
CONFIDENTIAL DOCUMENT

INSTRUCTION MANUAL

IPLOCA ROAD TO SUCCESS PLATFORM

CE DOCUMENT EST EXCLUSIVEMENT RÉSERVÉ À SON DESTINATAIRE, IL PORTE LA RESPONSABILITÉ DE LA CONFIDENTIALITÉ DES ÉLÉMENTS INCLUS ET METTRA TOUT EN ŒUVRE POUR LA GARANTIR.

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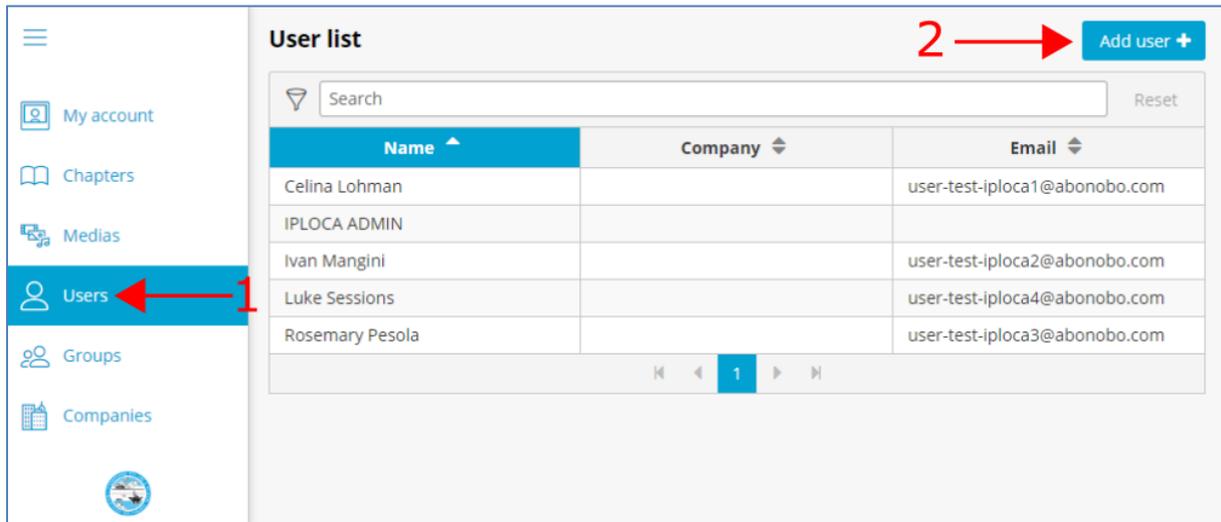
1 ADMINISTRATION AND USERS

1.1 Registration

Users can register by themselves by going to the platform's URL. A valid email is needed.

1.2 User creation

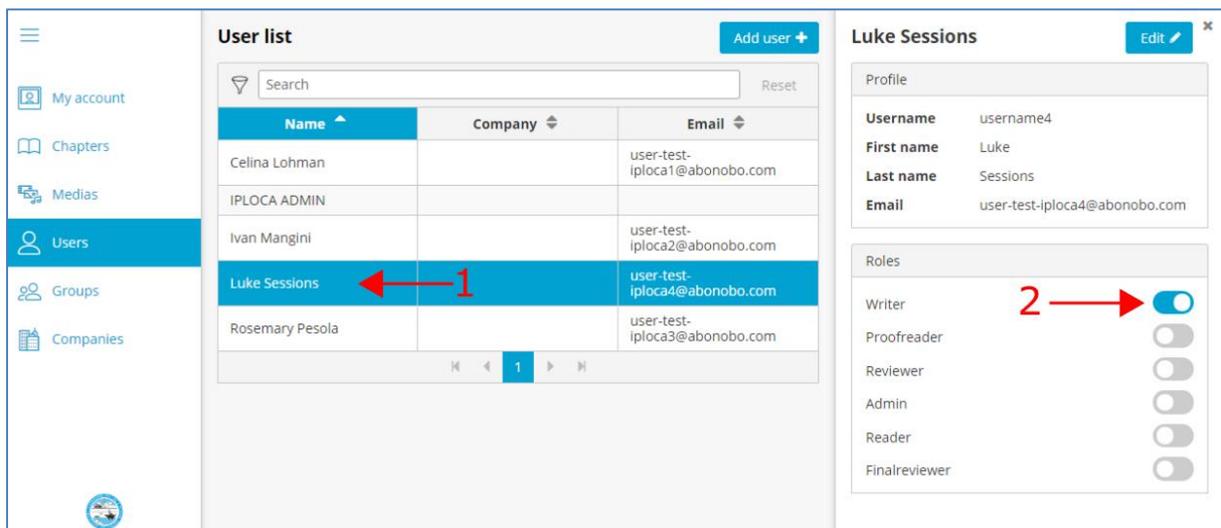
An administrator can create users by going into the "Users" view and clicking the « Add User » button.



