

Technical Query Settings user guide

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Technical Query Setup

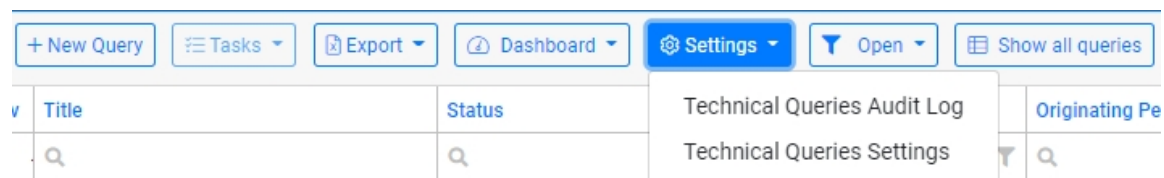
This document outlines the information required to use PIMS Technical Query setup.

Settings

Settings below can be managed in Technical Query Setup by project.

- Manage general settings for Technical Query on the project
- Manage Scopes
- Manage Scope Members
- Manage Allowed recipients for each Scope
- Module specific roles
- Set Default Values
- Manage Impact Areas
- Define Locations
- Define the mail content for existing emails
- Setup Status distribution notifications

Accessing Settings



Settings can be accessed from the dropdown menu by admins and module super users.

Working in the setup screens

1

Activities

2 Search...

3

Activity	Sort Order ↑	Inactive
4	5	6
Baseline		<input type="checkbox"/>
Commissioning		<input type="checkbox"/>
Completions		<input type="checkbox"/>
Design/Engineering		<input type="checkbox"/>
Development		<input type="checkbox"/>
Fabrication		<input type="checkbox"/>
Hook Up		<input type="checkbox"/>
HSSE		<input type="checkbox"/>
Information Management		<input type="checkbox"/>
Installation		<input type="checkbox"/>
7		<input type="checkbox"/>

8

9

10

11

12

13

14

15

16

1-10 of total 14

[Inactive] = False

- Header name and amount of records displayed out of total amount of records.
- Free text search.
- Column chooser and layout options.
- Column filters. Free text search for that column or pick options to filter on from the filter icon.
- Delete the selected row.
- Selected column indicator.
- New row. Column indicator shown as star, and enter text directly into the grid. Navigate out of the row to commit the new record.
- Navigate between pages. Go 1 page forwards or backwards, or go to last page or first page.
- View amount of records displayed out of total amount of records.
- Reload the grid.
- Export to Excel or PDF.
- Filter builder. Allows for building simple or complex filters, store them, and load them. Most grids will have a default filter applied i.e only show active records. You can remove this filter by clicking the

button and selecting the "Remove active filter" option.

13. Current active filter.

14. Open "more" to access print function etc.

15. View who created and last updated a specific record

16. Set maximum records to be displayed per page

Note: Moving columns around, hiding columns, or changing page size will be cached to the browser and remembered the next time you open the same page. Please note that this does not apply if you open the same page in another browser or on another computer. Some of the options listed above may be restricted based on the functionality or the users personal permissions, thus some options may not appear in every grid like delete ability etc.

Project Setup

TQ Settings (Balder Development Project)	
Default Distribution	
Distribution Matrix	
Default Values	
Email Templates	
General	
Impact Areas	
Locations	
Manage Scopes	
Roles	
Status Distribution	

Settings that applies to the current project. Project name is displayed in brackets at the top of the menu. Global/Project Admins module Super Users that has access to multiple project must use the change domain functionality to change their current domain to be able to edit settings for another project.

Note : Most of the settings that can be edited in the setup will apply directly for forms updated after the settings was edited, i.e if you set a value to be inactive it will immediately no longer appear in the

list of values inside any form but it will still remain selected on existing forms where previously used.

Global Setup

Global TQ Settings
Default Distribution (T)
Default Values (T)
Email Templates
General (T)
Impact Areas (T)
Locations (T)
Priorities
Query Types

The Global Template Project is used as a template for project settings. Any changes to global template tabs marked with "(T)" will act as defaults to be imported for new projects on creation. If updated these changes will not affect any oth the existing projects. Global Setup can only be managed by Global Administrators by changing their domain to "GlobalTemplate".

Tabs

Note : All tabs showing a (T) after the name will also have an initial global setup for the values.

