

Document Binder Module

Overview

The [Document Binder](#) module is used to gather specifications and other related SmartPlant Instrumentation documents that need to be maintained together. Each collection of documents is known as a binder package. You can perform a collective update for all the documents in a single binder package and assign them the same revision number. You can specify two types of binder package: Specification Binder packages and General Document Binder packages. For details of differences between the binder package types, see [Comparison of Binder Package Types](#).

You can group documents according to any criteria you require. However, for instrument specification sheets, a given instrument specification may only be assigned to **one** Specification Binder package **or** to any number of General Document Binder packages, but not to both types of binder packages.

For details of the options available in the tree for each binder package type, see:

- [Specification Binder Packages](#)
- [General Document Binder Packages](#)

For information on how to use the Document Explorer, see [SmartPlant Instrumentation Help, Document Explorer](#).

Specification Binder Packages

You use Specification Binder packages to create groups of instrument specifications for whatever purpose you require; for example, when requesting a price quotation from a vendor for several instruments, you can group the instruments together in a Specification Binder package and include other relevant documents.

The following folders are available:

- **Specification List:** This is a cover sheet with instrument tag data for all the specifications included in the Specification Binder package.
- **Form Notes:** This contains user notes that apply to specific form numbers. There must be at least one specification associated with a particular form number in the Specification Binder package in order for you to be able to add form notes.
- **General Notes:** General notes provide a means of adding user comments that are associated with the Specification Binder package as a whole.
- **Specification Sheets:** This category shows the specifications included in the Specification Binder package, and provides you with the options to access and edit individual sheets, to totally or partially revise the sheets in the list, and to print all or some of the sheets.
- **Change Summary Report:** This shows details of the changes that were made to the specifications since the last revision.

When the documents are created, each document type is numbered sequentially using the following method:

- **Specification Sheets:** S-1, S-2, S-3, and so forth. The pages of a multi-tag specification are identified by a number with a different suffix for each page, for example, S-2.1, S-2.2, S-3.1, S-3.2, and so forth.
- **Form Notes:** G-1, G-2, G-3, and so forth.
- **Change Summary Report:** C-1, C-2, C-3, and so forth.
- **General Notes:** N-1, N-2, N-3, and so forth.

Page numbers are calculated from the relative position of the document in the Specification Binder package. To recalculate the page numbers after modifying specifications, on the **Actions** menu, click **Repaginate**.

General Document Binder Packages

You use General Document Binder packages to create groups of documents for whatever purpose you require; for example, when requesting a price quotation from a vendor for several entities, you can group the entities together in a General Document Binder package and include other relevant documents.

The following folders are available:

- **Document List:** This is a cover sheet with data for all the documents included in the General Document Binder package.
- **Document Notes:** This contains user notes that apply to specific document numbers. There must be at least one document associated with a particular document number in the General Document Binder package in order for you to be able to add document notes.
- **General Notes:** General notes provide a means of adding user comments that are associated with the General Document Binder package as a whole.
- **Documents:** This category shows the documents included in the General Document Binder package, and provides you with the options to access and edit individual documents, to totally or partially revise the documents in the list, and to print all or some of the documents.

When the documents are created, each document type is numbered sequentially using the following method:

- **Documents:** D-1, D-2, D-3, and so forth.
- **Document Notes:** G-1, G-2, G-3, and so forth.
- **General Notes:** N-1, N-2, N-3, and so forth.

Page numbers are calculated individually for each document in the General Document Binder package. To recalculate the page numbers after modifying documents, on the **Actions** menu, click **Repaginate**.


Starting the Document Binder Module



Note

- Before starting this module, check with the Domain Administrator that you have been granted appropriate access rights for the tasks you will carry out.

➤ To start the Document Binder Module


- To open the main [Document Binder](#) window, do one of the following:
 - On the main toolbar, click .
 - On the **Modules** menu, click **Document Binder**.

General

Creating Binder Packages

A binder package is a group of documents or instrument specifications, and may include additional general notes and form notes. On creation of a new binder package, the software creates a complete set of folders. The software updates these folders as you assign documents to the binder package.

