Session 7: Publishing to SPF

Objective:

By the end of this session, you will be able to:

- Publish a document to SPF by using the **Publish** command.

Prerequisite Sessions:

- SP3D Overview
- Drawings: An Overview
- Creating a Volume Drawing
- Creating a Composed Drawing

Overview:

When you work in an integrated environment with SmartPlant Enterprise, you publish documents containing the drawing data before the authoring tools can share this information. You need to publish documents and associated data for:

- Exchanging data with other tools
- Sharing common data between tools
- Providing enterprise-wide accessibility to published documents
- Managing changes such as workflow history, document revisions, and title block information

You can publish your documents within the **Drawings and Reports** task by using the **Publish** command. This command is available for the following document types:

- 3D model data (SmartPlant Review file type)
- Orthographic drawings (viewable files with links to data)
- Piping isometric drawings (a viewable file with links to data)
- Reports (a viewable file with links to data)

In an integrated environment, you publish data to SmartPlant Foundation (SPF). SPF acts as a central repository for data and a medium through which information is shared among other tools, such as SmartPlant Instrumentation, SmartPlant P&ID, and SP3D.

This session will cover the procedure for publishing orthographic drawings to SPF.

Steps for Publishing Orthographic Drawings to SPF:

Publish the orthographic drawing document, **Piping Plan-1-0001**, of the **Piping Plan** component to SPF by using the **Publish** command. The drawing document, after publishing to SPF, should resemble the highlighted section in Figure 1.
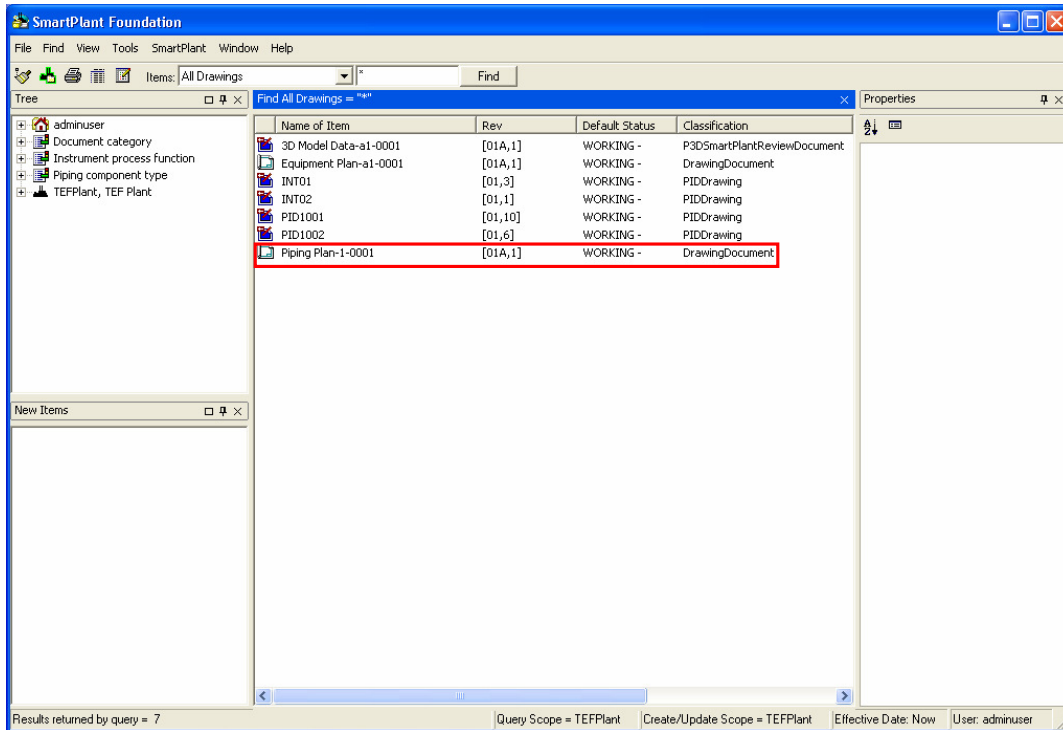
Figure 1: Published Orthographic Document

Before beginning the procedure:

- Your plant must be registered with SPF. Registration is done by using the **SmartPlant > Register…** command in the **Project Management** environment.