The administrator can then add the new user email, first name and last name. The email must be a valid email. A user created this way must click on the "Forgot Password?" link on the login page to create its password.

1.3 Assigning roles

An administrator can open the details of a user by clicking on it in the "Users" view. The administrator can then toggle the roles of the user.



Users need to have at least one role to be authorized to access the platform.

1.4 Companies

Only administrators can create companies.

The screenshot shows the 'Add a company' interface. On the left is a navigation menu with 'Companies' selected. The main area contains the following elements:

- Company name*** (1): Input field containing 'Pipeline Company'.
- Domain name*** (2): Input field containing 'pipelinecompany.com'.
- Members** (3): A list of users: IPLOCA ADMIN, Celina Lohman, Rosemary Pesola, and Luke Sessions.
- Ivan Mangini** (4): A list of users currently added to the company.
- Navigation buttons: '> 5', '>> 6', '< 7', and '<< 8'.
- Submit** (9) and **Cancel** buttons at the bottom right.

1. The name of the company
2. The email domain of the company. Users logging with this domain on the mobile application will have access to the full content of the book.
3. List of users that can be added to the company.
4. Users included in the company.
5. Add the selected user from list 3 to list 4.
6. Add all users from list 3 to list 4.
7. Remove the selected user from list 4.
8. Remove all users from list 4.
9. Clicking on "Submit" will save the company in the platform.

2 BOOK EDITION

2.1 Create a chapter

Administrators and FinalReviewers can create top-level chapters, only a name is necessary.

Name	State
1 The Baseline of a Construction Contract Free	Ready
2 Development Phases of a Pipeline Project	Ready
2.1 Titre 2 word	Ready
2.2 Front-End Loading (FEL) Phases	Ready

2.2 Writing groups

By default, new top-chapters can only be edited by members included in a writing group. Writing groups are created the same way as creating a company in the “Groups” view (See section “Company”).

Add a group

Group name* 1

Members*

IPLOCA ADMIN	>	Celina Lohman
Ivan Mangini	>>	Luke Sessions
Rosemary Pesola	<	
	<<	

2

Master writer* 3

Chapters

1. The Baseline of a Construction Contract	>	3. The Baseline of a Construction Contract
2. Development Phases of a Pipeline Project	>>	
2.1. Titre 2 word	<	
2.2. Front-End Loading (FEL) Phases	<<	

4

1. The writing group name.
2. Users can be added to the writing group in the same manner as adding users to a company.
3. A master writer must be selected to be able to create a writing group; the master writer must be part of the group writers (see 2.).
4. Chapters can be individually added to the writing group the same way as the users. Chapters in the list on the right are editable by the users included in the group.

2.3 Viewing chapter content

Chapters content can be viewed in 3 different modes.

The screenshot shows the 'Chapter list' interface on the left and a detailed view of '1 The Baseline of a Construction Contract' on the right. The 'Chapter list' table is as follows:

Name	State
1 The Baseline of a Construction Contract Free	Ready
2 Development Phases of a Pipeline Project	Ready
2.1 Titre 2 word	Ready
2.2 Front-End Loading (FEL) Phases	Ready
3 The Baseline of a Construction Contract	Ready

The detailed view on the right shows a timeline of actions:

- 19 July 2019 15:41: This chapter has been published. Open the published version.
- 19 July 2019 15:41: Set to Ready to publish by IPLOCA ADMIN
- 19 July 2019 15:41: Sent to final review by IPLOCA ADMIN
- 19 July 2019 15:41: Sent to proofreading by IPLOCA ADMIN
- 19 July 2019 15:41: Sent to initial review by IPLOCA ADMIN
- 19 July 2019 15:40: The chapter has been edited by IPLOCA ADMIN.