Default Distribution (T)

Default Distribution						Search...	
...	🔒	StepNo	Role		Sign Sequ	In Use	
	[-]	🔍	⌵	🔍	⌵	🔍	⌵
▶	🔒	1	Originating Person		1	<input checked="" type="checkbox"/>	
		2	Requesting TQ Coordinator		1	<input checked="" type="checkbox"/>	
	🔒	3	Responding TQ Coordinator		1	<input checked="" type="checkbox"/>	
	🔒	4	Responder		1	<input checked="" type="checkbox"/>	
		4	Reviewer		2	<input type="checkbox"/>	
		4	Responding TQ Coordinator		3	<input checked="" type="checkbox"/>	
	🔒	5	Endorser		1	<input checked="" type="checkbox"/>	
		7	Originating Person		1	<input checked="" type="checkbox"/>	
		7	Requesting TQ Coordinator		1	<input type="checkbox"/>	
		8	Commissioning		1	<input type="checkbox"/>	
		8	Master TQ Coordinator		1	<input type="checkbox"/>	
		8	Requesting Master TQ Coordinator		1	<input type="checkbox"/>	
		8	Responding Master TQ Coordinator		1	<input checked="" type="checkbox"/>	

The Default Distribution is used for defining the inclusion of signature Interface Management roles for your project. This is also available as a template on global which is copied down when creating new projects. You can only modify the existing setup for the roles in each section by turning them on/off or setting them to be included for information instead of having a required signature on the form. You cannot add new roles or move the existing between sections. Roles that are indicated with a padlock icon are mandatory signatures that cannot be set to not in use but only changed sign sequence of. By setting a role to information it means that the role will be included as a mail recipient on the form and be notified once the form reaches that section or when that section is being completed which can be set by selecting the "notify on step completion" option.

Distribution Matrix

Matrix Setup				
By Discipline By System By Contract/PO By Involve Operations				
Discipline (showing 1-5 of total 5 rows)				Search...
...	Query Type	Req. Scope	Resp. Scope	Discipline
🔍	⌵	🔍	⌵	🔍
▶	%	%	%	%
	Engineering Query	OMEGA	CON3	F
	Engineering Query	TQContractor1	%	MyTQDisc
	Other	CON3	%	S
★				
Distribution (showing 1-1 of total 1 rows)				
...	Name (ID)	Login	Email	Company
🔍	🔍	🔍	🔍	🔍
▶	Thorsen, Vegard (ThorVega)	vegardt@omega.no	vegardt@omega.no	Omega AS
★				

This setup allows you to define persons available for specific roles that should be linked against specific fields on the form like discipline, system, contract or involve operations. The roles that you can define persons against are Endorsers, Responders and Reviewers. You can either set the specific combination of query type, scopes and field value, set value to % for any to make it applicable to all combinations. If no user is specifically selected the form will show all users that has access to the module in these roles.

Default Values (T)

Save

Cancel

Updated on 11-Dec-2017 by trygve

S&OR Implications ☒

Required for Start Up? ☐

MoC Required? ☐

Deviation Required? ☐

Actions Required? ☐

Type of default value toggles:

- ☐ indicates that the checkbox on the form will have no default value set
- ☐ indicates that the checkbox on the form initially will show as No/False
- ☒ indicates that the checkbox on the form initially will show as Yes/True

In this tab you can configure a default selection of listed fields. When a new form is raised the value of the field will be set per what is configured here.

Email Templates

Email Templates (showing 1-1 of total 1 rows)

q Search...

...	Template ID	Description	Subject	Global Template	Template
	<div>Q</div>				
▶	TQActionCompleted	Pims TQ - Section 9 - Actions Completed - TO Master TQ Coordinator	Pims TQ Notification - Technical Queries Notification	Project: <%ProjectName%> - Title: <%Title%> - Number: <%Qu...	Test
★					

⏪ ⏩ ⏴ ⏵ showing 1-1 of total 1 rows Page size: 15

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When opened from the global template this will display all email templates that are used within the module. Then at the project level after you are allowed to edit the content of the email templates used if required to differ from the standard template. The project setup will initially be empty for each project as it would use all from global setup, if you then add a new version of a specific module template at project level it will prioritize using this instead.

General (T)

Cancel

Save

Updated on 17-Sep-2021 by trygve

Send Due Notifications?

☒

Due Today Notification?

☒

Due Within Notification

3

Day(s)

Late Notification

3

Day(s)

No Master TQ Coordinator Required

☒

Is Affected Projects Required?

☐

Is Key Milestones Required?

☐

Milestone Due Notification

7

Day(s)

Use Fixed Response Cycle

☐

Send email notification for new comments?

☐

Use Default Role Nomination

☐

Default Commissioning

Default Master TQ Coordinator

Originating Team Response Acceptance Note

The response to this query does not permit a deviation to a stipulated specification, standard or code nor does it modify contractual scope. If the implementation of the response results in either of these then a deviation request or MOC is required to be submitted by the recipient, and approval obtained, before proceeding

Query Types Response Cycle

Query Type	Response Cycle		
Engineering Query	30	day(s)	
Site Query	5	day(s)	

This tab is used to set managing available predefined values for fields to be used in the forms.

Due Today Notification : Sends due notification for forms due today.

Due Within Notification : Set number of days for sending of out due notification mails. This mail will only be triggered once for each form at the specified amount of days set.

