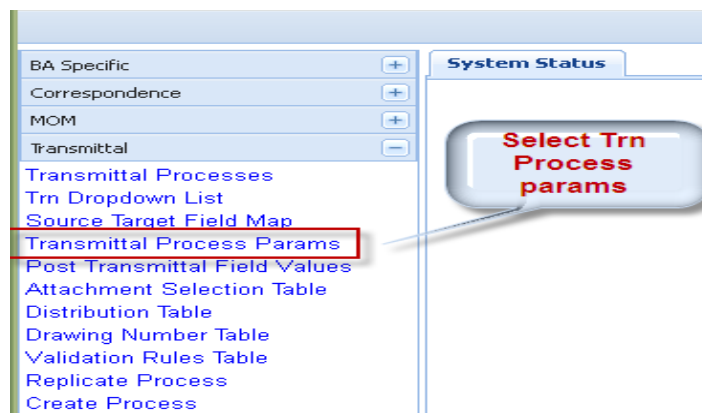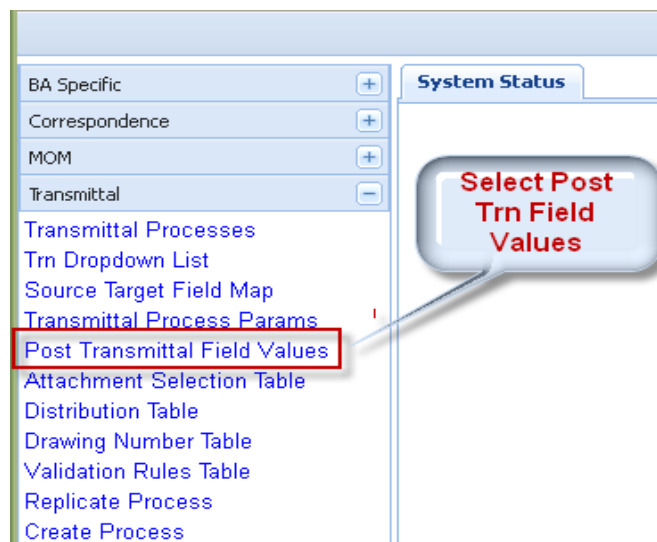

Screen Shot 5

3. Now select the newly configured process [the replicated process]

4. After selecting it displays the values for each parameter in the table

5. Verify each and every parameter and its value

6. Change the value according to the new project.

		Name	Value	
	Remove	AccessTo	aus_001_imp_dtn_users,aus_001_epcm_dtn_users,Owner	Mailing List of Both Companies
	Remove	approvalRoleName	DTNApprover	
	Remove	calendar		
	Remove	ccList	david.watt,boyne,mitchellp,nbozikovic	Circulation List
	Remove	deliverableFieldId	79	
	Remove	dtnFieldId	64	
	Remove	DTNFooterImage	IMP_DTN_Footer	
	Remove	DTNFrom	For IMP	
	Remove	DTNHeaderImage	IMP_DTN_Header	
	Remove	dtnLogger	andre	Logger on whose name the DTN should be created
	Remove	DTNNoteFieldId	33	
	Remove	dtnSignatory	andre	Whose sign should appear on DTN Note
	Remove	emailBody		
	Remove	kindAttention		
	Remove	originator	IMP	Source BA creating the transmittal
	Remove	ProjectCode	505-PC-0078	Change the Code w.r.t current Project
	Remove	ProjectName	505-PC-0078 FMG 2nd Outload Circuit SPF	
	Remove	recipient	EPCM	Target BA receiving the transmittal
	Remove	Remarks	Enter Remark	
	Remove	stickiness	{"toList":1, "ccList":1,"dtnSignatory":1}	
	Remove	toAddress	EPCM [Worley Parsons]	Address of Target Company
	Remove	toList	155MTPADocControl@worleyparsons.com	Assignee
	Remove	transmittal_id_prefix	-EPCM-DTN-	DTN number Format
	Remove	transmittal_template_name	dtn_template_imp_submission...	
	Remove	transmittalSubject		
	Remove	TransmittedFileFieldId	34	
	Remove	uniqueTransmittalNumberFieldId	110	

In most cases the values of parameters highlited in red change,so please confirm the values