Red arrows and numbers 1, 2, and 3 point to the 'Open the current content', 'See the latest published version', and a timeline entry respectively.

1. "Open the current content" opens the most recent version of the content.
2. "See the latest published version" is available only if the chapter has already been published once.
3. Clicking on the timeline on edit actions will show the changes that happened in this edition of the chapter.

2.4 Edit a chapter

Some options are available from the chapter current content view:

The screenshot shows the 'Current content' view of '3 The Baseline of a Construction Contract' on the left and its history on the right. The 'Current content' view includes a navigation bar (1), a 'NOT Free' status (2), and a 'Delete' button. The content text is as follows:

The recommendations below can be classified in four categories:

- Detailed definition of the scope of works, of the physical conditions of the site, of the environment and of the socioeconomic and local constraints. This will define the baseline of the contract to be entered by the parties.
- Establishment of a detailed project execution plan, including a fully resourced programme of the works described in the baseline to monitor progress and promptly assess the time impact of changes to the project or to its environment.
- Recommended extent of the cost information to include in all the contracts may vary from just one of:
 - Cost plus
 - Bill of quantities
 - Activity schedule
 - Lump sum or a combination of the above, to enable a prompt evaluation of the cost impacts of:
 - Changes to the project or to the environment of the project
 - Mitigation measures elaborated to reduce the adverse consequences of the above changes
 - The conditions of contract

Red arrows and numbers 1, 2, 3, 4, and 5 point to the navigation bar, 'NOT Free' status, 'Delete' button, 'Edit this chapter' button, and the 'Cost plus' bullet point respectively.

The history on the right shows:

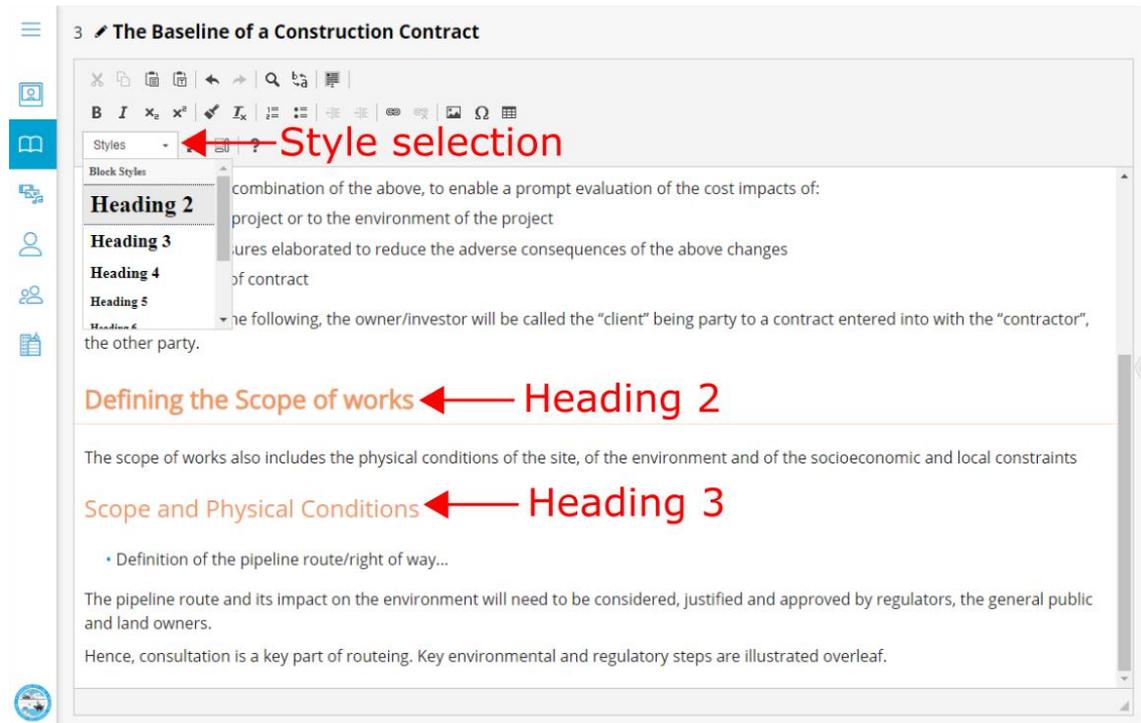
- in 5 minutes: The chapter has been edited by IPLOCA ADMIN.
- 19 minutes ago: Chapter has been created by IPLOCA ADMIN.

