Project Compliance System

# Create/Edit Projects

## Editing a project

VeriSource™ for Operator

veriforce (John Veriforce)

Home | Administrative | Employees | Internal Evaluators | Contractors | OQ | Project | D&A | Training | Safety | Audit | Resources | P & P

Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

**Instructions**

First, choose a project in the Active Projects list by clicking a row. Next, start a task with one of the four buttons below.

Need help? View tutorial

◉ Active Projects ○ Archive Projects ○ Manage Employee Groups

| New<br>Create new project | New Division<br>Create new division within project | Template<br>Create new project with template | Copy<br>Copy existing project |
|---|---|---|---|

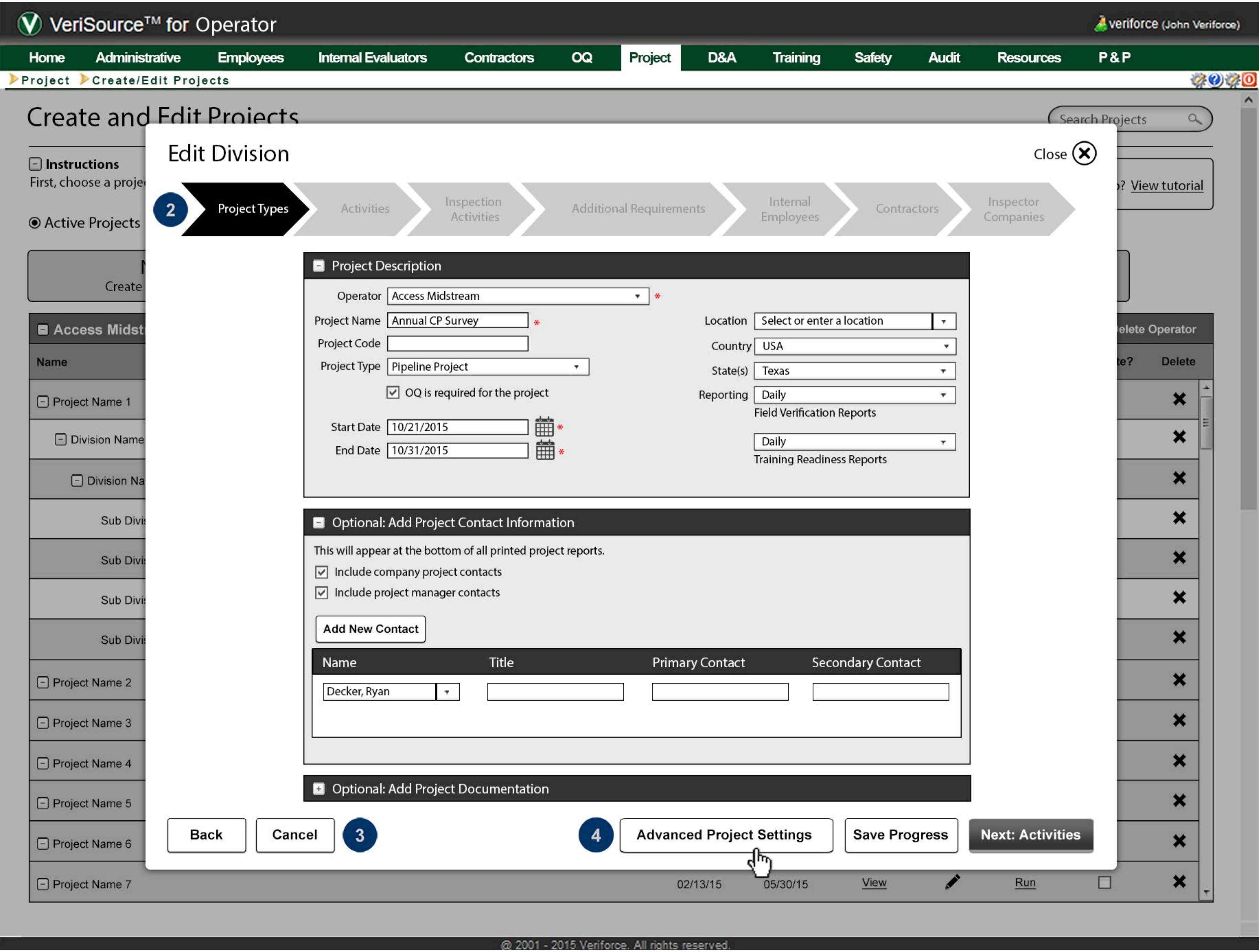
**Access Midstream** — Delete Operator

| Name | Start Date | End Date | Summary | Edit | Reports | Complete? | Delete |
|---|---|---|---|---|---|---|---|
| Project Name 1 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Division Name 1 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Division Name 2 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Sub Division 1 | 02/13/15 | 05/30/15 | View | 1 | Run | ☐ | ✖ |
| Sub Division 2 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Sub Division 3 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Sub Division 4 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 2 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 3 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 4 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 5 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 6 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |



## Notes

1 To edit a project, user would select the "Edit" icon under the Edit column.




## Notes

1. To edit a project, user would select the "Edit" icon under the Edit column.

2. This will open a modal window showing a step by step process for editing the project.

   The main navigation arrows will be clickable and go to that section if selected.