- Make sure that you are in the **Drawings and Reports** task**.**

You can see the **Piping Plan** component under the **Management Console** and the associated orthographic drawing document, **Piping Plan-1-0001**, under the **Name** column, as shown in Figure 2.
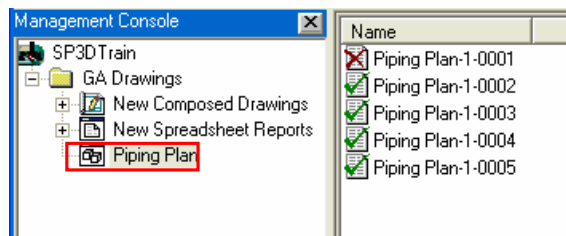

Figure 2: Piping Plan Volume Component in the Management Console

The **Piping Plan** component is created in the **Drawings and Reports** task with a specific template. The template, with its associated view styles, defines the contents of the component documents when they are created. SP3D generates a Shape2D document, which is saved as an SHA file in the model database. The document shown in the Management Console, in Figure 2, is simply a placeholder for all of these files. You set this file type as an output file for the **Piping Plan** component and save the file as a Shape2D file in the database for publishing.

1. Right-click the orthographic document, **Piping Plan-1-0001**, and click the **Properties…** option, as shown in Figure 3, to open the **Properties** dialog box.
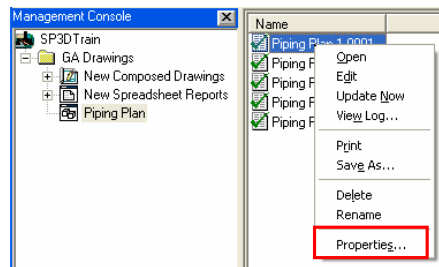

Figure 3: Properties… Option

2. The **Properties** dialog box appears. Select the following specifications on the **WBS** tab in the **Properties** dialog box, as shown in Figure 4, and click **OK**:

   Document Type: Piping Plan
   Document Style: Ortho
   Discipline: Piping
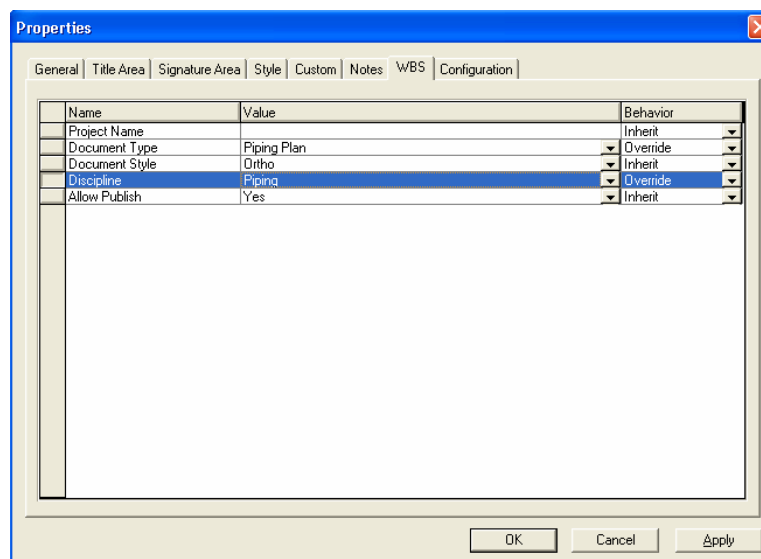   **Allow Publish:** Yes

Figure 4: Properties Dialog Box

Notes:

- We are editing the properties of an orthographic drawing; therefore, a list of disciplines will be available, for example, Civil, Electrical, Piping, or Structure.