1. This is a navigation bar. Links to previous, next and parent chapters are available here.
2. The toggle "free / NOT free" and the button "Delete" are only available for final reviewers. Adding a chapter in a "Free" state will mark this chapter to be published for the free version of Road to Success.

3. Depending on the current user roles, options for chapter validation will be displayed here, see section "Chapter validation process" for more informations.
4. Clicking the "Edit this chapter" link will bring the user into the edition mode for this chapter.
5. This is the content of the chapter, without its eventual subchapters.

2.4.1 Create a subchapter

Creating a subchapter happens in edition mode.



By selecting a different heading in the "Style selection" box, subchapters can be created. In the picture above, the heading 2 "Defining the Scope of works" will create a subchapter of the current chapter ("The Baseline of a Construction Contract") with the content below it. The heading 3 "Scope and Physical Conditions" will create a subchapter of the heading 2 "Defining the Scope of works", with the content below it. Headings chains must follow the proper order (heading 2, then heading 3, then heading 4, then ...). Only heading 2 and 3 will create subchapters that can be edited on their own. Headings with a number higher than 3 must be included in a chapter of heading 3.

Subchapters inherits the authorizations of its parents' chain.

Please note that styles "Title 1", "Title 2" and "Title 3" won't create subchapters. They are only cosmetic styles and can be inserted into any chapters. Clicking again on the current style disable styling and returns to the normal style.

2.4.2 Adding table to chapter

The screenshot shows a document editor interface with a toolbar at the top. A red arrow points to the 'New table' icon (a grid symbol) in the toolbar. Below the toolbar, there is a list of bullet points and a table. The table has the following structure:

Stage	Front End Loading			Project Execution	Start Up and Operations
	FEL 1	FEL 2	FEL 3		
Cost Estimate Accuracy	Order of Magnitude	+/-30%	+/-15%	+/-5%	Complete
Process	Appraisal	Feasibility	Selection / definition	Approvals / execute / construction	Operation

Below the table, there is a caption: *Table ???: Narrowing Down of Pipeline Corridor Durnig Project Stages*. A contextual menu is open over the table, showing options like 'Paste', 'Cell', 'Row', 'Column', 'Table Properties', and 'Switch to advanced table'.

Clicking the table icon will create an empty table. By right-clicking on a cell, a contextual menu will open with possible actions on this cell.

The "Row" menu is used to insert a row before or after the row of the current cell, it is also used to delete the current row.

The "Column" menu is used to insert a column before or after the column of the current cell, it is also used to delete the current column.

The "Cell" menu is used to merge and split cells, the "cell properties" option bring to a new configuration window for the current cell.

It is possible to set headers for the entire table by using the "Table Properties" option.

2.4.3 Adding advanced table to chapter

The screenshot shows a document editor interface. The main content area contains a list of bullet points and a table. The table is titled 'Table ref-8094f335: Narrowing Down of Pipeline Corridor Durnig Project Stages'. The table has the following structure:

Stage	Front End Loading			Project Execution	Start Up and Operations
	FEL 1	FEL 2	FEL 3		
Cost Estimate Accuracy	Order of Magnitude	+/-30%	+/-15%	+/-5%	Complete
Process	Appraisal	Feasibility	Selection / definition	Approvals / execute / construction	Operation

Below the table, there is a caption: 'Table ref-8094f335: Narrowing Down of Pipeline Corridor Durnig Project Stages'. The text below the caption reads: 'In this section and the following, the owner/investor will be called the "client" being party to a contract entered into with the "contractor", the other party.'

By switching a table to an advanced table, it is possible to configure cells width and height. An "advanced" graphic is show behind the table; this is only displayed in edit mode. An advanced table loses its responsive properties.

