ATTACHMENT I

TD-4001P-02

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

[redacted]
Business Process Owner

[redacted]
Author

Document Control

Revision History

Date	Author	Revision	Change

Related Documents

Name	Date	Version #	Document #

Reviewers

Name	LAN ID

Table of Contents

Contributors to the Document

Name	Role	LAN ID
[redacted]	Lead Developer	[redacted]
[redacted]	Developer	[redacted]

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

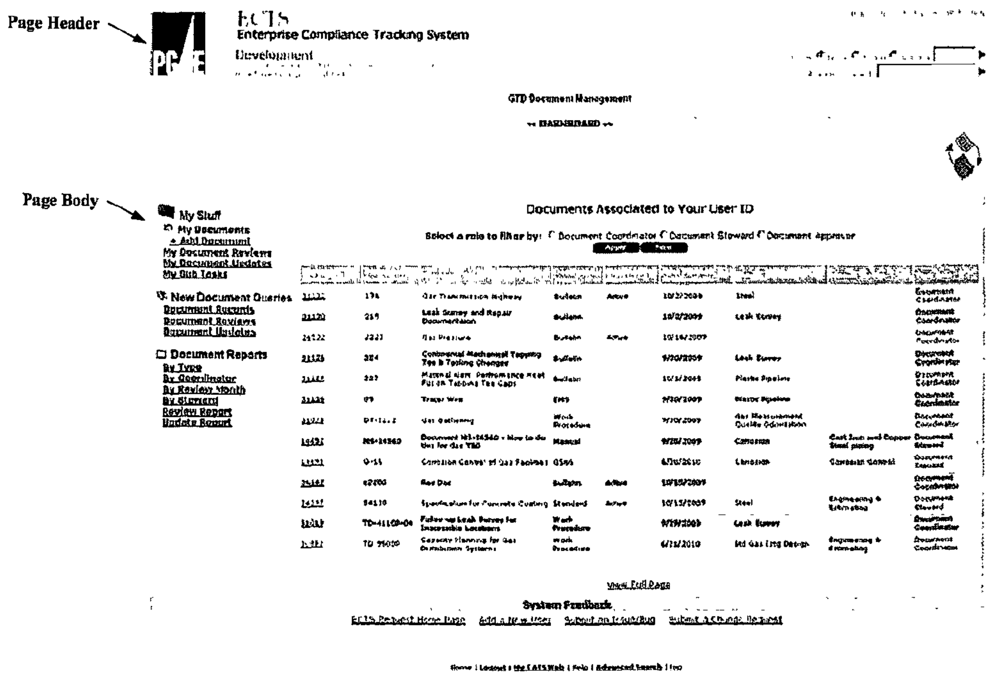
Role Name	Description
Director	The final point of escalation for ensuring reviews to Gas Standards documents are completed within the regulatory timeframe prescribed.
Document Coordinator	The role responsible for maintaining document status, updating notices, and ensuring a Steward is assigned to the 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.

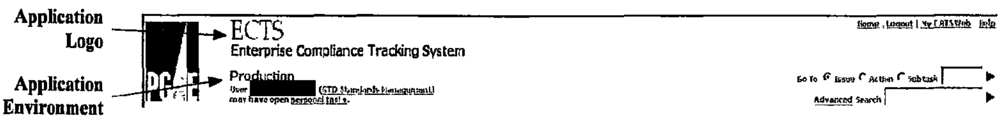
Application Window

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



Page Header

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.



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

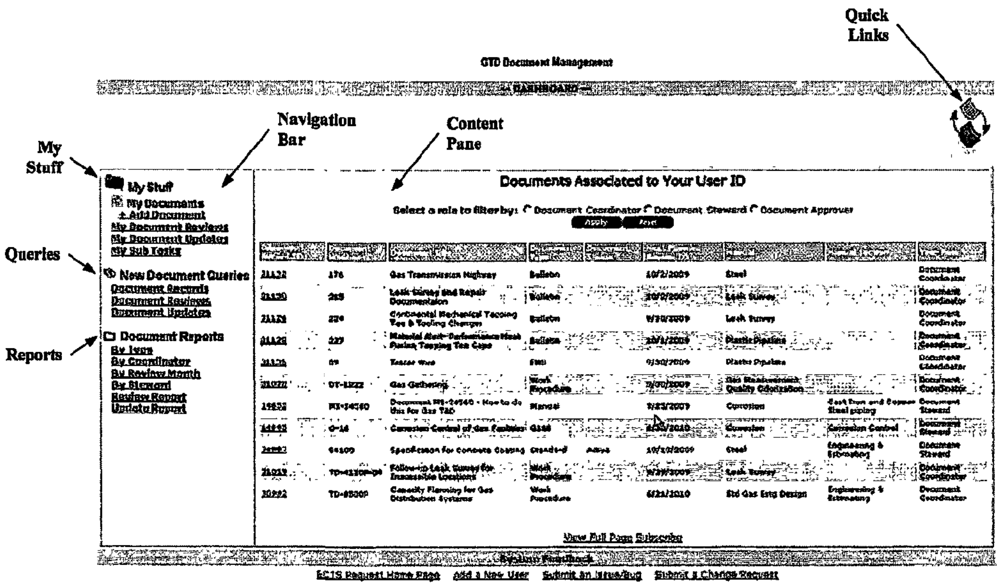
Overview

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.



