



**Pacific Gas and
Electric Company™**

**ISTS SAG-GEOPS Engineering & Compliance
Enterprise Compliance Tracking System**

Gas T&D Document Management User Guide

*Draft Version A
10/21/2009*


Business Process Owner


Author

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Document Control

Revision History

Date	Author	Revision	Change

Related Documents

Name	Date	Version #	Document #

Reviewers

Name	LAN ID

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Introduction

Application Overview

The Enterprise Compliance Tracking System (ECTS) has been implemented to track compliance efforts across the spectrum of business activities at Pacific Gas & Electric. This system allows multiple groups to track their compliance activities while providing reporting capabilities to management.

User Roles

Table 1 User Roles provides a description for each user role in the business.

Table 1 User Roles	
Role Name	Description
Director	The final point of escalation for ensuring reviews to Gas Standards documents are completed within the regulatory timeframe prescribed.
Document Coordinator	The role responsible for maintaining document status, updating notices, and ensuring a Steward is assigned to the documents they coordinate.
Document Review Team	The cross-functional team that assesses updated documents for completeness and correctness.
Document Steward (SMEs)	The person responsible for reviewing and updating one or more Gas Standards documents.
Manager	The manager of Supervisors and the mid-point for escalation.
Supervisor	The manager of a Document Steward and the first level of escalation.

Application Interface

The ECTS application is a web application that requires no installation. The application has been implemented to allow role-mapped users access without having to login past their network login.

Application Window

The application window is comprised of two areas: the Page Header and the Page Body.

Page Header

ECTS Enterprise Compliance Tracking System
Development

GTD Document Management
-- BASHMARD --

Page Body

Documents Associated to Your User ID

Select a role to filter by: Document Coordinator Document Steward Document Approver

Document ID	Title	Status	Date	Document Coordinator	Document Steward	Document Approver
21120	219	Leak Survey and Repair Documentation	Active	10/27/2009	Steel	Leak Survey
21122	222	Flt Procedure	Active	10/14/2009	Steel	Leak Survey
21123	224	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21124	227	Material Spec Performance Heat Pat on TACOM T80 CABT	Active	10/1/2009	Steel	Leak Survey
21125	229	Truck Weigh	Active	07/02/2009	Steel	Leak Survey
21126	232	Use of Refractory	Work Procedure	07/02/2009	Steel	Leak Survey
21127	235	Document 93-24540 - How to do this for the T80	Manual	07/02/2009	Steel	Leak Survey
21128	236	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21129	237	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21130	238	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21131	239	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21132	240	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21133	241	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21134	242	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21135	243	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21136	244	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21137	245	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21138	246	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21139	247	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21140	248	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21141	249	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21142	250	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21143	251	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21144	252	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21145	253	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21146	254	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21147	255	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21148	256	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21149	257	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21150	258	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21151	259	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21152	260	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21153	261	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21154	262	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21155	263	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21156	264	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21157	265	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21158	266	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21159	267	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21160	268	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21161	269	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21162	270	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21163	271	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21164	272	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21165	273	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21166	274	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21167	275	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21168	276	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21169	277	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21170	278	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21171	279	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21172	280	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21173	281	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21174	282	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21175	283	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21176	284	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21177	285	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21178	286	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21179	287	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21180	288	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21181	289	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21182	290	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21183	291	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21184	292	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21185	293	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21186	294	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21187	295	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21188	296	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21189	297	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21190	298	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21191	299	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey
21192	300	Compositional Mechanical Testing Type B Testing Changes	Active	07/02/2009	Steel	Leak Survey

System Feedback

Home | Logout | The ECTS Web | Help | Advanced Search | Feedback

Page Header

The page header appears consistently across all ECTS pages except for reports. The Page Header is made up of the application and user area, and system links.

Application Logo: ECTS Enterprise Compliance Tracking System

Application Environment: Production (GTD Management Environment) may have open personal tasks

System Links: Home | Logout | The ECTS Web | Help | Advanced Search | Feedback

The ECTS application logo at the top left may be clicked to view the About page for the application's vendor. The system links along the top of the header provide direct access to the Home, page from any point in the application. The Logout link ends your application session, and the Help link opens the vendor supplied context-sensitive help page that is relevant to the page you are currently viewing in ECTS. For convenience, these links are repeated along the bottom of each page. Note that you will not see a Manage link if you do not have permission to administer the system.

Below the System Name is your user name, department and a sentence that indicates whether or not you have open tasks in the system. Your current department is shown in parentheses, and clicking it will open the Department Tasks page. If you do have open tasks, the "personal tasks" phrase will be a link. Clicking it opens the Personal Tasks page.

The Go To section allows you to navigate directly to a specific record. Choose the type of record, enter the record number in the box, and click the arrow. If the Full Text Search option is installed, a search box and link to the Advanced Search form may appear here as well.

On the Home page only, a Jump To selection list is provided immediately below the header. If you have access to multiple dashboards, this provides an easy way for you to change your current department: select a different department and click the arrow. If the optional Multiple Employee Personalities feature is installed, you may also change your Personality in the same way.

