Dashboard

See your logo here
Upload a different logo for each project; Reports will have your logo.

Account level menu bar
Role based access means only users with relevant access are shown certain choices.

Account Summary menu
is available only for the Super User.

You may choose a language other than English using this dropdown menu.

Access details of changes or updates through the Revision History button.

Five most recently created projects shown in reverse chronological order with statistical data.

Activity calendar & chart (not visible in this screen shot) for the project selected.

Access the comprehensive User manual here (opens in a new window).

Logged in user’s name and settings menu to change password and to select choices for units, date, print sizes.

Mouse over on data to see a list of welds or to perform action e.g. inspection.
## Step 1 – Add WPS & PQR

1. Open the Libraries menu
2. Select WPS
3. Click on “Add Details” button. You may also import a list of WPS & PQR using the Import CSV button
4. Enter the WPS & PQR data and upload the files
5. Once saved, the WPS will be listed. If you revised a WPS and created a new revision, the “Archive” button will become visible

**NOTE:** The libraries menu is available for Super User, Account Administrator and Account Contributor roles
Step 2 – Add Welders

1. Open the Libraries menu
2. Select Personnel
3. Click on “Add Details” button. You may also import a list of welders using the Import CSV button
4. Enter the welders details. If you do not want to use the welder, uncheck the “Status” checkbox to make the welder inactive
5. Select all the WPS the welder is qualified to and upload the WPQ files
6. Add certification details, if any. This is useful for managing qualifications of welding professionals
7. Once saved, the welders will be listed

NOTE: Continuity or prolongation records are automatically maintained from project data
Step 3 – Create New Project

1. Go to Dashboard (click on the logo) and select the “Account Summary” tab.

2. Click this button to create a new project.

3. Enter the project number, title and select the size (small, medium or large).

NOTE: The Account Summary tab is visible only for the Super User.
Step 4 – Configure the Project

1. Go to Dashboard or Projects tab and click on the project number.

2. Until the project is configured, this message will appear and the project cannot be used.

3. Click the “Configure” button.

4. Enter the customer name, upload separate logo for the project, select units & weld numbering system.

5. Select users to assign to roles. If you are the only user, select your name for Project Administrator 1.

6. Add other users to roles. If you are the only user, assign yourself to all the roles.

NOTE: Users may be added through the “Users” menu.

NOTE: The new project may be configured by the Super User or Account Administrators.
Step 4 – Configure the Project - continued

Set the NDE and inspection requirements for the project. These may be edited later.

Select the maximum number of repair welds a failed weld can have. Repair welds are created automatically and will have “-R1” or “-R2” suffixed.

Select “Common” or “Separate” for materials, consumables and drawings. If you select “Common”, this project will use data from the respective common library (see top menu). If you select “Separate”, this project will have separate menu for these.

Click “Save” to complete the configuration and make the project available to all users.

Select users who will have read only access. This field is optional.

NOTE: The new project may be configured by the Super User or Account Administrators.
Step 5 – Select WPS & Welders for the Project

NOTE: The project menu bar showing the menu structure based on the configuration

NOTE: You may change the default access to the project for different roles through “Access Control”

Click “+WPS” to add WPS and welders to the project

Select the WPS’ you would like to use in the project and if there is more than one version of it, then select the version as well

Select the welders for each WPS. Only those who are qualified to a WPS will be listed

Click “Save” to save the selection and continue
Step 6 – Load Drawings

1. Click “Add” to open a single entry screen (shown below).
2. You may add drawings through the “Multiple Entry” interface that looks and behaves like Excel spreadsheet or import a spreadsheet file through the “Import CSV” button.
3. You may bulk upload the drawing files with this button.
4. Enter the drawing number, other information and upload the file.
5. Once saved, the drawings will be listed.

NOTE: The libraries menu is available for Super User, Account Administrator and Account Contributor roles.
Step 7 – Weld Mapping (Annotate on Drawings) - optional

1. Click on the drawing number from the list to view the Drawing Detail screen.
2. Click on this button to open the drawing in the annotation mode (screenshot shown below).
3. Select the page using the arrows.
4. Select the pen colour from the palette.
5. Select one of the three shapes.
6. Select the pen icon and draw; use the finger pointer icon to edit size, position, leader & elbow.

NOTE: Each drawing may have up to 5 sheets. Annotations (weld map bubbles) may be transferred from one revision of the drawing to another.
Step 8 – Create Items - optional

NOTE: An item may be a spool, a pressure vessel or a line. Though this step is optional, it is highly recommended to save time.

1. Click on items tab

2. Click on this button to add an item (see screenshot below)

3. Enter a unique number for the item and enter other information

4. Add drawings. An item may have up to 10 drawings

5. Saved items will be listed here
Step 9 – Create Welds

Enter the weld number, select drawing number, item number and enter weld inches (optional) and planned date.