- The **WBS** tab in the **Properties** dialog box is available only if you are connected with the **TEF** and **Project Management** environments.

3. Revise the document before publishing. This reserves the revision number of a document locally and saves the number to the database with the Major and Minor sets, depending on the revision scheme.

   Right-click the drawing document, **Piping Plan-1-0001**, and click the **Revise…** option, as shown in Figure 5, to revise the document.
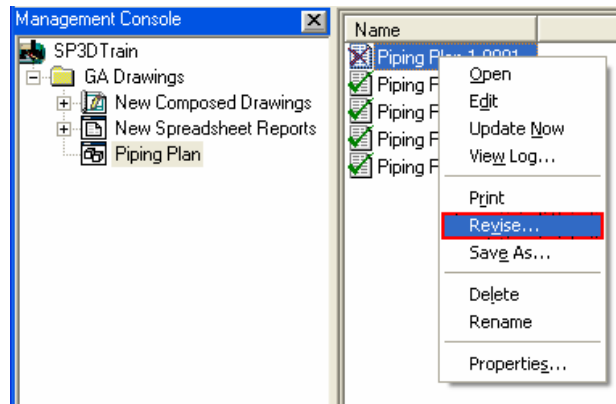

Figure 5: Revise… Option

4. The **Revise** dialog box appears, as shown in Figure 6. Specify the revision scheme and the next available major revision number for the document to revise it locally, without publishing the new information. Select the following specifications and click **OK**:

   Revision Scheme: Rev01A
   Revise in Tool Major: First
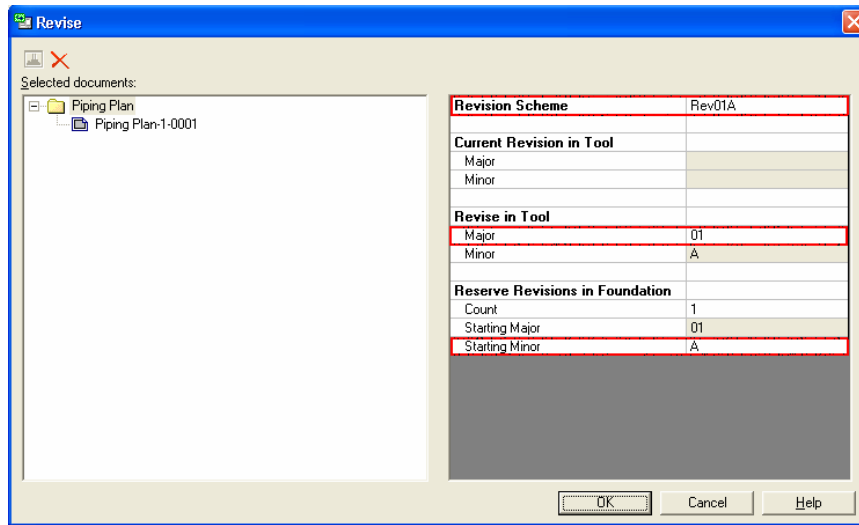   **Reserve Revisions in Foundation Starting Minor:** First

Figure 6: Revise Dialog Box

Tips:

- If you have selected a new document or a document for which no revision scheme has been selected, choose the revision scheme to be applied from the list of available options. If you have selected a document with a defined revision scheme, that scheme is displayed here in a read-only format.

- If you do not want to revise the document or if you want to reserve revision numbers without revising the document, leave the **Major** option empty.

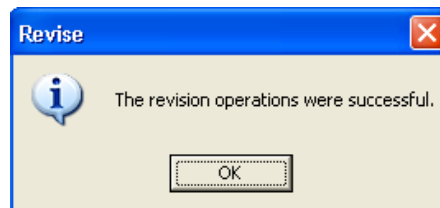5. The system confirms the completion of the revision operations, as shown in Figure 7. Click **OK**.