➤ To create a new binder package

1. Open the [Document Binder](#) module.
2. In the **Document Binder** window, at the top of the left frame, select  **Binder Packages**.
3. On the **Actions** menu, click **New Binder Package**.
4. In the **New Binder Package** dialog box, enter the following data:
 - The binder package type (required)
 - The binder package name (required)
 - Description (optional)
 - Purchase order number (optional)
 - Requisition number (optional)



Note

- For Specification Binder packages only, if you select **Apply purchase order and requisition number to all tags**, the software adds this data to all tags currently associated with the Specification Binder package. As long as this checkbox is selected, the software adds this data to every tag that you associate with the Specification Binder package.
5. Click **OK**.

Assigning Instrument Specifications to a Specification Binder Package


After creating a Specification Binder package, you can assign instrument specifications to it as required. On assigning a specification, the **Instrument Specification List** is automatically updated. Moreover, in the browser view, the **Item Status** column for the instrument tags associated with the newly assigned specification is set to [Added](#).



Notes

- To view detailed information in the right area of the window, set the specification list option in the [Document Binder Preferences](#) dialog box.
- When you display detailed data in the right area of the screen, the layout is determined by the default view in the Package Browser (of the Document Binder group) and can be customized by modifying the view in the [Browser](#) module.

➤ To assign an instrument specification to a Specification Binder package

1. In a Specification Binder package, select the  **Specification Sheets** folder.
2. On the **Actions** menu, click **Assign Specification**. A selection dialog box (**Find Tag**) opens, from which you can retrieve tags. To filter the retrieved tags, enter values in the selection fields.
3. Click **Find** to retrieve the list of tags.
4. From the list, select tags to be included in the Specification Binder package and click **OK**.

The list of tags appears under the **Specification Sheets** folder for the Specification Binder package.

5. To open a specification for viewing or editing, select a sheet from the list and do one of the following:
 - On the **Actions** menu, click **Open**.
 - Double-click the sheet.

Editing Binder Package Properties

You can rename a binder package and edit its description until the first time you add a revision to it. After that you can only edit the purchase order number and requisition number.

➤ To edit binder package properties

1. In the **Document Binder** window, in the left frame, right-click the binder package that you want to edit.
2. On the shortcut menu, click **Properties**.
3. On the **General** tab, edit the following data as needed:
 - Binder package name — after you save at least one revision, this field is not available.
 - Description — after you save at least one revision, this field is not available.
 - Purchase order number.
 - Requisition number.



Note

- If you select **Apply purchase order and requisition number to all tags**, the software updates all tags currently associated with the binder package. As long as this checkbox is selected, the software adds this data to every tag that you associate with the binder package.
4. Click **OK**.

Removing Instrument Specifications from a Specification Binder Package

You can remove instrument specifications from a Specification Binder package when those specifications are no longer required.



Notes

- You can choose whether SmartPlant Instrumentation keeps or deletes revisions that you saved while the specification was part of the Specification Binder package.
- On removing a specification, the way in which the specification list is updated depends on the following:
 - If the specification was originally assigned prior to saving the last revision of the Specification Binder package, the instrument tag still appears in the specification list browser view, with the **Tag Number** column set to [Deleted](#).
 - If the specification was originally assigned after saving the last revision of the Specification Binder package, its tag does not appear in the specification list.

Choose one of the following options:

- Removing a single specification
- Removing selected specifications
- Removing all specifications

➤ To remove a single instrument specification from a Specification Binder package

1. In the **Document Binder** window, in the **Binder Packages** tree, do the following:
 - a) Expand the Specification Binder package from which you want to remove an instrument specification.
 - b) Select **Specification Sheets**.
2. In the right pane, select the specification that you want to remove.
3. On the **Actions** menu, click **Remove Specification**.

➤ **To remove a selection of instrument specifications from a Specification Binder package**

1. In the **Document Binder** window, in the **Binder Packages** tree, do the following:
 - a) Expand the Specification Binder package from which you want to remove a specification.
 - b) Select **Specification Sheets**.
2. Right-click the desired specification sheets, and on the shortcut menu, click **Remove Selected Items**.
3. In the **Remove Selected Items** dialog box, under **Select**, select the check box beside each specification that you want to remove.



Note

- You can select the **Select all** check box if you want to remove all the specifications.