Click “Add” to open a single entry screen (see screenshot below LHS).

You may add welds through the “Multiple Entry” interface (see screenshot) or import a spreadsheet file through the “Import CSV” button.

NOTE: This step creates the welds. Allocation of WPS and welders need to be done through the “Add Details” button - see the steps 11 & 12.

In the multiple entry interface, select the last entry row and by pressing on the blue square at the bottom of the last cell and dragging it down, you can create new entries. The weld number will be appended by 1 and all other entries will be copied down.
Step 10 – Create a Work Pack - optional

1. Select “Work Packs”

2. Click here to create a new work pack

3. Select Drawing Number, Item Number, Weld Number or All to filter the welds

4. Enter the search criteria to see the matching welds

5. Select all or some welds, give a reference number and click save

NOTE: Allocation of WPS and welders is easier through the edit work pack function – see the next step button - see the steps 11 & 12
Step 11 – Edit a Work Pack - optional

1. Select the Work Pack from the Work Packs list.

2. Select the WPS.

3. Select the welder IDs. Multiple welders can be selected for root, fill or cap. Welders whose last weld for the process is over 6 months old will be shown in red.

4. Select materials & consumables (data for these need to be entered in the materials & consumables sections).

5. The work pack and all the weld mapped drawings for the welds in this pack may be printed as PDF files. Click on the printer icon in the Work Packs list screen and then on these buttons to generate PDF files.
Step 12 – Allocate & update Welds

1. Click “Add Details” button in the Welds screen.

2. First select the WPS.

3. Select the welder IDs. Multiple welders can be selected for root, fill or cap. Welders whose last weld for the process is over 6 months old will be shown in red.

4. Select materials & consumables – columns not shown (data for these need to be entered in the materials & consumables sections).

5. If a weld is already completed, you may enter the date here or through the weld details screen or through a work pack or through the mobile tablet app.
Step 13 – Visual Inspection

1. Open “+ Inspection” menu from welds list screen.

2. This is the multiple entry inspection screen (data to the left of inspection result column will be locked).

3. Results can be selected & photographs uploaded.

4. Click on the “Inspection” tab from a weld’s detail info screen to open the full inspection function (same functionality in the mobile tablet app).

5. These checkboxes will open other checkboxes to record pre-weld & inspection during welding.

6. You may upload a photograph or take the picture of a weld using the device’s camera in the mobile app.

NOTE: Only those users who have the welding inspector’s role can access the inspection menu.
Step 14 – Create Test Request

Test requests already created will be listed here. You may view and add results using the hyperlink.

Search and select welds to test.

NOTE: Only those welds that are marked as welded and not already added to another test request will be shown here.

Select one or more tests; Only those NDE methods selected in project configuration will be available.

“Pen” is for assigning penalty to a welder.

If a weld has failed and another weld has to be selected as a tracer for the failed weld, you may do that here.

Test requests may be revised using this icon.

Click on this button to create a new test request (see screenshot below).

Click on this tab.

Click on this tab.
Step 15 – Test Reports

1. Click on this tab
2. Click on this button to create a new test request (see screenshot below)
3. Enter the report details and upload the report in PDF format
4. Test reports already added will be listed here. You may view and edit using the hyperlink

Note: Test reports may be linked to welds in the test pack edit screen
Step 16 – Project Reports

Click on this tab

You may view and print reports. You may also search and export results to a spreadsheet for further analysis.

The history reports are only shown for the roles of Project Administrator and above.
Step 16 – Project Reports - continued

“Weld Quantities” report for measuring productivity

Search to filter data within the report for search terms

You may print this report to a PDF file and export results to a spreadsheet for further analysis

NDT Compliance report by drawing
Step 17 – Final Project Documentation

1. Open “Reports” and navigate to “Project Data Book” tab in the second level menu bar.

2. Select some or all drawings.

3. Click on this button to generate the documentation (see next page for screenshots).

4. Open the configuration screen.

5. Select what to include and the order of the listing by moving the sections around.

6. Click on this button to select data for the drawings to be included in the final documentation.
Step 17 – Final Project Documentation - continued

When an uncompiled file is available, this button will be enabled. Click to generate a PDF file with all the attachments embedded.

Once the compilation process is completed, an email will be sent to the user and the link to download the file will be shown.

NOTE: The “Compile” button will be disabled when a compiled data book is available. When an uncompiled data book is generated, the compiled data book file will be deleted and the compile button will be enabled.

Click “Print” to generate the PDF file with links to the files.

Once it is generated, the file will be available to download for 48 hours.

Details of data in the entire project and for the drawings selected can be seen here.