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CONFIDENTIAL DOCUMENT

# INSTRUCTION MANUAL

## IPLOCA ROAD TO SUCCESS PLATFORM USER DOCUMENTATION

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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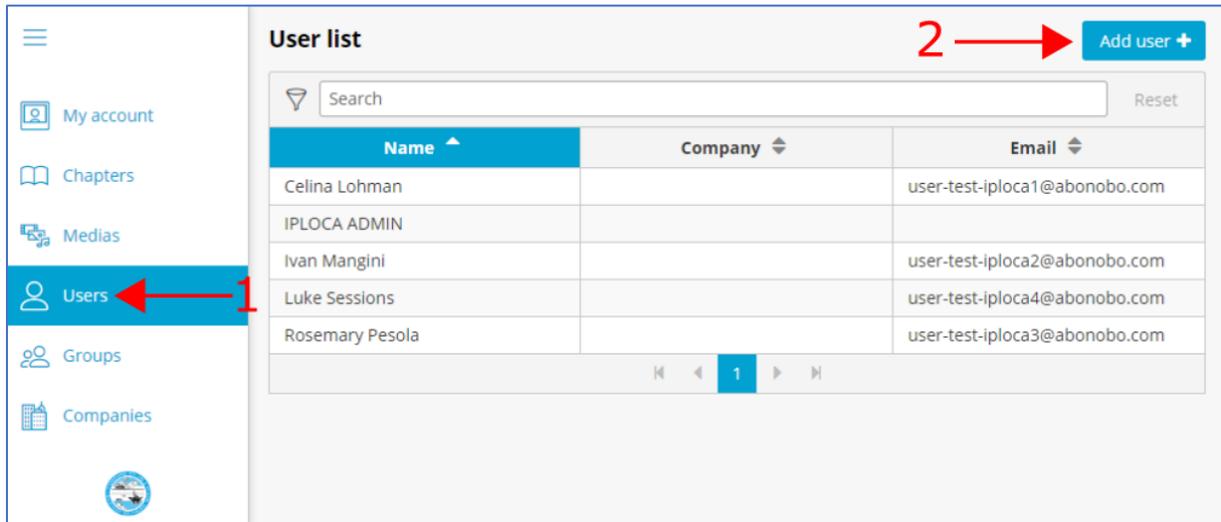
## ADMINISTRATION AND USERS

### Registration

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

### User creation

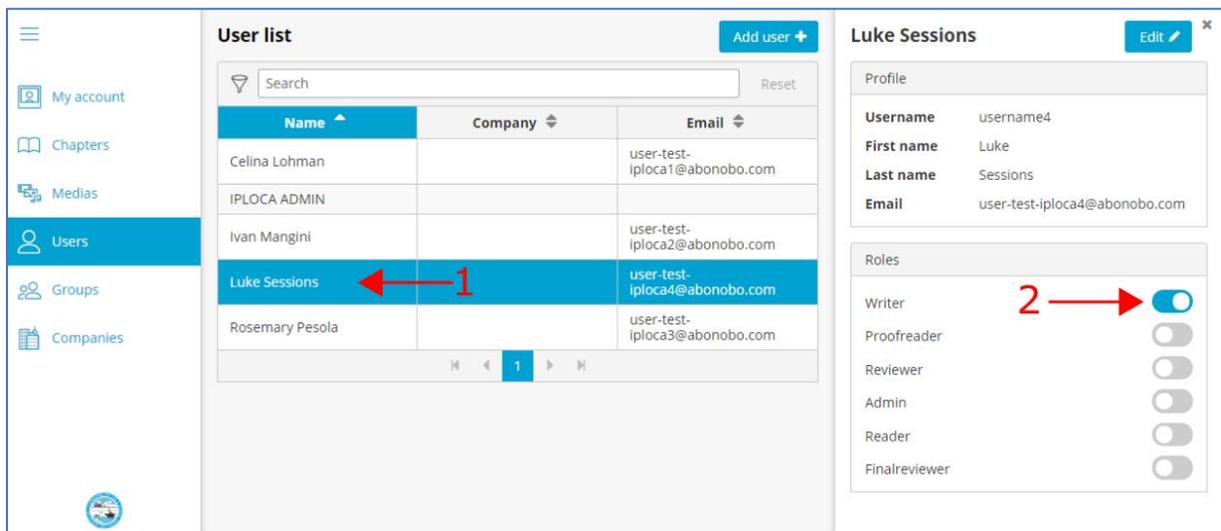
An administrator can create users by going into the “Users” view and clicking the « Add User » button.



