



Installation and User Instructions

Visions WRMemo

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Version 1.00



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Approvals

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Table of Contents

1 PREFACE 5

 1.1 *Description of the User*..... 5

 1.1.1 Retaining Instructions.....5

 1.2 *Obtaining Documentation and Information* 6

 Feedback6

2 User Guide 7

 2.1 *Considerations* 7

 2.1.1 Launch Application7

 2.1.2 Enter Visions Credentials.....7

 2.1.3 Download Template8

 2.1.4 Populate Template Fields9

 2.1.5 Data Upload.....10

3 TROUBLESHOOTING..... 11

4 Appendices..... 12

5 GLOSSARY 13

6 RELATED DOCUMENTATION 14

1 PREFACE

1.1 Description of the User

Visions WRMemo was developed to support the automation of the Visions database. Specifically, it is a tool that can create work request memo's or inspection task memo's.

1.1.1 Retaining Instructions

These instructions should be maintained for the life of the product or until a new version is distributed.

1.2 Obtaining Documentation and Information

The latest version of the documentation can be obtained by contacting info@arcsolutions.ca

Feedback

Please submit any feedback to info@arcsolutions.ca.

We appreciate your comments.

2 User Guide

2.1 Considerations

The application is a self-contained deployment; this means that no installation is necessary. However it does rely on an active network connection to the visions database and Microsoft Excel. If either of these are unavailable the application will not function as intended.

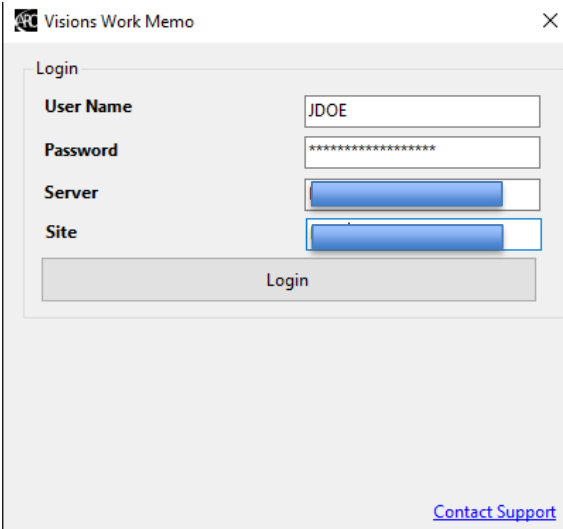
The changes this application make are permanent, care should be used when uploading data to any system. It is strongly encouraged to run a series of test against a mock database before applying the changes to productions.

2.1.1 Launch Application

Double click Icon for “Visions WRMemo” to launch the application.

2.1.2 Enter Visions Credentials

Enter your Visions credentials as you normally would and click the “Login” button.



The screenshot shows a window titled "Visions Work Memo" with a close button (X) in the top right corner. Inside the window, there is a "Login" section with the following fields and controls:

- User Name:** A text input field containing the text "JDOE".
- Password:** A text input field containing a series of asterisks "*****".
- Server:** A blue button.
- Site:** A blue button.
- Login:** A large, light gray button centered below the input fields.

At the bottom right of the window, there is a blue hyperlink labeled "Contact Support".

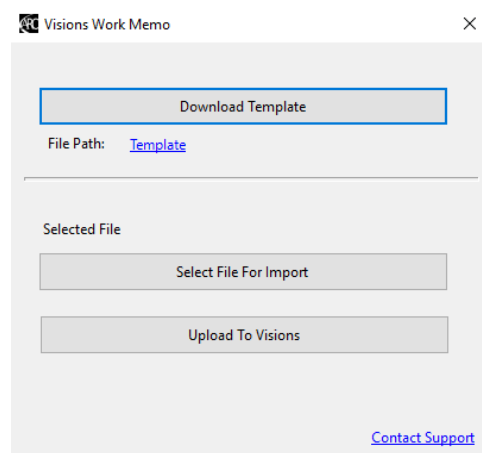
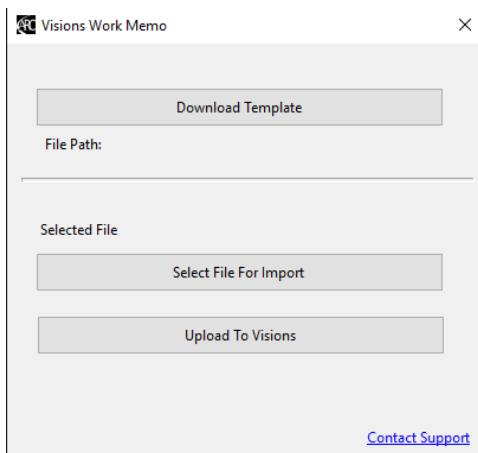
2.1.3 Download Template

A template is provided to structure your data in a manner that the application expects.

Click on the “Download Template” button to retrieve a copy of the template.

The template is generated by the system and is located under %userprofiles%\AppData\Local\.
Once the template has been opened, the user can save the workbook to any location desired.

After clicking on the “Download Template” button a hyperlink to the temporary location is generated and displayed, as can be seen in image below.



2.1.4 Populate Template Fields

Populate the excel rows with data you would like to upload to visions. Please note that there are required fields denoted in red text that are necessary for Visions to create a WR or IT. These are:

Plant No.

Equipment No.

Equipment Type

Failure to provide these values will result in an application error.

Several fields require their corresponding value from Visions F3 lists.

