



Getting To Know E*Doc

INTRODUCTION

This document provides an overview of the E*Doc document management system, demonstrating its major features, navigation and use. This is intended as a tutorial that provides enough information to understand what the program does and how the program works, and it gives you the knowledge and confidence to intuitively explore other parts of the program in more detail.

E*Doc is an advanced document management system that organizes the documents and procedures of a large industrial process facility. In E*Doc these documents and how they are processed are strictly controlled preserving the integrity of their information. Documents can be created, checked out, edited, copied, reviewed, transmitted to contractors, checked in, approved, printed, deleted and more while maintaining complete control and insuring accuracy. E*Doc allows both on-site and remote users to access hundreds of thousands of documents and all of their associated information from any device with a browser and a connection to the company's intranet providing a rich collaboration between staff while enforcing strict document control functions.

The E*Doc document management system was created in 1998 to manage oil refinery engineering documents. Since then, the program has expanded to encompass **all** document types including hard-copy controlled documents and provides flexibility in how each facility manages their documents while providing full revision control.

SEARCH PAGE

E*Doc always opens to the Search page. Because most E*Doc users are searching for documents, this is the most frequently visited page in the program, and the ideal place to start. This page can be opened from anywhere in the program by clicking on the "SEARCH" hyperlink at the top of any page.

E*Doc V6.0 Demo

ALL USERS EDITOR MANAGER ADMIN PROJECTS

SEARCH HELP ABOUT

Welcome To E*Doc - Startup Notes Version 6.0.1

E*Doc is ready to help you manage your controlled documents.

9/18/2017 7:31:52 AM

9583 Document Profiles In System.
5 Documents Are Checked Out.
0 New Documents Added In The Last 24 Hours
9052 New Documents Added In The Last 90 Days

Search Menu ?

Click the Desired Option

SEARCH OPTIONS

PUBLIC SEARCHES

PERSONAL SEARCHES

LINKS

9/18/2017 7:32:14 AM

Log In

Time: < 1 Second

Search By Field ?

Clear Selections

Create Search

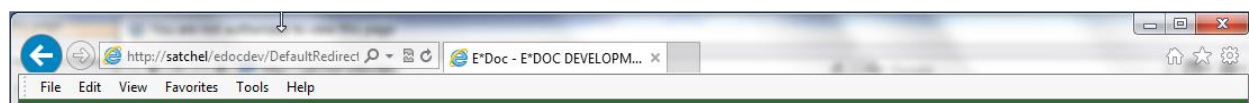
Select Search Fields
Select The Desired Fields To Search For A Document.

<input type="checkbox"/> Awaiting Approval	<input type="checkbox"/> File Name	<input type="checkbox"/> Application
<input type="checkbox"/> Area	<input type="checkbox"/> Approved By	<input type="checkbox"/> Certification Due Date
<input type="checkbox"/> Check Out Date	<input type="checkbox"/> Checked Out By	<input type="checkbox"/> Create Date
<input type="checkbox"/> Creator	<input type="checkbox"/> Department/Unit	<input type="checkbox"/> Document Number
<input type="checkbox"/> Document Title	<input type="checkbox"/> Equipment Number	<input type="checkbox"/> File Number
<input type="checkbox"/> Hard Copy Updated	<input type="checkbox"/> Instrument Tag Number	<input type="checkbox"/> Latest Revision Author
<input type="checkbox"/> Latest Revision Date	<input type="checkbox"/> Project Title	<input type="checkbox"/> Note
<input type="checkbox"/> Requires Review	<input type="checkbox"/> Revision	<input type="checkbox"/> Section
<input type="checkbox"/> Stage	<input type="checkbox"/> CKD Status	<input type="checkbox"/> Under Review
<input type="checkbox"/> Current E*Doc Version	<input type="checkbox"/> Last Certified Date	<input type="checkbox"/> Assigned Editor
<input type="checkbox"/> Assigned Supervisor	<input type="checkbox"/> Check Out MOC	<input type="checkbox"/> CKD Department
<input type="checkbox"/> CKD Hybrid	<input type="checkbox"/> CKD Type	<input type="checkbox"/> Current File Size
<input type="checkbox"/> Department Manager	<input type="checkbox"/> Discipline	<input type="checkbox"/> DocID
<input type="checkbox"/> Document Size	<input type="checkbox"/> External Editing	<input type="checkbox"/> Has View Remarks

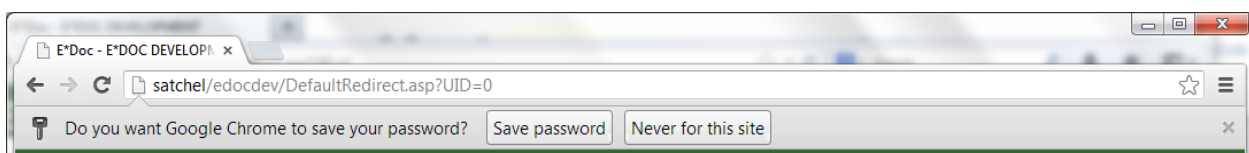


E*Doc is run from an internet browser. This could be Microsoft Internet Explorer, Mozilla Firefox, Google Chrome or others. You do not need any proprietary software or special equipment to run this program. In fact, E*Doc will run on any internet-enabled device with access to your company's secure intranet.

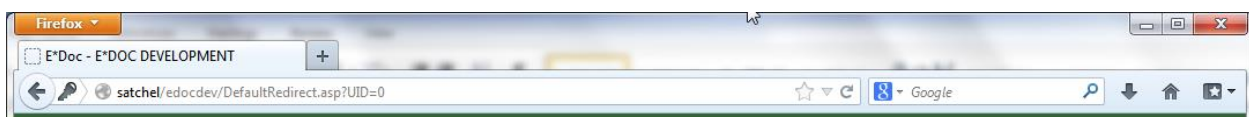
At the very top of the screen are your browser's controls. These will vary depending on which browser you are using. It contains the toolbars, icons and address bars that come standard with your browser. Browser controls will always be visible in E*Doc (but are not displayed in subsequent screen shots).