Application Help

The Help facility is available on the Dashboard (all topics) and on each page (specific topics).

Gas T&D Standards Management

Overview

In 1995, The Department of Transportation issued a final rule requiring gas utilities to develop and maintain gas maintenance and operations plans. In 2008, the CPUC indicated that it needed to have better documentation of how PG&E's gas maintenance & operations plans were being reviewed and updated to comply with the regulation.

Subsequently, the Company issued WP 4000-02 entitled Procedures for Reviewing and Updating Gas Manuals Subject to 49 CFR Part 192, Sections 603 and 605 in September 2008. This work procedure provides the steps that PG&E follows to review and update its applicable gas maintenance, operations, and emergency response manuals to ensure compliance with Code of Federal Regulations (CFR) Title 49, Part 192, "Transportation of Natural and Other Gas by Pipeline; Minimum Federal Safety Standards, Sections 603, "General provisions," and 605, "Procedural manual for operations, maintenance, and emergencies." These federal regulations require that documents that cover gas maintenance, normal operations, emergency response, and abnormal operations (for transmission lines) must be reviewed and updated as necessary at intervals of at least once each calendar year, but not exceeding 15 months, to the date.

GAS T&D Document Management Dashboard

The Document Management Dashboard gives a user quick access to information about standards documents and the tasks assigned to them. From the Navigation bar, access is available to detailed document data, reports, and queries that are displayed in the Content Pane.

The screenshot shows the 'GTD Document Management' dashboard. The 'Navigation Bar' on the left includes links for 'My Stuff', 'Queries', and 'Reports'. The 'Content Pane' displays a table of documents associated to the user. The table has columns for Document ID, Revision, Description, Status, Date, and Assignee. A 'Quick Links' icon is located in the top right corner of the dashboard area.

Document ID	Revision	Description	Status	Date	Assignee
21122	176	Gas Transmission Highway	Ballot	10/2/2009	David
21120	268	Leak Testing and Repair Documentation	Ballot	10/07/2009	Leah Slives
21121	224	Continental Mechanical Tapping Test & Tapping Changes	Ballot	9/29/2009	Leah Slives
21123	229	Manuals Work-Performance/Work Order, Tapping Test Caps	Ballot	10/1/2009	David Spillane
21124	99	Tapping Work	File	9/30/2009	David Spillane
21072	07-1822	Gas Gathering	Work Progress	10/01/2009	Rob Robinson/Quality Operations
19832	03-0450	Document 03-0450 - How to do Gas for Gas T&D	Manual	10/27/2009	Corrosion
21125	0-14	Construction Control of Gas Facilities	Q100	10/01/2009	Corrosion
21083	0100	Specification for concrete casing	Contract	10/01/2009	David
21032	TD-0100-04	Following Leak Survey/Inaccessible Locations	Work Progress	10/01/2009	Leah Slives
20282	TD-0500	Capacity Planning for Gas Distribution System	Work Progress	02/2/2010	Ed Gas Eng Design

My Stuff

This area of the Navigation bar allows access to Documents assigned to a user. The view in the Content Pane can be filtered by selecting a role. It also provides access to the Reviews, Updates, and Subtasks that are open.

Queries

These links allow you to filter Documents, Reviews, and Updates by any combination of data for those three subjects.

1. Click the link for the query type of interest on the Navigation Bar.
2. Choose the search parameters for the query.
3. Click Submit.

Reports

The Dashboard contains the following Document reports:

- By Type
- By Coordinator
- By Review Month
- By Steward
- Review Report
- Update Report

The Documents by Type report is a detailed data view. The default view is all documents, but filtering by one or more types can be requested. Ctrl + Click the list entries to select the types to be included in the report.

The other five reports have both a summary and a detailed view. The following filters, which can be used individually or in combination, are available for the reports:

- Doc Coordinator
- Steward
- Document Type
- Tech Team

The Document Coordinator

Overview

Document Coordinators are assigned multiple documents to oversee in the review and update cycle. This part of the guide provides detailed steps on how to use ECTS to complete their tasks. The following conventions are use in the steps for each task:

- Links are underlined
- Data field names are in **bold**
- Form names are in *italics*

Coordinator Tasks

Creating a New Document Record

1. Click the +Add Document link on the Navigation bar of the Dashboard.

The screenshot shows the 'Documents Associated to Your User ID' page. On the left is a navigation menu with the following items: My Stuff, My Comments, Add Document (highlighted in red), Document Records, Document Updates, My Sub Tasks, New Document Queries, Document Records, Document Updates, Document Reports, My Stuff, My Comments, My Sub Tasks, Update Record. The main content area is titled 'Documents Associated to Your User ID' and includes a filter section: 'Select a role to filter by: Document Coordinator Document Steward Document Approver'. Below this is a table with columns: Document ID, Title, Type, Status, Date, Assignee. The table contains several rows of document records. At the bottom of the table, there is a 'VIEW FULL PAGE SUMMARY' link. Below the table are several small links: 'ECIS Record', 'More Info', 'Add a New Item', 'Submit an Issue/Request', and 'Submit a Change Request'.