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

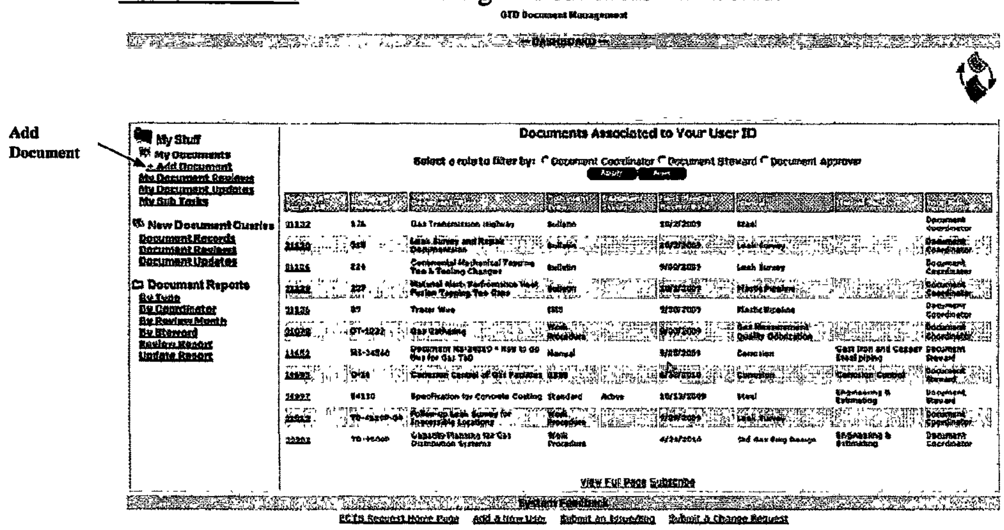
• Data field names are in **bold**

• Form names are in *italics*

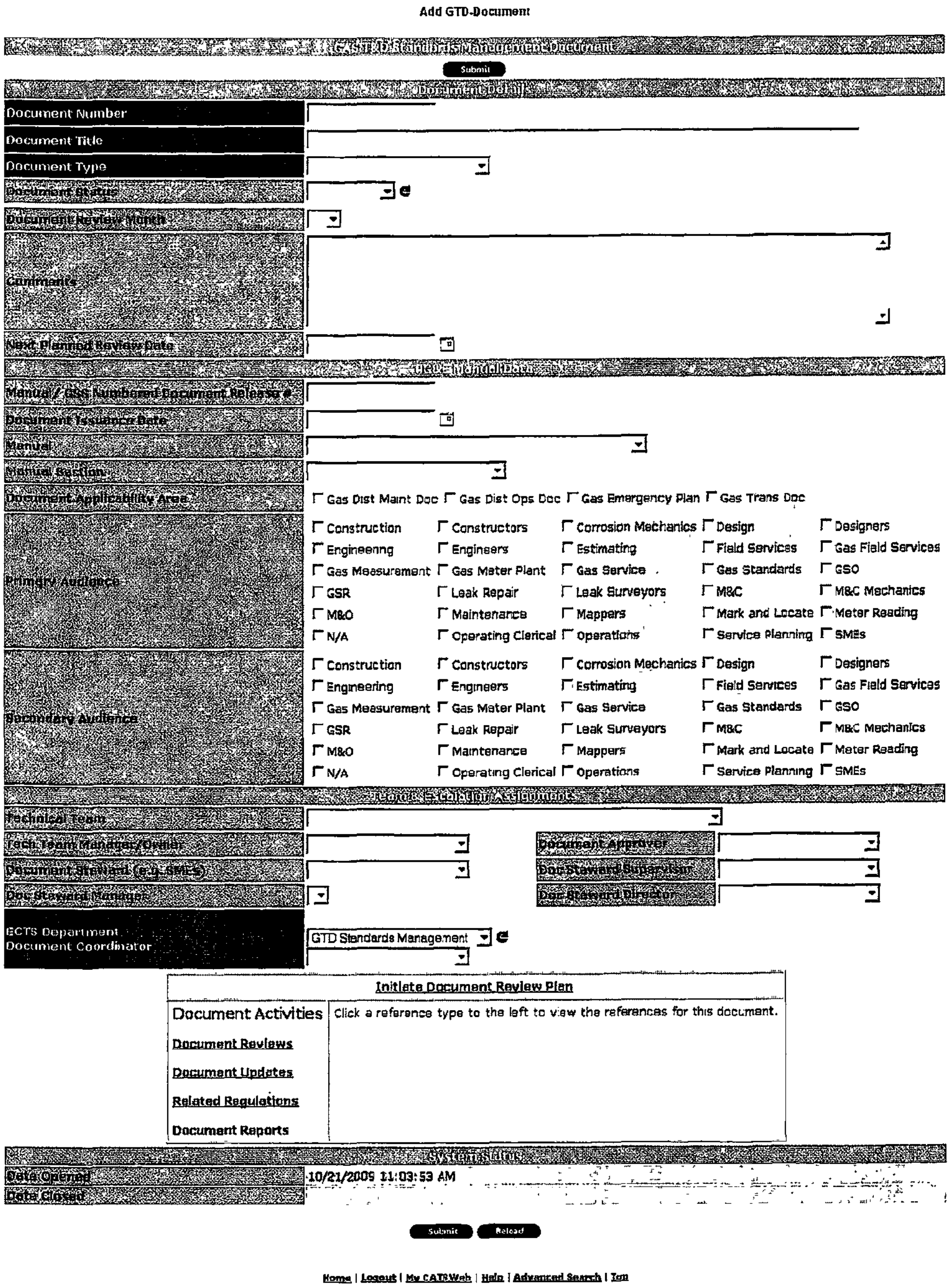
Coordinator Tasks

Creating a New Document Record

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



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

GAS T&D Standards Management Document

Submit

Document Detail

Document Number

Document Title

Document Type

Document Status

Document Review Month

Comments

Next Planned Review Date

Manual Data

Manual / GSS Numbered Document Release #

Document Issuance Date

Manual

Manual Section

Document Applicability Area: Gas Dist Maint Doc; Gas Dist Ops Doc; Gas Emergency Plan; Gas Trans Doc

Primary Audience: Construction; Constructors; Corrosion Mechanics; Design; Designers; Engineering; Engineers; Estimating; Field Services; Gas Field Services; Gas Measurement; Gas Meter Plant; Gas Service; Gas Standards; GSO; GSR; Leak Repair; Leak Surveyors; M&C; M&C Mechanics; M&O; Maintenance; Mappers; Mark and Locate; Meter Reading; N/A; Operating Clerical; Operations; Service Planning; SMEs

Secondary Audience: Construction; Constructors; Corrosion Mechanics; Design; Designers; Engineering; Engineers; Estimating; Field Services; Gas Field Services; Gas Measurement; Gas Meter Plant; Gas Service; Gas Standards; GSO; GSR; Leak Repair; Leak Surveyors; M&C; M&C Mechanics; M&O; Maintenance; Mappers; Mark and Locate; Meter Reading; N/A; Operating Clerical; Operations; Service Planning; SMEs