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.

### 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.

## Companies

Only administrators can create and manage companies.

**Add a company**

Company name\* 1 Pipeline Company

Domain name\* 2 pipelinecompany.com

Members

IPLOCA ADMIN  
Celina Lohman  
Rosemary Pesola 3  
Luke Sessions

> 5  
» 6  
< 7  
<< 8

Ivan Mangini 4

Cancel Submit 9

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.

## DATA IMPORT

Administrators can import users and companies through the “CSV Import” feature, located in the “Settings” menu item. From there, select the “Users” or “Companies” import. The columns must be separated by a semicolon (“;”).

**Settings**

CSV Import

Select import type: Users Companies users

CSV file: [ Choisir un fichier ] user-model-csv.csv

Lastname	Firstname	Email	Password	Roles	Groups	Companies
Doe	John	john.doe@gmail.com	1234567	reader writer		
Trajl	Emily	trajl.emily@abonobo.com	fnufe5	admin	Logistics Bendings	Abonobo SA jimmy corp.
Abi	Celine	abi.celine@jimmy.com	ritsjd2	reviewer	Logistics	Jimmy Corp.

import users

## Importing users

Importing users will create users, set their roles, add them to companies and writing groups. The csv format is the following, with an example:

Lastname	Firstname	Email	Password	Enabled	Roles (multivalued)	Companies (multivalued)	Writing groups (multivalued)
Dery	Eric	eric@abc.com	dcsk_243	true	Writer Reviewer	Iploca Pipeline AG	Earthwork Logistics

The values inside a multivalued column (roles, companies and writing groups) are separated by the right closing square bracket character ("]"). The enabled column **only** takes "true" or "false" as value. It will default to "false" if empty or something else is inside. Roles must be the ones present in the book platform. The example above would translate as a csv line to:

```
Dery;Eric;eric@abc.com;dcsk_243>true;Writer]Reviewer;Iploca]Pipeline AG;Earthwork]Logistics
```

Companies will be created if they do not exist, the same is true for writing groups. Companies names and writing groups names must be the same as the platform names for users to be added to them. The import users feature does not update existing users, it only adds new users.

## Importing companies

The csv format for companies import is:

Company name	Email domain	Enabled
Pipeline AG	pipelineag.com	true

The email domain **must** be without the "@" character. The enabled column **only** takes "true" or "false" as value. It will default to "false" if empty.

The example above would translate as a csv line to:

```
Pipeline AG;pipelineag.com>true
```

The import companies feature does not update existing companies, it only adds new companies.

## BOOK EDITION

### Create a chapter

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

**Chapter list** Reorder chapters Add chapter + Publish

All chapters Editable chapters only

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

### 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  
Ivan Mangini  
Rosemary Pesola 2

Celina Lohman  
Luke Sessions

Master writer\* 3

Chapters

1. 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

3. The Baseline of a Construction Contract

Cancel Submit

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.).

- 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.

## Viewing chapter content

Chapters content can be viewed in 3 different modes.