2. Complete the fields on *GAS T&D Standards Management Document form*, noting that the fields in red are required fields and will need to be filled in before the record can be submitted.

Add GTD-Document

Submit

Document Number	<input type="text"/>
Document Title	<input type="text"/>
Document Type	<input type="text"/>
Document Status	<input type="text"/>
Document Review Month	<input type="text"/>
Comments	<input type="text"/>
Next Planned Review Date	<input type="text"/>
Manual / Add Numbered Document Release	<input type="text"/>
Document Expiration Date	<input type="text"/>
Manual	<input type="text"/>
Manual Section	<input type="text"/>
Document Applicability Area	<input type="checkbox"/> Gas Dist Maint Doc <input type="checkbox"/> Gas Dist Ops Doc <input type="checkbox"/> Gas Emergency Plan <input type="checkbox"/> Gas Trans Doc
Primary Audience	<input type="checkbox"/> Construction <input type="checkbox"/> Constructors <input type="checkbox"/> Corrosion Mechanics <input type="checkbox"/> Design <input type="checkbox"/> Designers <input type="checkbox"/> Engineering <input type="checkbox"/> Engineers <input type="checkbox"/> Estimating <input type="checkbox"/> Field Services <input type="checkbox"/> Gas Field Services <input type="checkbox"/> Gas Measurement <input type="checkbox"/> Gas Meter Plant <input type="checkbox"/> Gas Service <input type="checkbox"/> Gas Standards <input type="checkbox"/> GSO <input type="checkbox"/> GSR <input type="checkbox"/> Leak Repair <input type="checkbox"/> Leak Surveyors <input type="checkbox"/> M&C <input type="checkbox"/> M&C Mechanics <input type="checkbox"/> M&O <input type="checkbox"/> Maintenance <input type="checkbox"/> Mappers <input type="checkbox"/> Mark and Locate <input type="checkbox"/> Meter Reading <input type="checkbox"/> N/A <input type="checkbox"/> Operating Clerical <input type="checkbox"/> Operations <input type="checkbox"/> Service Planning <input type="checkbox"/> SMEs
Secondary Audience	<input type="checkbox"/> Construction <input type="checkbox"/> Constructors <input type="checkbox"/> Corrosion Mechanics <input type="checkbox"/> Design <input type="checkbox"/> Designers <input type="checkbox"/> Engineering <input type="checkbox"/> Engineers <input type="checkbox"/> Estimating <input type="checkbox"/> Field Services <input type="checkbox"/> Gas Field Services <input type="checkbox"/> Gas Measurement <input type="checkbox"/> Gas Meter Plant <input type="checkbox"/> Gas Service <input type="checkbox"/> Gas Standards <input type="checkbox"/> GSO <input type="checkbox"/> GSR <input type="checkbox"/> Leak Repair <input type="checkbox"/> Leak Surveyors <input type="checkbox"/> M&C <input type="checkbox"/> M&C Mechanics <input type="checkbox"/> M&O <input type="checkbox"/> Maintenance <input type="checkbox"/> Mappers <input type="checkbox"/> Mark and Locate <input type="checkbox"/> Meter Reading <input type="checkbox"/> N/A <input type="checkbox"/> Operating Clerical <input type="checkbox"/> Operations <input type="checkbox"/> Service Planning <input type="checkbox"/> SMEs
Technical Team	<input type="text"/>
Tech Team Manager (Optional)	<input type="text"/>
Document Reviewer (Optional)	<input type="text"/>
Doc Standard Manager	<input type="text"/>
ECTS Department	<input type="text"/>
Document Coordinator	<input type="text"/>

Initiate Document Review Plan

Document Activities Click a reference type to the left to view the references for this document.

[Document Reviews](#)

[Document Updates](#)

[Related Regulations](#)

[Document Reports](#)

10/21/2005 11:03:53 AM

Submit Refresh

[Home](#) | [Logout](#) | [My CATS Web](#) | [Help](#) | [Advanced Search](#) | [Top](#)

3. Click Submit.

Editing a Document Record

1. Click My Documents on the Navigation bar of the Dashboard.

GTS Document Management

Dashboard

My Documents

- My Staff
- My Documents & Add Document
- My Document Reviews
- My Document Updates
- My Task Tasks

New Document Queries

- Document Reviews
- Document Updates

Document Reports

- By Terms
- By Coordinator
- By Section Month
- By Steward
- Review Bonus
- Update Round

Document Record ID

Documents Associated to Your User ID

Select a role to filter by: Document Coordinator Document Steward Document Approver