Late Notification : Set number of days for sending of out late notification mails. This mail will only be triggered once for each form at the specified amount of days set.

No Master TQ Coordinator Required : Set if Master TQ Coordinator role is not mandatory to include on the form.

Is Affected Projects Required? : Set if affected projects control should be in use and required.

Is Key Milestones Required? : Set if key milestones control should be in use and required.

Milestone Due Notification : Set the amount of days to send a notification to next to sign of milestone due date

Use Fixed Response Cycle : Set if the predefined amount of days should be used for auto setting dates on the form or if the users needs to set dates manually.

Use Default Role Nomination : Set if the default role nomination should be used. This can be used to set a default Master TQ Coordinator or Comissioning role to be auto nominated on all forms. Note : This option is only available when distribution option is set to "Project distribution list".

Default Commissioning : Set a default Commissioning responsible.

Default Master TQ Coordinator : Set a default Master TQ Coordinator responsible.

Distribution : Set type of distribution to use, options are "Project distribution list" or "Distribution matrix".

Originating Team Response Acceptance Note : Set the content value of the text being used for the acceptance note.

Query Types Response Cycle : Set specific amount of days auto set for target completion by query type based on the date form was initially submitted.

Impact Areas (T)

Impact Areas (showing 1-9 of total 9 rows)						<input type="text" value="Search..."/>	
...	Impact Area	Sort Order		Default		Inactive	
	<input type="text" value="Q"/>	<input type="text" value="Q"/>	<input type="text" value="T"/>	<input type="text" value="Q"/>	<input type="text" value="T"/>	<input type="text" value="Q"/>	<input type="text" value="T"/>
▶	Plateau Rate			<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	CAPEX		1	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
	Schedule		1	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
	DRILLEX		2	<input type="checkbox"/>		<input type="checkbox"/>	
	NPV (Post Tax)		2	<input type="checkbox"/>		<input type="checkbox"/>	
	Reputation		2	<input type="checkbox"/>		<input type="checkbox"/>	
	Reserves		2	<input type="checkbox"/>		<input type="checkbox"/>	
	Revenue		2	<input type="checkbox"/>		<input type="checkbox"/>	
	Weight		2	<input type="checkbox"/>		<input type="checkbox"/>	
★				<input type="checkbox"/>		<input type="checkbox"/>	
<input type="button" value="H"/> <input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="M"/>		showing 1-9 of total 9 rows		Page size: <input type="text" value="15"/>	<input type="button" value="↺"/>	<input type="button" value="X"/>	<input type="button" value="T"/> Inactive=0

Manage the impact area values that should be available for the project. The default checkbox can be used to auto include the impact on form creation, if not set as default the value must be included manually on the form when applicable.

Locations (T)

Locations (showing 1-2 of total 2 rows)					Search...	
...	Location		Sort Order	Inactive		
	Q	Y	Q	Y	Q	Y
▶	Arbatax			<input type="checkbox"/>		
	Sector A			<input type="checkbox"/>		
★				<input type="checkbox"/>		

⏪ ⏩ ⏴ ⏵
showing 1-2 of total 2 rows
Page size: 15
↺ ↻ 📄 Y Inactive=0

Manage the location values that should be available for the project.

Manage Scopes

Scopes						Search...	
...	Scope	Description	Impl.	Inactive	Master		
	Q	Y					
▶	AOGD	Demo AOGD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
	EPCM1	Topsides EPCM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	OMEGA	OMEGA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
	OMIO	Omega Ølensvåg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	OMS	Omega Stavanger	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
★			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Members Users					Search...	
...	Name	User Type	Can Raise	Default		
	Q	Y				
▶	Aalbotsjord, Trygve - Omega	Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Balpande, Rashmi - OMEGA	Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	DocController, Mary - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Elmoughny, Noura - Demo AOG	Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Engineer, Jane - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Engineer, John - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Engineer, Linda - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Manager, Eric Engineering - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Manager, Macy - Demo AOG	Write	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Markhus, Arvid - Demo AOG	No Permissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Patterson, Ryan - Omega AS	Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Vetvik, Alf - OMEGA	Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
★			<input type="checkbox"/>	<input type="checkbox"/>		

Scope is a general term used by Omega for a group of persons working together on the same contract delivering a service to another part. For smaller projects it will normally only be persons from the same contractor within the same scope. The system is setup to be as flexible as possible by allowing any grouping of members to be defined. Any users that has access to the module can be inserted as members of a Scope. When a user is added a a member he will automatically get access to all forms where this Scope is involved. The Scopes are not shared between projects and must be setup individually, you can have a "ScopeA" in ProjectA and a "ScopeA" in ProjectB which has completely different setup and members. Once a Scope has been setup use the Implemented check to indicate that the Scope is now ready for use.