3. Back, Cancel and Save buttons will be on each step in the edit process. The Next button will go to the next section in the main navigation.

4. Advanced Project Settings opens a new modal window replacing the current window.

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Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

Instructions

First, choose a proje

? View tutorial

Active Projects

Create

Access Midst

Delete Operator

| Name | | | | | | te? | Delete |
|---|---|---|---|---|---|---|---|
| Project Name 1 | | | | | | | ✖ |
| Division Name | | | | | | | ✖ |
| Division Na | | | | | | | ✖ |
| Sub Divi | | | | | | | ✖ |
| Sub Divi | | | | | | | ✖ |
| Sub Divi | | | | | | | ✖ |
| Sub Divi | | | | | | | ✖ |
| Project Name 2 | | | | | | | ✖ |
| Project Name 3 | | | | | | | ✖ |
| Project Name 4 | | | | | | | ✖ |
| Project Name 5 | | | | | | | ✖ |
| Project Name 6 | | | | | | | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |

## Advanced Project Settings 1

Close

### Project FVR Settings

- ☐ Assign personnel to OQ Tasks, but not Work Types
- ☐ Include Span of Control on FVRs
- ☐ Qualification Matrix FVR
  - ☐ Qualification Matrix FVR
- ☐ Assign personnel to OQ Tasks, but not Work Types

### Project TVR Settings

Task Verification Report Options:

- ○ Contractors and Internal Employees will prepare TVRs
- ○ Only Inspectors and Internal Employees will prepare TVRs
- ○ Only Internal Employees will prepare TVRs

### Project Notification Settings

**Project Management Team Email Information**

☐ Notify project management if the Qualifications of project personnel will expire during the project

**Send a notification to the above email addresses under following circumstances**

- ☐ Qualification will expire within 90 days
- ☐ Qualification will expire within 60 days
- ☐ Qualification will expire within 30 days
- ☐ Qualification has expired

**Notify project management at end of Project**

- ☐ Notify 1 month prior to end
- ☐ Notify 2 weeks prior to end
- ☐ Notify 1 week prior to end
- ☐ Notify when project ends