Document ID	Document Title	Document Type	Document Status	Document Date	Document Category	Document Role
31127	Gas Transmission Highway	Section	Active	10/21/2009	Steel	Document Coordinator
31130	Leak Survey and Repair Documentation	Section	Active	10/22/2009	Leak Survey	Document Coordinator
31126	Commercial Mechanical Tapp-02 Tap in Cooling Changeout	Section	Active	9/16/2009	Leak Survey	Document Coordinator
28120	Material Allow Deduction/Inventor System Tapping Test 0493	Section	Active	10/16/2009	Hydro Pipeline	Document Approver
31124	Tracer Wire	SPB	Active	9/20/2009	Plastic Pipeline	Document Coordinator
31228	Gas Gathering	Work Procedure	Active	10/22/2009	Gas Measurement Quality Observation	Document Coordinator
14452	Document 48-24560 - How to do this for Gas T&D	Manual	Active	9/23/2009	Comms	Cost from end of new Steel piping
31122	0-26	Commission Control of Gas Pipelines	Standard	10/22/2009	Commission	Document Approver
31122	0-26	Specification for Concrete Coating	Standard	10/22/2009	Steel	Engineering & Insulating
31122	0-26	Flaming Leak Survey for Inoperable Locations	Work Procedure	10/22/2009	Leak Survey	Document Approver
20282	TD-95000	Gas Safety Planning for Gas Distribution Systems	Work Procedure	6/11/2010	Gas Safety Design	Engineering & Insulating

View Full Page | Subscribe

GTS Document Management

[GTS Document Home Page](#)
[Add a New User](#)
[Submit an Issue/Bug](#)
[Submit a Change Request](#)

2. Select a Document for editing by clicking the **Document Record ID**.
3. Click "Edit" on the task bar at the top of the *GAS T&D Standards Management Document form*.

GTD-Document #31130

Home Back Account Logout My Documents My Task My Documents My Documents My Documents My Documents

Revision

4. Update the fields that need to be changed.

GTD STANDARDS MANAGEMENT	
Submit	
Document Number	215
Document Title	Leak Survey and Repair Documentaion
Document Type	Bulletin
Document Status	10
Next Planned Review Date	11/2/2009
GTD STANDARDS	
Manual / CSR Number / Document Release #	
Document Release Date	
Version	Leak Survey
Manual Section	
Document Applicability Area	<input type="checkbox"/> Gas Dist Maint Doc <input type="checkbox"/> Gas Dist Ops Doc <input type="checkbox"/> Gas Emergency Plan <input type="checkbox"/> Gas Trans Doc <input type="checkbox"/> Construction <input type="checkbox"/> Constructors <input type="checkbox"/> Corrosion Mechanics <input type="checkbox"/> Design <input type="checkbox"/> Designers <input type="checkbox"/> Engineering <input type="checkbox"/> Engineers <input type="checkbox"/> Estimating <input type="checkbox"/> Field Services <input type="checkbox"/> Gas Field Services <input type="checkbox"/> Gas Measurement <input type="checkbox"/> Gas Meter Plant <input type="checkbox"/> Gas Service <input type="checkbox"/> Gas Standards <input type="checkbox"/> GSO <input type="checkbox"/> GSR <input checked="" type="checkbox"/> Leak Repair <input checked="" type="checkbox"/> Leak Surveyors <input type="checkbox"/> M&C <input type="checkbox"/> M&C Mechanics <input type="checkbox"/> M&O <input type="checkbox"/> Maintenance <input type="checkbox"/> Mappers <input type="checkbox"/> Mark and Locate <input type="checkbox"/> Meter Reading <input type="checkbox"/> N/A <input type="checkbox"/> Operating Clerical <input type="checkbox"/> Operations <input type="checkbox"/> Service Planning <input type="checkbox"/> SMEs
Primary Audience	<input type="checkbox"/> Construction <input type="checkbox"/> Constructors <input type="checkbox"/> Corrosion Mechanics <input type="checkbox"/> Design <input type="checkbox"/> Designers <input type="checkbox"/> Engineering <input type="checkbox"/> Engineers <input type="checkbox"/> Estimating <input type="checkbox"/> Field Services <input type="checkbox"/> Gas Field Services <input type="checkbox"/> Gas Measurement <input type="checkbox"/> Gas Meter Plant <input type="checkbox"/> Gas Service <input type="checkbox"/> Gas Standards <input type="checkbox"/> GSO <input type="checkbox"/> GSR <input type="checkbox"/> Leak Repair <input type="checkbox"/> Leak Surveyors <input type="checkbox"/> M&C <input type="checkbox"/> M&C Mechanics <input type="checkbox"/> M&O <input type="checkbox"/> Maintenance <input type="checkbox"/> Mappers <input type="checkbox"/> Mark and Locate <input type="checkbox"/> Meter Reading <input type="checkbox"/> N/A <input type="checkbox"/> Operating Clerical <input type="checkbox"/> Operations <input type="checkbox"/> Service Planning <input type="checkbox"/> SMEs
Secondary Audience	<input type="checkbox"/> Construction <input type="checkbox"/> Constructors <input type="checkbox"/> Corrosion Mechanics <input type="checkbox"/> Design <input type="checkbox"/> Designers <input type="checkbox"/> Engineering <input type="checkbox"/> Engineers <input type="checkbox"/> Estimating <input type="checkbox"/> Field Services <input type="checkbox"/> Gas Field Services <input type="checkbox"/> Gas Measurement <input type="checkbox"/> Gas Meter Plant <input type="checkbox"/> Gas Service <input type="checkbox"/> Gas Standards <input type="checkbox"/> GSO <input type="checkbox"/> GSR <input type="checkbox"/> Leak Repair <input type="checkbox"/> Leak Surveyors <input type="checkbox"/> M&C <input type="checkbox"/> M&C Mechanics <input type="checkbox"/> M&O <input type="checkbox"/> Maintenance <input type="checkbox"/> Mappers <input type="checkbox"/> Mark and Locate <input type="checkbox"/> Meter Reading <input type="checkbox"/> N/A <input type="checkbox"/> Operating Clerical <input type="checkbox"/> Operations <input type="checkbox"/> Service Planning <input type="checkbox"/> SMEs
Technical Team	
CSR Update Manager/Owner	
Document Supervisor (S - Safety)	
Doc Standard Manager	
CSR Department	GTD Standards Management
Document Coordinator	
GTD STANDARDS	
Initials Document Review Plan	
Document Activities	Click a reference type to the left to view the references for this document.
Document Reviews	
Document Updates	
Related Regulations	
Document Reports	
Doc Opened	9/29/2009 12:35:46 PM
Doc Closed	
Reason For Edit	
Submit Reload	