Internet Explorer

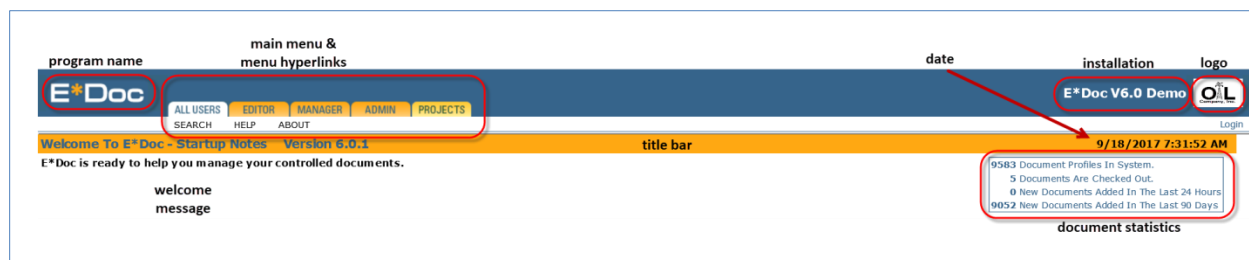


Chrome



Firefox

Immediately below the browser controls is the Main Menu. The Main Menu will always appear at the top of every E*Doc page. The Main menu contains the program name, tabbed menu & menu hyperlinks, installation, company logo, login, title bar, help & welcome message. The welcome message only appears at startup.



The **program name** is E*Doc and is represented with a logo image.

The **tabbed main menu** displays the user authorizations and project link.

The **menu hyperlinks** display the navigation options for each tab.

The **installation** is the site name and application where the program is installed.

The **logo** is the client's corporate logo.

The **login** is a hyperlink that opens the login page.

The **title bar** appears at the top of every E*Doc page and displays the page description.

The **welcome message** is a user message that can be changed by the E*Doc Administrator.

The **date** is the timestamp when the E*Doc session begins.



The **document statistics** displays the number of documents in the system, the number checked out, and the number recently added.

The **help** icon (when visible) is a hyperlink that opens the help page.

Depending on the Administrator's settings, the welcome message, date and document statistics can be individually displayed or hidden. When these are displayed, they will disappear as soon as the user performs an action.

Below the Main Menu is the Search page. The Search page consists of two parts. The Search Menu on the left is where the user makes their search selections. The Search Actions on the right is where the user carries them out. What appears in the Search Actions section depends on which options the user selected in the Search Menu. The Search Menu categories and their associated subcategories can be expanded or contracted by clicking on them. Document searches are covered in more detail later in this document.

Select Search Fields Select The Desired Fields To Search For A Document.		
<input type="checkbox"/> Awaiting Approval	<input type="checkbox"/> File Name	<input type="checkbox"/> Application
<input type="checkbox"/> Area	<input type="checkbox"/> Approved By	<input type="checkbox"/> Certification Due Date
<input type="checkbox"/> Check Out Date	<input type="checkbox"/> Checked Out By	<input type="checkbox"/> Create Date
<input type="checkbox"/> Creator	<input type="checkbox"/> Department/Unit	<input type="checkbox"/> Document Number
<input type="checkbox"/> Document Title	<input type="checkbox"/> Equipment Number	<input type="checkbox"/> File Number
<input type="checkbox"/> Hard Copy Updated	<input type="checkbox"/> Instrument Tag Number	<input type="checkbox"/> Latest Revision Author
<input type="checkbox"/> Latest Revision Date	<input type="checkbox"/> Project Title	<input type="checkbox"/> Note
<input type="checkbox"/> Requires Review	<input type="checkbox"/> Revision	<input type="checkbox"/> Section
<input type="checkbox"/> Stage	<input type="checkbox"/> CKO Status	<input type="checkbox"/> Under Review
<input type="checkbox"/> Current E*Doc Version	<input type="checkbox"/> Last Certified Date	<input type="checkbox"/> Assigned Editor
<input type="checkbox"/> Assigned Supervisor	<input type="checkbox"/> Check Out MOC	<input type="checkbox"/> CKO Department
<input type="checkbox"/> CKO Hybrid	<input type="checkbox"/> CKO Type	<input type="checkbox"/> Current File Size
<input type="checkbox"/> Department Manager	<input type="checkbox"/> Discipline	<input type="checkbox"/> DocID
<input type="checkbox"/> Document Size	<input type="checkbox"/> External Editing	<input type="checkbox"/> Has View Remarks

LOGGING IN

E*Doc has five different authorization levels. They are:

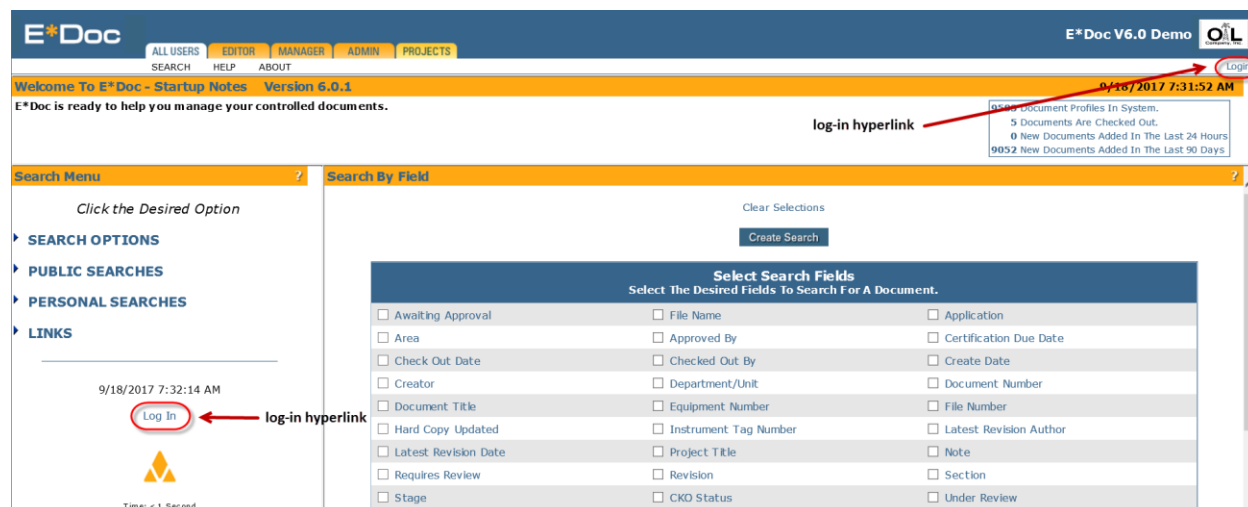
1. All Users
2. Reviewer
3. Editor
4. Manager
5. Administrator

