Points to be covered in the Administration Training

List of DO's

1. **BA Properties**

   i. How to create a Business Area

   ii. How to Export Business Area

   iii. How to Import Business Area

   iv. Email Settings of Business Area

   v. Incoming Mail Settings

   vi. Naming Convention to be followed while importing or creating a new BA.

2. **BA Fields**

   i. How to add Fields in BA

   ii. What are the different data types available

   iii. How to add type values to Type fields.

   iv. Importance of Tracking Option Column

   v. Convention to be followed while adding Fields / Types [No spaces or special characters]

   vi. Dependencies in Type Fields.

   vii. Difference between Fixed and Extended fields

   viii. Difference between Name,Display Name & Description of Field

   ix. How to delete type fields

   x. When not to delete type fields

   xi. How to delete extended fields

   xii. When not to delete an extended field

3. **Field Permissions**

   i. Overview of Permissions

   ii. Importance of View, Add, Change, Email Permissions

   iii. What permissions are to be given to different roles

   iv. How to apply the same permissions to other roles for the same BA

   v. Adding of New Role

   vi. Importance of Request , Business Area & Private field Permissions.

4. **Field Controls**

   i. Overview of Field Controls

   ii. Importance of View, Add, Change Controls

   iii. How the BA behaves when we give only View Control to fields

   iv. How the BA behaves when we give View & Add Controls to fields

   v. How the BA behaves when we give View & Change Controls to fields

   vi. How the BA Behaves when we give View,Add & Change Controls to fields

   vii. Importance of Search Control

   viii. Importance of Carryover Control [What happenes if carryover is not checked for a particular field ?]

   ix. Importance of Action Unique & Request Unique Control

   x. Difference between permissions for Request field in **Field Permissions** & permissions for Request field in **Field Controls**

   xi. Difference between permissions for Business Area field in **Field Permissions** & permissions for Business Area in **Field Controls**

5. **Display Groups**

   i. Importance of Display Groups

   ii. How to add display groups

   iii. How to add / remove fields from display groups

   iv. Active / Inactive display groups

iv. When does a BA gets captured into a BA Menu

v. How to add BA's to a particular Menu

10. Reports

i. Importance of Reports

ii. How to Add New Reports

iii. How to Edit Report

iv. How to Delete selected Reports

v. How to make a Report Private

vi. How to Classify Reports into Different Groups

11. App Properties

i. Importance of App Properties

ii. How to add new property

iii. Importance of **transbit.tbits.enablemailoutgoing** property

iv. Importance of transbit.tbits.maximumEmailAttachmentSizeInBytes property

v. How to delete a property

12. Job List

i. How to Add new Job

ii. How to edit new Job

iii. How to Execute new Job

iv. Cron Expression

v. How to Delete a job

13. Mailing List

i. Importance of Mailing List

ii. How to add Mailing List

iii. How to Add users to Mailing List

iv. How to Edit Mailing List

v. User Type of Mailing List

14. Users

i. How to Add a User

ii. How to add users via Import from Excel tab

iii. Different User types

iv. Difference between Internal & external user

v. What is Internal – Mail List Usertype

vi. Mandatory columns while adding new user [Name,Email etc]

vii. Convention to add a user [Without Spaces & Special Character]

viii. How to assign a password to user

15. Transmittal

i. Brief Description on all tables related to transmittal

ii. How to Create a Process

iii. How to Replicate an existing Process

16. Correspondence

i. Importance of all tables in Correspondence

ii. How to configure Correspondence

iii. Entries of Correspondence in App Properties.

17. **Minutes Of Meeting**

      i. Table which is used to configure MoM

      ii. Entries of MoM in Application Properties

List of Dont's

1. **BA Properties**

      i. Do not check the "Set as E-mail Active" & "Notify appender for Every action"option in any of the BA areas barring the DTN BA for DCM Module

      ii. The BA name should not contain special characters.

2. **BA Fields**

      i. "Import from Excel"tab is not to be used for BA fields

      ii. Special characters/Spaces are not be used in naming the fields/types.

      iii. Do not try to delete the field/types if the request is already made with that field/type.

3. **Field Permissions**

      i. Once the permissions for a particular Role is set do not use "apply these permissions to other roles" before saving the permissions for that particular role.

4. **Field Controls**

      i. After giving the permissions to the fields do not quit the page before saving.

5. **Display Groups**

      i. Do not close the page before saving the fields in the respective display groups.

      ii. Don't ever delete the "**default**" display group. It would have an adverse impact.

   iii. Display groups which are in use should not be marked "Inactive".

6. BA User

   i. After assigning the respective roles to the BA users do not ever close the page before saving it.

7. Roles

   i. Name given in the role should not have spaces and special characters.

8. Captions

   i. Do not delete any caption unnecessarily

9. BA Menu

   i. Parent Menu Id is to be given correctly.

   ii. A user with enabled permissions should be a user of that particular BA which has to feature in that hierarchy.

10. Reports

   i. Removing the report from UI also deletes the report from the repository.

   ii. If BA users are added in to the included users list in that case only the included users lists can view the reports**.**

11. App Properties

   i. The **transbit.tbits.enablemailoutgoing** property should never be "False" if users are to be notified via mail for every action on DTN BA.

12. Mailing Lists

   i. A mailing list would not be added unless the mailing list is added in the All users list with User-Type as "**Internal-Mail-List**".

   ii. After adding the respective users in the mailing list from the mailing list tab the page is not be closed or refreshed before saving.