**The OQ Admin will be included in all notifications**

OQ Admin Contact

### Project Owner

☐ Decker, Ryan | Remove | Add 2

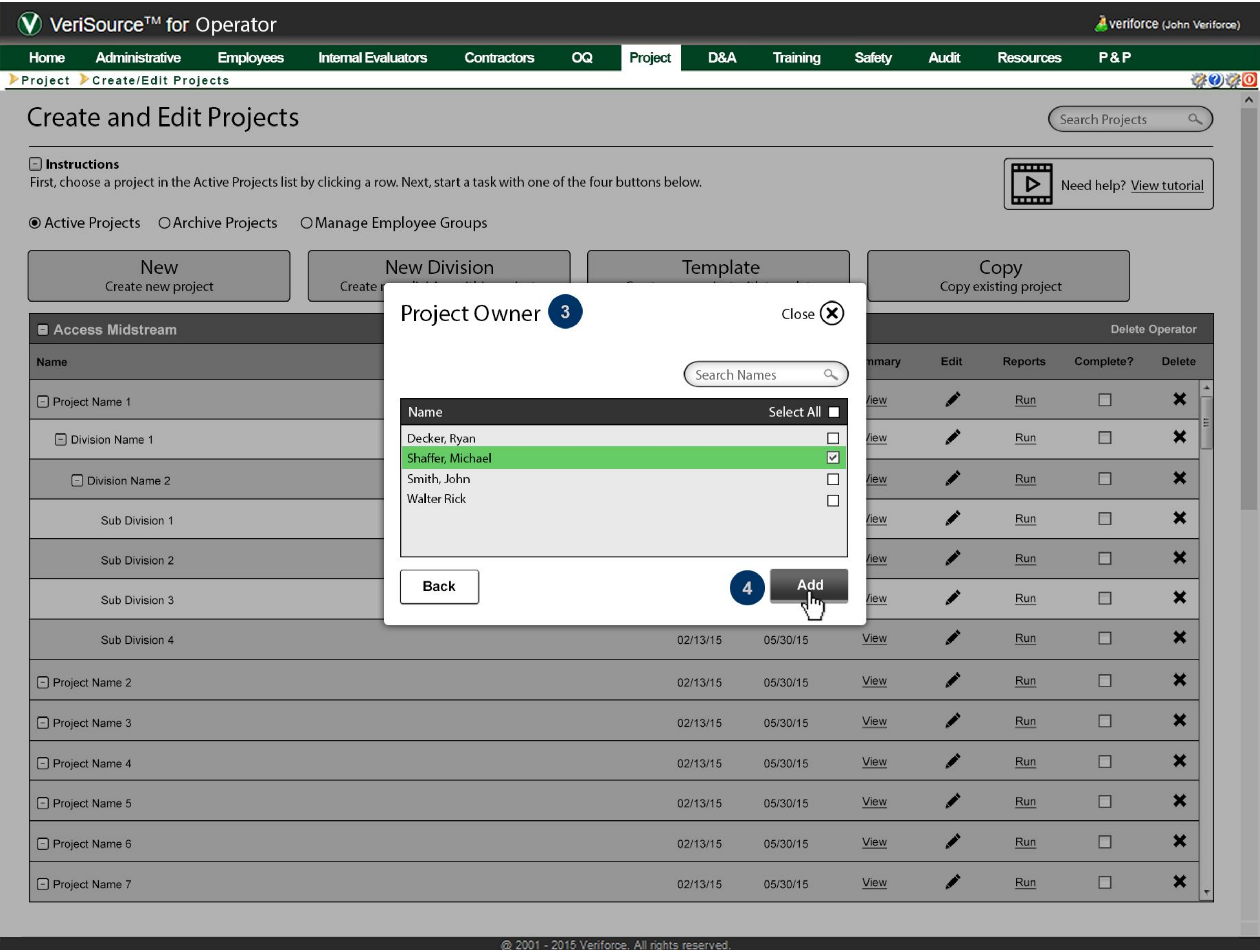
Back

Set Advanced Project Settings



## Notes

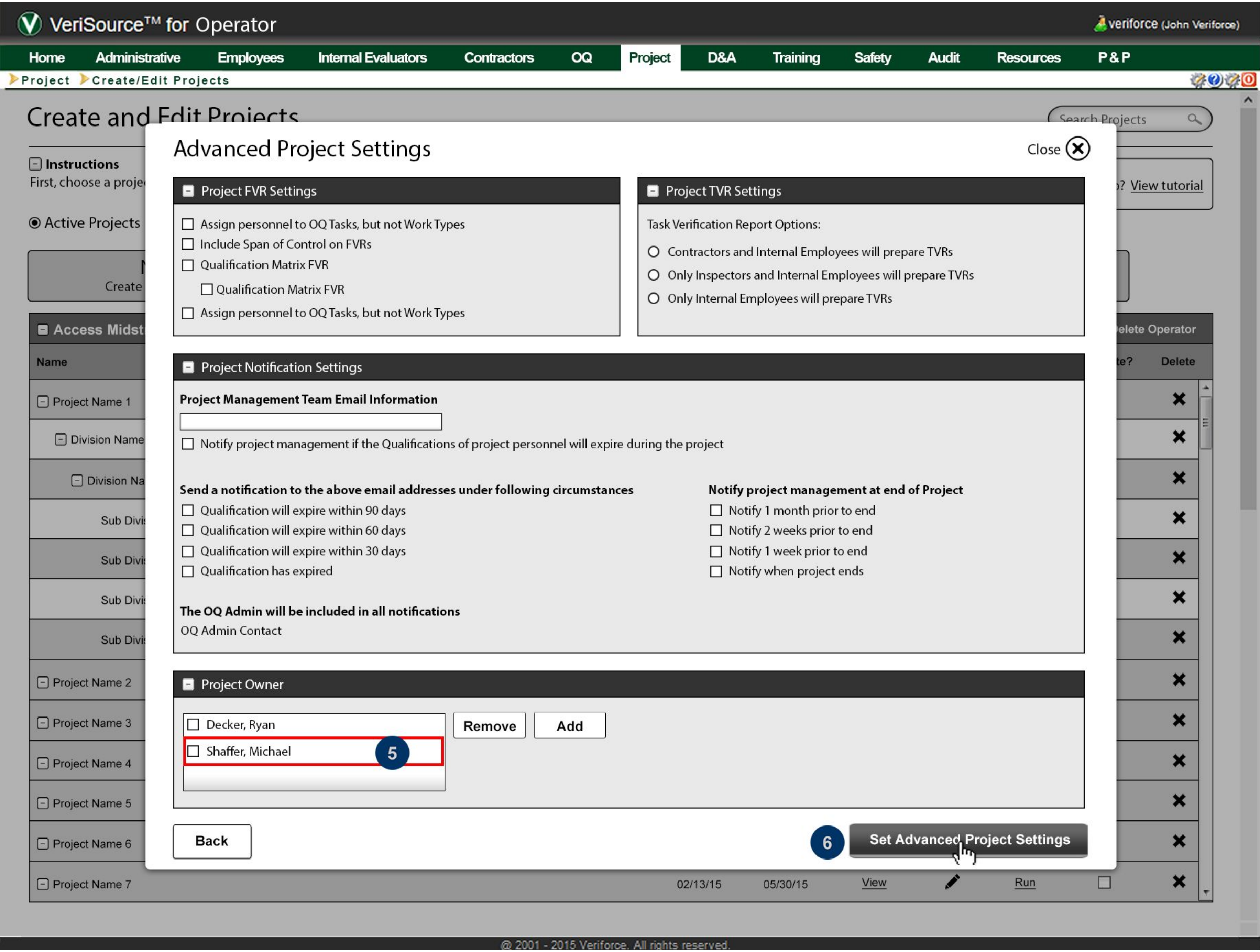
1. Advanced Project Settings screen displays several project settings editable by users. This is current functionality.
2. Users can add or remove Project Owners in this section.




## Notes

3 Modal window is replaced with Project Owner window that displays current list of Project Owner names.

4 User can add their choice(s) by selecting the Add button.




## Notes

5 New Project Owner is added to the list. They can be deleted by selecting the Remove button.

6 All settings can be saved by selecting the Set Advanced Project Settings button.

Upon selecting, a popup window lets the user know the Advanced Project Settings are set and the window closes.

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Home | Administrative | Employees | Internal Evaluators | Contractors | OQ | Project | D&A | Training | Safety | Audit | Resources | P & P

Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

Instructions

First, choose a proje...

Active Projects

## Edit Division

Close

Project Types > **Activities** > Inspection Activities > Additional Requirements > Internal Employees > Contractors > Inspector Companies

**Instructions**

First, Filter the Work Types choices to display the various selection lists in the table below. Optionally, add OQ tasks as needed.