➤ **To remove all instrument specifications from a Specification Binder package**

1. In the **Document Binder** window, in the **Binder Packages** tree, do the following:
 - a) Expand the Specification Binder package from which you want to remove a specification.
 - b) Select **Specification Sheets**.
2. On the **Actions** menu, click **Remove All Specifications**.

Deleting a Binder Package

You can only delete a binder package if it has not yet been saved as a revision. In this case, if the binder package includes specifications, these must be removed first.

➤ To delete a binder package

1. Remove any specifications in the binder package you want to delete.



Note

- If all specifications with a particular form number are deleted, the form note associated with that form is automatically deleted.
2. Delete the binder package by doing one of the following:
 - On the **Actions** menu, click **Delete**.
 - Click the right mouse button and on the shortcut menu, click **Delete**.

Managing Association of External Files with a Binder Package

Use these procedures to manage external files that you associate with a binder package. You can associate a new file with the binder package, dissociate a file, or open an associated file. Associated files can be DOC, TXT, BMP, WAV, PSR files, or any file formats that are supported by your Windows system.

For all of the procedures, do the following to open the **Associated Documents** dialog box:

1. In the **Document Binder** window, select the binder package for which you want to manage external files.
2. On the **Actions** menu, click **Associated Documents**.

From the **Associated Documents** dialog box, you can perform the following procedures:

➤ To associate an external file with a binder package

1. In the **Associated Documents** dialog box, click **Associate**.
2. In the **Associate External Document** dialog box, navigate to the file, and click **Open**.
3. In the **Associated Documents** dialog box, under **Description**, type a short description for the associated file.

➤ To open an external file that you associated with a binder package

- In the **Associated Documents** dialog box, select the file that you want to open, and click **Open**.

➤ To dissociate an external file from a binder package

- In the **Associated Documents** dialog box, select the file that you want to dissociate from the binder package, and then click **Dissociate**.

Notes

Overview

There are three classes of notes that you can add to a binder package:

- **Form Notes**
A form note is associated with a particular form in a Specification Binder package, and is used, for example, to indicate the purpose of certain fields in the form.
- **Document Notes**
A document note is associated with a particular document type in a General Document Binder package, and is used, for example, to indicate the purpose of certain fields in the document.
- **General Notes**
A general note can appear in a Specification Binder package or in a General Document Binder package and is associated with the binder package as a whole.

Creating Form Note Templates

Form note templates are source forms used to create form notes.

➤ To create a form note template

1. On the **Actions** menu, click **Form Note Templates**.
2. In the **Form Note Templates** dialog box, click **New**.
3. In the **New Form Note Template** dialog box, enter a name for the note template (required) and description (optional) as follows:
 - a) Select a form from the **Form** list or click **Browse** and select a form from the list that appears.
The **Template** and **Description** fields are automatically filled with the form or template name and description (if one exists).
 - b) If required, overwrite the name displayed in the **Template** field. (a required field.)
 - c) Enter text in the **Description** field if required.



Note

- Form note template names must be unique.
4. Click **OK**.

Editing Form Note Templates

Form note templates are source forms used to create form notes in the [Document Binder](#) module. Use this procedure to edit form note templates.

➤ To edit a form note template

1. In the **Form Note Templates** dialog box, select the template you require.
2. Click **Edit Text**.
3. In the **Note Editor** window, edit the note name, description, and note text as you require.



Caution

- The text editor only allows you to paste text from the clipboard. You can copy text from other text editors or word processing applications, for example, Notepad or Microsoft Word. However, any formatting in the original document will be lost when you paste the text into this field. You should not attempt to paste graphics images, as this may cause problems in the file later.

4. When done, click .

Deleting Form Note Templates

Form note templates are source forms used to create form notes. Use this procedure to delete form note templates.

➤ To delete a form note template

1. On the **Actions** menu, click **Form Note Templates**.
2. In the **Form Note Templates** dialog box, select the required template and click **Delete**.
3. Click **Yes** to delete the note.
4. Click **Close** to close the window.

