Technical Queries user guide

Type: User Documentation 26-Jan-2022 | Valdas Piekus

Techincal Queries Workflow

This document outlines the information required to access the Pims Technical Queries system and perform such tasks as inputting Queries, submitting records for acceptance and response, tracking progress, and reporting.

Pims is an electronic tool to facilitate the capture, response, approval, distribution, performance management and communication of project Technical Queries.

Definitions and abbreviations

Action	A non-routine request or activity that requires formal, documented close-out and approval.
Endorser	Identified individual(s) with the authority and accountability for Approving or Rejecting a change
TQ	Technical Query
Deviation	Any deviation from mandated requirements (Shall statement) within the spec.
Form	An individual numbered document held in Pims. A form may be a Risk, Action, Change Proposal, or an IR form, which is submitted into the system.
Workflow	Module process for completing the form.
Module	A specific module within Pims, e.g. the Action Tracking module.
Approver	Identified individual(s) with the authority and accountability for Approving or Rejecting a change.
Scope	A specific piece of work with an identified owner who is responsible for completing that scope of work.
Requesting Scope	The requesting scope of a query.
Responding Scope	The responding scope of a query.

Accessing the system

To be able to view Technical Queries forms a user must either be an Admin or have access to Technical Queries for the Project.

Permissions

- Global Admins can view all forms.
- Project Admins can view all forms.
- Scope Members can view forms if they are members of any of the involved scopes on that Project.
- Users can always view forms where they are nominated to sign regardless if they are still a member of the Scope.

- Users can only raise Queries from scopes that they are member of and to scopes that these are allowed to raise to. (see Technical Query setup)
- Admins or Master Company users cannot raise forms unless they are added as a scope member.

Navigation

Technical Queries are accessed from the Pims menu. Click the "Technical Queries" menu item, and you will be taken to the register. From the register you will have access to all regarding Technical Queries.
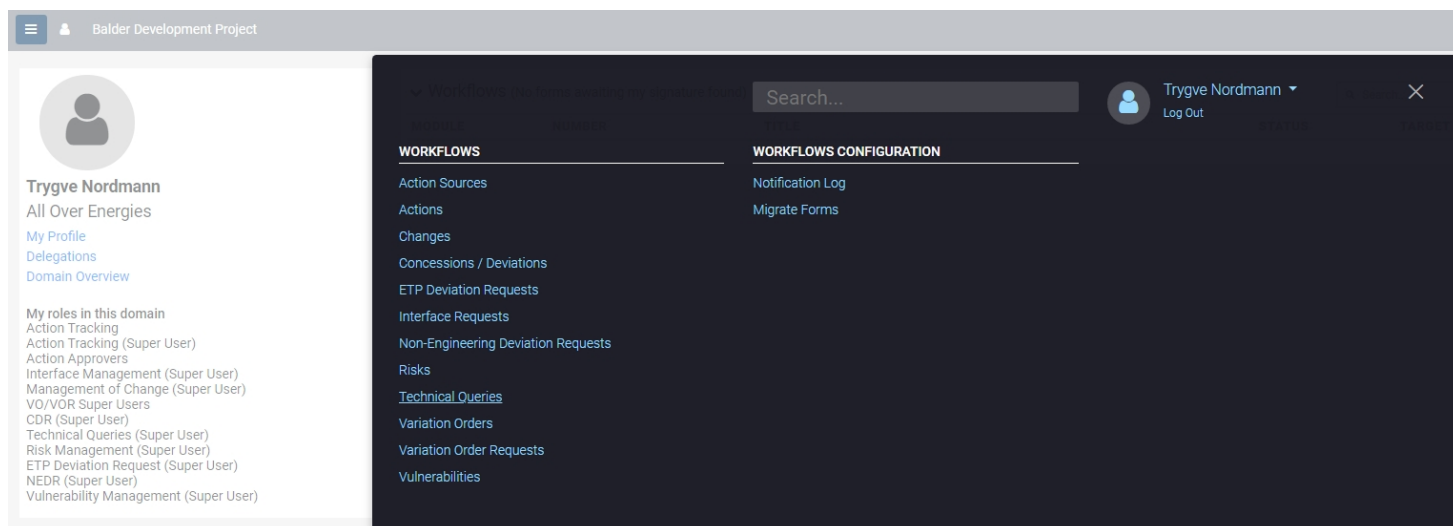
Common functionality

For information about common functionality please refer to the Common Functionality user guide.