5. Provide a Reason for Edit.
6. Click Submit.

Changing Document Status

1. Follow steps 1-3 for *Editing a Document Record*.
2. Update Document Status

NOTE: The following table illustrates the valid changes in status:

Current Status	Valid New Status
Proposed	Draft or Cancelled
Draft	Active or Cancelled
Active	For Reference Only or Superseded or Cancelled

3. Provide a Reason for Edit
4. Click Submit.

Deleting a Record

NOTE: A deleted record is automatically saved to the archive.

1. Access the record to be deleted.
2. Click "Edit" on the task bar.

Edit GTD - Document Activity Task #65

GTD-Document Review Plan Task			
Parent ID	41108	From Dept	GTD Standards Management
From Employee		Parent Type	Action
Opened	10/20/2009 3:07:57 PM	Assigned	10/20/2009 3:07:57 PM
Related Document Details			
Document Record ID	36502		
Document Number	2223		
Document Title	Gas Pressure		
Document Type	Bulletin		
Task Details			
Task Type	GTD-Document Review Plan		
Task Title	Check Gas Standard		
Task Assignment Notes	Confirm pressure levels in all standards.		
Task Completion Notes			
Assignment Details			
GTD Dept	GTD Standards Management	Task Assignee	TAYLOR, D(DYTE)
Task Status	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> Closed		
Date Date	10/16/2009		
Task Completion Date			
Date Closed			
Reason For Edit			
<input type="checkbox"/> Check this box to permanently Delete the record.			
<input type="button" value="Submit"/> <input type="button" value="Reload"/>			

3. Check the box at the bottom of the form.
4. Click Submit.

The Document Steward

Overview

Stewards are responsible for completing tasks to successfully complete the review and update cycle. This part of the guide provides detailed steps on how to use ECTS to complete those tasks. The following conventions are used in the steps for each task:

- Links are underlined
- Data field names are in **bold**
- Form names and notices are in *italics*

Steward Tasks

Initiate Document Review Plan

1. Receive *New Document Review / Update Cycle Notice*.

Please initiate the review / update cycle for the document identified below. Please respond with confirmation for initiation of the review / update cycle to ensure that the document is fully reviewed by the Document Steward by 10/2/2009.

Document Number: 215

Document Title: Leak Survey and Repair Documentation

Target Review /Update Cycle Completion Date: 10/2/2009

ECTS Record:

<https://catswebdev/catsweb/main.asp?WCI=Main&WCE=ViewAction&WCU=r%3d31131>

2. Click the link on the Notice.
3. Click Initiate Document Review Plan on *GAS T&D Standards Management Document*.
4. Complete the fields on *Add GTD-Document Review Plan form*, noting that the fields in red are required fields and will need to be filled in before the record can be submitted.
5. Click Submit.

Accept Document Assignment

1. Click "Edit" on *GAS T&D Standards Management Document Review Plan form*.

Edit GTD-Document Review Plan #31131

GAS T&D Standards Management Document Review Plan	
Submit	
Document Details	
Doc Record ID	31130
Document Number	215
Document Title	Leak Survey and Repair Documentation
Document Type	Bulletin
Plan Assignment Details	
Due Date	10/2/2009
EGIS Dept.	GTD Standards Management
Document Standard	
Assignment Accepted	Yes
	Acceptance Date 9/29/2009
Actual Review Date	
Review Determination	
Document Update Required?	Document Mended?
Document Need Explanation	
Document Changed?	
System Status	
Review Plan Status	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> Closed
Date Opened	9/29/2009 12:43:28 PM
Date Completed	
Date Closed	
Reason For Edit	
Submit Reload	

2. Select a response in **Assignment Accepted**.
3. Provide a **Reason for Edit**.
4. Click Submit.

Creating a Plan for a Review (Subtasks)

1. Click My Document Reviews on the Dashboard.
2. Select a **Document Record ID**.
3. Click the green arrow to the right of "Add Subtask" on *GTD-Document Review Plan*.