Creating Form Notes

Form notes are notes that are attached to a particular form. They can be used, for example, to indicate the purpose of certain fields in the form where this is not clear to the user. They can also be used to provide vendors with your standard company specifications. Form notes may only be added for the forms with which the specification is associated. Consequently, if you remove all the specifications associated with a particular form from the Specification Binder package, the form notes for that form are deleted.

➤ To create a form note

1. In the left pane, select the **Form Notes** folder.
2. On the **Actions** menu, click **New Form Note**.
3. In the **New Form Note** dialog box, enter a name for the form note (required) and description (optional) as follows:
 - a) Create a form note based on a form by selecting a form from the drop-down list in the **Form** field or by clicking **Browse** and selecting a form from the list that appears.



Note

- If any form note templates have been defined for the form you selected, you can base the form note on one of these templates if required.
- b) To base the form note on a template, select it from the **Template** list or click **Browse** and select the required template.



Notes

- Selecting a form note template not only copies the name and description to the form note but also uses the note text in the template as default. For details of defining form note templates, see Creating Form Note Templates.
- The **Form note** and **Description** fields are automatically filled with the form or template name and description (if one exists), which overwrite the previous entries.

- c) If required, overwrite the name displayed in the **Form note** field (required field).
- d) Enter text (optional) in the **Description** field if required.

**Note**

- The names of form notes must be unique.


4. Click **OK**.

**Note**

- The form note editor dialog box opens. If you selected to create a form note from a template, any note text that was entered for the template will appear by default in the note field.
5. Make any changes as required to the note name, the description, and the note text itself.

**Caution**

- The text editor only allows you to paste text from the clipboard. You can copy text from other text editors or word processing applications, for example, Notepad or Microsoft Word, however, any formatting in the original document will be lost when you paste the text into this field. You should not attempt to paste graphics images as this may cause problems in the file later.

6. When done, click .

Assigning General Notes to Binder Packages

General notes apply to an entire binder package, which can be either a Specification Binder package or a General Document Binder package.


➤ To assign a general note to a binder package

1. Click the **General Notes** folder.
2. On the **Actions** menu, click **New General Note**.
The **Note Editor** window opens, with the default general note name [\[New\]](#).
3. Change the name of the note from the default, enter a description (optional), and type the required note text.



Caution

- The text editor only allows you to paste text from the clipboard. You can copy text from other text editors or word processing applications, for example, Notepad or Microsoft Word. However, any formatting in the original document will be lost when you paste the text into this field. You should not attempt to paste graphics images as this may cause problems in the file later.

4. When done, click .

Editing Binder Package Notes

After creating a note, you can edit the name, description, and note text if required.

➤ To edit a note

1. Select one of the following folders:
 - **Form Notes.**
 - **Document Notes.**
 - **General Notes.**
2. Do one of the following:
 - On the **Actions** menu, click **Open** to open the **Note Editor** window. (Continue at step 3.)
 - Expand the folder by double-clicking it. (Continue at step 4.)
3. Select the required note from the list in the dialog box and click **OK**.
The **Note Editor** window opens. (Continue at step 5.)
4. Open the **Note Editor** window as follows:
 - a) Select the required note in the tree.
 - b) Do one of the following:
 - Double-click the note.
 - On the **Actions** menu, click **Open**.
5. Edit the note name, description, and note text as required.



Caution

- The text editor only allows you to paste text from the clipboard. You can copy text from other text editors or word processing applications, for example, Notepad or Microsoft Word. However, any formatting in the original document will be lost when you paste the text into this field. You should not attempt to paste graphics images as this may cause problems in the file later.

6. When done, click

Revisions

Specification Binder Package Revisions

You can revise a set of specifications and notes in a Specification Binder package, for example, before printing a request for quotation from a vendor. Once you assign a specification to a Specification Binder package you may only create revisions to that specification as part of the Specification Binder package from the [Document Binder](#) module.

In general, the software allows you to save a revision only for documents that you have changed and saved. You are also allowed to save a revision in the following situations:

- If a specification has been newly-assigned to the binder package or if you have modified a specification for which a revision was already generated in the binder package.
- If you manually modified the **Changed** status of a document from **No** to **Yes**.
- If you removed an instrument specification from a Specification Binder package.