Team & Escalation Assignments

Technical Team

Tech Team Manager/Owner | Document Approver

Document Steward (e.g. SMEs) | Doc Steward Supervisor

Doc Steward Manager | Doc Steward Director

ECTS Department Document Coordinator: GTD Standards Management

Initiate Document Review Plan

Document Activities: Document Reviews; Document Updates; Related Regulations; Document Reports

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

System Status

Date Opened: 10/21/2009 11:03:53 AM

Date Closed

Submit | Reload

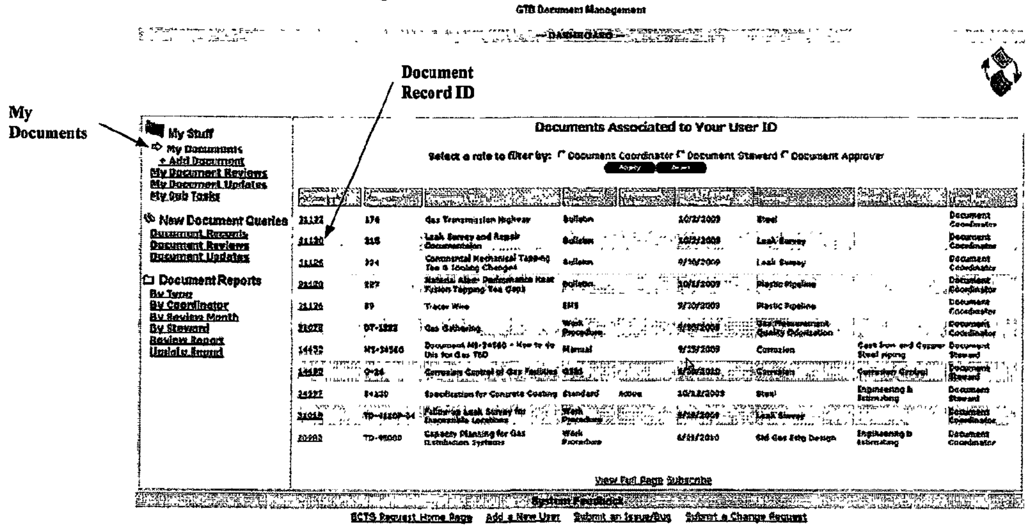
Home | Logout | My CATSWeb | Help | Advanced Search | Top

3. Click Submit.

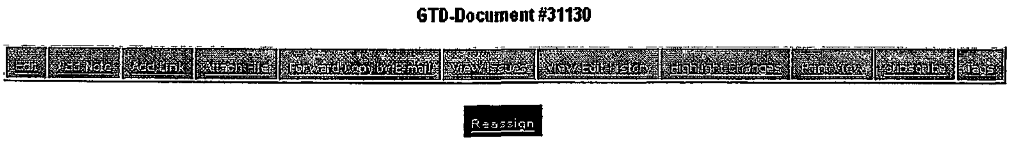
Material Redacted GTR0009367

Editing a Document Record

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



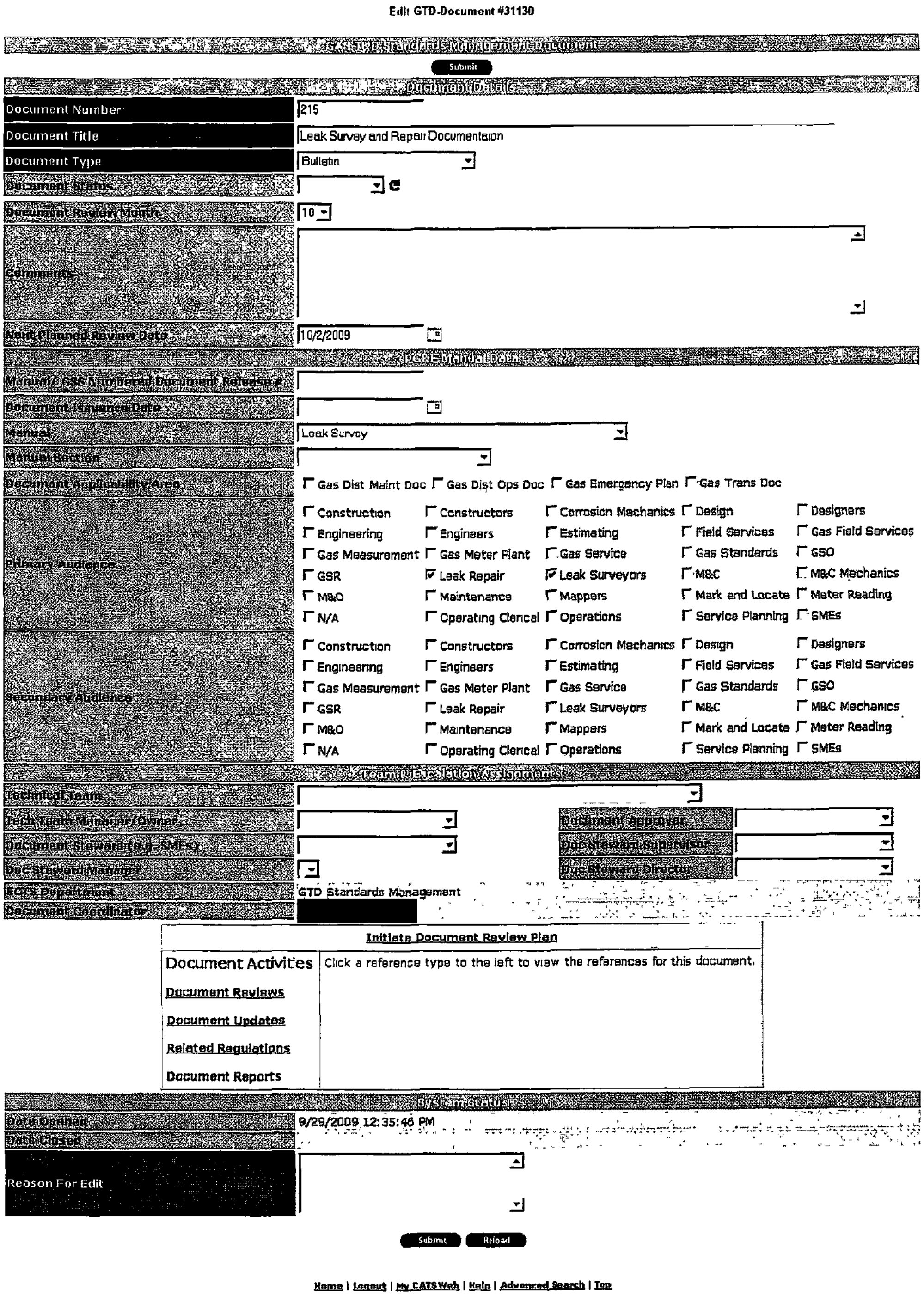
2. Select a Document for editing by clicking the **Document Record ID.**
3. Click "Edit" on the task bar at the top of the *GAS T&D Standards Management Document form.*