GTD-Document Review Plan #36503

Home	My Documents	My Assignments	My Calendar	My Profile	My Settings	My Tools	My Reports	My Alerts	My Help
Assignment Add Subtask GTD - Document Activity Task									

4. Complete the fields on *Add GTD - Document Activity Task form*, noting that the fields in red are required fields and will need to be filled in before the record can be submitted.

Add GTD - Document Activity Task

Document Record ID		36502
Document Number		2223
Document Title		New Doc 2
Document Type		Bulletin
Task Details		
Task Type		GTD-Document Review Plan
Task Title		
Task Assignment Notes		
Assignment Details		
ECTS Dept: Task Assignee		GTD Standards Management
Task Status		<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> Closed
Due Date		11/8/2010
Task Completion Date		
Date Closed		

5. Modify **Due Date**.
 6. Click **Submit**.
 7. ECTS will send a message to the subtask assignee.
- NOTE:** To view all Subtasks, access the Document Review Plan.

Recording Review Results and Actual Review Date

1. Click the [My Document Reviews](#) link on the Dashboard.
2. Select a document ID.
3. Click "Edit" on *Edit GTD-Document Review Plan*.
4. Enter data into fields in the Review Determination section of the Review Plan.
5. Update Review Plan Status.
6. Provide a **Reason for Edit**.
7. Click **Submit**.

Initiate Document Update Plan

1. Click [Launch a Document Update Plan for this Document](#) on *GAS T&D Document Review Plan*

Add GTD-Document Update Plan

GTD Standards Management Document Update Plan

Document Details	
Doc Record ID	36502
Department Number	2223
Document Title	Gas Pressure
Document Type	Bulletin
Plan Assignment Details	
Planned Update Date	11/02/2009 <input type="button" value="..."/>
ECTS Dept: Document Steward	GTD Standards Management <input type="button" value="..."/>
Update Determination	
Update Priority	Medium <input type="button" value="..."/>
Update Priority Reasons	<input type="text"/>
Summary of Updates Required	<input type="text"/>
Planned Update Doc Steward Manhours	2 <input type="button" value="..."/>
Planned Update Doc Tech Writing Manhours	2 <input type="button" value="..."/>
Update Completion Details	
Actual Update Date	<input type="text"/>
Summary of Updates / Changes	<input type="text"/>
Actual Update Doc Steward Manhours	<input type="text"/>
Actual Update Doc Tech Writing Manhours	<input type="text"/>
DDM Summary Data	<input type="text"/>
System Status	
Review Plan Status	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> Closed
Date Opened	11/22/2009 1:22:58 PM
Date Completed	
Date Closed	

2. Complete the fields on *Add GTD-Document Update Plan form*, noting that the fields in red are required fields and will need to be filled in before the record can be submitted.
3. Click Submit.

Creating a Plan for Update (Subtasks)

1. Click the [My Document Reviews](#) link on the Dashboard.
2. Select a document ID.
3. Click the green arrow to the right of "Add Subtask" on *GTD-Document Update Plan*.
4. Complete the fields on *Add GTD - Document Activity Task form*, noting that the fields in red are required fields and will need to be filled in before the record can be submitted.
5. Modify **Due Date**.
6. Click Submit.
7. ECTS will send a message to the subtask assignee.

NOTE: To view all Subtasks, access the Document Update Plan.

Recording Updates to a Document and the Actual Update Date

1. Click the [My Document Updates](#) link on the Dashboard.
2. Select a Doc Update Record ID.

- Click "Edit" on *GTD-Document Update Plan*.

Edit GTD-Document Update Plan #41511

Update Plan Details	
Doc Report ID	36502
Document Number	2223
Document Title	Gas Pressure
Document Type	Bulletin
Plan Management Details	
Planned Update Date	10/23/2009
Active Plan	GTD Standards Management
Document Steward	[Redacted]
Update Characteristics	
Update Priority	Medium
Update Priority Reason	
Summary of Updates Required	
Planned Update Doc Steward Manhours	2
Planned Update Doc Tech Writing Manhours	2
Update History Details	
Actual Update Date	
Summary of Updates / Changes	
Actual Update Doc Steward Manhours	0
Actual Update Doc Tech Writing Manhours	0
Update History Date	
Update Plan Status	
Update Plan Status	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> Closed
Date Opened	10/22/2009 1:22:58 PM
Date Completed	
Date Closed	
Reason For Edit	

Submit Reload

- Enter data into fields in the Update Completion section of the Update Plan.
- Click the Update Plan Status.
- Provide a Reason for Edit.
- Click Submit.

Reassigning a Subtask

- Click the Subtask ID at the bottom of the Review or Update Plan.

GTD - Document Activity Task #65

Reassign

GTD-Document Review Plan Task			
Parent ID	41106	From Dept	GTD Standards Management
From Employee		Parent Type	Action
Opened	10/20/2009 3:07:57 PM	Assigned	10/20/2009 3:09:55 PM
Related Document Details			
Document Record ID	36502		
Document Number	2223		
Document Title	Gas Pressure		
Document Type	Bulletin		
Task Details			
Task Type	GTD-Document Review Plan		
Task Title	Check Gas Standard		
Task Assignment Notes	Confirm levels in 5100		
Task Completion Notes			
Assignment Details			
ECTS Dept:	Assignee		
Task Assignee	GTD Standards Management		
Task Status	Open		
Due Date	10/16/2009		
Task Completion Date			
Date Closed			
Reason For Edit	New record	Creation Date	10/20/2009 3:09:55 PM
Creation User		Last Edit Date	10/20/2009 3:09:55 PM
Last Edit User			

Parent Information
GTD-Document Review Plan 41106

Tags: There are no tags. Public ▶

- Click **Reassign** At the top of the form.

