



Zenator Systems – Best Practices Scheduling Reports & File Sharing



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Introduction

In order for Zenator to operate most effectively and efficiently for the Customer and obtain productivity and performance benefits, it will be essential for Zenator to connect with the Customer's project server(s).

There, a Shared Folder for reports will be created and access setup to the document library. It is assumed the document library will be the location containing all current drawings and engineering documents. The document library (or other location) could be where completion information from Zenator will need to be sent, as documentation is transmitted to the Customer at key milestones, such as System Turnover, Transfer of Care, Custody and Control (TCCC), intermediate and final Handover to Operations. There will be many such events, with the terminology, sequence and frequency varying from Customer to Customer.

Objectives and Recommended Sequence

After initial training of project users, setting up File Sharing is the next step in the implementation scope of work and a critical activity.

This document should be shared with the Customer's IT people that will provide the required permissions, credentials and confirm details of server(s), ports, URLs and any other such details as may be required?

Falcon Group will provide all relevant information needed by the Customer's IT people. Note, the server address for Zenator is: <https://vsnn.falconglobal.net>, where VSnn is the number of the specific virtual server Zenator operates from.

Falcon Group outsources its IT infrastructure and networking provision to Precept, a Northern Ireland company based in Belfast, where the Falcon development team operates from.

The purpose of the connection is essentially two-fold:

- To set up a Shared Folder where Zenator Business Users (ZBUs) and other authorised project team members can access reports from Reports Plus – as mentioned during ZBU training, this is a Best Practice we want to deploy in order for the Customer to obtain productivity and performance benefits;
- To enable the Customer engineering drawings and documents to be referenced in Zenator and for completed Zenator-generated documents (ITRs, Certificates, MOCs, Inhibits, Isolations, PLIs) to be copied to the designated repository in the document library.

Setting up and testing the two-way connection will require support from Precept.

All coordination in getting Zenator/VSnn connected with the Customer document library will be coordinated with a Senior Manager, the Zenator Power Users (ZPUs) on site and in conjunction with the Customer's IT people.



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Creating a Shared File Folder for Reports

Here follows a brief summary of our guidance. Contact FGL at support@globalfalcon.net for greater detail.

1. Within Customer's network, Customer will create a folder on SharePoint called Zenator Reports. This is where designated project users will access reports produced automatically from Zenator's reporting tool called, Reports Plus;
2. Customer will assign designated project users with permissions to access the folder. Customer will share the users' access credentials with Falcon Group/Precept. Note, the customer's IT people and the ZPUs should be assigned with permissions to Add, Change, Delete; while ZBUs and normal project users will be read-only;
3. Customer will create an Office 365 account for Zenator (we suggest calling it zenator@yourdomain.com) and assign the account with permissions to Add, Change, Delete;
4. Falcon Group/Precept will install and activate One Drive sync on VSnn and assign credentials and permissions for users set up in Step 2, above;
5. Falcon Group/Precept will notify Customer of the specific location on VSnn where published reports from VSI I are stored.
6. Zenator Reports Plus will be programmatically configured by Falcon Group to produce a designated number, type and report format at a specified frequency to the Shared Folder. This step is performed in coordination of ZPUs with Falcon Group.
7. Falcon Group/Precept will perform ongoing maintenance to ensure smooth uninterrupted running of the file sharing folder.

Creating a Shared File Folder for Transmitting Completion Documentation

Here follows a brief summary of our guidance. Contact FGL at support@globalfalcon.net for greater detail.

1. As the project progresses and significant completion events occur (as mentioned in Introduction) documentation will be transmitted from Zenator to the final end-user, which in most cases is Operations. This location will probably different to the shared file folder for Reports and will be setup by the Customer's IT people in coordination with Falcon Group.



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Creating access to the Document Library

Here follows a brief summary of our guidance. Contact FGL at support@globalfalcon.net for greater detail.