4. Update the fields that need to be changed.

Material Redacted

GTR0009368



Edit GTD-Document 431130

GAS T&D Standards Management Document

Submit

Document Details

Document Number	215
Document Title	Leak Survey and Repair Documentation
Document Type	Bulletin
Document Status	
Document Review Month	10
Comments	
Next Planned Review Date	10/2/2009

PG&E Manual Data

Manual/ GSS Numbered Document Release #	
Document Issuance Date	
Manual	Leak Survey
Manual Section	
Document Applicability Area	☐ Gas Dist Maint Doc ☐ Gas Dist Ops Doc ☐ Gas Emergency Plan ☐ Gas Trans Doc
Primary Audience	☐ Construction ☐ Constructors ☐ Corrosion Mechanics ☐ Design ☐ Designers ☐ Engineering ☐ Engineers ☐ Estimating ☐ Field Services ☐ Gas Field Services ☐ Gas Measurement ☐ Gas Meter Plant ☐ Gas Service ☐ Gas Standards ☐ GSO ☐ GSR ☑ Leak Repair ☑ Leak Surveyors ☐ M&C ☐ M&C Mechanics ☐ M&O ☐ Maintenance ☐ Mappers ☐ Mark and Locate ☐ Meter Reading ☐ N/A ☐ Operating Clerical ☐ Operations ☐ Service Planning ☐ SMEs
Secondary Audience	☐ Construction ☐ Constructors ☐ Corrosion Mechanics ☐ Design ☐ Designers ☐ Engineering ☐ Engineers ☐ Estimating ☐ Field Services ☐ Gas Field Services ☐ Gas Measurement ☐ Gas Meter Plant ☐ Gas Service ☐ Gas Standards ☐ GSO ☐ GSR ☐ Leak Repair ☐ Leak Surveyors ☐ M&C ☐ M&C Mechanics ☐ M&O ☐ Maintenance ☐ Mappers ☐ Mark and Locate ☐ Meter Reading ☐ N/A ☐ Operating Clerical ☐ Operations ☐ Service Planning ☐ SMEs

Team & Escalation Assignments

Technical Team			
Tech Team Manager/Owner		Document Approver	
Document Steward (e.g. SMEs)		Doc Steward Supervisor	
Doc Steward Manager		Doc Steward Director	
ECTS Department	GTD Standards Management		
Document Coordinator	[redacted]		

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	

System Status

Date Opened	9/29/2009 12:35:46 PM
Date Closed	
Reason For Edit	

Submit Reload

Home | Logout | My CATSWeb | Help | Advanced Search | Top

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:

Table 2 Document Status Changes

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

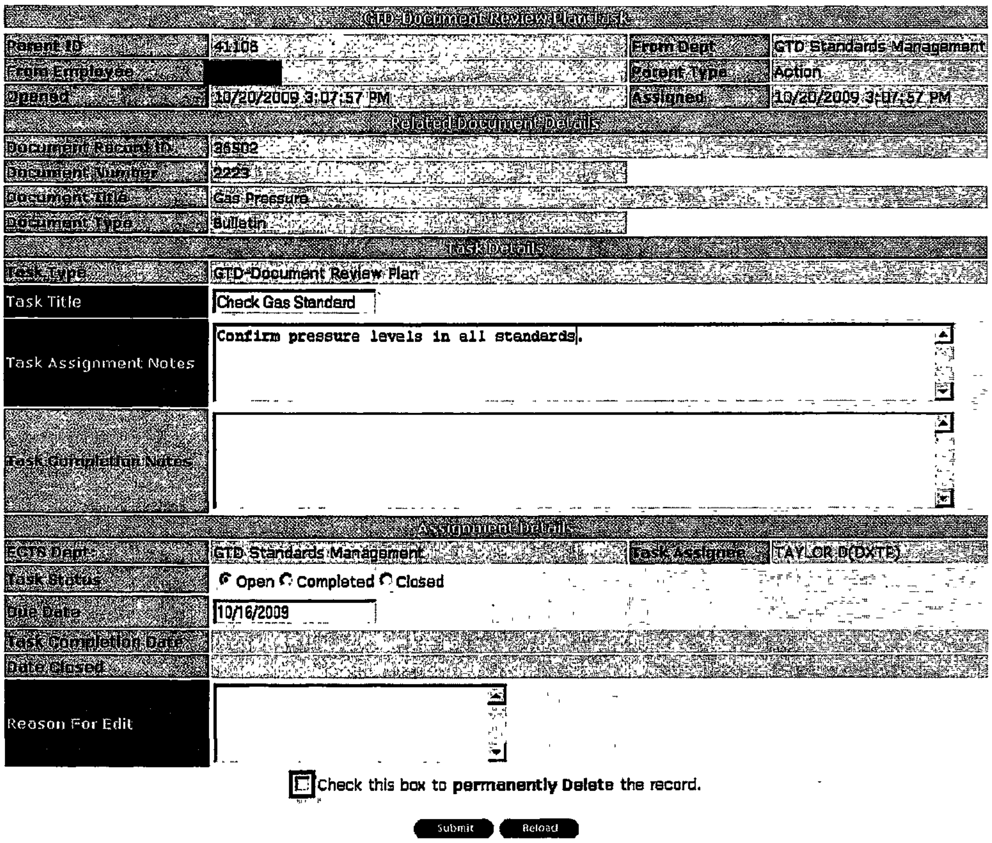
3. Provide a **Reason for Edit**
4. Click Submit.