### Work Types

Filter By:

- (●) Pipeline Project Types ( ) All Work Types
- ( ) Selected Work Type ( ) Selected Task's Work Type

| Name | All ☐ |
|---|---|
| Aviation(AVI) | ☑ |
| Building Construction(BCT) | ☐ |
| Communications(COM) | ☐ |
| Consulting Services(CLT) | ☐ |
| Electrical & Automation(ENA) | ☐ |
| Engineering Design Services(EDS) | ☐ |
| Environmental(ENV) | ☐ |
| Equipment Lease Rental(ELR) | ☐ |
| General (Non-DOT) Construction(NDC) | ☐ |
| Inspections(ISP) | ☐ |
| Line Locating(LLT) | ☐ |
| NDE(NUR) | ☐ |
| Offshore/Marine(OFM) | ☐ |
| Pipeline Construction(PCT) | ☐ |
| Pipeline Integrity/Corrosion Control(PIC) | ☐ |
| Pipeline Operations/Maintenance(POM) | ☐ |
| Plant Construction(PLT) | ☐ |

### OQ Tasks

Filter By:

- (●) Selected Tasks ( ) All Tasks
- ( ) Selected Work Type's Task

| Task ID | Task Description | All ☐ |
|---|---|---|
| 007 | Operate Valves | ☐ |
| 008 | Measurement of Wall Thickness with Ultra... | ☐ |
| 103 | Nondestructive Testing (Other than testi... | ☐ |
| 201 | Abnormal Operating Conditions Related to... | ☐ |
| 202 | Monitoring of Welding Process | ☐ |
| 203 | Visual Inspection of Welds not Non-Destr... | ☐ |
| 204 | Non-Destructive Testing (Dye Penetrant) | ☐ |
| 205 | Non-Destructive Testing (Mag Particle) | ☐ |
| 206 | Non-Destructive Testing (Ultrasonic) | ☐ |
| 207 | Non-Destructive Testing (X-Ray) | ☐ |
| 213 | Joining of Metal Pipe and Components by ... | ☐ |
| 214 | Joining of Metal Pipe and Components by ... | ☐ |
| 215 | Joining of Metal Pipe and Components by ... | ☐ |
| 217 | Small Diameter Metal Tubing and Fitting ... | ☐ |
| 401 | Examination of Buried Pipelines When Exp... | ☐ |
| 402 | Apply Approved Coatings to Above Ground ... | ☐ |

Back | Cancel | Save | **Next: Inspection Activities**

Access Midst... | Name | ...te? | Delete Operator | Delete

Project Name 1, Division Name, Division Na..., Sub Divi..., Sub Divi..., Sub Divi..., Sub Divi..., Project Name 2, Project Name 3, Project Name 4, Project Name 5, Project Name 6

