

Project Compliance System

Create/Edit Projects

Create/Edit Templates

1 Users can create or edit a template with this call to action.

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

1

Create new project
 Create new division within project
 Create new project with template
 Copy existing project

Access Midstream								Delete Operator
Name	Start Date	End Date	Summary	Edit	Reports	Complete?	Delete	
<input type="checkbox"/> Project Name 1	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Division Name 1	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Division Name 2	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
Sub Division 1	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
Sub Division 2	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
Sub Division 3	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
Sub Division 4	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 2	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 3	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 4	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 5	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 6	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		
<input type="checkbox"/> Project Name 7	02/13/15	05/30/15	View		Run	<input type="checkbox"/>		

Create and Edit Projects

Instructions

First, choose a project in the Active Projects list by clicking on the project name.

Active Projects
 Archive Projects
 More

New
Create new project

Access Midstream








Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template Close

Instructions

Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates
 All Templates
 2


Project Templates			
Global			
Name	Action	Summary	Edit
Annual CP Survey	Apply	View	
Anomaly Dig	Apply	View	
Coating	Apply	View	
Locating / Potholing	Apply	View	
Pigging	Apply	View	
Pressure Test	Apply	View	
Tie-In Welding	Apply	View	
Access Midstream			
BHP Billiton			

6 Create New Template

















Back Cancel

Save Progress

Search Projects

 Need help? [View tutorial](#)

Copy
Copy existing project

Delete Operator			
Edit	Reports	Complete?	Delete
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	

- A modal window opens showing an accordion view of all current templates. The templates can be filtered between Global and All.
- If the user wants to apply an existing template to their project, the "Action" column will have the Apply template functionality.
- The Summary column will display a modal window that shows all of the template's information in a tabbed format. This would include:
 - Overview
 - Subcontractors
 - Employees
- The Edit column will have the edit icon used to make changes to the template.
- User can create a new template with this call to action.

7 Users can Apply a template by selecting "Apply" in the row.

Create and Edit Projects

Instructions
First, choose a project in the Active Projects list by clicking on the project name.

Active Projects Archive Projects More

New
Create new project

Access Midstream

Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template Close

Instructions
Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates All Templates

Project Templates			
Global			
Name	Action	Summary	Edit
Annual CP Survey	7 Apply	View	
Anomaly Dig	Apply	View	
Coating	Apply	View	
Locating / Potholing	Apply	View	
Pigging	Apply	View	
Pressure Test	Apply	View	
Tie-In Welding	Apply	View	
Access Midstream			
BHP Billiton			

Create New Template

Search Projects

Need help? [View tutorial](#)

Copy
Copy existing project

Delete Operator			
Edit	Reports	Complete?	Delete
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	

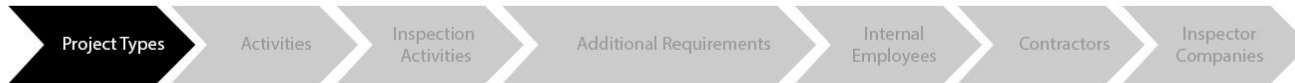
Create and Edit Projects

- Instructions
- Active Projects

Name
Project Name 1
Division Name
Division Name
Sub Division
Sub Division
Sub Division
Sub Division
Project Name 2
Project Name 3
Project Name 4
Project Name 5
Project Name 6
Project Name 7

Apply Template - Annual CP Survey 8

Close X



Project Description

Operator: Access Midstream *

Project Name: Annual CP Survey *

Project Code: []

Project Type: Pipeline Project

OQ is required for the project

Start Date: 10/21/2015 *

End Date: 10/31/2015 *

Location: Select or enter a location

Country: USA

State(s): Texas

Reporting: Daily

Field Verification Reports: Daily

Training Readiness Reports: []

Optional: Add Project Contact Information

This will appear at the bottom of all printed project reports.

Include company project contacts

Include project manager contacts

Add New Contact

Name	Title	Primary Contact	Secondary Contact
Decker, Ryan	[]	[]	[]

Optional: Add Project Documentation

Back Cancel Advanced Project Settings Save Progress Next: Activities

8 A new modal window replaces the previous window. This window will be identical to the Create/New work flow window but will have a clear header showing the user they are applying a specific template to a project.

9 Once the user goes through the process, there can select Save and Close.

Create and Edit Projects

Instructions
First, choose a project

Active Projects

Access Midst

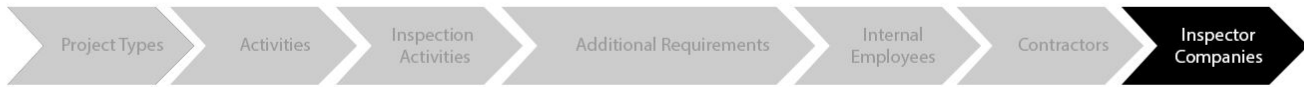
- Name
- Project Name 1
- Division Name
- Division Na
- Sub Divis
- Sub Divis
- Sub Divis
- Sub Divis
- Project Name 2
- Project Name 3
- Project Name 4
- Project Name 5
- Project Name 6
- Project Name 7

Search Projects

View tutorial

Apply Template - Annual CP Survey

Close



All	Company Name	Readiness	OQ	Training	D&A	Insurance	Delete
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	✕
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	✕

Add Contractors

Back Cancel

Save Progress Save and Close

9



Create and Edit Projects

Instructions
First, choose a project in the Active Projects list by clicking on the project name.