Screen Shot 6

Post Transmittal Field Values

1. Select Transmittal in Admin Panel

2. Select Post Transmittal under Transmittal

Screen Shot 7

3. Now select the newly configured process [the replicated process]

4. After selecting it displays the values for each parameter in the table

5. Verify each and every parameter and its value

6. Change the value according to the new project.

		Target BA	Target Field	Target Field Value
	Remove	CCLE_IMP <32>	Flow Status with EPCM-Owner <4>	UnderReview
	Remove	CCLE_IMP <32>	Decision From EPCM - Owner <5>	None
	Remove	CCLE_IMP <32>	Description <13>	Document Submitted to EPCM & Owner via letter of Transmital Number#
	Remove	CCLE_IMP <32>	Last Update By. <16>	dc_IMP
	Remove	CCLE_IMP <32>	Resubmission Date to EPCM - Owner <18>	
	Remove	CCLE_IMP <32>	EPCM-Owner Response Date <68>	{"Revision":{"default":"14"}}
	Remove	CCLE_IMP <32>	ECPM-Owner Decision File <78>	[]
	Remove	CCLE_IMP <32>	Submit To EPCM-Owner <91>	0
	Remove	CCLE_CALIBRE <33>	Flow Status with IMP <4>	UnderReview
	Remove	CCLE_CALIBRE <33>	Comments from Owner <5>	None
	Remove	CCLE_CALIBRE <33>	Description <13>	Document Received from IMP via letter of Transmital Number#
	Remove	CCLE_CALIBRE <33>	Last Update By. <16>	dc_IMP
	Remove	CCLE_CALIBRE <33>	Response Date to IMP <18>	{"Revision":{"default":"14"}}
	Remove	CCLE_CALIBRE <33>	IMP Resubmission Date <71>	
	Remove	CCLE_CALIBRE <33>	Flow Status with Owner <94>	PendingReceipt
	Remove	CCLE_CALIBRE <33>	Response Date From Owner <95>	{"Revision":{"default":"10"}}
	Remove	CCLE_CALIBRE <33>	Decision File to IMP/Owner <107>	[]
	Remove	CCLE_FMG <34>	Flow Status with IMP <4>	UnderReview
	Remove	CCLE_FMG <34>	Comments to EPCM <5>	None
	Remove	CCLE_FMG <34>	Description <13>	Document Received from IMP via letter of Transmital Number#
	Remove	CCLE_FMG <34>	Last Update By. <16>	dc_IMP
	Remove	CCLE_FMG <34>	Response Date to IMP <18>	{"Revision":{"default":"14"}}
	Remove	CCLE_FMG <34>	IMP Resubmission Date <68>	
	Remove	CCLE_FMG <34>	EPCM Decision File to Owner <78>	[]
	Remove	CCLE_FMG <34>	Comment File to EPCM <83>	[]
	Remove	CCLE_FMG <34>	Flow Status with EPCM <108>	PendingReceipt
	Remove	CCLE_FMG <34>	EPCM Decision to IMP-Owner <109>	None
	Remove	CCLE_FMG <34>	Owner Response Date to EPCM <113>	{"Revision":{"default":"10"}}

Select the newly configured Process

15 | Add Row | Remove Selected | Refresh | Save

In this table generally the Doc Controller [dc_imp] and the Turn Around Time Changes.Please confirm before proceeding

Screen Shot 8

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Procedure to Configure Minutes of Meeting Module

Import the BA of MoM.

Export the BA of MoM from 2nd Outload Circuit SPF Project into the system.

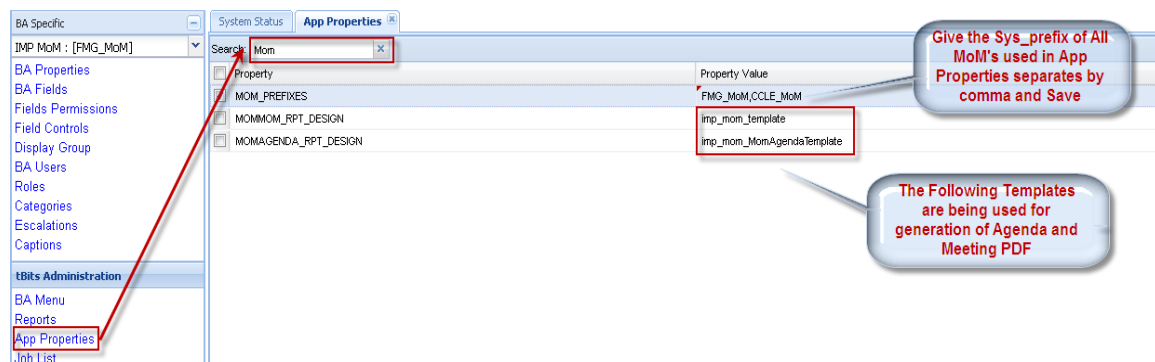[[FMG_MoM]]