Figure 7: Revision Completion Confirmation

6. After generating a revision number for the document, you need to update the out-of-date document before publishing. Right-click the document and click the **Update Now** option, as shown in Figure 8, to update the document.
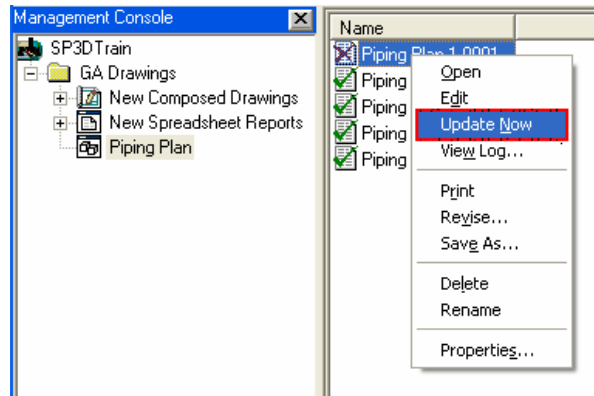
Figure 8: Update Now Option

7. The revised and updated document is ready to be published. Right-click the document and then click the **Publish...** option.
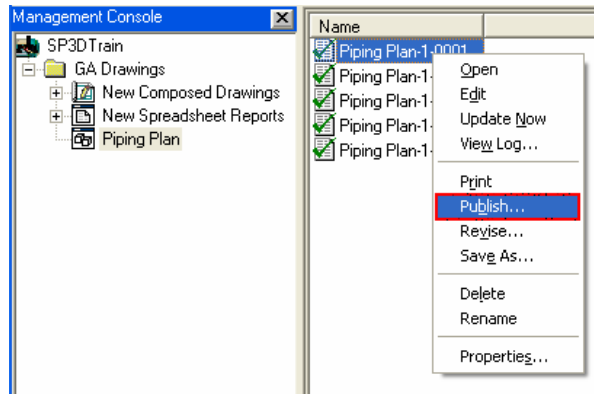

Figure 9: Publish... Option

8. The **Publish** dialog box shows the configuration and identification details that you specified while revising the document. Click **OK** to accept these specifications.
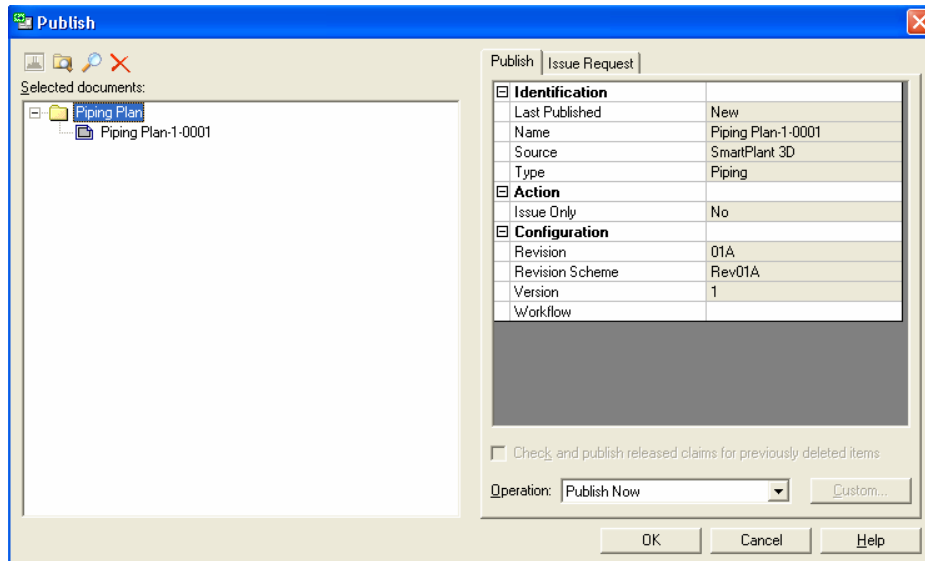
Figure 10: Publish Dialog Box

Note:

- This is a good opportunity to select a workflow in the **Publish** dialog box, through which the document will be processed further. Workflows in SPF are an important part of the process. For example, a workflow may send this published document to several people through e-mail for review.