The users in each level are granted different levels of access and privileges within the program. **All Users** can search for, view and print documents provided they have read-only network rights to the file. Security to view a file is dependent on the credentials of the logged-in user. They cannot change any document or its information. **Reviewers** can, in addition, review and redline the documents and provide written feedback. **Editors** can review documents, check out documents, modify their contents and send documents out for review. **Managers** can review document changes and either approve them or send the documents back to the Editor for more work. **Administrators** can perform all tasks, access all pages and configure all aspects of E*Doc.

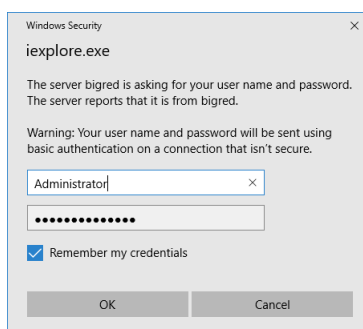
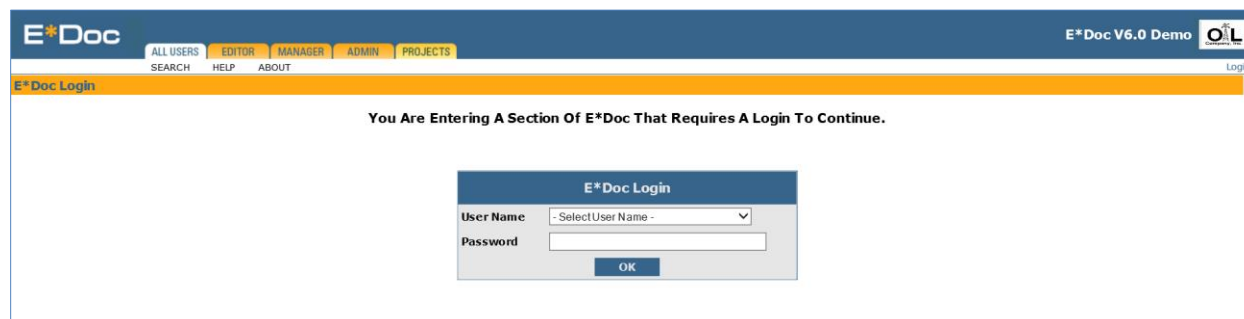
All E*Doc users from Reviewer through Administrator must log in to the program to use its features. There are several ways to log in to E*Doc. One way to open the Login page from the Search page is to click the login hyperlink on the Main Menu or the login hyperlink on the Search Menu. Another way to



open the Login page from the Search page is to click the “Editor”, “Manager” or “Admin” tabs in the Main Menu. Throughout E*Doc each time a user attempts to navigate to a page whose authorization level is higher than that assigned to the current user, the Login page will appear. Depending on how your instance of E*Doc is set up, the Log In hyperlink in the Search Menu may not appear.



Logging in involves selecting the user name from the drop-down list (or manual entry) and entering the correct password. Login names and passwords for new users are initially created by the E*Doc Administrator, however all users can manage their own passwords. Depending on the security method used at your site, the login fields will look different.



How a user logs in to E*Doc depends on the network security protocols established by the facility's IT department. In the “Database Security” model, the users authorization is established when they log in to E*Doc through the Log In page. In the “Windows Integrated Security” model, E*Doc uses the desktop's



logged-in user account to establish the user's authorization level. In the "Basic Windows Security" model, the user's Windows login dialog box is used to establish the user's authorization level.

SEARCHING FOR DOCUMENTS

Searching for documents is one of the core functions of E*Doc and is central to its use. It is important to understand how to search for and view documents in E*Doc. While this overview does not go into documents searches in great detail, it will provide you with enough information to perform some basic documents searches.

The Search Menu on the Search page displays four choices. They are:

1. Search Options
2. Public Searches
3. Personal Searches
4. Links

Search Options display, among other things, three different ways to search for documents.

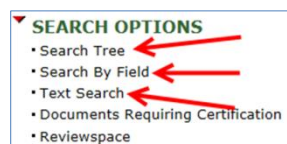
Public Searches are prepared searches that return specific groups of documents. Public searches are created by the Administrator and are viewable and usable by all E*Doc users.

Personal Searches are prepared searches that return specific groups of documents. Personal searches are created by the logged-in user and viewable and usable by only that user.

Links are useful navigation links to plant resources provided by the Administrator to all E*Doc users.

Expanding the Search Options category will display a list of additional options to select from. There are three basic search options in E*Doc. They are:

1. Search Tree
2. Search By Field
3. Text Search (if enabled)





Search Tree lets you search for documents by sequentially choosing different categories. The options that appear after one selection depend on the selection that was just made. This kind of search results in groups of documents sharing similar selection criteria based on broad categories and is best for finding documents within physical locations.