Now import the BA from your system [.XML format]

Note : Sys_prefix and Name should not have any spaces or special characters except underscore(_)

Email Id of BA for IMP project should be sys_prefix followed by impgroup.com.au [**fmg_mom@impgroup.com.au**]

As sys_prefix of MoM for earlier project was "FMG_MoM",this time I name it as "CCLE_MoM"

Entries to be done in App Properties for MoM

The exact sys_prefix value of newly created MoM BA has to be given in App Properties "MOM_Prefixes". If you have multilple MoM BA's then give the values separated by comma.

Entries to be done in Database for MoM

After making the entries in App Properties,some of the entries have to be made in Database.

1. Know the sys_id of the BA [select * from business_areas where sys_prefix='CCLE_MoM']

2. By executing the above query I found out that sys_id is 38 of CCLE_MoM BA.

3. Now execute the below query in database table "**mom_templates**"

----

insert into mom_templates values (38,0,0,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,0,0,0,'imp_mom_MomAgendaTemplate.rptdesign')

insert into mom_templates values (38,6,1,1,'imp_mom_template.rptdesign')

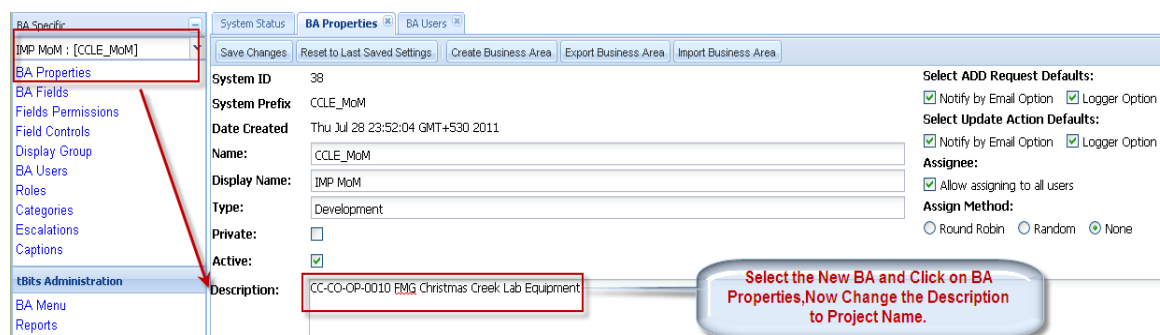insert into mom_templates values (38,6,2,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,6,6,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,6,7,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,6,8,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,6,9,1,'imp_mom_template.rptdesign')

insert into mom_templates values (38,6,10,1,'imp_mom_template.rptdesign')

----

4. Where 38 is the sys_id in the query.[Put the sys_id of you MoM BA]

5. Note: The sys_id may be different when you import the BA.

6. Rest of the values remain same.

Changes to be done in BA Properties for MoM.

1. As BA has been imported,the BA Property description will be the same as previous project MoM BA.So change the description for the new MoM BA by giving the Project Name.

2. Generally the Agenda and Meeting Auto generated PDF files pick the Project Name from the description of BA Properties.

3. So template will be common for all MoM BA's

CC-CO-OP-0010 FMG Christmas Creek Lab Equipment
Proposed Agenda

Meeting Title			Meeting ID				
Type	Internal Meeting		Venue				
Start Date	29 Jul 2011	Start Time	00:00	End Date	29 Jul 2011	End Time	00:00

CAT	Subject	Discussion	Decision Taken	Assignee	Planned Sub Date	Status	Action Taken/ Comments

505-PP-0078 FMG 2nd Outload Circuit SPF
Proposed Agenda

Meeting Title			Meeting ID				
Type	Internal Meeting		Venue				
Start Date	29 Jul 2011	Start Time	00:00	End Date	29 Jul 2011	End Time	00:00

CAT	Subject	Discussion	Decision Taken	Assignee	Planned Sub Date	Status	Action Taken/ Comments

Permissions to MoM

1. They are different roles in MoM

2. Give the permissions as per roles to each user.

3. Eg: Project Director will get the role of Project Director and you can change the permissions of that particular role as suitable to you.

