Projects and Equipments

Master Data

Master data is typically shared by multiple users and groups across a project. Master data includes data about Clients, End users, Third party, Projects, Sub-contractors, and Locations.

> Image-1651039906305.png Image not found or type unknown Users assigned with **cuteQM_Power User** role only can access the **Master Data** menu and their functionalities.

1.0 Clients

In the Pressure Vessel module, clients are created so that when creating project they can be selected as Client. The **Clients** tab in the **Master Data** menu helps you to add the details of clients. If you want to add any new client,

Click **Clients** in the **Master Data** menu.

The **Clients** page opens.

image-1651038981611.png Image not found or type unknown

Figure 1.1: Clients page

Add a Client

If you want to add a client, do the following steps,

1. Click image-1651039059221.png Image not found or type unknown (**ADD** button) in the **Clients** page. See Fig 1.1.

   The page shows a new box to add the details of a client.

image-1651039098211.png Image not found or type unknown

   image-1651039119706.png Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of a client.

3. In the **Abbreviation** box, enter the abbreviation for the added client.

image-1651039215712.png

4. If you want to add a logo, click Image not found or type unknown (**Browse** button) provided with the **Logo** box, and then add the logo of the client.

5. Click **Save**.

The client is successfully added.

Edit a Client

If you want to edit any existing client in the **Clients** page, do the following,

image-1651039346963.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective client. See Fig 3.1.

The page shows the details of added client.

image-1651039368651.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete a Client

image-1651039430200.p

If you want to delete any specific client from the list of clients, you can use Image not found or type unknown (Delete icon) provided in the **Delete** column of the **Clients** page, See Fig 3.1.

image-1651039430200.png

1. Click Image not found or type unknown (Delete icon) for the corresponding client.

   You receive a notification message "**Do you want to delete this row**?".
2. Click **OK**.
   The selected client will be deleted.

Export Clients List

You can export a list of clients in the pdf and excel formats.

image-1651039614212.png

1. If you want to export the clients list in the pdf format, click Image not found or type unknown (**PDF** button). See Fig 3.1.

The clients list will be downloaded in the pdf format.

image-1651039668111.png

2. If you want to export the clients list in the excel format, click Image not found or type unknown (**Excel** button).

The clients list will be downloaded in the excel format.

2.0 End Users

End User is an entity who will be using the Pressure Vessel being fabricated. Sometimes, the end user can be same as client for you. The **End Users** tab in the **Master Data** menu helps you to add the details of end users. If you want to add any end user, do the following steps,

1. Click **End Users** in the **Master Data** menu.

   The **End Users** page opens.

image-1651039756087.png

Image not found or type unknown

Figure 2.1: End Users page

Add an End User

If you want to add an end user,

image-1651039862728.png

1. Click Image not found or type unknown (**ADD** button) in the **End Users** page. See Fig 2.1.

The page shows a new box opens to add the details of an end user.

image-1651039885629.png

Image not found or type unknown

image-1651039906505.png

Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of an end user.

3. In the **Abbreviation** box, enter the abbreviation for the added end user.

image-1651039956634.png

4. If you want to add a logo, click Image not found or type unknown (**Browse** button) provided with the **Logo** box, and add the logo of the end user.

5. Click **Save**.

The end user is successfully added.

Edit an End User

If you want to edit any existing end user in the **End Users** page, do the following,

image-1651040718465.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective end user. See Fig 6.2.

The page shows the details of the selected end user.

image-1651040745669.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete an End User

image-16510408C

If you want to delete any specific end user from the list of end users, you can use Image not found or type (Delete icon) provided in the **Delete** field of the **End Users** page.

Export End Users List

You can export a list of end users added in the **End Users** page in the pdf and excel formats by

image-1651040857920.png

using Image not found or type unknown (**PDF** button) and

image-1651040869702.png

Image not found or type unknown (**Excel** button).