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



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 use in the steps for each task:

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

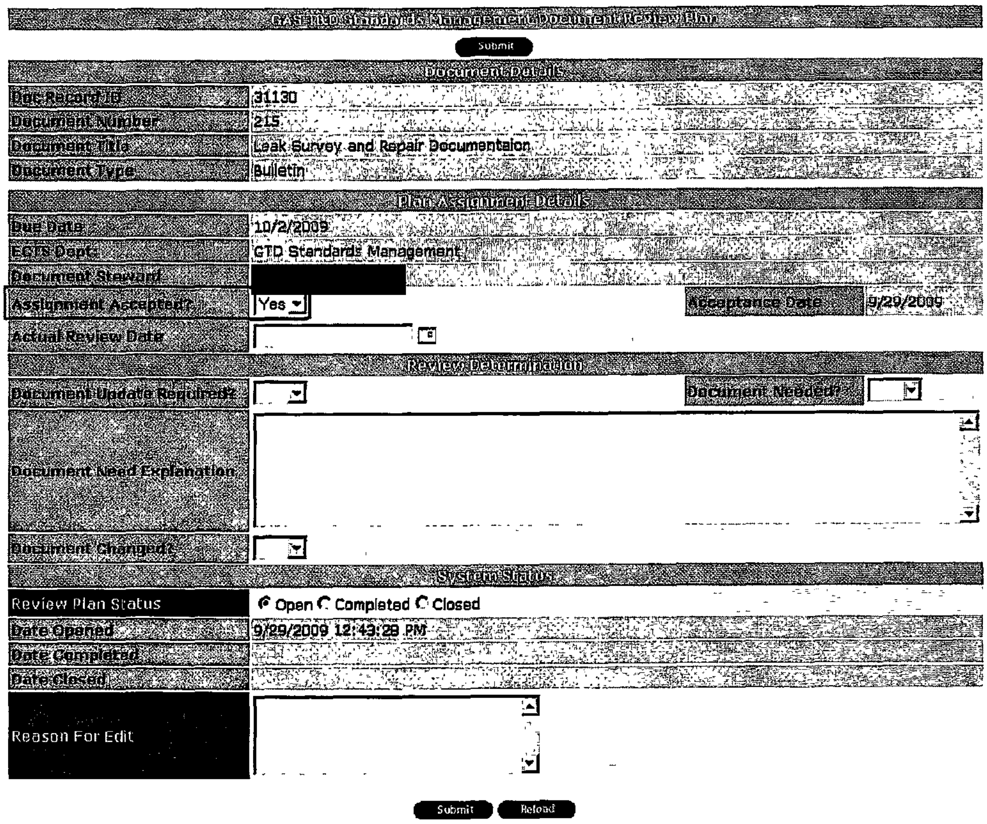
2. Click the <u>link</u> on the Notice.
3. Click <u>Initiate Document Review Plan</u> on *GAS T&D Standards Management Document.*
4. Complete the fields on *Add GTD-Document Review Plan form,* noting that the fields in red are required fields and will need to be filled in before the record can be submitted.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

Accept Document Assignment

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

Material Redacted GTR0009371

Edit GTD-Document Review Plan #31131

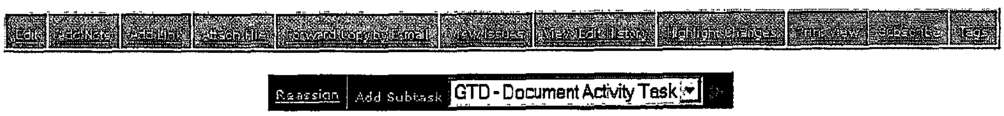


2. Select a response in **Assignment Accepted.**
3. Provide a **Reason for Edit.**
4. Click Submit.

Creating a Plan for a Review (Subtasks)

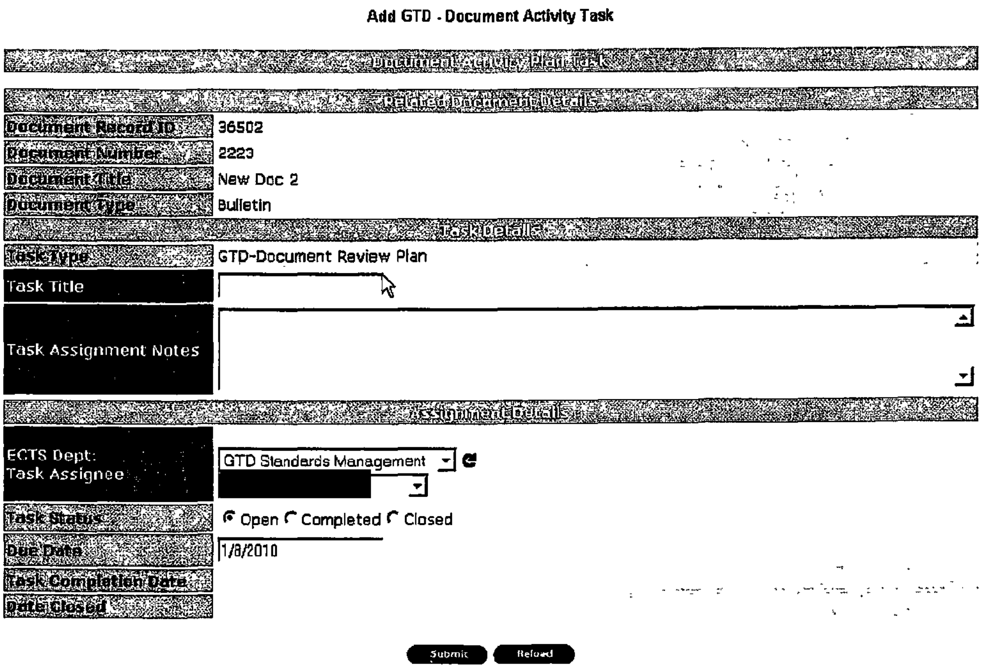
1. Click <u>My Document Reviews</u> on the Dashboard.
2. Select a **Document Record ID.**
3. Click the green arrow to the right of "Add Subtask" on *GTD-Document Review Plan.*

GTD-Document Review Plan #36503



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.