The screenshot shows the 'Search Tree' interface. At the top, a yellow header bar contains the text 'Search Tree' and 'CURRENT SEARCH - Department/Unit = 00AERATION; Discipline = A'. Below this, a red arrow points to the text 'NUMBER OF DOCUMENTS IN THE CURRENT SEARCH - 4'. Another red arrow points to the text 'CLICK RUN SEARCH TO VIEW RESULTS'. A third red arrow points to the 'Run Search' button. A fourth red arrow points to the text 'click button to run search'. A fifth red arrow points to the 'Department/Unit' list. A sixth red arrow points to the 'Discipline' list. A seventh red arrow points to the 'New Doc Type' list. A eighth red arrow points to the text 'click text to select search criteria'. A ninth red arrow points to the text 'number of documents returned in search'.

Department/Unit

- ▼ 00AERATION- Gray-Water Aeration Unit
- ▶ 00SWPA - Safe Work Practices
- ▶ 01- Refinery General
- ▶ 01VPS - Crude Unit
- ▶ 03COB - CO Boiler
- ▶ 03WGS - Wet Gas Scrubber
- ▶ 04GRU - Gas Recovery Unit
- ▶ 05ARU - Amine Recovery Unit
- ▶ 05POLY - Cat-Poly Unit
- ▶ 06ISO - ISOM Unit
- ▶ 07HTU1 - Hydrotreating Unit #1
- ▶ 08BHU - Butadiene Hydrogenation Unit
- ▶ 11HTU2 - Hydrotreating Unit #2
- ▶ 12ALKY2 - Alkylation Unit #2
- ▶ 17TGTU - Tail Gas Treating Unit

Discipline

- ▼ A - P&ID
- ▶ AG - PLO PLAN
- ▶ B - CIVIL
- ▶ E - EQUIPMENT
- ▶ G - GENERAL
- ▶ L - LIPING
- ▶ N - INSTRUMENTATION

New Doc Type

- ▶ DATA SHEET*

Run Search **Clear Selections**

Search By Field lets you search for documents using specific criteria of your own choosing. After selecting the search fields, you create a search on a second page that tells E*Doc how to use these fields to find your documents.

The screenshot shows the 'Search By Field' interface. At the top, a yellow header bar contains the text 'Search By Field'. Below this, a red arrow points to the 'Create Search' button. Another red arrow points to the text 'click button to run search'. A third red arrow points to the 'Area' checkbox. A fourth red arrow points to the 'Document Title' checkbox. A fifth red arrow points to the 'Clear Selections' button. A sixth red arrow points to the 'Create Search' button.

Select Search Fields

Select The Desired Fields To Search For A Document.

<input type="checkbox"/> Awaiting Approval	<input type="checkbox"/> File Name	<input type="checkbox"/> Application
<input checked="" type="checkbox"/> Area	<input type="checkbox"/> Approved By	<input type="checkbox"/> Certification Due Date
<input type="checkbox"/> Check Out Date	<input type="checkbox"/> Checked Out By	<input type="checkbox"/> Create Date
<input type="checkbox"/> Creator	<input type="checkbox"/> Department/Unit	<input type="checkbox"/> Document Number
<input checked="" type="checkbox"/> Document Title	<input type="checkbox"/> Equipment Number	<input type="checkbox"/> File Number
<input type="checkbox"/> Hard Copy Updated	<input type="checkbox"/> Instrument Tag Number	<input type="checkbox"/> Latest Revision Author

Create Search **Clear Selections**

You populate the search criteria form from left to right, and you read it just like a sentence. “Return a list of all documents whose field “Area” Equals either “Engineering” or “Maintenance” and whose field “Document Title” Contains the word “naphtha”. All of the boxed fields displayed below are active and can be modified. Some fields can even accept multiple selections. You can also specify an additional sorting criteria and the maximum number of documents to display per page.

Search By Field ?

[Start Over](#)

Enter Search Criteria		
Field	Operator	Value
Area	Equals	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #2c5e8c; color: white; padding: 2px;">Business Planning and Development</div> <div style="background-color: #007bff; color: white; padding: 2px;">Engineering</div> <div style="padding: 2px;">Finance</div> <div style="padding: 2px;">General Administration</div> <div style="padding: 2px;">HSSE</div> <div style="padding: 2px;">Human Resources</div> <div style="padding: 2px;">Laboratory</div> <div style="padding: 2px;">Learning and Development</div> <div style="background-color: #007bff; color: white; padding: 2px;">Maintenance</div> <div style="padding: 2px;">Operations</div> </div>
Document Title	Contains	<div style="border: 1px solid #ccc; padding: 5px;"> naphtha </div>

Sort By (Optional):

Document Number

Number of Records Returned per Page:

100

Text Search lets you search for documents whose contents contain a specified character string. This method has some limitations. It is not available on all servers, and it only works on those documents whose contents are capable for inclusion in a search catalog.

Text Search ?

Text Search For Documents
Enter Search String Then Click "Run Search"

For Documents Containing:

CD1-H12B

Sort By:

File Name

Order:

Ascending



Whichever search method was employed, the end result is a list of documents stored in E*Doc that matches your search criteria. In this example, 4 documents were returned on one page. To refine your search, click on the Edit Search hyperlink in the title bar.

PROJECT COPIES	STATUS	STAGE	AREA	DEPARTMENT/UNIT	DOCUMENT NUMBER	FILE NAME	NEW DOC TYPE	REVISION	SECTION	SUB-SECTION	DOCUMENT TITLE	PROFILE	DO ACTION
---	Effective Maintenance	00AERATION	AA-00AERATIONA-0003-001	AA-00AERATIONA-0003-001.jpg	DATA SHEET	0	A	CR2	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>		
---	Effective Maintenance	00AERATION	AA-00AERATIONA-0004-001	AA-00AERATIONA-0004-001.jpg	DATA SHEET	0	A	CR2	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>		
---	Effective Maintenance	00AERATION	AA-00AERATIONA-0005-001	AA-00AERATIONA-0005-001.jpg	DATA SHEET	0	A	CR2	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>		
---	Effective Maintenance	00AERATION	AA-00AERATIONA-0006-001	AA-00AERATIONA-0006-001.jpg	DATA SHEET	0	A	CR2	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>		

The Search Results page contains a table filled with the selected attributes of all documents that matched your search criteria. These attributes (with certain exceptions) are determined by the E*Doc administrator. Document Title, Profile and Do Action will always be displayed. You can view any of the documents displayed on this page by clicking on the document's title.