13. All Users

     i.   User type has to be mentioned correctly.

     ii.   If a User is a involved stakeholder in the system then it should not be marked as inactive.

     iii.   Do not use special characters except dot(.) and underscore(_) while adding a new user

   iv.   Always give the email-id of the users while adding.

TASKS TO DO

1. Creating a Single Business Area
     i.   Add some extended fields to that BA
     ii.   Give 3 users (X,Y,Z) the permission to that BA
     iii.   User 'x' should only have the permission to view the request
     iv.   User 'y' should only have the permission to update the request
     v.   User 'z' should have the permission to Add & Update the request

2. Configuring a DTN Process
     i.   Work Flow to be explained
     ii.   Project Name : **OASIS ,** Project Code : **05621A0259**
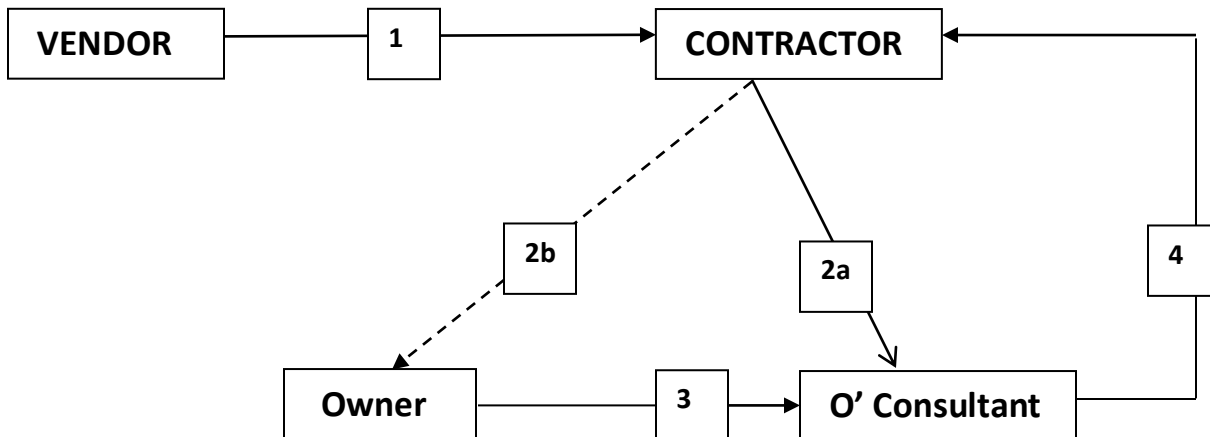
Note : Turn Around Times

     i.   Owner – Owner's Consultant = 7 calendar days
     ii.   Owner's Consultant – Contractor = 10 calendar days
     iii.   Contractor – Vendor = 14 calendar days
     iv.   Vendor Resubmission = 10 calendar Days

Total No of BA's Required

    i.   Vendor

    ii.   Contractor

    iii.   Owner

    iv.   Onwer's Consultant

    v.   DTN

    vi.   DTN Approval

DTN Numbering System to be followed

    i.   Vendor to Contractor = **05621A0259-VEN-CON-0001**

    ii.   Contractor to Owner = **05621A0259-CON-OWNER-0001**

    iii.   Owner's Consultant to Contractor = **05621A0259-OC-CON-0001**

    iv.   Contractor to Vendor = **05621A0259-CON-VEN-0001**

Users to be created in each BA

    i.   Vendor BA = vendor_engg , vendor_pm , vendor_pd

    ii.   Contractor BA = contractor_engg , contractor_pm, contractor_pd

    iii.   Owner BA = owner_engg, owner_pm, owner_pd

    iv.   Owners Consultant = oc_engg, oc_pm, oc_pd

Fields to be created in each BA

    i.   Use the same fields which are used

Submission Codes & Decision Codes to be used

    i.   A-Approval , I – Information, P-Preliminary, T-Tender Purpose ---------Submission Codes

    ii.   1-Approved , 2- Approved with Notes, 3-Approved with Notes Resubmit, 4- Rejected , 5-Commented

3. Configuring Correspondence

3a. Total Number of BA's Required

    i.   Corr Draft

    ii.   Corr BA

Protocol Given Below

Communication Protocol With VENDOR				
From Owner to Vendor				
From	**Discipline**	**Corr Type**	**To**	**cc**
Name			Name	Name
owner_pd	Mechanical	Email	vendor_pd	vendor_pm,vendor_engg,owner_pm
owner_pd	Electrical	Email	vendor_pd	vendor_pm,owner_pm
owner_pm	Civil	Email	vendor_pm	vendor_pd,owner_pd
owner_pd	Mechanical	Letter	vendor_pd	vendor_pm,owner_pm
owner_pd	Electrical	Letter	vendor_pd	vendor_pm,owner_pm,owner_engg
owner_pm	Civil	Letter	vendor_pm	vendor_pd,owner_pd,owner_engg
From Vendor to Owner				
From	**Discipline**	**Corr Type**	**To**	**cc**
Name			Name	Name
vendor_pd	Mechanical	Email	owner_pd	vendor_pm,vendor_engg,owner_pm
vendor_pd	Electrical	Email	owner_pd	vendor_pm,owner_pm
vendor_pm	Civil	Email	owner_pm	vendor_pd,owner_pd
vendor_pd	Mechanical	Letter	owner_pd	vendor_pm,owner_pm
vendor_pd	Electrical	Letter	owner_pd	vendor_pm,owner_pm,owner_engg
vendor_pm	Civil	Letter	owner_pm	vendor_pd,owner_pd,owner_engg

Configuring MoM BA

    i.   Configure a simple MoM BA as done for the first project