3.0 Third Party

A Third Party Inspector is an independent inspector, usually from a certification body or inspection agency, who verifies that fabrication, testing, and documentation meet the client's requirements, international codes, and sometimes statutory regulations. The **Third Parties** tab in the **Master Data** menu helps you to add the details of third parties. If you want to add a third party,

1. Click **Third Parties** in the **Master Data** menu.

   The **Third Parties** page opens.

image-1651040938528.png

Image not found or type unknown

Figure 3.1: Third Parties page

Add a Third Party

If you want to add a third party, do the following steps,

1. Click (**ADD** button) in the **Third Parties** page. See Fig 3.1.

The page shows a new box to add the details of a third party.

image-1651041015142.png

Image not found or type unknown

image-1651041029750.png

Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of a third party.

3. In the **Abbreviation** box, enter the abbreviation for the added third party.

image-1651041076993.png

4. If you want to add a logo, click Image not found or type unknown (**Browse** button) provided with the **Logo** box, and then add the logo of the third party.

5. Click **Save**.

The third party is successfully added.

Edit a Third Party

If you want to edit any existing third party in the **Third Parties** page, do the following,

image-1651041143353.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective third party.

The **Third Parties** page shows the details of added third party.

image-1651041167494.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete a Third Party

image-16510

If you want to delete any specific third party from the list of third parties, you can use Image not found (Delete icon) provided in the **Delete** field of the **Third Parties** page.

Export Third Parties List

You can export a list of third parties added in the **Third Parties** page in the pdf and excel formats

image-1651041313727.png image-1651041329458.png

by using Image not found or type unknown (**PDF** button) and Image not found or type unknown (**Excel** button).

4.0 Authorised Inspectors (AI)

An Authorised Inspector is specifically an inspector **certified and authorised under a regulatory code**, most notably **ASME Section VIII (for pressure vessels)**. They represent the jurisdiction or regulatory authority to ensure compliance with code rules..

The **Authorized Inspectors** tab in the **Master Data** menu helps you to add the details of authorized inspectors. If you want to add an authorized inspector,

1. Click **Authorized Inspectors** in the **Master Data**

The **Authorized Inspectors** page opens.

image-1651041410918.png

Image not found or type unknown

Figure 4.1: Authorized Inspectors page

Add an Authorized Inspector

If you want to add an authorized inspector, do the following steps,

image-1651041651056.png

1. Click Image not found or type unknown (**ADD** button) in the **Authorized Inspectors** See Fig 4.1.

The page shows a new box to add the details of an authorized inspector.

image-1651041671594.png

Image not found or type unknown

image-1651041688409.png

Image not found or type unknown Note: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of an authorized inspector.

3. In the **Abbreviation** box, enter the abbreviation for the added authorized inspector.

image-1651041751402.png

4. If you want to add a logo, click Image not found or type unknown (Browse button) provided with the Logo box, and then add the logo of the authorized inspector.

5. Click **Save**.

The authorized inspector is successfully added.

Edit an Authorized Inspector

If you want to edit any existing authorized inspector in the **Authorized Inspectors** page, do the following,

image-1651041936698.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective authorized inspector.

The page shows the details of added authorized inspector.

image-1651041957037.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click Save.

Delete an Authorized Inspector

If you want to delete any specific authorized inspector from the list of authorized inspectors, you image-1651042018368.png

can use Image not found or type unknown (Delete icon) provided in the **Delete** field of the **Authorized Inspectors** page.

Export Authorized Inspectors List

You can export a list of authorized inspectors added in the **Authorized Inspectors** page in the pdf and excel formats by using

image-1651042069227.png image-1651042078236.png

Image not found or type unknown (PDF button) and Image not found or type unknown (Excel button).

5.0 Subcontractors

Subcontractor is an entity which has taken a portion of contract from a principal contractor such as your firm or from another subcontractor for Pressure Vessel module.

1. Click **Subcontractors** in the **Companies and Projects**

The **Subcontractors** page opens.

image-1651042249300.png

Image not found or type unknown

Figure 5.1: Subcontractors page

Add a Subcontractor

If you want to add a subcontractor, do the following steps,

image-1651042309193.png

1. Click Image not found or type unknown (**ADD** button) in the **Subcontractors** See Fig 3.5.

The page shows a new box to add the details of a subcontractor.

image-1651042337627.png

Image not found or type unknown

image-1651042352612.png

Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of a subcontractor.

