

Common Functionality

Type: User Documentation 19-Feb-2024 | Violeta Telich

Attachments

Clicking the upload button will display a popup where user can select files to upload, uploaded files will appear in the grid once uploaded successfully.

Attachments

Upload

Download

***	Filename	Size	Updated	
	IRForm001.pdf	208 KB	05-Nov-2020 01:08:26	

Comments

Write your comment into the field and click the save button when completed, if you have any attachments these can be added by clicking the add attachment button.

B *I* U **A**

Write a comment here ...

Add attachment

Save Comment

Aalbotsjord, Trygve 06-Nov-2020 08:30, rev 1 Edit

We re-visited the Risk Assessment to include others that couldn't make the original risk assessment session. In addition, the purpose of the re-visit was to add more detail with respect to the LOPC potential and split out hazards into different scenarios to avoid potential misinterpretation later.

Reply

Comments can be edited by the user that created the comment, the user can also remove his comment if needed. Though there are some rules for when editing/remove is allowed on a comment.

- No Reply has been added to the comment.
- No comments has been added by another users after the comment was added.
- No signatures has been performed by another user after the comment was added.

Aalbotsjord, Trygve 06-Nov-2020 08:30, rev 1

B *I* U **A**

We re-visited the Risk Assessment to include others that couldn't make the original risk assessment session. In addition, the purpose of the re-visit was to add more detail with respect to the LOPC potential and split out hazards into different scenarios to avoid potential misinterpretation later.

Delete

Cancel

Add attachments

Save

Related Forms

You can assign related forms to a workflow by clicking in the empty row (indicated by a star) and then in the "No" cell, and in the lookup that appears you can filter on the workflow you want to relate. Once saved it will display the form number with a link to the form, and the Title of the form.

Related Forms			
...	No	Title	
▶	Balder-CDR-000009	Deviation from Design materials	🗑️
★			

Associated References

You can input associated references onto a form. These can be hyperlinks to a document stored in another location, or simply reference the number and title of a reference.

Associated References			
...	Number	Title	Rev
▶	001	Document 001	A
	Omega	https://www.omega365.com/	
★			

Actions

In some of the workflows you are able to raise actions which will generate a new action in the Action Tracking workflow. You can raise several actions against a workflow, and the workflow becomes the action source for the actions. To raise a new action you click the "Add Action" button, and a dialog will appear. This dialog requires you to input a Title and will if possible default the Confidentiality Level and Delivery Line to that of the workflow. If the workflow does not use these fields you will need to select these values as well. Once the mandatory fields are filled you click "Ok" and the new action will be raised and opened in a new window/tab. The action details will appear in the actions grid in the workflow, and by clicking the "Action No" you will be taken to the action workflow

Actions					+ Add Action	🔗 Unlink
...	Action No	Title	Status	Next To Sign	Target Date	
▶	Balder-AT-000003-A-0003	Weekly Review Meeting	Closed		31/10/2020	
	Balder-CP-000018-A-0001	Purchase new equipment	Proposed	Aalbotsjord, Trygve		

It is also possible to link existing actions to the workflow. To do so you click the "Add Action" button, and in the dialog that appears you select the "Link existing" tab. You can select from existing actions in the lookup, and once you have selected the correct one you click "Ok" to link in the action. If you have selected a linked action in the grid you will get an option to unlink the action. If clicked the link will be removed.

Workflow Header Menu Options

- **Save** - Allows saving any changes done to the form.
- **Cancel** - Allows reverting any unsaved changes.
- **Void** - An option for administrators / super users that allows voiding the form. A voided form is not included in any calculations or dashboards. Please see further below for additional information.
- **Raise Revision** - An option for administrators / super users that allows incrementing the revision of the form, and put it back to any previous or current step. Please see further below for additional information.
- **Undo Last Signature** - An option for administrators / super users that allow re-opening of a signature without doing a full recycle or raise revision of the form, and simply put the form back to the last person who signed off. Typically used if a user signed off in error or forget to add some details before signing off, and they can then reach out to an admin or super user to ask them to do this to allow them to re-sign after.

Undo last signature? ×

This will undo the last signature performed.
Are you sure you want to proceed?