Material Redacted GTR0009372


Add GTD - Document Activity Task

Document Activity Plan Task

Related Document Details

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 [redacted]
Task Status	Open Completed Closed
Due Date	1/8/2010
Task Completion Date	
Date Closed	

Submit Reload

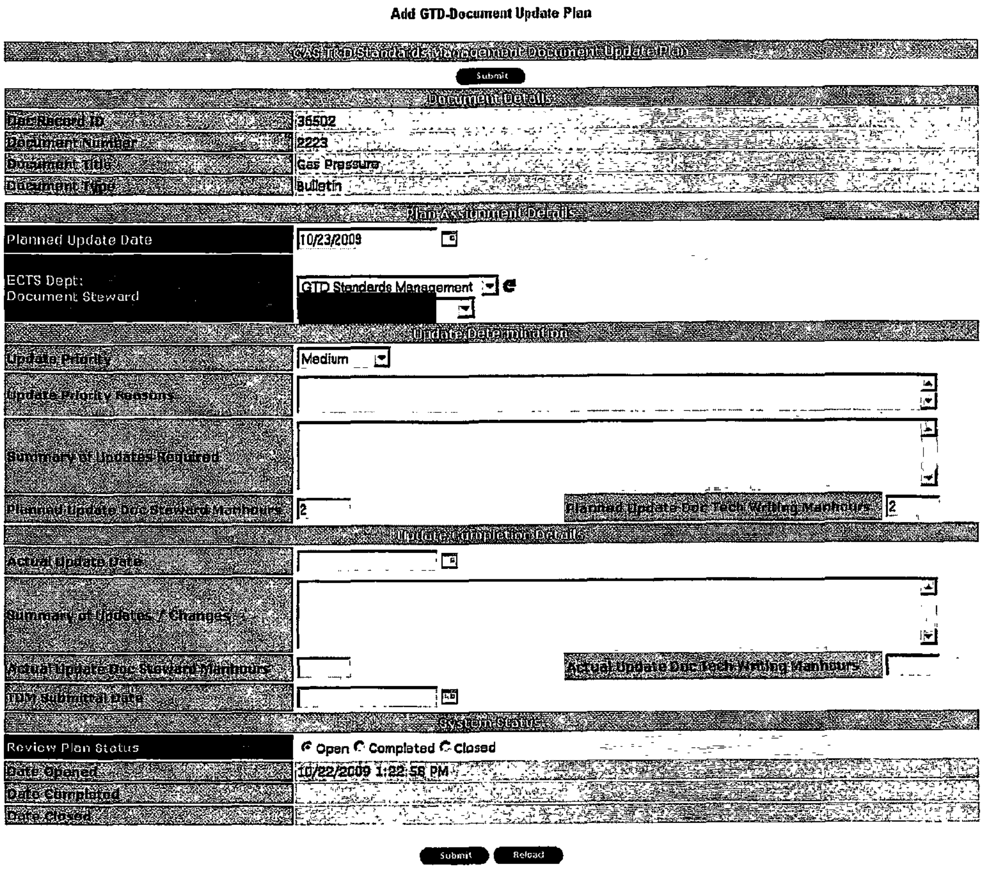
5. Modify **Due Date.**
6. Click Submit.
7. ECTS will send a message to the subtask assignee.
   NOTE: To view all Subtasks, access the Document Review Plan.

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

GAS T&D Standards Management Document Update Plan

Submit

Document Details	
Doc Record ID	35502
Document Number	2223
Document Title	Gas Pressure
Document Type	Bulletin
Plan Assignment Details	
Planned Update Date	10/23/2009
ECTS Dept: Document Steward	GTD Standards Management [redacted]
Update Determination	
Update Priority	Medium
Update Priority Reasons	
Summary of Updates Required	
Planned Update Doc Steward Manhours	2
Planned Update Doc Tech Writing Manhours	2
Update Completion Details	
Actual Update Date	
Summary of Updates / Changes	
Actual Update Doc Steward Manhours	
Actual Update Doc Tech Writing Manhours	
TDM Submittal Date	
System Status	
Review Plan Status	Open / Completed / Closed
Date Opened	10/22/2009 1:22:58 PM
Date Completed	
Date Closed	

Submit Reload

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)

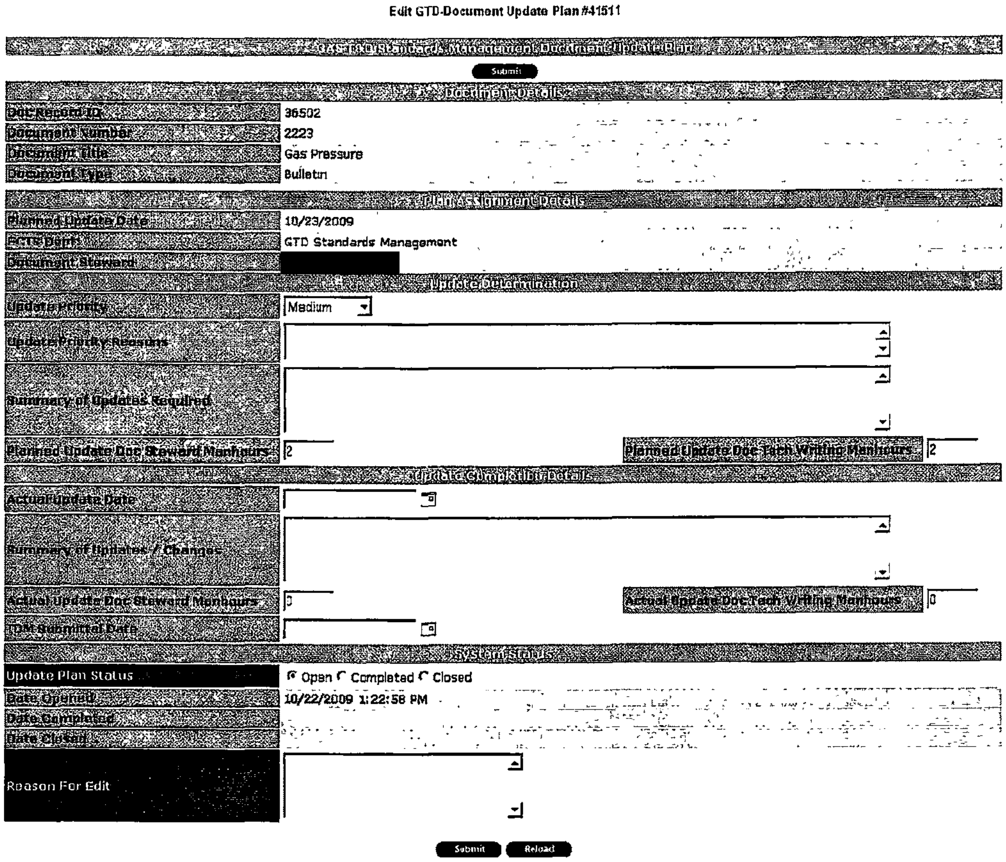
1. Click the <u>My Document Reviews</u> link on the Dashboard.
2. Select a document ID.
3. Click the green arrow to the right of "Add Subtask" on *GTD-Document Update Plan.*
4. Complete the fields on *Add GTD - Document Activity Task form*, noting that the fields in red are required fields and will need 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 <u>My Document Updates</u> link on the Dashboard.
2. Select a Doc Update Record ID.