1. Defines the Scopes.

2. Assign members to the Scope. Members can be added either by adding a specific user directly or by adding a role containing multiple users. If you add a role all users within that role will be granted membership to the Scope.

3. Define what other Scopes it can communicate within the allowed responders tab. Note: The communication are only setup one way, so adding "ScopeB" as allowed responder for "ScopeA" will only allow for ScopeA to communicate with ScopeB, you will need to also select ScopeB and add ScopeA to be an allowed responder for this to allow communication in both ways.

4. Define the role responsibilities as required for each Scope.

Scope Access

Ability to view forms within the module is by default restricted to scope membership for normal users that are not Master Company users. Master Company is the main owner of the system, so for an internal site in Omega the master company will be Omega. This means that all users that has company set to Omega in the user setup and has access to the module will automatically be allowed to view all forms for projects they have access to without having specific access to each Scope as a member.

Access Rules

- 1. User has access to the module (either directly or indirectly as admin). This is a prerequisite for all the options below.
- 2.1 User is a Master Company User, or has the Inherit Master Company permissions checked in the user setup.
- 2.2 User Is a Member of either the forms Requesting or Responding Scope involved on the form for the specific project.
- 2.3 User has a signature on the form.
- 2.4 User is set as Delegate for a user that has a signature on the form.

Note : Only users that are actually a direct member of the Scope can create new forms for that Scope. This means that admins will not have access to raise any forms unless they have also been added as scope member separately.

Scope Allowed Responders

Select which scopes each of the scopes should be able to communicate with. If a scope should no longer be able to raise forms to another scope the scope can be set to inactive directly in the allowed responders list disabling it for this specific scope.

Roles

Set roles for each scope. A Coordinator is always required as a minimum to be set.

Roles can be set/changed by clicking edit on the role and then select a new person in the role or the clear button to empty the role.

Note : Only persons that have already been added as scope members can be set in the roles.

Priority (Global only)

Priorities (showing 1-3 of total 3 rows)										<input type="text" value="Search..."/>	
...	Priority	Sort Order		Default		Inactive					
	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
▶	High	1		<input type="checkbox"/>		<input type="checkbox"/>				<input type="button" value="Delete"/>	
	Medium	2		<input type="checkbox"/>		<input type="checkbox"/>					
	Low	3		<input type="checkbox"/>		<input type="checkbox"/>					
★				<input type="checkbox"/>		<input type="checkbox"/>					

Manage the priority values that should be available for the system.

Roles

Roles (showing 1-1 of total 1 rows)

...

Role

Q

TQ Commissioning

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showing 1-1 of total 1 rows

Page size: 15

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⌵

Persons (showing 1-4 of total 4 rows)

...

Person ID

Name

EMail Address

Q

BalpRash

BuffThom

CompRash

TestTQCo

Balpande, Rashmi

Buffon, Thomas

Company, Rashmi

Tester, TQCon1User

rashmi@omega.no

thomas@omega.no

rashmi@omega.no

rashmi@omega.no

★

⏪ < > ⏩

showing 1-4 of total 4 rows

Page size: 15

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Manage the role members of available module roles.

Status Distribution

Persons (showing 1-4 of total 4 rows)					<input type="text" value="Search..."/>	
...	Status	Name	Immediate			
	<input type="text" value="Q"/>	<input type="text" value="Q"/>	<input type="text" value="Q"/>			
▶	Pending Close-Out	Aalbotsjord, Trygve	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Closed	Afsharpour, Sam	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Rejected	Alsvik, Unni	<input type="checkbox"/>	<input type="checkbox"/>		
	Submitted	Kaldestad, Øystein	<input type="checkbox"/>	<input type="checkbox"/>		
★			<input type="checkbox"/>	<input type="checkbox"/>		

The status distribution is included on all workflow modules. Here you can setup user/role subscriptions linked directly to the form statuses. The system will send out mail to the user when a status is being set to the selected subscribed status on a form. The notification will by default follow each users personal email notification settings, if you want to bypass this and always send the status notification immediately you can tick this box.

Query Types (Global only)

Query Types (showing 1-3 of total 3 rows)							
<div> <div>Q Search...</div> </div>							
...	Query Type	Response Cycle		Sort Order		Default	Inactive
	Q	Q		Q		Q	Q
▶	Engineering Query	30	day(s)	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Site Query	5	day(s)	2		<input type="checkbox"/>	<input type="checkbox"/>
	Other		day(s)	3		<input type="checkbox"/>	<input type="checkbox"/>
★						<input type="checkbox"/>	<input type="checkbox"/>
<div> <div> <div>⏪ < > ⏩</div> <div>showing 1-3 of total 3 rows</div> <div>Page size: 15</div> <div> <div>↺</div> <div>📄</div> <div>⏴</div> </div> <div>Inactive=0</div> </div> </div>							

Manage the query type values that should be available for the system.