Reassign GTD - Document Activity Task #68

Department	GTD Standards Management	Employee	
Due Date	1/16/2009		
Reason For Edit			
<input type="button" value="Submit"/> <input type="button" value="Reload"/>			

- Select an **Employee** for the Assignment.
- Provide a **Reason for Edit**.
- Click **Submit**.

Application Features

The tool bar at the top of forms allows access to a number of application features. The following section contains a description of each feature.



Edit

When Edit is clicked by those with access rights, the data on forms is made available to be changed.

Add Note

This option allows a Note to be added to a record.

Add Note
UtilRel Standard #1366

Date Entered	8/11/2009 1:08:40 PM	Entered By	[Redacted]
Note Text	<input type="text"/>		

[Home](#) | [Manage](#) | [Logout](#) | [My CATSWeb](#) | [Help](#) | [Advanced Search](#) | [Top](#)

Add Link

Add Link allows the current Action or Subtask record to be linked to other items on the Internet/intranet. The entry fields are:

Link To - Specifies the type of link. These links point to other records in the ECTS system. URL links can point to any page, document, file, etc. anywhere on the Internet or intranet.

Link Text - This is the text that will be shown as a clickable link. For example, the phrase *Back to Contents* in the following text is link text: *Back to Contents*.

URL - Any valid URL on the internet or your intranet (Ex: *http://www.yourcompany.com/PariSpec.htm*). The field is only used for URL links and is ignored for Issue, Action or Subtask links.

Record Number - For Action or Subtask links, this specifies the record number to link to. The field is ignored for URL links.

Link Graphic (optional) - You may select a graphic to be associated with your link. The

description of the graphic (e.g. *Issue*) will be replaced by the Link Text that you specify. In the displayed link, both the Link Text and the Link Graphic will be active (clickable).

Add Link
GTD-Document Review Plan #14682

Submit Reload

Link To	<input type="radio"/> Issue <input type="radio"/> Action <input type="radio"/> Subtask <input checked="" type="radio"/> URL
Link Text	<input style="width: 90%;" type="text"/>
URI	<input style="width: 90%;" type="text"/>
Record Number	<input style="width: 50%;" type="text"/>

Link Graphic (Optional)

<input type="radio"/> Analysis <input type="radio"/> Action <input type="radio"/> Diagram <input type="radio"/> Drawing <input type="radio"/> Inspection Document <input type="radio"/> Manual <input type="radio"/> Issue <input type="radio"/> Procedure <input type="radio"/> Supplier <input checked="" type="radio"/> None	<input type="radio"/> Assembly Document <input type="radio"/> Customer <input type="radio"/> Document <input type="radio"/> Graph <input type="radio"/> ISO 9000 Document <input type="radio"/> Measurements <input type="radio"/> Practice <input type="radio"/> Specification <input type="radio"/> Test Document
--	---

Submit Reload

Attach File

File Attachments are uploaded and stored securely in the ECTS database.

Add File Attachment
GTD-Document Review Plan #14682

File	<input style="width: 80%;" type="text"/>	Browse...
Description	<input style="width: 95%;" type="text"/>	
Notes	<input style="width: 95%;" type="text"/>	

Submit

Forward Copy via E Mail

The ECTS **Forward by E-mail** page allows a copy of the record to be sent via E-mail. The recipients of the E-mail are not granted access to the record on the live ECTS system.

To/Cc/Bcc – Select from the recipient list or enter the E-mail address of the person(s) to forward the record to. Separate multiple addresses with commas. You may also select one or more recipients from the lists. The message will be sent to the recipients from the lists *and* to any ad-hoc recipients you have entered.

Forward Copy by E-mail
UtilRel Standard #1366

To

Cc

Bcc

To select more than one recipient from the list, hold down the Ctrl + Shift key and click on your selections.

Subject	The subject of the message.
From	Your E mail Address (This field is prefilled with your email address)
Message	The body of the E mail message

Subject	
From	
Message	

Include Attachments - If file attachments exist for the record being forwarded, this list will display the unique attachment filenames. Select the attachment filenames that you wish to include with the message.

NOTE: If multiple file attachments have the same filename, all of them will be sent if that filename is selected. The files will receive unique names when sent.

If a filename contains commas, the comma will be replaced by "{Comma}", both in the list and in the actual file that is sent.

ZIP Attachments - If file attachments were selected in Include Attachments, checking this box causes the attachments to be automatically ZIPped (PKZip compatible format) into a single compressed file. This guarantees the most efficient transmission through the E-mail system. Uncheck to box to cause the attachments to be sent separately and not zipped.