Setup & Settings

Some settings allows each project to define individually. Admins can access this setting from the cogwheel menu item in the top right. Ref. Technical Queries Setup user guide.

Note: When using the settings admins must make sure that they are standing in the correct domain. The settings applied will only apply for the domain they are currently standing in.

Register

For information about the general functionality of the register please refer to the Registers user guide.

New Technical Query

General

Clicking the "New Query" button from the Register will generate a popup for creating a new Technical Query. Select Project, insert title, and select **Requesting Scope**, i.e. the scope asking the question, and **Responding Scope**, i.e. the scope to provide the response. Click the OK button when all fields have been filled.

Note: Depending on the settings for the project a TQ Coordinator needs to have been set as a minimum for each of the scopes used to be able to create new queries (see settings)

Add New Technical Query

Project

Select project ▼

Title

Requesting

Select requesting scope ▼

Responding

Select responding scope ▼

Cancel   OK

Workflow - Technical Query

Toolbar

The buttons that are available in the toolbar depends on the users access. For more information please refer to the Common Functionality user guide.

Header

The form header displays general information about the Technical Query.

Balder Development Project **Technical Query**			omega
Title * Use of laser line gas detectors	**Status** Proposed	**Revision** 1	**Contract / PO No**
Query No Balder-TQ-000012	**Date Originated** 04-May-2020	**Date Submitted**	**Target Response Date** 13-May-2020
Query Type Engineering Query	**Priority** Medium	**Location** Singapore	**Discipline** Electrical
Originating Person Sondresen, Terje	**Requesting Scope** Omega Ølensvåg	**Responding Scope** Omega Stavanger	**Progress** 1 2 3 4 5 6 7 8

Header Data

- **Title** - The form Title entered by the originating person. Can be edited.
- **Status** – The current status of the form.
  - **Proposed** - The form is either waiting for Originating Person to complete Section 1 or Originating TQ Coordinator to complete Section 2
  - **Submitted** - The form is awaiting Responding TQ Coordinator Validation in Section 3
  - **Pending Proposed Response** - The form is with Responder in Section 4.
  - **Pending Proposed Review** - The form is with Review(s) or Responding TQ Coordinator in Section 4.
  - **Pending Response Endorsement** - The form is with Response Endorser(s) in Section 5
  - **Pending Final Response** - The form is with Section 7 to confirm/accept the final response
  - **Pending Close-Out** - The form is with TQ Coordinator / Commissioning Team to validate response is implemented
  - **Closed** - The query has been implemented and closed.
  - **Rejected** - The query has been rejected and closed as not required.
  - **Void** - The query is no longer required and no further activity therefore required.
  - **Superseded** - The form has been superseded by a new revision.
- **Revision** - Current revision of the form
- **Contract / PO No** - Content pulled from Section 1 input
- **Query No** - A Unique Number assigned to the form
- **Date originated** - The date the form was initially created (first revision).
- **Date submitted** - Date the form was submitted in Section 2
- **Target Response Date** - Content pulled from Section 1 input
- **Query Type** - Content pulled from Section 1 input
- **Priority** - Content pulled from Section 1 input
- **Location** - Content pulled from Section 1 input
- **Discipline** - Content pulled from Section 1 input
- **Originating Person** - The person who entered the form into Pims
- **Requesting Scope** - The Requesting Scope of the TQ.
- **Responding Scope** - The Responding Scope of the TQ.
- **Progress Indicator** - Identifies which section in the form is currently live. Clicking a step navigates to that section in the form.

Section 1 - Initiate

Status - Proposed

Here the originating person inputs all the required information to allow the teams to make an informed decision on whether to Endorse or Reject the query.