On creating a new revision for a Specification Binder package, documents in the binder package (Specification List, Form Notes, General Notes, and Change Summary report) are revised automatically, provided a change notification is set for at least one specification. Other document revisions are displayed in the title block of a printed version of these documents.



Notes

- To be able to generate revisions, a Specification Binder package must have at least one specification assigned to it (if the binder package contains only general notes, for example, you cannot generate a revision for it).
- You cannot delete or rename a Specification Binder package once a revision has been performed on it.
- Before performing a revision in the [Document Binder](#) module, verify that none of the designated documents are open for editing in any other SmartPlant Instrumentation modules.
- When you perform a revision on a Specification Binder package, the specifications it contains may be assigned revision numbers that are actually lower than the number of any revisions that were performed for the individual specifications before they were assigned to the binder package.
- The software does not include in the [Document Binder](#) module revisions or documents that you created from the **Properties** dialog box for an entity, for example, in the **Terminal Strip Properties** dialog box.
- You can set the preferences to allow for independent viewing of specification revisions made before and after incorporation into a Specification Binder package.

- Before saving a revision, you must first release all instrument tags associated with the designated specifications from any workflow assignments. If the System Administrator selected to implement a workflow option, one of the following conditions applies:
 - If **Full** was selected (which includes workflow for the [Document Binder](#) module), all the specifications in the Specification Binder package must have the status [Release to Spec](#).
 - If **Without Document Binder** was selected, only those specifications in the Specification Binder package whose status is [PD not required](#) or [Locked from PD](#) can be revised.

Adding a Revision to a Binder Package

Use this procedure in order to revise the documents in a binder package. There are a number of conditions restricting adding a new revision. For more details, see [Specification Binder Package Revisions](#).

➤ To add a revision to a binder package

1. Select the desired binder package.
2. Do one of the following:
 - On the **Actions** menu, click **Revisions**.
 - Click the right mouse button and on the shortcut menu, click **Revisions**.
3. In the **Revisions** dialog box, select one of the revision numbering methods (use **P0**, **P1**, **P2**... for preliminary revisions or **0**, **1**, **2** / **A**, **B**, **C**, and so forth for normal serial revisions).



Note

- When you first select a revision numbering method, several options are available to you, including preliminary revisions (designated by **P0**, **P1**, **P2**...). Once you select one of the other revision methods, you will not be able to return to the preliminary revision method and this option will be disabled.
 - Only the last five revisions appear in the **Revisions** dialog box.
4. Click **New** to add new revision data.
 5. Add the revision data in the appropriate data fields.



Note

- The **By** field contains the current user's initials by default, if previously defined by the SmartPlant Instrumentation System Administrator. You can also edit this field if required. Today's date appears in the **Revision Date** field, by default, but you can change it if required.

6. Click **OK** to save the revision and close the dialog box.

**Notes**

- After the revision is saved, the change notifications for all the specs are set to **No**. In the browser view, the **Tag Status** column for instrument tags associated with specs assigned to or deleted from the binder package prior to the last revision is cleared.
- An instrument specification that is added to a Specification Binder package becomes a part of that package and is revised according to the new Specification Binder package revision number, and not the previous revision number that applied to the individual instrument specification.
- If you add a document to a General Document Binder package, and a revision is made for the package as a whole, you can still add revisions for the individual drawings in the package without any relation to the revision number of the package.

Deleting a Revision from a Binder Package

Use this procedure to delete revisions from a given binder package.



Note

- You can set the module preferences for automatic deletion of revisions when removing a specification from a binder package.

➤ To delete a revision from a binder package

1. In the **Document Binder** window, highlight the binder package from which you want to delete a revision.
2. Do one of the following:
 - On the **Actions** menu, click **Revisions**.
 - On the module toolbar, click
3. In the **Revisions** dialog box, select the revision you want to delete, and click **Delete**.
4. Confirm the deletion by clicking **Yes**.



Note

- Repeat steps 1 – 3 for each revision that you want to delete.

Binder Package Revision Archive: An Overview

When you create a new revision for a binder package in the [Document Binder](#) module, a view-only archive copy is made of the information contained in the Specifications, Notes, and Change Summary Report.

The revision archive data can be saved in the database or in a file, depending on the setting that the Domain Administrator selects in the [Administration](#) module.