Active Projects Archive Projects More

New
Create new project

Access Midstream

Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template Close

Instructions
Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates All Templates

Project Templates			
Global			
Name	Action	Summary	Edit
Annual CP Survey			
Anomaly Dig	Apply	View	
Coating	Apply	View	
Locating / Potholing	Apply	View	
Pigging	Apply	View	
Pressure Test	Apply	View	
Tie-In Welding	Apply	View	
Access Midstream			
BHP Billiton			

10 Template applied successfully!

Create New Template

Back Cancel

Save Progress

Search Projects

Need help? [View tutorial](#)

Copy
Copy existing project

Edit	Reports	Complete?	Delete
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	

10 Upon selecting Save and Close, the window closes showing the original window and a confirmation message displays letting the user know the action was successful.

11 If the user wants to see more details about the template, they can select the View link under the Summary column.

Create and Edit Projects

Instructions
First, choose a project in the Active Projects list by clicking on the project name.

Active Projects Archive Projects More

New
Create new project

Access Midstream

Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template

Close

Instructions
Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates All Templates

Project Templates				
Global				
Name	Action	Summary	Edit	
Annual CP Survey	Apply	View		
Anomaly Dig	Apply	View		
Coating	Apply	View		
Locating / Potholing	Apply	View		
Pigging	Apply	View		
Pressure Test	Apply	View		
Tie-In Welding	Apply	View		
Access Midstream				
BHP Billiton				

Create New Template

Back

Cancel

Save Progress

Search Projects

Need help? [View tutorial](#)

Copy
Copy existing project

Delete Operator

Edit	Reports	Complete?	Delete
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	

Create and Edit 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](#)

Summary 12

Close

- Overview
- Subcontractors
- Employees

<p>Project: Annual CP Survey</p> <p>Description:</p> <p>Project Type: Pipeline Project</p>	<p>Field Verification Report (FVR): The FVR must be prepared Daily</p> <p>Electronic FVR: Disabled</p> <p>Paperless Audits: Disabled</p>
---	---

- + Project Properties
- + Activities
- Selected Work Types and Activities
- 207 Non-Destructive Testing (X-Ray)
- 704 Permanent Field Repair by Grinding
- NDE / Radiography
- + Training Requirements

Project Name 5	02/13/15	05/30/15	View		Run	<input type="checkbox"/>	
Project Name 6	02/13/15	05/30/15	View		Run	<input type="checkbox"/>	
Project Name 7	02/13/15	05/30/15	View		Run	<input type="checkbox"/>	

12 A new modal window replaces the previous window. This window will be identical to the Create/New Summary window but will have new tabs related to the templates:

1. Overview
2. Subcontractors
3. Employees

Create and Edit Projects

Instructions
First, choose a project in the Active Projects list by clicking on the project name.

Active Projects Archive Projects More

New
Create new project

Access Midstream

Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template

Instructions
Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates All Templates

Project Templates				
Global 13				
Name	Action	Summary	Edit	
Annual CP Survey	Apply	View		
Anomaly Dig	Apply	View		
Coating	Apply	View		
Locating / Potholing	Apply	View		
Pigging	Apply	View		
Pressure Test	Apply	View		
Tie-In Welding	Apply	View		

Access Midstream

BHP Billiton

Create New Template

Save Progress

Back **Cancel**

Search Projects

Need help? [View tutorial](#)

Copy
Copy existing project

Delete Operator			
Edit	Reports	Complete?	Delete
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	
	Run	<input type="checkbox"/>	

13 If the user wants to edit the template, they can select the edit icon.

Create and Edit Projects

Instructions
First, choose a project

Active Projects

Access Midstream

Name

Project Name 1

Division Name

Division Name

Sub Division

Sub Division

Sub Division

Sub Division

Project Name 2

Project Name 3

Project Name 4

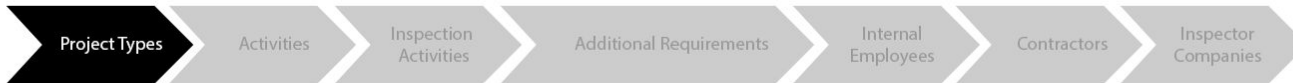
Project Name 5

Project Name 6

Project Name 7

Edit Template - Annual CP Survey 14

Close



Project Description

Operator: Access Midstream *

Project Name: Annual CP Survey *

Project Code: []

Project Type: Pipeline Project

OQ is required for the project

Start Date: 10/21/2015 *

End Date: 10/31/2015 *

Location: Select or enter a location

Country: USA

State(s): Texas

Reporting: Daily

Field Verification Reports: Daily

Training Readiness Reports: []

Optional: Add Project Contact Information

This will appear at the bottom of all printed project reports.