Icons in the document status column indicate if the documents are available for editing, checked out to another user, checked out to you or are a view-only document.

PROJECT COPIES	STATUS	STAGE	AREA	DEPARTMENT/UNIT	D
---	Effective Maintenance	00AERATION	AA-0		
---	Effective Maintenance	00AERATION	AA-0		
---	Effective Maintenance	00AERATION	AA-0		
---	Effective Maintenance	00AERATION	AA-0		

To perform actions on these documents, you must select the documents by placing a check mark in the boxes of the "Do Action" column, selecting the action to perform on them, and finally clicking the "Do Action" button. In the example below, the first three documents in the list are being checked out.

NEW DOC TYPE	REVISION	SECTION	SUB-SECTION	PROFILE	DO ACTION
A-	DATA SHEET	0	A	CR2	Profile <input checked="" type="checkbox"/>
A-	DATA SHEET	0	A	CR2	Profile <input checked="" type="checkbox"/>
A-	DATA SHEET	0	A	CR2	Profile <input checked="" type="checkbox"/>
A-	DATA SHEET	0	A	CR2	Profile <input type="checkbox"/>



There are many actions that can be performed on the documents on the search results page. Documents can be copied out, sent to contractors, checked out for editing, modified, replaced and deleted. Not all users can perform all of these actions. The text color of each action indicates which authentication level is required to perform that action. If a user does not have the authorization to perform an action, the Log In page will appear, and after a suitable login is established, E*Doc will continue on to the desired page so that the requested action can be performed.

Clicking on the “Profile” hyperlink opens the document’s profile. The profile contains all of the attributes (meta-data) associated with the selected document. If the user has the proper authentication, they can edit these attributes by clicking on the “Edit Profile” button. Document attributes are created by the Administrator and can apply to the document itself, the check-out process or its revision history. They can be either single-entry or multi-entry fields.

E*Doc

ALL USERS

EDITOR

MANAGER

ADMIN

PROJECTS

SEARCHREVIEWSPACEHELPABOUT

Profile for Master Document - AA-00AERATIONA-0003-001?

[Return To Search Results](#)

View Master File

Edit Profile

This Document Is Checked Out - CKO Status: Edit

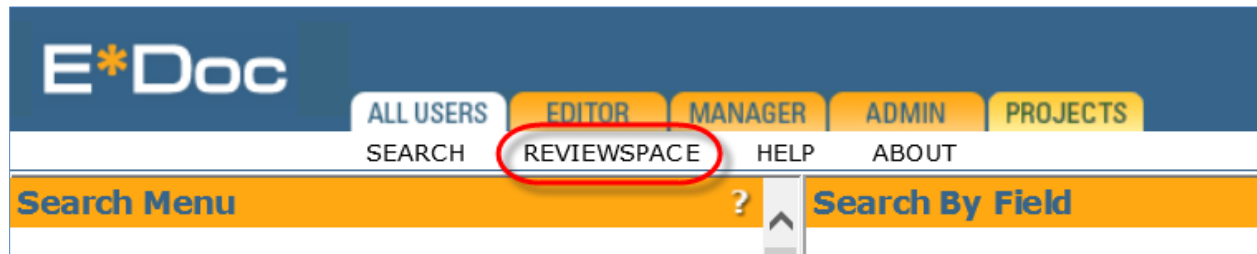
Master Document: AA-00AERATIONA-0003-001
(AA-00AERATIONA-0003-001.jpg)
00AERATION MAINTENANCE CR2 DATA SHEET

Document Information
Current E*Doc Version: 0
Document Title: 00AERATION MAINTENANCE CR2 DATA SHEET
Application: JPG Image
Create Date: 8/17/2017 1:48:55 PM
Creator: ~Rick Kaiser (~Rick.Kaiser)
Current File Size: 620888
Document Number: AA-00AERATIONA-0003-001
Department/Unit: 00AERATION- Gray-Water Aeration Unit
File Name: AA-00AERATIONA-0003-001.jpg
File Number: AA-00AERATIONA-0003-001
New Doc Type: DATA SHEET
Area: Maintenance
CKO Status: Out



REVIEWSPACE (ALL USERS)

When a document has been checked out and is being distributed for a review, each reviewer on the distribution list receives their own copy of the document in their Reviewspace folder. This way, everyone reviewing the document can redline their own copy of the document. The Reviewspace page is opened by clicking the “Reviewspace” hyperlink under the “All Users” tab. Users with the authorization of Reviewer and above have access to the Reviewspace page.



Reviewspace

5 Documents Are Awaiting Review.
Ordered By File Name - Ascending

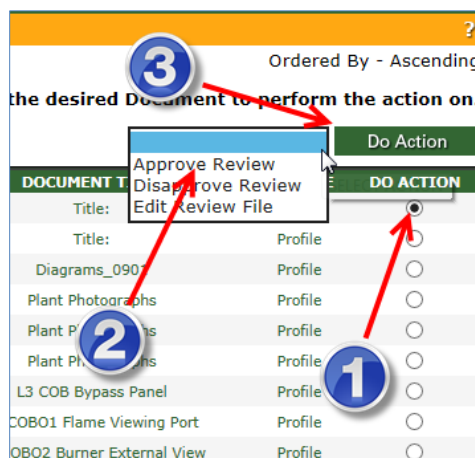
D = Distributed Review
L = Linear Review

Select An Action And Check The Desired Document To Perform The Action Upon.