2.4.4 Adding picture to chapter

It is possible to insert a picture by clicking the picture icon, and then "Browse server". A new window will open:

The screenshot shows a 'Browse server' window with a search bar and a grid of image thumbnails. The thumbnails include a person in a field, the letters 'ABC', an apple icon, and a watch. Red arrows and numbers indicate the following steps:

1. Filters (pointing to the search bar)
2. Pictures selection (pointing to the grid of thumbnails)
3. Upload a new picture (pointing to the 'Upload' button)
4. Insert the selected picture into chapter (pointing to the 'Insert' button)

1. Filters.
2. Pictures selection.
3. Upload a new picture.
4. Insert the selected picture into chapter.

2.4.5 Referencing a figure or a table in chapter content

Tables and figures are initially created with three “?” symbols in their legends. When saving the chapter, an id will replace those three question marks. Copying this id in any chapter of the book will make a direct reference to this table or figure. This id will be replaced by the proper number once the book will be published.

3 The Baseline of a Construction Contract

- Activity schedule
- Lump sum or a combination of the above, to enable a prompt evaluation of the cost impacts of:
- Changes to the project or to the environment of the project
- Mitigation measures elaborated to reduce the adverse consequences of the above changes
- The conditions of contract

Stage	Front End Loading			Project Execution	Start Up and Operations
	FEL 1	FEL 2	FEL 3		
Cost Estimate Accuracy	Order of Magnitude	+/-30%	+/-15%	+/-5%	Complete
Process	Appraisal	Feasibility	Selection / definition	Approvals / execute / construction	Operation

Table ref-8094f335: Narrowing Down of Pipeline Corridor Durnig Project Stages

In this section and the following, the owner/investor will be called the “client” being party to a contract entered into with the “contractor”, the other party.
See table ref-8094f335 for more informations.