- **Reassign** - Allows reassigning any open signature on the form. Please see further below for additional information.
- **User Guide** - Opens a new tab with the user guide.
- **Workprocess** - Opens a modal dialog showcasing the workflows work process diagram / [Dynamic Workprocess workflow chart](#).
- **Print** - Allow printing the form in PDF.
- **Log** - Opens a modal dialog showing a log over:
 - **Revision** - Lists all revisions of the form with a link to open that particular revision.

[Revision](#)
[E-Mails](#)
[Notifications](#)
[Audit](#)

Revision 1 [open](#)
Revision 2 [open](#)



- **E-Mails** - Shows a log of any emails sent using the "Email" option from the workflow header menu.

Revision

E-Mails

Notifications

Audit

Sent	From	To	Cc	Subject	#
19-Nov-2020 08:34	Aalbotsjord, Trygve	Fjellstad, Geir Ove (geirf2@omega.no)	Aalbotsjord, Trygve (trygveaa@omega.no)	Instrument Tag No to be confirmed	▼

Dear Geir Ove Fjellstad,

Please review the linked Technical Query to provide input.

Click here to open the form

Best regards

Aalbotsjord, Trygve

- **Notifications** - Shows a log of any system generated emails sent, i.e. next to sign emails when signatures are performed.

Revision

E-Mails

Notifications

Audit

Created	Sent	Status	Name	Subject	#
14-Oct-2020 12:48	14-Oct-2020 12:48	Sent	Tan, Robin Kah Wee	Revision Raised	▼
<div>Revision of workflow has been raised, you are next to sign. Project: Balder Development Project - Title: Instrument Tag No to be confirmed - Number: Balder-TQ-000305 - Hyperlink to form: Balder-TQ-000305 - Instrument Tag No to be confirmed</div>					
14-Oct-2020 12:48	14-Oct-2020 12:48	Sent	Tan, Robin Kah Wee	Technical Queries Notification	◀

- **Audit** - Shows a log of changes done on the form. It is split into "Signatures" and "Field Edits". Signatures shows all signatures performed, whilst field edits shows any changes to fields.

Revision

E-Mails

Notifications

Audit

Field Edits

Created	Operation	Field	Old Value	New Value	Name
10/11/2020 16:01	Updated	InitialTargetApprovaIm...		2020-11-25	Larin, Semion
10/11/2020 16:01	Updated	InitialTargetCloseOutDate		2020-11-29	Larin, Semion
10/11/2020 16:01	Updated	Status	Proposed	Open	Larin, Semion
10/11/2020 16:01	Updated	TargetApprovaImplem...		2020-11-25	Larin, Semion
10/11/2020 16:01	Updated	TargetCloseOutDate		2020-11-29	Larin, Semion

- **Access Levels** - Opens a list of users with access to the workflow, categorized according to the permissions type. The button will not appear if the view for the access levels is not defined in the workflow type field Access Levels Route.
- **Email** - Opens a modal dialog allowing you to send an information email with a link to the form. This can be sent to anyone, but note that for the user to access the form they need the required permissions in the system.

Email ✕

To

✕ Fjellstad, Geir Ove

Cc

✕ Aalbotsjord, Trygve

Subject

Balder-CP-000274 Replace Steam Unit

Message

Dear Geir Ove Fjellstad,
Please review the linked form below, and add information as required.
[Click here to open the form](#)

Best regards
Aalbotsjord, Trygve

Cancel

Send

Reassign Signature

The option to reassign open signatures on the form is available from the register under the tasks menu or from the detail form in the header menu. When you click the "Reassign" option a dialog will appear allowing you to select which role you want to reassign, and if there are multiple persons in that role you will be able to select which person you want to reassign, and you will be able to select a person to assign too. Please note that any signatures already signed will not be reassigned. A comment, and if attachment if required, must be provided giving reason as to why you are reassigning the person. The comment will be put into the current open section, provided it has a comment control. When you click "Reassign" it will replace all open signatures on the form for the role selected and nominated selected. A mail is sent out to notify the persons if at the time of reassigning the nominated person was next to sign, if not the new person will receive a notification as per normal next to sign setup.