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


Edit GTD-Document Update Plan #41511

GAS-GTD Standards Management Document Update Plan

Submit

Document Details

Doc Record ID	36502
Document Number	2223
Document Title	Gas Pressure
Document Type	Bulletin

Plan Assignment Details

Planned Update Date	10/23/2009
FCTS Dept	GTD Standards Management
Document Steward	[redacted]

Update Determination

Update Priority	Medium		
Update Priority Reasons			
Summary of Updates Required			
Planned Update Doc Steward Manhours	2	Planned Update Doc Tech Writing Manhours	2

Update Completion Details

Actual Update Date			
Summary of Updates / Changes			
Actual Update Doc Steward Manhours	0	Actual Update Doc Tech Writing Manhours	0
TDM Submittal Date			

System Status

Update Plan Status	Open Completed Closed
Date Opened	10/22/2009 1:22:58 PM
Date Completed	
Date Closed	
Reason For Edit	

Submit Reload

4. Enter data into fields in the Update Completion section of the Update Plan.
5. Click the Update Plan Status.
6. Provide a **Reason for Edit.**
7. Click Submit.

Reassigning a Subtask

1. 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	[redacted]	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	35502		
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 S100.		
Task Completion Notes			
Assignment Details			
ECTS Dept: Task Assignee	Assignee GTD Standards Management [redacted]		
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	[redacted]	Last Edit Date	10/20/2009 3:09:55 PM
Last Edit User	[redacted]		

Parent Information
GTD-Document Review Plan 41106

Tags: There are no tags. Public

2. Click Reassign At the top of the form.

Reassign GTD - Document Activity Task #68

Department	GTD Standards Management	Employee	[redacted]
Due Date	1/16/2009		
Reason For Edit			

Submit Reload

3. Select an **Employee** for the Assignment.
4. Provide a **Reason for Edit.**
5. Click Submit.

Material Redacted GTR0009376

Application Features

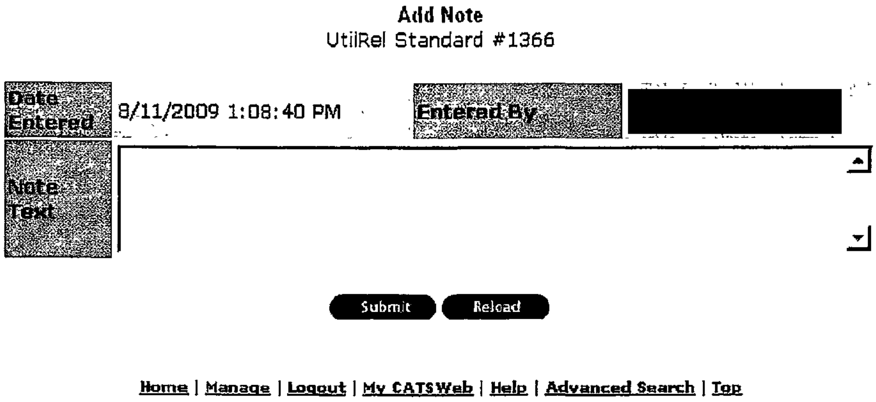
The tool bar at the top of forms allows access to a number of application features. The following section contains a description of each feature.

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 Link

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

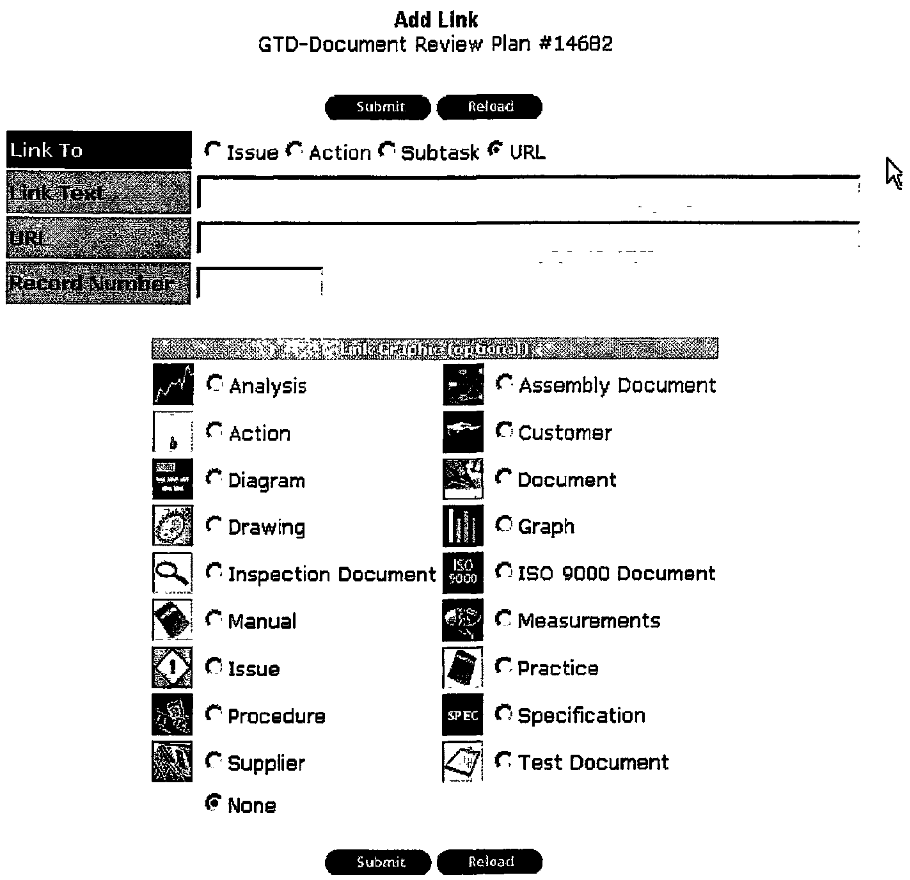
Link To - Specifies the type of link. These links point to other records in the ECTS system. URL links can point to any page, document, file, etc. anywhere on the Internet or intranet.