1. Initiate

Query Description *

| Style ▾ | **B** | *I* | U | **A** ▾ | ☰ | ☰ | ☰▾ | ⊞▾ | ⌐ | — | ⤢ |

Proposed Solution *

| Style ▾ | **B** | *I* | U | **A** ▾ | ☰ | ☰ | ☰▾ | ⊞▾ | ⌐ | — | ⤢ |

Consequence of Rejection

| Style ▾ | **B** | *I* | U | **A** ▾ | ☰ | ☰ | ☰▾ | ⊞▾ | ⌐ | — | ⤢ |

Query Type *	Location *	Target Response Date *	Priority	Contract / PO No	Workpack Number
▾	▾	🗓	Medium ▾		

Primary Affected Discipline *	Primary Affected DeliveryLine *
▾	▾

Other Affected Disciplines	Other Affected Delivery Lines

Systems *	Commissioning Systems *

Key Milestones	Affected Projects

Impacts *   [+ add new]

| CAPEX | ○ Yes ○ No | [✕] |
| Schedule | ○ Yes ○ No | [✕] |

S&OR Implications *
○ Yes   ○ No

Required for Start-up? *
○ Yes   ○ No

Reference Documents

•••	Number	Title	Rev	
★				

Attachments   [⬆ Upload] [⬇ Download]

•••	Filename	Size	Updated	

Tag Number(s)

•••	Tag Number	
★		

Related Forms

•••	No	Title	
★			

| ⚡▾ | **B** | *I* | U | **A** ▾ | ☰ | ☰ | ☰▾ | ⊞▾ | ⌐ | — | ⤢ |

[🔗 Add attachment] [💬 Save Comment]

Role	Name	Action	Signed By
Originating Person	Aalbotsjord, Trygve	▾ ✔	

Fields

- **Query Description -** Describe the query

- **Proposed Solution -** Describe a Proposed solution of how you have interpreted the requirements and intend to proceed
- **Consequence of Rejection -** Describe any potential consequences of rejecting the Proposed Solution
- **Query Type -** Select the applicable query type, e.g. Engineering Query or Site Query
- **Location -** Identification of the location applicable to the query
- **Target Response Date -** Calendar pop-up or fixed value
  - From the **calendar popup**, select the date by which the reponse is required.
    - Pick a sensible date that aligns with any schedule requirements. Setting an arbitrary date without due consideration could cause unnecessary confusion
  - For a **fixed value**, this field will not appear in Section 1 (only the form header), and the date is automatically applied based on fixed Project parameters.
    - e.g. a response is required within 30 days for ALL TQ's, where the Response Date start point is based on the Section 2 completion date
- **Priority -** The assigned action priority of the query. Priority is selected based on the criticality of the action and not the proximity of the target date.
- **Contract / PO No. -** Input the relevant Contract / PO No.
- **Workpack Number -** Input the relevant Workpack Number.
- **Primary Affected Discipline -** From the drop down menu select the Discipline most affected / linked to the form.
- **Primary Affected Delivery Line -** From the drop down menu select the Delivery Lines most affected / linked to the form.
- **Other Affected Disciplines -** Here you may identify any other Disciplines affected by the query.
- **Other Affected Delivery Lines -** Here you may identify any other Delivery Lines affected by the query.
- **Systems -** Here you can identify any Engineering Systems relevant to the query.
- **Commissioning Systems -** Here you can identify any Commissioning Systems relevant to the query.
- **Key Milestones -** Link in any relevant key milestones.
- **Affected Projects -** Link in any other affected projects outside of the one in which the TQ has been raised.
- **Impacts -** Identify whether there are any potential impacts.
- **S&OR Implications -** Identify whether or not the TQ has S&OR implications.
- **Required for Start-up -** Identify whether the response is required to enable start-up.
- **Reference Documents -** Pims gives the option to reference any project documents that are applicable to the form without adding a copy. As a minimum, the document number and revision should be included.
- **Attachments -** By pressing the Upload Attachment button when in a form, an attachment can be added to the form through the pop up that appears on screen.
- **Tag Number(s) -** Select any tag numbers applicable to the TQ from the dropdown.
- **Related Forms -** Here you can reference other Pims forms that are linked to/associated with this form

Signature

Drop down selection and Submit button. The originating person has one option:

- **Proposed** – All required fields have been completed and the form will move forward to Section 2
    a. On sign off the status of the form will remain **Proposed**

Section 2 - Requesting Team Validation

Status - Proposed

Here the nominated Requesting TQ Coordinator reviews the TQ, and confirms whether it is acceptable for submission or not. Projects may decide this Section is not required and allow the Originating Person to submit a TQ.