Role

Risk Owner ▼

Nominated

Aalbotsjord, Trygve ▼

Assign to

Aastvedt, Eivind ▼

Comment

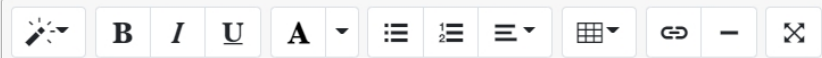


[Add Attachments](#)[Cancel](#)[Reassign](#)

Make Void

This option is to cancel/void the form, and it can be done through the register under the tasks menu or from the detail form in the header menu. This option is only available to administrators / super users. When you click the option to void a comment dialog will appear requiring you to provide a reason as to why you are voiding the form, and allowing you to attach any attachments. When you are done you click "Void" to proceed, and the form will then get closed down with the status "Void" and the comment is added by default into the last section of the form. Void forms are configured to not be included in any KPI's.

Please provide a comment as to why you are voiding the form.



 Add Attachments

Cancel

Void

Raise Revision

This option is to raise the revision of the form, and it can be done through the register under the tasks menu or from the detail form in the header menu. This option is only available to administrators / super users. When clicking the "Raise Revision" option you will need to select which section you are raising the revision to. You can select any previous section or the current live section. Once you have selected which section to raise revision to, you click "Raise Revision" and a comment dialog will appear requiring you to input a reason as to why you are raising the revision, and any attachments that might be needed. After that you click "Save", and the revision of the form is incremented. The new revision will be loaded in and the reason provided will appear in the comment control in the section which was the current live section when revisions was performed. The person who becomes next to sign will be sent a notification letting them know revision was incremented and they are now next to sign.

Raise Revision



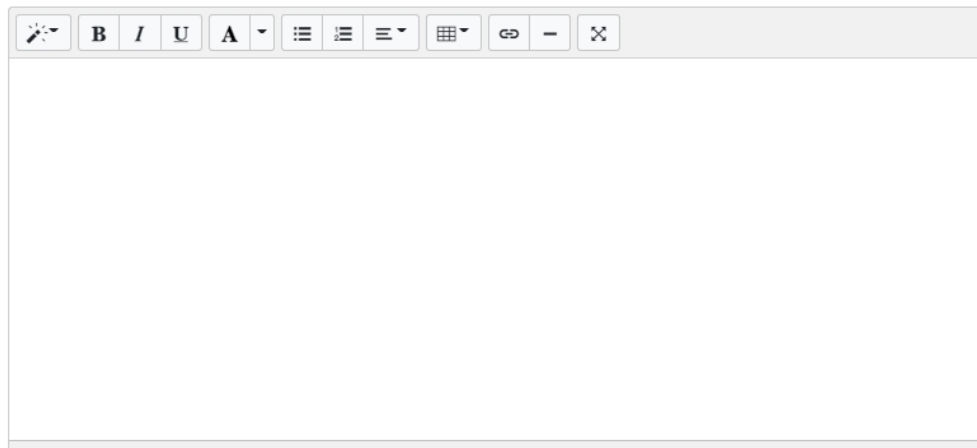
Please select the step you want to roll back to.

2. Risk Assessment

Cancel

Raise Revision

Please provide a comment as to why you are raising revision of the form.

A rich text editor interface. The toolbar at the top includes icons for bold (B), italic (I), underline (U), text color (A with a dropdown arrow), bulleted list, numbered list, decrease indent, table, link, unlink, and a full screen icon. Below the toolbar is a large, empty rectangular text area for entering a comment.

 Add Attachments

Save

Cancel

Create Similar

Create Similar option is a part of all standard workflow modules. When chosen, it creates a new workflow (AT, CDR, MOC, etc.) and automatically copies all data from the header and step 1 of the source form to the corresponding fields of the target workflow.