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/PartSpec.htm*). The field is only used for URL links and is ignored for Issue, Action or Subtask links.

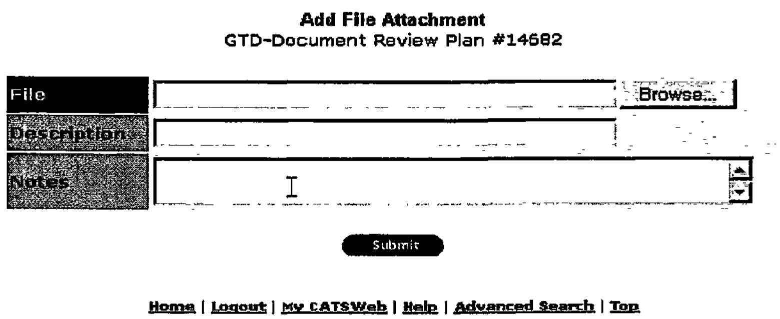
Record Number - For Action or Subtask links, this specifies the record number to link to. The field is ignored for URL links.

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).



Attach File

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

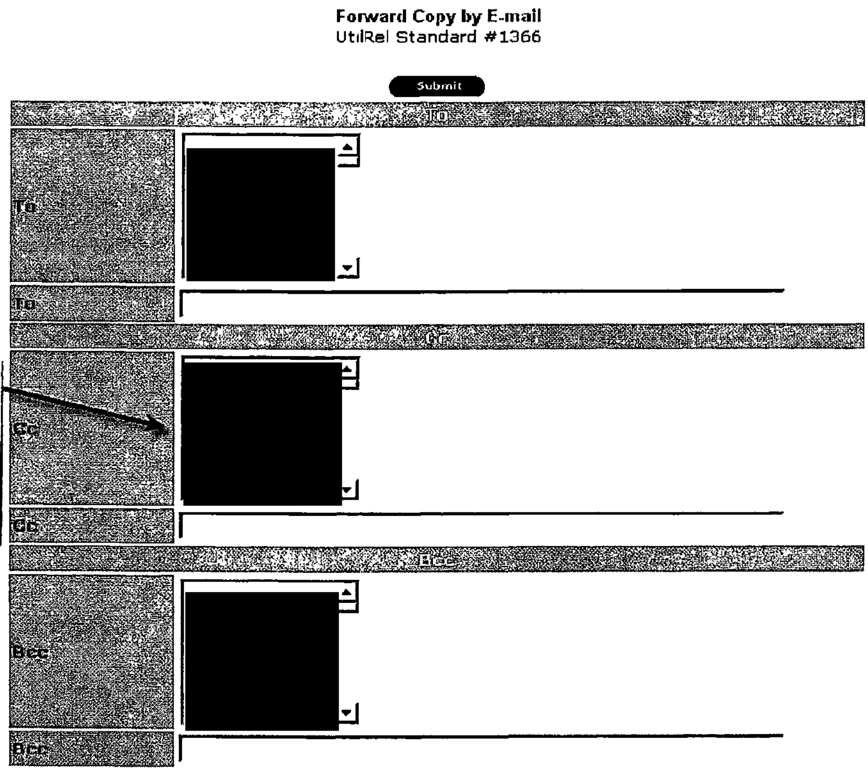


Forward Copy via E Mail

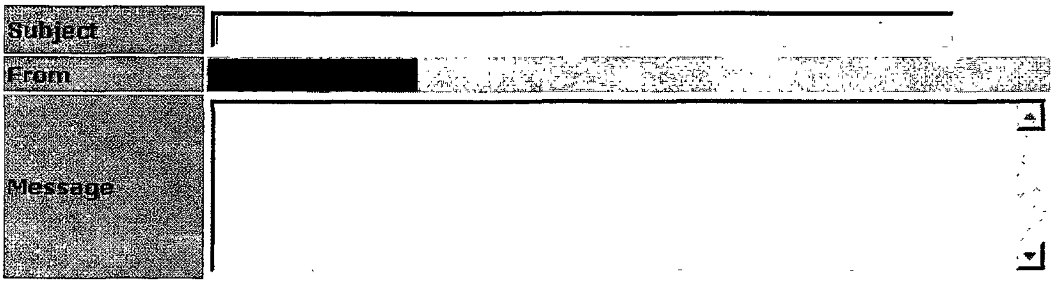
The ECTS **Forward by E-mail** page allows a copy of the record to be sent via E-mail. The recipients of the E-mail are <u>not</u> granted access to the record on the live ECTS system.

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.

To select more then 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

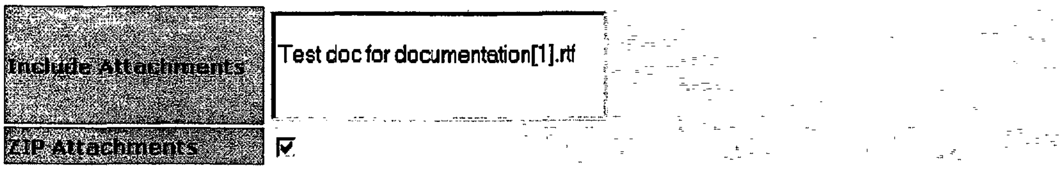


Include Attachments - If file attachments exist for the record being forwarded, this list will display the unique attachment filenames. Select the attachment filenames that you wish to include with the message.

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.



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.

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 or 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*.