Numbering System for MoM

1. In Admin Panel, Click BA fields Tab, Select field "Meeting Type" and click on its Types.

2. Now Type Tab opens,in Type Description specify your MoM Numbering format

3. [Eg: for Internal Meeting Type,I want the No. to be "IM-IMP-001" so I give "IM-IMP" in type description and Save.]

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Procedure to Configure Technical Query [TQ]

Import the BA of TQ.

1. Export the BA of TQ from 2nd Outload Circuit SPF Project into the system.

   [[FMG_TechQuery]]

2. Now import the BA from your system [.XML format]

Note : Sys_prefix and Name should not have any spaces or special characters except underscore(_)

Email Id of BA for IMP project should be sys_prefix followed by impgroup.com.au [**fmg_techquery@impgroup.com.au**]

As sys_prefix of TQ for earlier project was "**FMG_TechQuery**",this time I name it as "**CCLE_TQ**"

Entries to be done in Database for MoM

1. Some entries have to be made in " trn_change_note_configuration" table

2. Select * from trn_change_note_configuration

	change_note_id	src_sys_prefix	ba_type	target_sys_prefix	caption	template_name	src_attachment_field_id	target_attachment_field_id
1	1	FMG_IMP	DCN	FMG_FCN	Create FCN	fcn_template.rptdesign	0	0
2	2	FMG_IMP	TECH_QUERY	FMG_TechQuery	Create Tech Query	technical_query.rptdesign	0	0

3. The above value is showed when the query is executed, by the help of the query we can know the maximum number of column "change_note_id", The max number is 2 and next entry is 3.

4. Now insert the following query for new Tech Query entry in DB

5. insert into trn_change_note_configuration values

   (3,'CCLE_IMP','TECH_QUERY','CCLE_TQ','Create TechQuery','technical_query.rptdesign',0,0)

	change_note_id	src_sys_prefix	ba_type	target_sys_prefix	caption	template_name	src_attachment_field_id	target_attachment_field_id
1	1	FMG_IMP	DCN	FMG_FCN	Create FCN	fcn_template.rptdesign	0	0
2	2	FMG_IMP	TECH_QUERY	FMG_TechQuery	Create Tech Query	technical_query.rptdesign	0	0
3	3	CCLE_IMP	TECH_QUERY	CCLE_TQ	Create TechQuery	technical_query.rptdesign	0	0

6. In the above result first column is change_note_id which should be unique and incremented by one

7. Second column is sys_prefix of IMP BA from DCM .

8. Fourth column is sys_prefix of Tech Query.

9. Now execute [Select * from trn_change_note_field_map]

	src_sys_id	template_field_name	field_name
1	4	subject	subject
2	4	drawingNumber	VendorNo
3	4	Revision	Revision

Now Execute

insert into trn_change_note_field_map values (32,'subject','subject')

insert into trn_change_note_field_map values (32,'drawingNumber','VendorNo')

insert into trn_change_note_field_map values (32,'Revision','Revision')

	src_sys_id	template_field_name	field_name
1	4	subject	subject
2	4	drawingNumber	VendorNo
3	4	Revision	Revision
4	32	subject	subject
5	32	drawingNumber	VendorNo
6	32	Revision	Revision

Here Src_sys_id 4 is the sys_id of IMP BA [DCM] in Project FMG 2nd Outload Circuit SPF and src_sys_id 32 is the sys_id of IMP BA [DCM] from Project Christmas Creek Lab Equipment.

update business_areas set type='CC-CO-OP-0010-IMP-' where sys_id=39

Here sys_id 39 is that of Tech Query BA.

Changes to be done in BA Properties for TQ.

4. As BA has been imported,the BA Property description will be the same as previous project TQ BA.So change the description for the new TQ BA by giving the Project Name.

5. Generally the TQ PDF files pick the Project Name from the description of BA Properties.

6. So template will be common for all TQ BA'