For example entering a value of "Critical" for the field "Priority Code" will result in no value being entered in Visions. The correct value in this instance would be "Crit" as shown below

The screenshot shows a web form with several input fields: 'Activity Code:', 'Inspector Name:', 'Priority Code:', 'Department:', and 'Component Code:'. The 'Priority Code:' field is selected, displaying a dropdown menu. The dropdown menu has two columns: 'Value' and 'Description'. The values listed are 'Crit', 'High', 'Low', 'Med', 'None', and 'PEIM1'. The descriptions are 'Critical priority', 'High priority', 'Low priority', 'Medium priority', 'No priority', and 'Leak, Leak Save & ABSA Compliance Issues' respectively. The 'Crit' value is highlighted in blue.

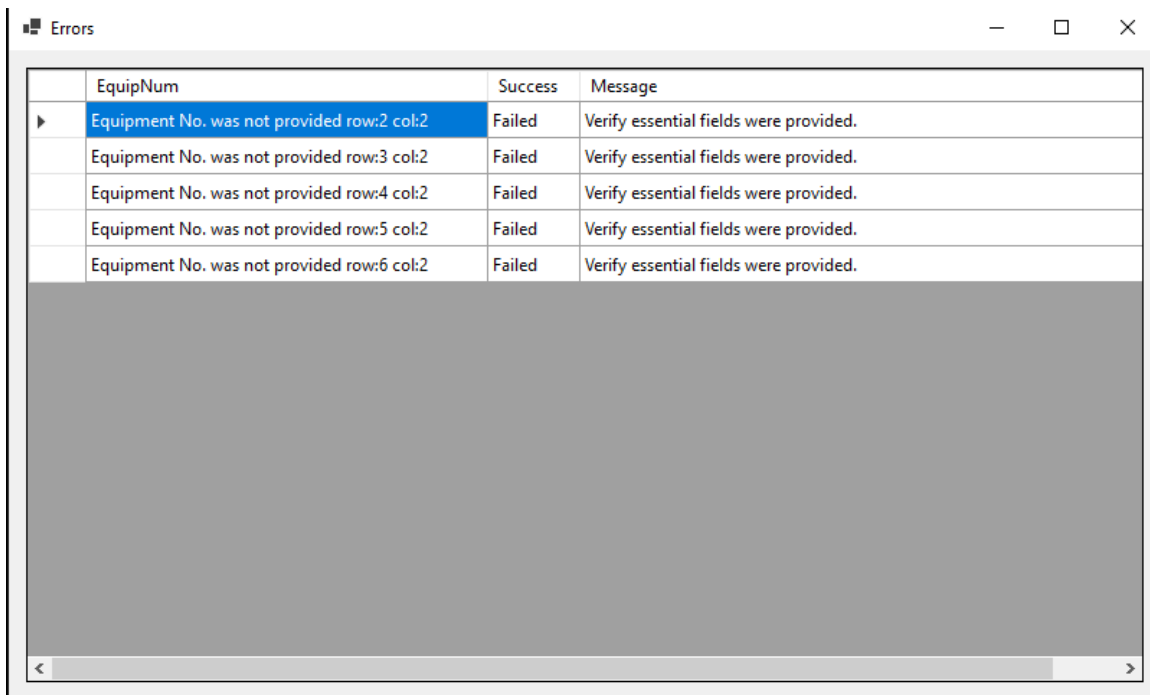
Value	Description
Crit	Critical priority
High	High priority
Low	Low priority
Med	Medium priority
None	No priority
PEIM1	Leak, Leak Save & ABSA Compliance Issues

2.1.5 Data Upload

Once you're satisfied that the data in the excel sheet is in right shape, click the "Select File For Upload" and navigate to the excel template you have prepared. Double click the template to load it into the application.

Next click "Upload to Visions" and the application will attempt to send your data to Visions database. Any errors will be displayed.

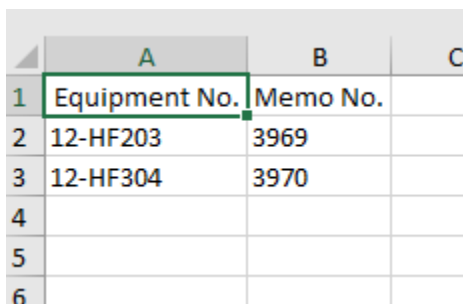
If there was issues with the excel data a table will be displayed that indicates the error and which piece of equipment or row in the sheet was culprit.



The screenshot shows a window titled "Errors" with a table containing the following data:

EquipNum	Success	Message
Equipment No. was not provided row:2 col:2	Failed	Verify essential fields were provided.
Equipment No. was not provided row:3 col:2	Failed	Verify essential fields were provided.
Equipment No. was not provided row:4 col:2	Failed	Verify essential fields were provided.
Equipment No. was not provided row:5 col:2	Failed	Verify essential fields were provided.
Equipment No. was not provided row:6 col:2	Failed	Verify essential fields were provided.

Upon successful completion and excel sheet will launch that will display each asset and memo number that was created.



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C
1	Equipment No.	Memo No.	
2	12-HF203	3969	
3	12-HF304	3970	
4			
5			
6			

3 TROUBLESHOOTING

If you are unable to upload data please check the following:

1. Confirm you have entered the correct server information was entered.
2. Confirm the Visions Database is operational.
3. Confirm you have access to network.
4. Fix any errors shown in Error report.

If none of these solves you problem please contact infor@arcsolutions.ca for assistance.

4 Appendices

5 GLOSSARY

[Explain the meaning of all terms used in this document]

Term	Meaning

6 RELATED DOCUMENTATION

#	Document Title	Version #	Location	Author