Include company project contacts

Include project manager contacts

Add New Contact

Name	Title	Primary Contact	Secondary Contact
Decker, Ryan	[]	[]	[]

Optional: Add Project Documentation

Back

Cancel

Advanced Project Settings

Save Progress

Next: Activities

14 A new modal window replaces the previous window. This window will be identical to the Create/New work flow window but will have a clear header showing the user they are **editing** a specific template to a project.

15 Once all editing is complete, user can select the Save and Close button.

Create and Edit Projects

Instructions First, choose a project

Active Projects

Access Midst

Name

Project Name 1

Division Name

Division Na

Sub Divis

Sub Divis

Sub Divis

Sub Divis

Project Name 2

Project Name 3

Project Name 4

Project Name 5

Project Name 6

Project Name 7

Edit Template - Annual CP Survey 15 Close

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

All	Company Name	Readiness	OQ	Training	D&A	Insurance	Delete
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	✕
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	✕

Add Contractors

Create and Edit Projects

Instructions
First, choose a project in the Active Projects list by clicking on the project name.

Active Projects Archive Projects More

New
Create new project

Access Midstream

Name
<input type="checkbox"/> Project Name 1
<input type="checkbox"/> Division Name 1
<input type="checkbox"/> Division Name 2
Sub Division 1
Sub Division 2
Sub Division 3
Sub Division 4
<input type="checkbox"/> Project Name 2
<input type="checkbox"/> Project Name 3
<input type="checkbox"/> Project Name 4
<input type="checkbox"/> Project Name 5
<input type="checkbox"/> Project Name 6
<input type="checkbox"/> Project Name 7

Create New Project From Template Close

Instructions
Create a new template for your project. If you wish to use an existing template, select a template from the list below and choose "Apply" to assign the template to a new project.

Global Templates All Templates

Project Templates				
Global				
Name	Action	Summary	Edit	
Annual CP Survey	Apply	View	<input type="button" value="Edit"/>	
Anomaly Dig	Apply	View	<input type="button" value="Edit"/>	
Coating	Apply	View	<input type="button" value="Edit"/>	
Locating / Potholing	Apply	View	<input type="button" value="Edit"/>	
Pigging	Apply	View	<input type="button" value="Edit"/>	
Pressure Test	Apply	View	<input type="button" value="Edit"/>	
Tie-In Welding	Apply	View	<input type="button" value="Edit"/>	
Access Midstream				
BHP Billiton				

16

Search Projects

Need help? [View tutorial](#)

Copy
Copy existing project

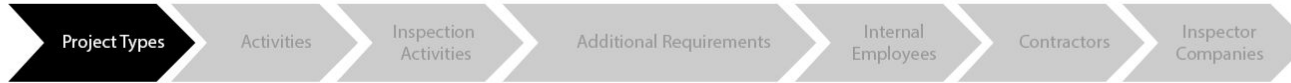
Delete Operator			
Edit	Reports	Complete?	Delete
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="button" value="Edit"/>	Run	<input type="checkbox"/>	<input type="button" value="X"/>

16 User can create a new template with this main call to action.

Create and Edit Projects

New Template 17

Close X



Project Description

Operator *

Project Name * Location Select or enter a location

Project Code Country USA

Project Type Pipeline Project State(s) Texas

OQ is required for the project Reporting Daily

Start Date * Field Verification Reports

End Date * Training Readiness Reports Daily

Optional: Add Project Contact Information

This will appear at the bottom of all printed project reports.

Include company project contacts

Include project manager contacts

Name	Title	Primary Contact	Secondary Contact
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Optional: Add Project Documentation

17 A new modal window replaces the previous window. This window will be identical to the Create/New work flow window but will have a clear header showing the user they are **creating** a new template for a project.

18 Once all editing is complete, user can select the Save and Close button.

Create and Edit Projects

Instructions

First, choose a project

Active Projects

Create

Access Midst

Name

Project Name 1

Division Name

Division Na

Sub Divis

Sub Divis

Sub Divis

Sub Divis

Project Name 2

Project Name 3

Project Name 4

Project Name 5

Project Name 6

Project Name 7

New Template Close X

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

All	Company Name	Readiness	OQ	Training	D&A	Insurance	Delete
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	X
<input checked="" type="checkbox"/>	Creation Contracting	50.00%	0 Qual	0 Course	●	●	X

Add Inspector Companies

Back
Cancel

Save Progress
Save and Close