Fields

- **Add Comment -** Comments justifying the selected signature action may be added here.

Signature

Drop down selection and Submit button. The Requesting TQ Coordinator has three options:

- **Recycle** – This option should be selected if there is insufficient information to proceed. It is good practice to discuss with the Originating Person prior to recycling. A comment explaining the reason for recycling is required, and is enforced through an Add Recycle Comment dialog.

- **Rejected** – The TQ is rejected and will not be submitted for further processing.
    a. On sign off, the status of the form will change to **Rejected**
- **Submitted** – You Endorse the TQ and believe it should be submitted.
    a. On sign off, the form will progress to Section 3, and the status will update to **Submitted.**

Section 3 - Responding Team Validation

Status - Submitted

Here the nominated Responding Team validate the query and submit/recycle as required.

Section 4 Fields

- **Add Comment -** Here you can add a comment to justify your signature type.
- **Review Required -** Here you can identify if any review is required before submission for approval.
- **Current Forecast Date -** Here you can set the forecast date.
- **Responder -** Identify and nominate the person best placed to provide the TQ Response, e.g. the discipline engineer.
- **Reviewer(s) -** If Review is required then it becomes mandatory to assign minimum 1 reviewer of the TQ response.
- **Endorser(s) -** Here you must assign a minimum of 1 endorser of the TQ response.

Signature

Drop down selection and Submit button. The available signature options for the Responding TQ Coordinator are:

- **Submitted**- the form is submitted for a response.
  - On sign off, the form will progress to Section 4, and the status will update to **Pending Proposed Response.**
- **Recycle** - This option should be chosen if the form is not validated / technically correct. The form will be returned to Section 2 as a new revision, and the status will revert to Proposed.

Section 4 – Draft Response

Where Company is the Responding Party, non-Company people cannot see this section

Status

- With Responder – **Pending Proposed Response**
- With Reviewer – **Pending Response Review**
- With Responding TQ Coordinator – **Pending Response Review**

4. Draft Response

S&OR Implications *	Required for Start-up? *	MoC Required?	Deviation Required?
● Yes ○ No	○ Yes ● No	○ Yes ○ No	○ Yes ○ No

Proposed Response *

| Style ▾ | **B** | *I* | U | A ▾ | ☰ | ☰ | ☰▾ | ▦▾ | ⊘ | — | ✕ |

Reference Documents

···	Number	Title		Rev	
★					

Attachments   [⬆ Upload] [⬇ Download]

···	Filename	Size	Updated	

Related Forms

···	No	Title		
★				

Review

| ⚒▾ | **B** | *I* | U | A ▾ | ☰ | ☰ | ☰▾ | ▦▾ | ⊘ | — | ✕ |

[⊘ Add attachment] [💬 Save Comment]

[☑ edit]

Role	Name	Action	Signed By
Responder	Aalbotsjord, Trygve	▾ ✓	

Role	Name	Action	Signed By
Reviewer	Kaldestad, Øystein		

Fields

- **S&OR Implications -** Identify if there are any potential S&OR implications as a result of the response. *Content is copied in from Section 1.*
- **Required for Start-up? -** Identify if the response is required to be implemented for start-up. *Content is copied in from Section 1.*
- **MoC Required? -** Identify if the proposed solution and subsequent response requires an MoC. This field is only required if Company is the responding party.
- **Deviation Required? -** Identify if the proposed solution and subsequent response requires a Deviation. *This field is only required if Company is the responding party.*
- **Proposed Response -** Provide a response in line with the original query and proposed solution from Section 1.
- **Reference Documents -** Pims gives the option to reference any project documents that are applicable to the form without adding a copy. As a minimum the document number and revision should be included.
- **Attachments -** By pressing the Upload Attachment button when in a form, an attachment can be added to the form through the pop up that appears on screen.
- **Related Forms -** Here you can reference other Pims forms that are linked to/associated with this form
- **Review – Add Comment -** Here the Reviewer(s) / Responding TQ Coordinator can add a comment to justify their signature.