Action: Do Action

REVIEW STATUS	TYPE	REVIEW BATCH	DISCIPLINE	DOCUMENT NUMBER	FILE NUMBER	SENT	REVIEW DUE	EDITOR	DOCUMENT TITLE	PROFILE	DO ACTION
NOT REVIEWED	D	Admin-1	-	AA-00AERATIONA-0005-001	AA-00AERATIONA-0005-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="radio"/>
NOT REVIEWED	D	Admin-1	-	AA-00AERATIONA-0006-001	AA-00AERATIONA-0006-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="radio"/>
NOT REVIEWED	D	Admin-1	-	BA-00AERATIONEO-0003-001	BA-00AERATIONEO-0003-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 3	Profile	<input type="radio"/>
NOT REVIEWED	L	Admin-419	-	BA-00AERATIONEO-0003-002	BA-00AERATIONEO-0003-002	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 2	Profile	<input type="radio"/>
NOT REVIEWED	L	Admin-419	-	BA-00AERATIONEO-0004-001	BA-00AERATIONEO-0004-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 4	Profile	<input type="radio"/>

The Reviewspace page displays all of the documents under review that the current user has yet to address. A document review is performed by selecting a document, selecting the appropriate action and executing that action by clicking on the “Do Action” button. Redlines of the review file can be made on the reviewer’s file copy by choosing the record, choosing the “Edit Review File” action and clicking the Do Action button. If the reviewer disapproves the review, the redlined copy will become viewable to the Editor of the document so they can incorporate the changes into the master document.





WORKSPACE (EDITOR LEVEL)

The Workspace page displays the contents of the current user's Workspace directory. The Workspace directory is the repository for all electronic documents that have been checked out to the user that are currently being edited or are under review. Each user, with an authorization of Editor or higher has their own Workspace directory. To view the Workspace page, click on the Editor tab and then the "Workspace" hyperlink that appears immediately below it.

E*Doc V6.0 Demo

Admin (ADMINISTRATOR) [Log Out]

Workspace For Admin

5 total records.
Ordered By Document Number - Ascending

Select An Action And Check The Desired Documents To Perform The Action Upon.

Blue - Editors Red - Managers Green - Administrator

Action: [Dropdown] Do Action

CKO TYPE	CHECK OUT STAGE	CREATE DATE	CHECK OUT DATE	CHECK OUT FILE NAME	CHECK OUT REVISION	DOCUMENT NUMBER	DEPARTMENT/UNIT SECTION APPLICATION	FILE NAME	PROCEDURE	DOCUMENT TITLE	NEW DOC TYPE	PROFILE	DO ACTION
Edit	Under Review Admin-1	8/17/2017 1:48:55 PM	9/19/2017	AA-00AERATIONA-0005-001.jpg	0.1	AA-00AERATIONA-0005-001	00AERATION A	JPG Image	AA-00AERATIONA-0005-001.jpg	No	00AERATION MAINTENANCE CR2 DATA SHEET	DATA SHEET	Profile <input type="checkbox"/>
Edit	Under Review Admin-1	8/17/2017 1:48:55 PM	9/19/2017	AA-00AERATIONA-0006-001.jpg	0.1	AA-00AERATIONA-0006-001	00AERATION A	JPG Image	AA-00AERATIONA-0006-001.jpg	No	00AERATION MAINTENANCE CR2 DATA SHEET	DATA SHEET	Profile <input type="checkbox"/>
Edit	Under Review Admin-1	4/27/2017 1:46:33 PM	9/19/2017	BA-00AERATIONEO-0003-001.doc	1.1	BA-00AERATIONEO-0003-001	00AERATION EO	Procedure	BA-00AERATIONEO-0003-001.doc	No	00AERATION MAINTENANCE STR DATA SHEET 3	DATA SHEET	Profile <input type="checkbox"/>
Edit	Under Review Admin-419	4/27/2017 1:46:33 PM	9/19/2017	BA-00AERATIONEO-0003-002.DOC	1.1	BA-00AERATIONEO-0003-002	00AERATION EO	Procedure	BA-00AERATIONEO-0003-002.DOC	No	00AERATION MAINTENANCE STR DATA SHEET 2	DATA SHEET	Profile <input type="checkbox"/>
Edit	Under Review Admin-419	4/27/2017 1:46:33 PM	9/19/2017	BA-00AERATIONEO-0004-001.doc	1.1	BA-00AERATIONEO-0004-001	00AERATION EO	Procedure	BA-00AERATIONEO-0004-001.doc	No	00AERATION MAINTENANCE STR DATA SHEET 4	DATA SHEET	Profile <input type="checkbox"/>

View Review Batch Responses
Admin-1
Admin-419

Your Documents Submitted For Approval

You Have No Documents Submitted For Approval

The contents of the Workspace table can be filtered to temporarily hide irrelevant documents. The "Create Filter" hyperlink opens a page where the user can specify the document types to display. The Workspace displays both documents being edited, and documents submitted for Manager approval. If there are no documents submitted for approval, or those that were submitted have already been approved and checked back in, then this table will be hidden and "You Have No Documents Submitted For Approval" will appear.

To perform actions on the Workspace documents, you must first select the documents, then select the action to perform and then click the "Do Action" button. In the example below, the first document in the list is being submitted for approval. Documents can be submitted for approval, distributed for review, edited, transmitted to a contractor, imported, printed and deleted. Also, the metadata of every document can be edited both inside and outside of E*Doc (in Excel). Not all users can perform all of these actions. If a user does not have the authorization to perform an action, the Log In page will appear, and after a suitable login is established, E*Doc will continue on to the designated page so that the requested action can be completed.

Custom Fields Create Filter ?

Select An Action And Check The Desired Documents To Perform The Action Upon.