3. In the **Abbreviation** box, enter the abbreviation for the added subcontractor.

image-1651042409656.png

4. If you want to add a logo, click Image not found or type unknown (**Browse** button) provided with the **Logo** box, and then add the logo of the subcontractor.

5. Click **Save**.

The subcontractor is successfully added.

Edit a Subcontractor

If you want to edit any existing subcontractor in the **Subcontractors** page, do the following,

image-1651042471376.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective subcontractor.

The **Subcontractors** page shows the details of added subcontractor.

image-1651042491600.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete a Subcontractor

If you want to delete any specific subcontractor from the list of subcontractors, you can use image-1651042554160.png

Image not found or type unknown (Delete icon) provided in the **Delete** field of the **Subcontractors** page.

Export Subcontractors List

You can export a list of subcontractors added in the **Subcontractors** page in the pdf and excel formats by using pdf.png Image not found or type unknown (**PDF** button) and excelimg.png Image not found or type unknown (**Excel** button).

6.0 NDT Inspectors

NDT (Non-Destructive Testing) Inspectors provide NDT inspection services to the clients who involved in fabrication, construction and maintenance of the Pressure Vessel.

The **NDT Inspectors** tab in the **Master Data** menu used to add an NDT inspector. If you want to add an NDT inspector, do the following steps,

1. Click **NDT Inspectors** in the **Master Data**

The **NDT Inspectors** page opens.

image-1651045421309.png

Image not found or type unknown

Figure 6.1: NDT Inspectors page

Add an NDT Inspector

If you want to add an NDT inspector, do the following steps,

image-1651045484448.png

1. Click Image not found or type unknown (**ADD** button) in the **NDT Inspectors** See Fig 6.1.

The page shows a new box to add the details of an NDT inspector.

image-1651045503852.png

Image not found or type unknown

image-1651045518638.png

Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Name** box, enter the name of the NDT inspector.

3. In the **No** box, enter the employee number of the NDT inspector.

4. If you want to add a photo of the NDT inspector, click (**Browse** button) provided with the **Photo** box, and then add the photo of the NDT inspector.

5. If the NDT inspector is working currently, select the checkbox of the **Is Active**

6. Click **Save**.

The NDT inspector is successfully added.

Add NDT Certificates of NDT Inspector

If you want to add NDT certificate details of any NDT inspector,

image-1651045608570.png

1. Click Image not found or type unknown (Add icon) of the respective NDT inspector.

The **Certificates** window opens.

image-1651045631425.png

Image not found or type unknown

2. Click **Add Certificate**.

The window shows a new box to add the details of certificate.

image-1651045654966.png

Image not found or type unknown

3. In the **Body** box, enter the body of the NDT qualification.

4. In the **Level** box, select the level of NDT qualification.

5. In the **Method** box, select the method of NDT qualification.

6. In the **Certificate Number** box, enter the certificate number.

7. In the **Certificate Start Date** box, select the staring date of certificate.

8. In the **Certificate Expiry Date** box, select the expiry date of certificate.

9. In the **Technical Start Date** box, select the technical staring date.

10. In the **Technical Expire Date** box, select the technical expiry date.

11. Click **Update**.

The certificates details will be updated.

Edit an NDT Inspector

If you want to edit any existing NDT inspector in the **NDT Inspectors** page, do the following,

image-1651045790090.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective NDT inspector.

The **NDT Inspectors** page shows the details of added NDT inspector.

image-1651045811576.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Attach a File into an NDT Inspector

If you want to attach a file with any NDT inspector listed in the **NDT Inspectors** page,

image-1651045873896.png

1. Click Image not found or type unknown (Attach icon) provided in the **Attachment** column for the respective NDT inspector in the **NDT Inspectors**

The **File Upload (NDT Inspector)** page opens.

image-1651045893030.png

Image not found or type unknown

image-1651045906944.png

Image not found or type unknown **Note**: Before uploading any file, read the instructions given in the **File Upload (NDT Inspector)** page.

image-1651045929623.png

2. Click Image not found or type unknown (**Browse** button) to select a file to be uploaded.

3. Select any file which you want to upload, from your computer.

image-1651045960993.png

4. Click Image not found or type unknown (**Upload** button) to attach the file.

The uploaded file will be displayed in the **File Upload** table.