Signature (Responder)

Drop down selection and Submit button. Here the Responder has two options:

- **Recycle** – There are issues with the TQ and the form is returned to the Responding TQ Coordinator.
    - a. On doing so, the form will return to status **Submitted**
- **Submitted** – You have provided response to the TQ and it is ready for Review / Approval and the status will update accordingly depending on who it is sent to.

If Review is required, the form moves into the Review part of Section 5. If not, it will jump straight to Section 6

Signature (Reviewer)

Drop down selection and Submit button. Here the Reviewer has two options:

1. **Agree** – The reviewer agrees with the Proposed Response.
2. **Disagree** – The Reviewer disagrees with the Proposed Response.
    - a. Reviewers do not have reject rights, so it is up to the Approver to take the Review comments into consideration when deciding whether to Approve the response or not.
    - b. If user selects "Disagree" they are forced to add a comment to justify their signature

Signature (Responding TQ Coordinator)

Drop down selection and Submit button. If required on the form, the Responding TQ Coordinator has two options:

1. **Proceed** – All is fine, the process has been followed, and the response can proceed for approval.
2. **Recycle** – There are issues with the TQ and the form is returned to the Responding TQ Coordinator
    - a. On doing so, the form will return to the Responder in Section 4. The status will update accordingly.

As part of the set-up, the Responding TQ Coordinator Review can be turned on/off at a Project level.

Section 5 - Query Response Endorsement

Where Company is the Responding Party, non-Company users cannot see this section

Status - Pending Response Endorsement

Fields

- **Add Comment -** Here a user can add a comment to justify any work done / not done

Signature

Drop down selection and Submit button. Here the Endorser has two options:

1. **Endorse** – The response is Endorsed (potentially with minor comments) and can proceed.
2. **Recycle**– There are issues with the TQ and the form is returned to the Responding TQ Coordinator,
   a. On doing so, the form will return to the Responder in Section 4. The status will update accordingly

Section 6 - Final Query Response

This step contains a copy of the information provided in step 4 and is the only response section available to the requesting party.

Section 7 – Requesting Team Response Acceptance / Close-Out

In the Project Admin Client you can configure if the Originating Person or TQ Coordinator or both are needed.

Status - Response Submitted

Once a Response is provided, the Originating Team are required to confirm acceptance or recycle for re-submission.

Fields

- **Add Comment -** Here a user can add a comment to justify any acceptance or not of the Response.

Signature

Drop down selection and Submit button. Here the Originating Person/Originating TQ Coordinator has two options:

- **Recycle**- There are issues with the TQ response, the form is returned to Originating Person in Section 1
- **Submitted** - The Response is accepted

Section 8 – Close Out

Status - Pending Close-Out

Once a query response is accepted, the form is returned to the TQ Coordinator/Commissioning Team for them to assign any actions required, and validate the form before final closeout.

Fields

- **Add Comment -** Here a user can add a comment to justify any work done/not done.
- **Commissioning Team Close-Out Required -** In line with current Procedures, this should always be set to Yes.
- **Actions Required -** The Company Team can raise any actions needs to ensure the TQ Response is implemented.
- **Add Action -** Any Project Actions required to be raised against the form can be raised here. On Pressing "Add" the above pop up will appear and all fields are mandatory for completion
  1. Input the required **Action Title**
  2. Validate the **Confidentiality**. Change this to a different level by opening the drop down menu, as required.
  3. Identify and Nominate an applicable Delivery Line
  4. On completion of all information press **OK**
     a. On doing so the Action form will open for you to complete accordingly
- **Systems -** Here you can identify any Engineering Systems affected by the query
- **Commissioning Systems -** Here you can identify and Commissioning Systems affected by the query
- **Tag Number(s) -** Input the any tag numbers applicable to the TQ

Signature – Company TQ Coordinator

Drop down selection and Submit button. The **Company TQ Coordinator** has one option:

- **Closed** – The TQ is closed

Signature – Commissioning Team4

Drop down selection and Submit button. The **Commissioning Team** has one option:

- **Closed** – The TQ captures all the information needed by the Commissioning/Completions Teams