Blue - Editors Red - Managers Green - Administrator

Action: [Dropdown] Do Action

ION	FILE NAME	PROCEDURE	PROFILE	DO ACTION
ge	AA-00AERATIONA-0005-001.jpg	No	Profile	<input checked="" type="checkbox"/>
ge	AA-00AERATIONA-0006-001.jpg	No	Profile	<input type="checkbox"/>
re	BA-00AERATIONEO-0003-001.doc	No	Profile	<input checked="" type="checkbox"/>
re	BA-00AERATIONEO-0003-002.DOC	No	Profile	<input type="checkbox"/>
re	BA-00AERATIONEO-0004-001.doc	No	Profile	<input type="checkbox"/>

Check In
Send For Review
Cancel Review
Submit For Approval
Edit File
Edit Profile
Transmittal
Batch Profile Edit
Batch Import
File Import
Batch CKO Profile Edit
Cancel Check-Out
Revision History
Print Files
Clear Checked Boxes
Check All Boxes
Delete Files
Export Profiles Group
Import Profiles Group
Remind Overdue Reviewers
Review Responses



USERSPACE (MANAGER LEVEL)

The Userspace is a page where the Manager or Administrator can conveniently and selectively view the lists of checked-out documents (Workspace) and documents under review (Reviewspace) for each E*Doc user. This is useful tool to gauge work flow and view the backlogs. Opening the Userspace for any user is performed by clicking on the “USERSPACE” hyperlink under the “MANAGER” tab. The name of the user is selected from the drop-down list, and the Userspace appears when you click the “Open Userspace” button.

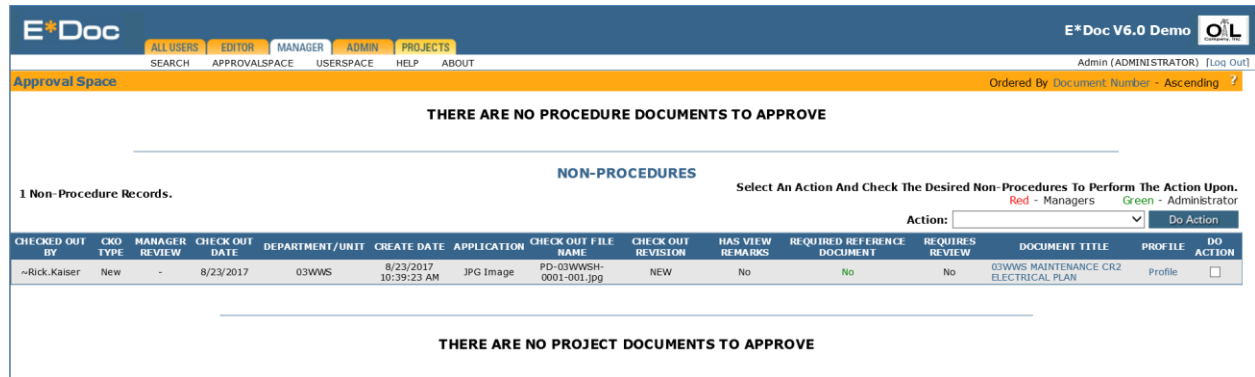
CHECK OUT STAGE	CHECK OUT DATE	CREATE DATE	APPLICATION	AREA	CHECK OUT FILE NAME	CHECK OUT REVISION	DEPARTMENT / UNIT	DOCUMENT NUMBER	HAS VIEW REMARKS	NEW DOC TYPE	PROCEDURE	REQUIRED REFERENCE DOCUMENT	REQUIRES REVIEW	SECTION	DOCUMENT TITLE	PROFILE	DO ACTION
Under Review Admin-1	9/19/2017	8/17/2017 1:48:55 PM	JPG Image	Maintenance	AA-00AERATIONA-0005-001.jpg	0.1	00AERATION	AA-00AERATIONA-0005-001	No	DATA SHEET	No	No	No	A	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>
Under Review Admin-1	9/19/2017	8/17/2017 1:48:55 PM	JPG Image	Maintenance	AA-00AERATIONA-0006-001.jpg	0.1	00AERATION	AA-00AERATIONA-0006-001	No	DATA SHEET	No	No	No	A	00AERATION MAINTENANCE CR2 DATA SHEET	Profile	<input type="checkbox"/>
Under Review Admin-1	9/19/2017	4/27/2017 1:46:33 PM	Procedure	General Administration	BA-00AERATIONEO-0003-001.doc	1.1	00AERATION	BA-00AERATIONEO-0003-001	No	DATA SHEET	No	No	No	EO	00AERATION MAINTENANCE STR DATA SHEET 3	Profile	<input type="checkbox"/>
Under Review Admin-419	9/19/2017	4/27/2017 1:46:33 PM	Procedure	HSSE	BA-00AERATIONEO-0003-002.doc	1.1	00AERATION	BA-00AERATIONEO-0003-002	No	DATA SHEET	No	No	No	EO	00AERATION MAINTENANCE STR DATA SHEET 2	Profile	<input type="checkbox"/>
Under Review Admin-419	9/19/2017	4/27/2017 1:46:33 PM	Procedure	Finance	BA-00AERATIONEO-0004-001.doc	1.1	00AERATION	BA-00AERATIONEO-0004-001	No	DATA SHEET	No	No	No	EO	00AERATION MAINTENANCE STR DATA SHEET 4	Profile	<input type="checkbox"/>