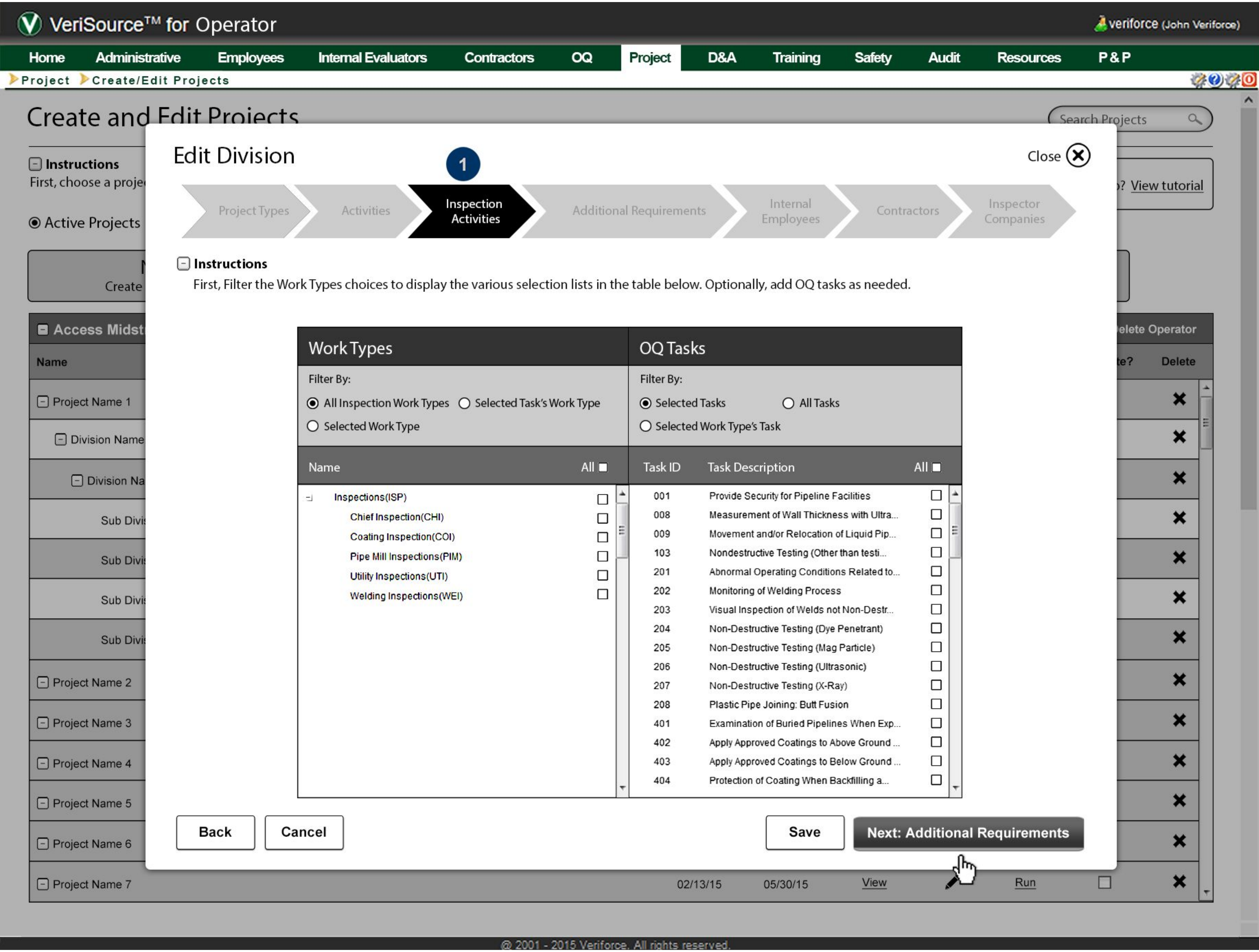
Project Name 7 | 02/13/15 | 05/30/15 | View | Run



## Notes

1. Users can filter what displays in the table by choosing the radio buttons under the Work Types and OQ Tasks columns.

2. The OQ Tasks column lists OQ tasks that can be added to the work type. This is an optional step.




## Notes

1 The Inspection Activities screen works identically to the Activities screen.

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Project > Create/Edit Projects

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**Instructions**

First, choose a proje...

...p? View tutorial

Active Projects

Create...

Access Midst... | Delete Operator

## Edit Division

Close

Project Types > Activities > Inspection Activities > **Additional Requirements** > Internal Employees > Contractors > Inspector Companies

| Required Job Type | | Minimum Amount Required | Delete |
|---|---|---|---|
| Blade Hand | | 1 | ✖ |
| Firewatch | | 1 | ✖ |
| Helper - Bead Grinder | | 1 | ✖ |
| Welder | Add 1 | 1 | ✖ |