Converting Binder Package Revisions to ZIP Files

When you save revisions to the database, the software compresses the data automatically to save space. To further streamline your database, you can also remove specification, binder package, and construction revisions from the database by converting them to .psr or .psr-within-.zip format files, which you save in folders external to the database. This feature is useful when you have made a large number of revisions, and want to reduce the size of the active and backup databases.

This procedure describes how to remove binder package revisions from the database into .zip format files.



Notes

- The Domain Administrator sets the default revision storage method in the [Administration](#) module. This gives you the option of storing binder package revisions directly to .zip files external to the database.
- As detailed below, you can vary this procedure to convert binder package revisions back-and-forth among .psr, .zip, and SmartPlant Instrumentation database format.

➤ To convert binder package revisions to .zip format files

1. On the **Actions** menu, click **Manage Revisions**.
2. To display binder packages of one revision only, under **Revisions filter**, type the revision number and click **Apply**.
3. Do one of the following:
 - In the data window, select the revisions that you want to convert.
 - To select all of the displayed revisions for conversion, click **Select all**.
4. Under **Convert revisions to**, click **ZIP files**.



Notes

- To convert revisions to uncompressed .psr format, click **PSR files**.
 - To restore .psr or .zip format files to the database, click **Database**.
5. Click **Convert**.

Change Summary Report

The change summary report allows you to view all the changes that were made to binder packages since the last time a revision was made. To generate such a report, you double-click the **Change Summary Report** folder in the left area of the main [Document Binder](#) window. The report shows a list of the instrument tags that were modified and are associated with the specifications in the selected binder packages. For example, in the case of a multi-tag specification, a tag may have been added to the specification, or deleted from it.

If the tag data was modified, the report will display the following:

- Tag number
- The column where the change was made
- The old and new values for the specific column
- The person who made the change
- The date of change



Notes

- The Change Summary Report uses data stored in the Audit Trail repository, therefore to enable generation of this report, in the Administration module **Domain Definition** window, the Domain Administrator has to select the **Audit trail options** check box.
- If changes were made to the main page of a multi-tag spec, each item in the list will be displayed separately in the report, along with its changes.
- Before a revision is saved for the first time or if no changes were made to items in the binder package after a certain revision, a report will not be generated.

Enabling Specification Changes Notification

When you edit a specification in the [Specifications](#) module after adding a revision, you can set whether to notify the changes in the [Document Binder](#) module.

When a notification of the changes to a specification is enabled,

- The revision number of the specification will be incremented the next time a revision is made to the Specification Binder package to which it is assigned.
- Changes to the specification appear in the Change Summary Report.



Note

- The Change Summary Report uses data stored in the Audit Trail repository, therefore to enable generation of this report, in the Administration module **Domain Definition** window, the Domain Administrator has to select the **Audit trail options** check box.

After a Specification Binder package has undergone a revision, the changes notification is removed (In the **Specification Change Notification** dialog box, [No](#) appears under the **Changed** column for all the specifications.), and any documents associated with it (Specifications, Form Notes, and General Notes) are saved.

Following a revision in the [Document Binder](#) module, if you modify a specification in the [Specifications](#) module, when saving the changes, a prompt appears enabling you to decide whether to notify the changes in the [Document Binder](#) module (this prompt does not appear if the change is already notified for the specification).

The available options are:

- **Mark this item as changed:** When this option is selected, the change you made in the [Specifications](#) module will also be indicated in the Document Binder module.— In the **Specification Change Notification** dialog box, the **Changed** column for the specification will display [Yes](#). Consequently, the specification revision number will be updated the next time you revise the Specification Binder package to which it is assigned. If any change was made to the specification, the instrument tags associated with the specification will appear in the Change Summary Report.
- **Do not change existing notification:** When this option is selected, the change will not be notified in the [Document Binder](#) module. In the **Specification Change Notification** dialog box, the **Changed** column for the specification will display [No](#). It is recommended that you select this option only when the change is minor and you do not want it to be included in the next saved revision.

Setting Specification Change Notifications Manually

You can modify the change notation of specifications in a Specification Binder package.