REVIEW STATUS	TYPE	DISCIPLINE	DOCUMENT NUMBER	FILE NUMBER	SENT DATE	REVIEW DUE DATE	EDITOR	DOCUMENT TITLE	PROFILE
NOT REVIEWED	D	-	AA-00AERATIONA-0005-001	AA-00AERATIONA-0005-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE CR2 DATA SHEET	Profile
NOT REVIEWED	D	-	AA-00AERATIONA-0006-001	AA-00AERATIONA-0006-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE CR2 DATA SHEET	Profile
NOT REVIEWED	D	-	BA-00AERATIONEO-0003-001	BA-00AERATIONEO-0003-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 3	Profile
NOT REVIEWED	D	-	BA-00AERATIONEO-0003-002	BA-00AERATIONEO-0003-002	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 2	Profile
NOT REVIEWED	L	-	BA-00AERATIONEO-0004-001	BA-00AERATIONEO-0004-001	9/19/2017	9/22/2017	Admin	00AERATION MAINTENANCE STR DATA SHEET 4	Profile

You can only perform actions to the documents on the Workspace (top) section of the Userspace. You must first select the documents then select the action to perform and then click the “Do Action” button. Only Managers and Administrators can perform these actions. If a user does not have the authorization to perform an action, the Log In page will appear, and after a suitable login is established, E*Doc will continue on to the designated page so that the requested action can be completed.

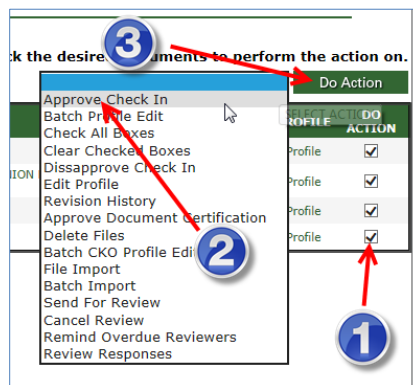
APPROVALSPACE (MANAGER LEVEL)

The Approvalsapce page displays all of the documents that require a manager's final approval before being checked back in to E*Doc. Because procedures master documents and project documents all have different work flow paths in E*Doc, they are displayed in separate tables on the Approvalsapce form. Users with authorization of Managers and above can open the Approvalsapce page for the units they are given rights to edit.



The Approvalsapce page is opened by clicking the “Manager” tab and then the “Approvalsapce” hyperlink that appears immediately below it. If there are no procedures or documents to approve, then one or both of the tables will be hidden and an appropriate notice will appear where the table would normally appear.

To perform actions on these documents, first select the documents, select the action to perform and finally click the “Do Action” button. In the example below four documents are being approved and checked back in to E*Doc. Documents can be approved, disapproved, distributed for review, imported and deleted from the Approvalsapce. Not all users can perform all of these actions (only Administrators can delete files).





ADMINISTRATION (ADMINISTRATOR LEVEL)

One of the important features of E*Doc is its flexibility in adapting to different workflows and business structures. The E*Doc Administrator has the ability to configure E*Doc to quickly and easily match how their company processes documents and procedures. This section is a brief summary of the tools the E*Doc Administrator has to perform these tasks.

The Administrator's section of E*Doc can be reached by clicking on the "Admin" tab of the Main Menu and then clicking on the "Administration" hyperlink that appears immediately below it. This opens the Administration Main Menu. If the projects module is enabled, the Project Administration (green) menu will appear on this page as shown below.

Master Doc Administration	System Configuration
<div>Master Files</div> <div>Document Fields</div> <div>Saved Searches</div> <div>Search Tree</div> <div>Document Types</div> <div>Shelf Directories</div> <div>Certification</div>	<div>E*Doc Users</div> <div>Profile Cards</div> <div>Contractors & Companies</div> <div>Review Groups</div> <div>Application Templates</div> <div>Email Messages</div> <div>Training Module Menu</div> <div>Feedback</div> <div>E*Doc Actions</div> <div>E*Doc Home Page</div> <div>Procedure Coordinator</div> <div>Diagnostics Menu</div> <div>Directory Data Reconcile</div> <div>Links</div>
Project Administration	
<div>Projects</div> <div>Project Types</div> <div>Project Document Fields</div> <div>Project Document Categories</div>	

From the Main Menu, the Administrator can perform the following primary E*Doc tasks:

Master Document Administration

1. **Master Files** - Perform all of the file-level operations on the documents managed by E*Doc (rename, delete, revert to past revision, etc.).
2. **Document Fields** - Manage how E*Doc stores and displays the meta-data profiles associated with every master document.
3. **Saved Searches** – Create and edit prepared document searches on the Search Menu.
4. **Search Tree** – Create and maintain the search tree structure.
5. **Document Types** – Create and edit the formats which generate new document numbers.
6. **Shelf Directories** - Manage the folders where all of the master documents reside.
7. **Certification** – Manage and monitor document recertification.



System Configuration

1. **Users** – Manage the names, email, unit access and authorization levels of every E*Doc user.
2. **Profile Cards** – Assemble profiles into logical groups
3. **Contractors & Companies** – Manage information on the contractors who use E*Doc documents.
4. **Review Groups** – Create & modify groups of users for the purpose of reviewing documents.
5. **Application Templates** – Manage and edit the documents used as placeholders & templates.
6. **Email Messages** – Create custom email messages for important E*Doc events.
7. **Training Module Menu** – Manage who gets trained on which documents.
8. **Feedback** – Create and manage a portal for structured user feedback.
9. **E*Doc Actions** – Determine which actions are visible and hidden on key E*Doc pages.
10. **E*Doc Home Page** – Create custom user messages that appear when E*Doc first opens.
11. **Procedure Coordinator** – Open the doc administration page of the Procedure Coordinator.
12. **Diagnostics Menu** – Open a menu for performing additional diagnostic tests.
13. **Directory Data Reconcile** – Open a diagnostic for finding orphaned files & records in E*Doc.
14. **Links** – Create hyperlinks to useful network & online information for E*Doc users.

Project Administration

1. **Projects** – Open a menu where the Administrator creates, views & closes projects.
2. **Project Types** – Open a menu where the Administrator creates, views & configures project types.
3. **Project Document Fields** – Manage how E*Doc stores and displays the meta-data profiles associated with every project document.
4. **Project Document Categories** – Create and manage categories that define project documents.