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

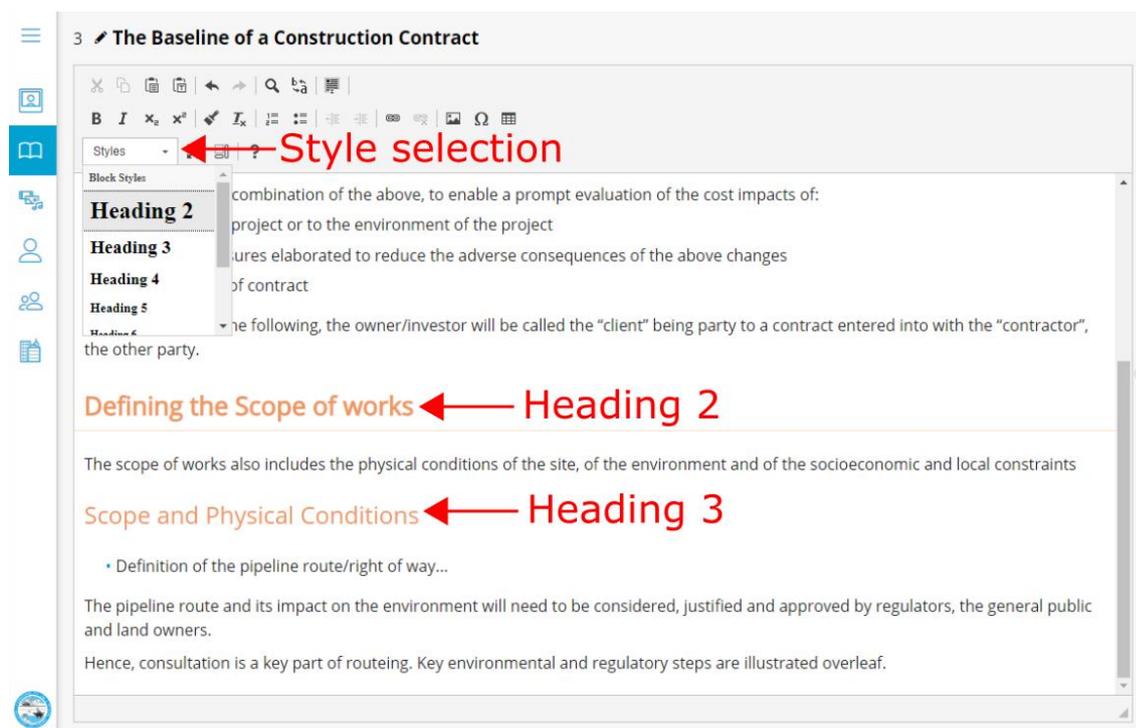
## Edit a chapter

Some options are available from the chapter current content view:

1. The “Print View” button opens the current chapter’s content (including subchapters) in a new page with no user-interface. It is then possible to print the chapter through the navigator’s options (Google Chrome can also convert it to a pdf file).
2. The toggle “free / NOT free”, the toggle “Numbered”, 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. “Numbered” removes the chapter number if not activated.
3. This is a navigation bar. Links to previous, next, first child and parent chapters are available here.
4. The chapter’s modifications history is here.
5. Depending on the current user’s roles, options for chapter validation will be displayed here, see section “Chapter validation process” for more information.
6. Clicking the “Edit this chapter” link will bring the user into the edition mode for this chapter.
7. This is the content of the chapter, without its eventual subchapters.

## 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, 3 and 4 will create subchapters that can be edited on their own. Headings with a number higher than 4 must be included in a chapter of heading 4.

Subchapters inherits the authorizations of its parents’ chain.

Please note that styles “Title 1”, “Title 2” and “Title 3” will not 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.

## Adding table to chapter

The screenshot shows a document editor window titled "3 The Baseline of a Construction Contract". The toolbar includes a "New table" icon, which is highlighted with a red arrow and the text "New table". Below the toolbar, a list of bullet points is visible. A table is inserted into the document, and a context menu is open over it. 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". Below the caption, there is a paragraph of text: "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."

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.

## Adding advanced table to chapter

**3 The Baseline of a Construction Contract**

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

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.

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.

## 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:

Newest First | In chapter | Search | Reset

Chapterre\_06\_111.PNG | avatar-facebook.jpg | apple-touch-icon.png | bbb.png

Upload | Chapterre\_06\_111.PNG | Insert

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

## Referencing a figure or a table in chapter content

Tables and figures are initially created with three “?” characters 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.

The screenshot shows a document editor interface with a sidebar on the left and a main content area. The title bar reads "3 The Baseline of a Construction Contract". The main content area contains a bulleted list of items related to a contract baseline. Below the list is a table with 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". Below the caption, there is a text block: "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." Two red arrows point from the text "the following" and "See table ref-8094f335" to the table and its caption respectively.