➤ To modify the change notification of a specification

1. Select a Specification Binder package.
2. Do one of the following:
 - On the **Actions** menu, click **Spec. Change Notification**.
 - Right-click on the specification you selected, and on the shortcut menu, click **Spec. Change Notification**.
3. In the **Specification Change Notification** dialog box, for the required specifications, select the required option in the **Changed** column:
 - **Yes** — Notify that the specification has changed.
 - **No** — Notify that the specification has not changed.



Note

- Where **Yes** is selected, the specification is revised when the Specification Binder package is next revised. You can view the changes in the Change Summary Report.
4. Click **OK**.

Print and Save Options

Printing from a Binder Package

Use this procedure to print documents from a binder package. You first choose between current documents on the one hand, and previous revisions on the other hand. You then specify what to print as follows:

- All the specifications and associated documents of the binder package.
- Changed documents only.
- Only the documents that you select.



Notes

- Your [Specifications](#) module preferences also determine preferences for specifications that you print within binder packages. For more information, see Preferences (Document Binder - General).
- You can set font and color for report comparison. For more information, see Setting Font and Color for Report Comparison.

➤ To print documents in a binder package

1. Select the binder package for which you want to print documents.
2. Do one of the following:
 - On the **Actions** menu, click **Print**.
 - Click the right mouse button and on the shortcut menu, click **Print**.
3. In the **Print** dialog box, under **Select revision**, do one of the following:
 - Click **Working issue** for current files.
 - For a previous revision, click **Formal issue** and select the required revision from the **Revision** list.

4. Under **Print what**, do one of the following:
 - Click **All documents in binder package** to print all the documents of the revision you selected, or of the working issue.
 - Click **Changed documents only** to print documents associated with specifications marked as changed since the previous revision. This option is available only if you selected **Working issue** above.
 - Click **Selected documents** to print the specifications and notes of your choice from the revision you selected, or from the working issue.
5. Select **Show print preview** to view the documents prior to printing.
6. Click **OK**.
7. If you clicked **Selected documents**, the **Select Documents** dialog box opens. Highlight the documents that you want to print, and click **OK**.

Printing from a Binder Package to a PDF File

You can print a set of documents in a binder package as .pdf files. After setting the path and file name, you choose between current documents on the one hand, and previous revisions on the other hand. You then specify what to print as follows:

- All the specifications and associated documents of the binder package.
- Changed documents only.
- Only the documents that you select.

All the documents that you select are saved together in a single .pdf file. When you open the file — in Adobe Acrobat® for example — you can navigate easily from one document to the next.




Caution

- Before printing binder package documents to a .pdf file, you must install GNU Ghostscript or Acrobat Distiller. You then launch SmartPlant Instrumentation Server (for details, see [SmartPlant Instrumentation Server Installation Guide](#), [SmartPlant Instrumentation Server Configuration](#)). In the **SmartPlant Instrumentation Server Settings** dialog box, you set the active .pdf generator (for details of the required settings, see [SmartPlant Instrumentation Server Online Help](#)).

➤ To print from a binder package to a .pdf file

1. Select the binder package for which you want to print documents to a file.
2. On the **Actions** menu, click **Print to File**.

3. In the **Print to File** dialog box, do one of the following:
 - Accept the file path displayed under **Path**. In this case, the software will create a unique file name in the currently displayed folder.
 - Click  and navigate to the folder where you want the software to save your .pdf files. After selecting this folder, you have the following **File name** options:
 - Type a file name.
 - Select an existing file name from the current folder.
 - Leave the **File name** box blank for the software to create a unique file name.

Click **Save** to return to the **Print to File** dialog box.
4. Under **Select revision**, do one of the following:
 - Click **Working issue** for current files.
 - For a previous revision, click **Formal issue** and select the required revision from the **Revision name** list.
5. Under **Print what**, do one of the following:
 - Click **All documents in binder package** to print to file all the documents of the revision you selected, or of the working issue.
 - Click **Changed documents only** to print to file documents associated with specifications marked as changed since the previous revision. This option is available only if you selected **Working issue** above.
 - Click **Selected documents** to print to file the specifications and notes of your choice from the revision you selected, or from the working issue.
6. Click **OK** to print the documents to a .pdf file.
7. If you clicked **Selected documents**, the **Select Documents** dialog box opens. Highlight the documents that you want to print, and click **OK**.