Comments

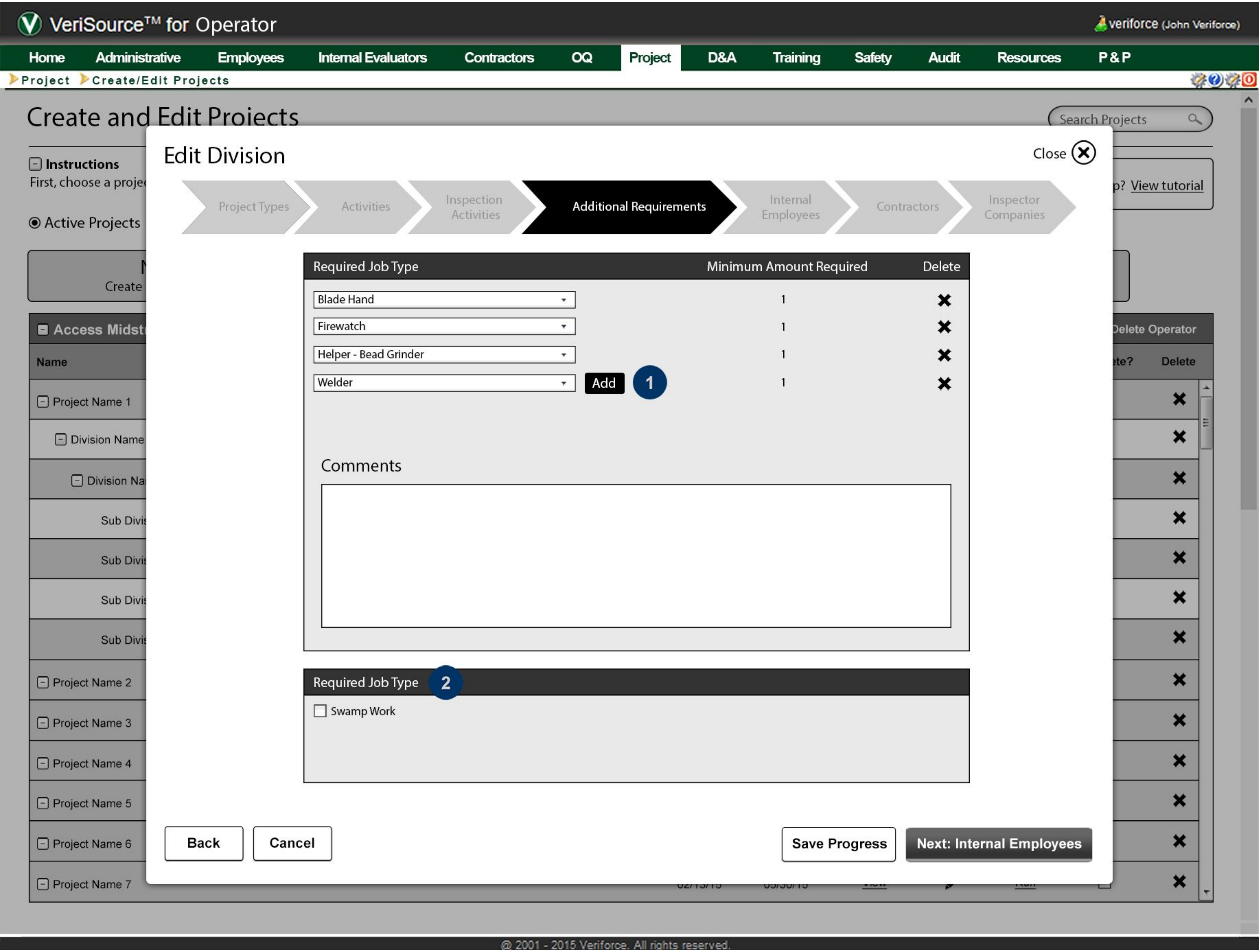
Back | Cancel | Save Progress | Next: Internal Employees

| Name | | | | | | | ...ete? | Delete |
|---|---|---|---|---|---|---|---|---|
| Project Name 1 | | | | | | | | ✖ |
| Division Name | | | | | | | | ✖ |
| Division Na... | | | | | | | | ✖ |
| Sub Divis... | | | | | | | | ✖ |
| Sub Divis... | | | | | | | | ✖ |
| Sub Divis... | | | | | | | | ✖ |
| Sub Divis... | | | | | | | | ✖ |
| Project Name 2 | | | | | | | | ✖ |
| Project Name 3 | | | | | | | | ✖ |
| Project Name 4 | 02/13/15 | 05/30/15 | View | ✎ | Run | | ☐ | ✖ |
| Project Name 5 | 02/13/15 | 05/30/15 | View | ✎ | Run | | ☐ | ✖ |
| Project Name 6 | 02/13/15 | 05/30/15 | View | ✎ | Run | | ☐ | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | ✎ | Run | | ☐ | ✖ |



## Notes

1. This section will have current functionality. Users will add new training requirements with an Add button or remove requirements from the Delete column.




## Notes

1. This section will have current functionality. Users will add new training requirements with an Add button or remove requirements from the Delete column.