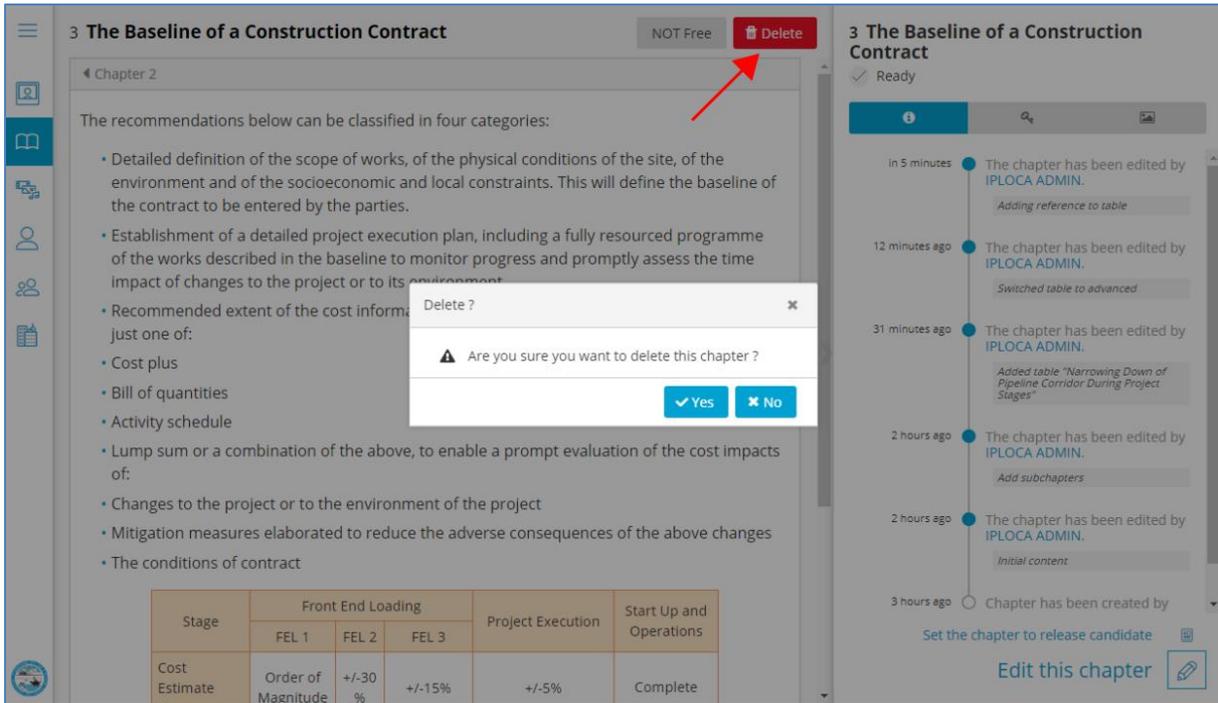
2.4.6 Pasting content from Word

It is possible to paste content directly from a Word document, with a few exceptions:

- Tables and figures can’t be properly pasted into the editor yet. It is possible to paste a Word table into the editor by creating an empty table in the editor first and pasting the Word table into this empty table.
- Titles must follow the rules defined in section “Create a subchapter”.

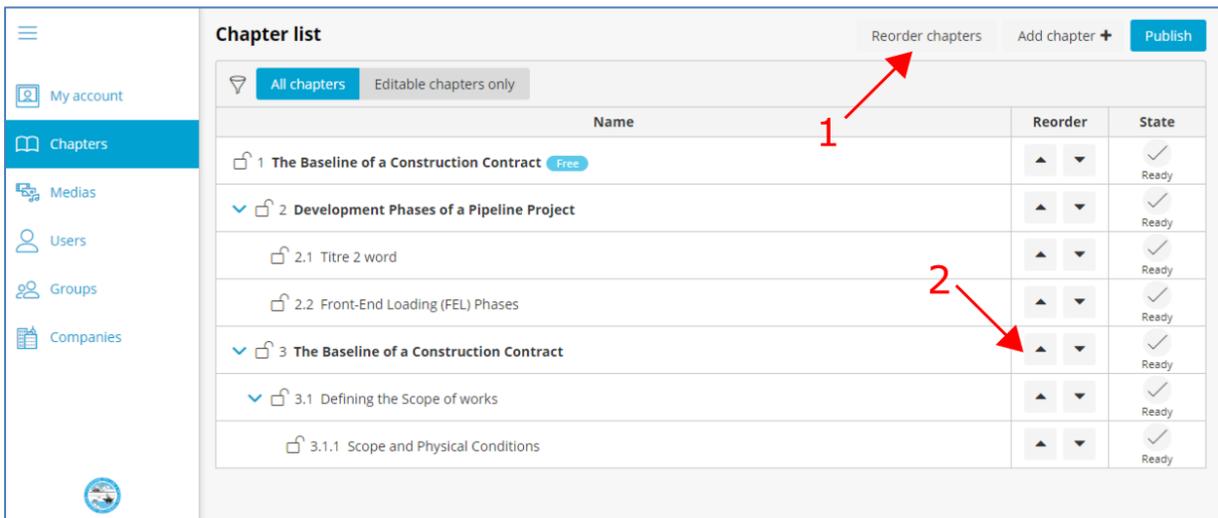
2.5 Delete a chapter

A finalreviewer can delete a chapter in its view mode by clicking the “Delete chapter” button. Accepting the action will delete the chapter and its subchapters. Please note that this is not a reversible operation.



2.6 Reorder chapters

Finalreviewers can reorder chapters from the chapter list by click the “Reorder chapters” button. Chapters are only reorderable at the same depth level.



3 BOOK PUBLISHING

3.1 Chapter validation process

Chapters must be verified by all the appropriate users before being published. The process is the following:

1. Writers write the chapter
2. Master Writer send the chapter to release candidate.
3. Reviewer reject or approves and send the chapter to proofreading.
4. Proofreader edit and approves and send the chapter to final review.

5. Finalreviewer reject or approves and set the chapter to "ready-to-publish".

Once the book is published, all "ready-to-publish" chapters return to state "Ready" so that they can be edited by writers again.

3.2 Book Publishing

Only finalreviewers can publish the book. By clicking the "Publish book" button on the chapter list, the user will be sent to the "Publish" view.

Publish book

Version*

Content* Free content Complete content

The finalreviewer needs to choose a name for the release and if the content to publish will be the free content or the full content.