Delete an NDT Inspector

If you want to delete any specific NDT inspector from the list of added NDT inspectors, you can use

image-1651046015115.png

Image not found or type unknown (Delete icon) provided in the **Delete** field of the **NDT Inspectors** page.

Export NDT Inspectors List

You can export a list of NDT inspectors added in the **NDT Inspectors** page in the pdf and excel formats by using pdf.png Image not found or type unknown (**PDF** button) and excelimg.png Image not found or type unknown (**Excel** button).

7.0 Projects

When a new project is awarded to the company, it needs to be created in the system so that all parties can use it to manage the data and documents.

The **Projects** tab in the **Master Data** menu used to add a new project.

You can add a new project if you have been assigned with **Power User** roles only.

To navigate into the **Projects** page,

1. Click **Projects** in the **Master Data**

The **Projects** page opens.

image-1651043046113.png

Image not found or type unknown

Figure 7.1: Projects page

Add a New Project

If you want to add a new project, do the following

image-1651043133166.png

1. Click Image not found or type unknown (**ADD** button) in the **Projects** page. See Fig 3.6.

The page shows a new box to add the details of a new project.

image-1651043152307.png

Image not found or type unknown

image-1651043170218.png

Image not found or type unknown **Note**: The fields notified with a symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Project Number** box, enter the project number.

3. In the **Project Name** box, enter a project name.

4. In the **End User** box, select an end user from a drop-down list.

5. In the **Client** box, select a client from a drop-down list.

6. In the **AI/ Third Party** box, select an AI or a third party from a drop-down list.

image-1651043227075.png image-1651043

Image not found or type unknown **Note**: If you want to add multiple third parties, add third parties by clicking Image not found or t **(Add TP** button) in the **Third party** column of the **Projects page**. This can be done after creating the project.

7. In the **Purchase Order (PO) Number** box, enter the purchase order number.

8. In the **Manufacturer Job Code** box, enter the manufacturer job code number.

9. In the **Client Project** box, enter the client project code.

10 In the **Client Job Code** box, enter the client job code.

11. In the **Owner Project** box, enter the owner project code.

12. In the **Owner Job** Code box, enter the owner job code.

13. In the **Delivery Date** box, choose the delivery date.

14. In the **Location/Position** box, enter the location/position detail.

15. In the **Cladding Material** box, enter the cladding material detail.

16. In the **Non-Destructive Examination (NDE) Weld Length Limit/RT Requirement** box, enter the length limit of NDE welding or the RT requirements.

17. If you need an external qualified welder, click the check box provided with the **External Qualified Welder**

18. In the **Bill of Quantities (BOQ)** box, enter the BOQ detail.

19. In the **Spool Count** box, enter the spool count.

20. Click **Save**.

A new project is added successfully.

Edit a Project

If you want to edit any existing project details from the list of projects in the **Projects** page, do the following,

image-1651043414875.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective project. See Fig 3.6.

   The page shows the added details of the selected project.

image-1651043430360.png

Image not found or type unknown

2. Click any box where you want to edit the details, and then edit the details in the respective box in the **Projects**

3. Click **Save**.

Delete a Project

image-16510434866

If you want to delete any specific project from the list of projects, you can use Image not found or type un (Delete icon) provided in the **Delete** field of the **Projects** page.

Export Projects List

You can export a list of projects added in the **Projects** page in the pdf and excel formats by using pdf.png

Image not found or type unknown (**PDF** button) and

excelimg.png

Image not found or type unknown (**Excel** button).

8.0 Equipments

Each project will have one or more equipments. Each equipment will be used to track and manage the details and documentation.

The **Equipments** tab in the **Master Data** menu used to add a new equipment under a project.

> You can add a new equipment if you have been assigned with **Admin** and **Power User** roles only.

To navigate into the **Equipments** page,

1. Click **Equipments** in the **Master Data**

   The **Equipments** page opens.

image-1651043924746.png

Image not found or type unknown

Figure 8.1: Equipments page

Add a New Equipment

If you want to add a new equipment, do the following steps,

1. Click (**ADD** button) in the upper side of the **Equipments**

   The **Equipments** page shows a new box to add the details of a new equipment.

image-1651043992217.png

Image not found or type unknown

image-1651044005105.png

Image not found or type unknown

Note: The fields notified with a symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Master Project Name** box, enter the master project name from a drop-down list.