2. If an operator defines a Risk Factor, this table will be visible as an option for the Contractor to choose.

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Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

## Edit Division

Close

Project Types > Activities > Inspection Activities > Additional Requirements > **Internal Employees** > Contractors > Inspector Companies

Will internal employees be performing work on the project? (•) Yes ( ) No **1**

Back | Cancel | Save Progress | **Next: Contractors**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Project Name 6 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | | Run | ☐ | ✖ |



## Notes

**1** Users will decide if employees will be working on the project by choosing "Yes" or "No" radio buttons.

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veriforce (John Veriforce)

Home | Administrative | Employees | Internal Evaluators | Contractors | OQ | Project | D&A | Training | Safety | Audit | Resources | P & P

Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

## Edit Division

Close

Project Types > Activities > Inspection Activities > Additional Requirements > **Internal Employees** > Contractors > Inspector Companies

Will internal employees be performing work on the project? (•) Yes ( ) No **1**

**Assign Personnel** | Assign Personnel Notification **2**

Gap Report

**Instructions**

Click an item below to display it's assigned personnel.

**Assign personnel to activities for work period: 10/19/2015 - 10/30/2015**

| All | Activities | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| | No Data Found. | | | |

| All | OQ Tasks | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| | No Data Found. | | | |

| All | Job Descriptions | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| ☐ | Teamster - Stringing/Pole Truck | | 0 | 0 |
| ☐ | Winch Truck | | 0 | 1 |

**Assigned Personnel for:**

| All | Candidate ID | Name | Readiness | OQ | Training | Earliest Exp | Covered Employee List | Delete |
|---|---|---|---|---|---|---|---|---|

Add Individuals | Add a Group

Back | Cancel | Save Progress | Next: Contractors

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Project Name 6 | 02/13/15 | 05/30/15 | View | ✎ | Run | ☐ | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | ✎ | Run | ☐ | ✖ |



## Notes

1. Users will decide if employees will be working on the project by choosing "Yes" or "No" radio buttons.

2. Upon selecting "Yes" the Assign Personnel tab interface is displayed.

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Home | Administrative | Employees | Internal Evaluators | Contractors | OQ | Project | D&A | Training | Safety | Audit | Resources | P & P

Project > Create/Edit Projects

# Create and Edit Projects

Search Projects

## Edit Division

Close

Project Types > Activities > Inspection Activities > Additional Requirements > **Internal Employees** > Contractors > Inspector Companies

Will internal employees be performing work on the project? (•) Yes ( ) No **1**

**Assign Personnel** | Assign Personnel Notification **2**

Gap Report

**Instructions**

Click an item below to display it's assigned personnel.

**Assign personnel to activities for work period: 10/19/2015 - 10/30/2015**

| All | Activities | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| | No Data Found. | | | |

| All | OQ Tasks | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| | No Data Found. | | | |

| All | Job Descriptions | Assigned Personnel | Ready | Total |
|---|---|---|---|---|
| ☐ | Teamster - Stringing/Pole Truck | | 0 | 0 |
| ☑ | Winch Truck | | 0 | 1 |

**3**

**Assigned Personnel for: Winch Truck**

| All | Candidate ID | Name | Readiness | OQ | Training | Earliest Exp | Covered Employee List | Delete |
|---|---|---|---|---|---|---|---|---|
| ☐ | Span of Control | | | | | | | |
| | jr-101120-01 | Smith, John | 0% | ● | ● 0 of 0 Courses | | ● | ✖ |

Add Individuals | Add a Group

Back | Cancel | Save Progress | Next: Contractors

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Project Name 6 | 02/13/15 | 05/30/15 | View | ✎ | Run | ☐ | ✖ |
| Project Name 7 | 02/13/15 | 05/30/15 | View | ✎ | Run | ☐ | ✖ |



## Notes

1. Users will decide if employees will be working on the project by choosing "Yes" or "No" radio buttons.

2. Upon selecting "Yes" the Assign Personnel tab interface is displayed.

3. If user selects an item like "Winch Truck", the informatrion for that item is displayed under the "Assigned Personnel for:" table.