Saving Binder Package Documents to a ZIP File

You can save a set of documents from a binder package to a .zip (compressed) file. The documents within the .zip file are in the .psr format that the software uses for saving reports.

After setting the path and file name, you choose between current documents on the one hand, and previous revisions on the other hand. You then specify what to save as follows:

- All the specifications and associated documents of the binder package.
- Changed documents only.
- Only the documents that you select.

➤ To save from a binder package to a .zip file

1. Select the binder package for which you want to save documents into a .zip file.
2. On the **Actions** menu, click **Save to File**.
3. In the **Save to File** dialog box, do one of the following:
 - Accept the file path displayed under **Path**. In this case, the software will create a unique file name in the currently displayed folder.
 - Click  to open the **Save As** dialog box. Navigate to the folder where you want the software to save your .zip files. After selecting this folder, you have the following **File name** options:
 - Type a file name.
 - Select an existing file name from the current folder.
 - Leave the **File name** box blank for the software to create a unique file name.
 - Click **Save** to return to the **Save to File** dialog box.

4. Under **Select revision**, do one of the following:
 - Click **Working issue** for current files.
 - For a previous revision, click **Formal issue** and select the required revision from the **Revision name** list.
5. Under **Save what**, do one of the following:
 - Click **All documents in binder package** to save all the documents of the revision you selected, or of the working issue.
 - Click **Changed documents only** to save documents associated with specifications marked as changed since the previous revision. This option is available only if you selected **Working issue** above.
 - Click **Selected documents** to save the specifications and notes of your choice from the revision you selected, or from the working issue.
6. Click **OK** to save the documents into a .zip file.
7. If you clicked **Selected documents**, the **Select Documents** dialog box opens. Highlight the documents that you want to save, and click **OK**.

Troubleshooting

Displaying Binder Package Properties

You can display the properties of a particular binder package to show general details and a record of the revisions that were made.

➤ **To display the properties of a binder package**

1. Select the desired binder package.
2. Do one of the following:
 - On the **Actions** menu, click **Properties**.
 - Click the right mouse button and on the shortcut menu, click **Properties**.
3. In the **Binder Package Properties** dialog box, click the **General** tab to show general details of the binder package.
4. Click the **Revisions** tab to show details of revisions made to the binder package.
5. When done, click **Close**.

Troubleshooting

Errors may occur when you are working in the [Document Binder](#) module. This section describes the common ones, with recommendations for solving the problems.

Binder package problems

Problem Description	Suggested Reason	Recommended Solution
Binder package cannot be renamed.	Binder package has already undergone a revision.	
Binder package cannot be deleted.	Binder package has already undergone a revision or if not, it still has specs assigned to it.	If binder package has not yet undergone a revision, remove all the specifications from the binder package.
When selecting detailed view of specification list, a message appears: Failed to retrieve Style Setting".	Default View deleted or not defined in Document Binder Browser.	Create a View in the Package Browser and define a style for it. Ensure that the Set as default view check box is selected.
No forms available for selection when you try to add a note to the Form Notes folder.	No specification has been assigned to the binder package.	

Revision problems

Problem Description	Suggested Reason	Recommended Solution
Cannot revise the binder package.	One or more of the documents in the binder package are being edited.	Close the edit location (specification or note editor).
	One or more of the instrument tags associated with the specification are locked for process data.	Release all instrument tags from any workflow assignments.
Revised documents cannot be saved.	Target is not defined for the revision.	Your Domain Administrator needs to define the path or location.

Printing problems

Problem Description	Suggested Reason	Recommended Solution
Pages cannot be prepared for printing.	Open specifications or notes.	Close all specifications and notes, then re-select the print option.
The binder package includes blank reports.	One or more of the documents in the binder package is missing.	Search for the missing reports according to the names displayed in the error messages, and move them to the appropriate document location.
Cannot print binder package.	Binder package contains no documents.	Assign a spec to the binder package, or add a General Note.
Cannot repaginate before printing.	A problem exists with the specification, the form, or the format.	Open the specification in the Specifications module and follow the instructions.