Create Similar Workflow

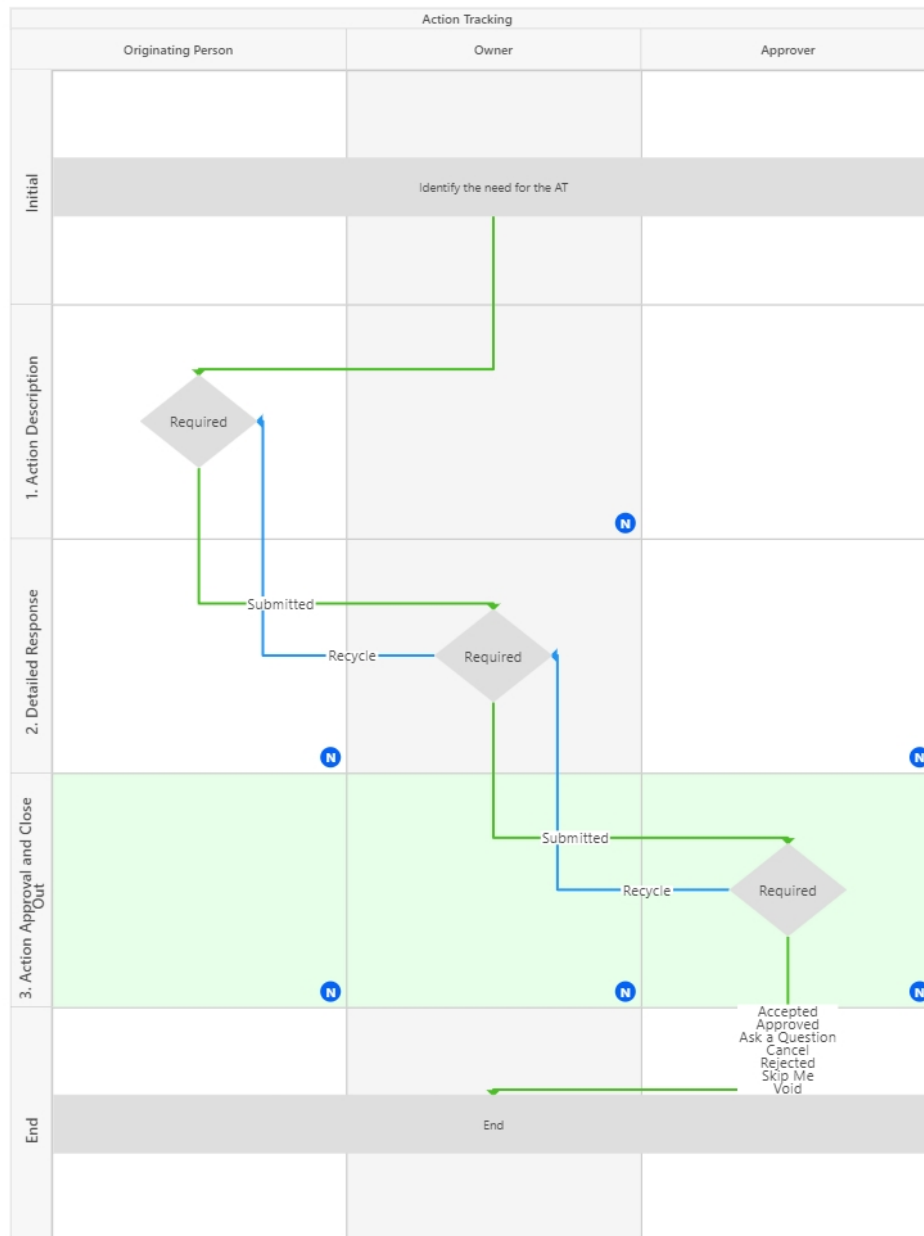
Mandatory Fields

Mandatory Fields on the workflow are marked with a red asterix, in addition if the field is open for the user it will be highlighted in pale yellow.

The workflow cannot proceed until all required fields has been filled. If the user is trying to proceed without filling all fields he will be prompted to fill in the missing data. These will then be highlighted in pale red.

Dynamic Workflow Process Chart

A "Dynamic Workflow Process Chart" is a visual representation that displays the configuration of processes in real time. It automatically updates and redraws the chart whenever changes are made to the workflow's business logic within Workflow. The matrix displays roles in columns and steps in rows. The diagram features two types of decisions: "Required" and "Optional." Additionally, it includes dataflow lines, such as "Advance," "Recycle," and "Close Out/Void." Notification points are also integrated into the diagram, indicating the steps at which specific roles will be notified.



R Required signature — Recycle — Advance — Close out/Void
 O Optional signature — Line Text N Notifications

Zoom in/out by using **CTRL** + **Mouse Wheel**

Drag diagram by holding **Left Mouse Button**

To activate "Dynamic Workflow Process Chart", navigate to the Workflow Settings and enable the Dynamic Chart option by checking the corresponding checkbox.