9. When the publishing process is successful, the system displays a confirmation message, as shown in Figure 11. Click **Close** in the message box.
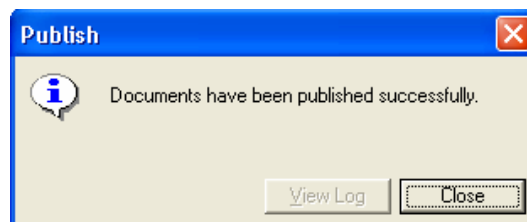

Figure 11: Publish Completion Confirmation

SP3D receives notification when publishing is complete. The software stores the orthographic drawing file in the appropriate location and loads the data into the database. The file can then be retrieved as published data by other authoring tools.

10. You can open **SmartPlant Foundation Desktop Client** on your computer to access the SPF. The orthographic document, **Piping Plan-1-0001**, you published appears in SPF, as shown in Figure 12.
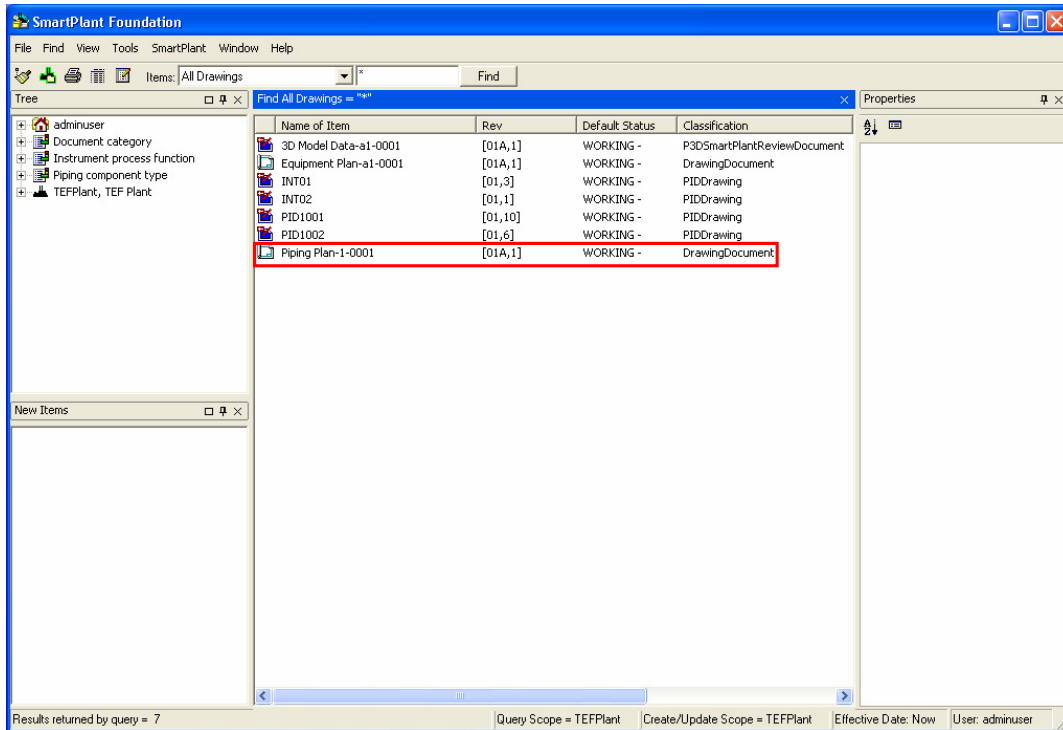
Figure 12: Document Published to SPF

For more information related to publishing to SPF, refer to the *Publishing Documents: An Overview* topic of the user guide *DrawingsandReportsUsersGuide.pdf.*