3. In the **Equipment** box, enter the equipment name.

4. In the **Equipment Serial Number** box, enter the equipment serial number.

5. In the **Report Prefix** box, the report prefix will be entered automatically. If you want change, you can edit the report prefix.

6. In the **Tag Number** box, enter the tag number.

7. In the **Delivery Date** box, choose the delivery date.

8. In the **Drawing Number** box, enter the drawing number.

9. In the **Applicable Code** box, enter the applicable code.

10. In the **Equipment Type** box, select the equipment type.

11. In the **Material** box, enter the material name.

12. In the **Weight (Kg)**box, enter the weight of the equipment.

13. In the **QC** box, select the QC type.

14. In the **Sub Contractor** box, select the sub-contractor from a drop-down list.

15. In the **Specification** box, enter the specification detail.

16. In the **Coded Vessel** box, select the coded vessel from a drop-down list.

17. In the **Location/Position** box, enter the location/position name.

18. In the **of Equipment** box, enter the number of equipment.

19. In the **DIMENSION** field, enter the inner diameter and length value.

20. In the **THICKNESS** field, enter the thickness of the shell and head.

21. In the **SPECIFIC REQUIREMENT** field, enter the PWHT, MDMT, HIC, and RT requirement detail.

22. Click **Save**.

A new equipment is added successfully.

Edit an Equipment

If you want to edit any existing equipment details from the list of equipments in the **Equipments** page, do the following,

image-1651044781890.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective equipment. See Fig 3.7.

The page shows the added details of the equipment.

image-1651044799632.png

Image not found or type unknown

2. Click any box where you want to edit the details, and then edit the details in the respective box in the **Equipments**

3. Click **Save**.

Delete an Equipment

image-16510

If you want to delete any specific equipment from the list of equipments, you can use Image not found (Delete icon) provided in the **Delete** field of the **Equipments** page.

Export Equipments List

You can export a list of equipments added in the **Equipments** page in the pdf and excel formats pdf.png

by using Image not found or type unknown

excelimg.png

(**PDF** button) and Image not found or type unknown (**Excel** button).

Print Equipments List

image-1651044935485.png

If you want to print equipments list, click Image not found or type unknown (Print icon) of the respective equipment in the **Equipments** page. The equipment list report will be opened.

9.0 Location

Each company may have multiple locations or bays to fabricate equipments. Carbon steel and Stainless steel material are strictly managed in different locations.

The **Location** tab in the **Master Data** menu helps you to add the details of location. If you want to add any location,

1. Click **Location** in the **Master Data**

   The **Locations** page opens.

image-1651045013501.png

Image not found or type unknown

Figure 9.1: Locations page

Add a Location

If you want to add a location, do the following steps,

image-1651045069288.png

1. Click Image not found or type unknown (**ADD** button) in the **Locations** See Fig 9.1.

The page shows a new box to add the details of a location.

image-1651045091120.png

Image not found or type unknown

image-1651045105266.png

Image not found or type unknown **Note**: The fields notified with the symbol (*) are mandatory. You must enter the relevant details in that fields before saving.

2. In the **Location** box, enter the location name.

3. In the **Priority** box, set the priority of the location.

4. Click **Save**.

The location is successfully added.

Edit a Location

If you want to edit any existing location in the **Locations** page, do the following,

image-1651045174907.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective location. See Fig 6.8.

The page shows the details of added location.

image-1651045193782.png

Image not found or type unknown

2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete a Location

image-1631t

If you want to delete any specific location from the list of added locations, you can use Image not found (Delete icon) provided in the **Delete** field of the **Locations** page.

Export Locations List

You can export a list of locations added in the **Locations** page in the pdf and excel formats by using pdf.png Image not found or type unknown (**PDF** button) and excelimg.png Image not found or type unknown (**Excel** button).

Revision #24
Created 27 April 2022 05:54:06
Updated 24 August 2025 05:00:38 by Jnaveen