1. Within Customer's network, Customer will expose to the user called zenator@yourdomainname.com (a trusted party) a folder(s) containing the engineering drawings and documents to be referenced in Zenator. Note, it is the link to the pdf format of each of these documents that will be populated in Zenator, not copies of the documents themselves. We do not recommend allowing the format of other document types;
2. Customer will assign only the ZPUs and the user called zenator@yourdomainname.com with permissions to access the folder(s) containing engineering drawings and documents.
3. Knowing the file details and link address, the ZPUs will populate the links into Zenator;
4. When the process has been completed, project users can view relevant engineering drawings such as P&IDs, SLDs, Data Sheets, Piping Isometrics and Loop Diagrams in Zenator, in their correct context, ie, the parent System, Sub System or Tag the document belongs to.

Important Points to Note

1. This Best Practice is borne out of experience and Lessons Learned from many projects.
2. By following the guidance in this Best Practice, Customers will achieve optimal productivity from the project team as each person that uses Zenator (and the information it produces) in the course of their job, will find their workflow significantly streamlined.
3. Periodic maintenance of the Shared Folder and access to Document Library is required to ensure smooth running of the system.



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Scheduling Reports to be Created Automatically in the Shared Folder Choose Your Favourite Reports You Can Access in the Shared Folder

For any ZBU, from Inspector to Manager level, it isn't an effective use of their time to run reports. Instead, the process is simplified for everyone by simply choosing the reports they want and then accessing them in the shared folder.

R+ Menu		Shared Folder				Person 1 / email				Person 2 / email			
Number	Title		Size	File Format	Frequency	Email	Size	File Format	Frequency	Email	Size	File Format	Frequency
01	Project Summary Report	Yes	A4	pdf	Daily	Yes	A4	pdf	Daily	No			
02	System Daily Report	Yes	A4	pdf	Daily	No				No			
03	System Report Summary (Pivot)	Yes	A4	pdf	Daily								
04	Sub System Rundown Curve	Yes	A4	pdf	Daily								
05	Weekly Progress All ITR Nodes	Yes	A4	pdf	Daily								
06	Weekly Progress (Mosaic View by System Group)	Yes	A4	pdf	Daily								
07	Weekly Progress (Mosaic View by Discipline)	Yes	A4	pdf	Daily								
08	PLI Curve Analysis	Yes	A4	pdf	Daily								
09	PLI Analysis (Pivot)	Yes	A4	pdf	Daily								
10	ITR Overall List	Yes	A4	pdf	Daily								
11	Sub System Skyline	Yes	A4	pdf	Daily								
12	ITR Report Summary (Pivot)	Yes	A4	pdf	Daily								
13	ITR Overall Detailed List	Yes	A4	pdf	Daily								
14	Test Packs with ITRs Status	Yes	A4	pdf	Daily								
15	TLCB ITRs (Pivot)	Yes	A4	pdf	Daily								
14	Other report type or filter selections 1	Yes	A4	pdf	Daily								
16	Other report type or filter selections 2	Yes	A4	pdf	Daily								
17	Other report type or filter selections 3	Yes	A4	pdf	Daily								
15	Other report type or filter selections 4	Yes	A4	pdf	Daily								
18	Other report type or filter selections 5	Yes	A4	pdf	Daily								
19	Other report type or filter selections 6	Yes	A4	pdf	Daily								
16	Other report type or filter selections 7	Yes	A4	pdf	Daily								
20	Other report type or filter selections 8	Yes	A4	pdf	Daily								

The above screenshot from the **R+ Menu** is used by ZPUs to canvass higher level ZBUs (senior managers, supervisors) to find out which reports they would like to receive automatically into their inbox.



Reports%20Plus%20Scheduler%20-%20

For all other ZBUs (general project users) the ZPU will use the **R+ Menu** find out which reports they would like to have access to, consistent with their job function and access permissions.

ZPUs should issue the **R+ Menu** to canvass the views of all project team members as quickly as possible, so as to not delay the setup. When the survey is complete, Falcon Group will provide ZPUs with assistance to configure the popular reports to be delivered each day as pdfs so these can then be accessed by ZBUs and any other authorised project users.

Falcon Group does not recommend putting xlsx report format in the shared folder. Only authorised users with the correct permissions should receive reports in xlsx format.