Include Attachments	Test doc for documentation[1].rtf
ZIP Attachments	<input checked="" type="checkbox"/>

Return Receipt - Check this box to request a return receipt from the recipient(s) when the message is read. Note that if the E-mail message travels across the Internet at any point, a return receipt is not guaranteed. This is due to a flaw in the SMTP protocol used for Internet mail. Most Internet mail clients, routers, and gateways recognize the request for a return receipt, but respecting and acknowledging the request is at the option of the person who receives the message

Importance - Select an importance (urgency) for the message. Note that not all E-mail systems and mail clients recognize this setting.

Return Receipt	<input type="checkbox"/>
Importance	<input type="radio"/> Highest <input type="radio"/> High <input checked="" type="radio"/> Normal <input type="radio"/> Low <input type="radio"/> Lowest

View Edit History

ECTS can display past versions of records and deleted records, including past versions and deletions of associated Notes, File Attachments, and Links. The following information displays when you choose the feature from the Task Bar.

Archived Versions of Action 31132

Record Edited **Record Deleted**

5346 10/16/2009 4:02:10 PM [Redacted] Status Update

[Home](#) | [Logout](#) | [My CATSWeb](#) | [Help](#) | [Advanced Search](#) | [Top](#)

When presenting lists of archived records, ECTS color-codes the records to indicate if it was archived as a result of an edit operation or a delete operation. When archived records are displayed in their entirety on a page, a special header is attached to the beginning of each record. This header is also color-coded. The header fields include:

- **Archive Date** - The date and time that the record was archived. Note that this is *not* the same as the last edit date and time for the record. To understand the difference, imagine working on a memo and making several revisions. You make the last revision just before you go to lunch. When you return from lunch an hour later, you send the memo out via E-mail. The date and time in the E-mail do not reflect the date and time of the last revision, which was an hour earlier. In this example, the date/time in the E-mail is analogous to the Archive Date, which is not the same as the time of the last revision.
- **Archived By** - The employee ID of the user who took an action that caused this version of the record to be archived. For example, the user may have edited the live record in ECTS, which caused this version of the record to be archived (*before* their edit was saved). As above, this is *not* necessarily the user that made the last edit to the archived record.
- **Archive ID** - A numeric ID which uniquely identifies this version of the archived record in the applicable archive table (separate tables are maintained for each type of record, such as Issues, Subtasks, etc.)
- **Archive Reason** - A brief description of the reason that this version of the record was archived. If your system has the optional Reason for Edit tracking installed, the reason will generally come directly from the user in the Archive ID field who specified the reason while conducting an edit or delete operation. ECTS will enter its own brief reason when Reason for Edit tracking is not installed, or for certain system processes that cause the record to be archived.

Highlight Changes

ECTS can display records with changes highlighted. A change is defined as a difference between the record version being viewed and the immediately prior version of the record. To view the highlighted version of a particular record, use the Highlight Changes link. The Normal View link changes the display back to normal, non-highlighted mode. When a record is being viewed with changes highlighted, a View All Prior Field Values link is made available.

Viewing Highlighted Changes

When a record is displayed in form view, prior field values are highlighted and displayed above the current field values. If a field had no value in the prior version, "{No Value}" is used. When records are displayed in a table view listing (ex: Links and Subform records), the

entire record is highlighted if it has been changed. The View Edit History link may be used to see the specific field value changes in these types of records.

Signatures, Signature Requests and Affiliate Routings do not provide change highlighting since these record types cannot be directly modified by users. Change highlighting is also not used for archived Subform records, since the display of these records makes it easy to see the field value changes without highlighting.

Viewing Prior Field Values

When the View All Prior Field Values link has been clicked, and a record is being displayed in form view, ECTS includes and highlights all prior values of each field. A Prior Record Version Summary table is displayed above the record and serves as "road map" to the prior field values. The Reference column shows sequential reference designators such as [1], [2], [3] and these reference designators are used to mark the corresponding prior value in each field. The Archive ID column provides a link to each of the archived prior record versions. The View All Prior Field Values feature makes it easy to see who changed what, why and when.

When child records such as Notes or File Attachments are displayed in form view, all prior values are shown, but reference designators are not included. This is because the changes to the child records were made at different times (and typically by different people and for different reasons) than the changes to the parent record. The Last Edit Date, Last Edit User and Reason for Edit fields on the Notes and File Attachments show who changed what, why and when. When child records such as Links are displayed in a table view listing, the entire record is highlighted if it has been changed (same behavior as when viewing highlighted changes). To see prior values of these records, click one of the Archive ID links in the Prior Record Version Table, or click View Edit History from the live record view, to view archived instances.

Note that when viewing all prior field values for an archived record, only the values that existed prior to this version are shown. Values that existed in record versions after this version are omitted. To see all values that ever existed in the record, return to the live record and view all prior field values from there.

Print View

A copy of the form is sent to the default printer.

Tags

Tags are keywords that you can add to records to make them easier to find. Tags can be private (visible only to you) or public (visible to everyone). Your administrator specifies whether you may add private or public tags, and may vary this capability based on the type of record. For further information, see [Help](#).