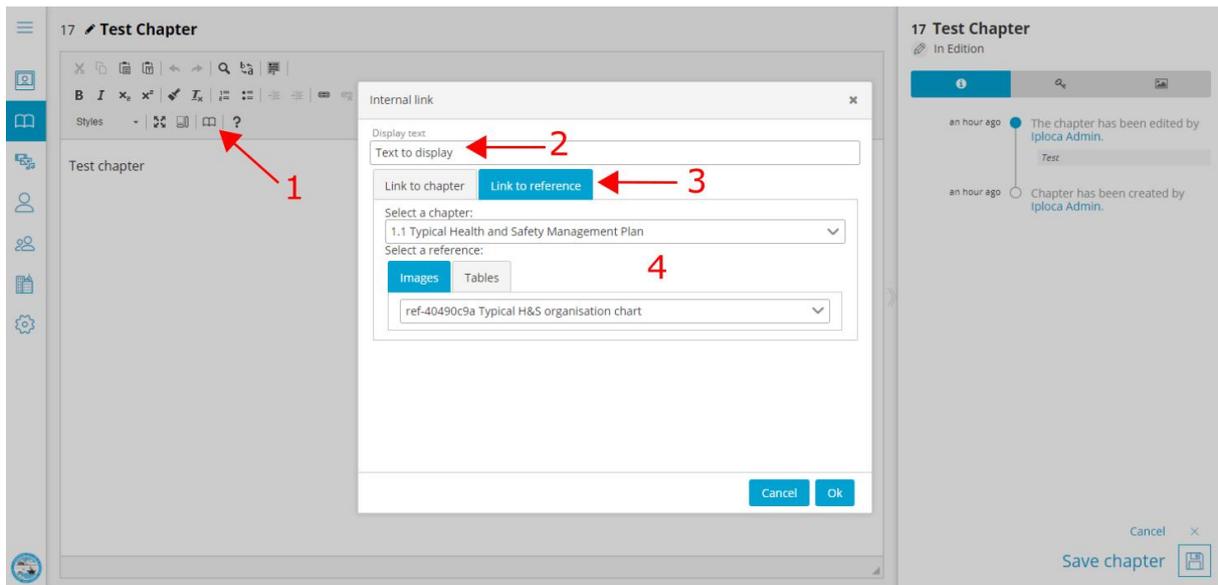
## Pasting content from Word

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”.

## Internal links

It is possible to create a link to a chapter or a reference (figure or table) by clicking the “Internal Link” button.

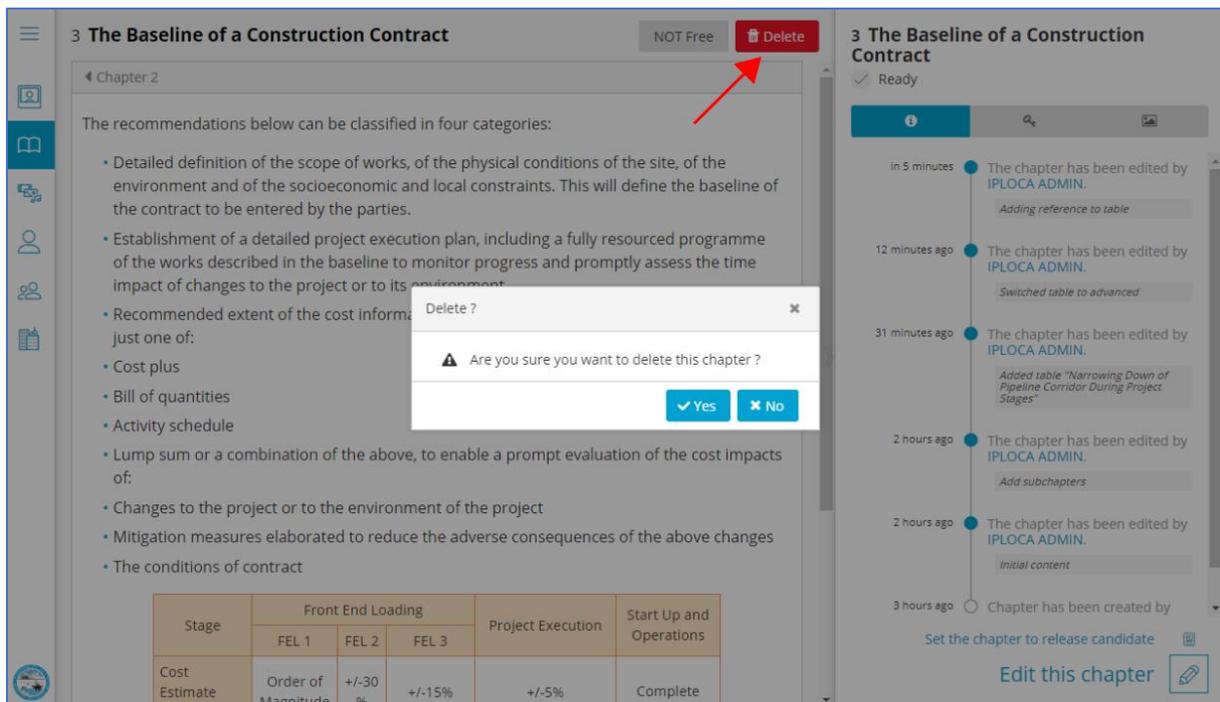


1. The “Internal Link” button.
2. The text to be displayed for the link.
3. Internal link type selection, chapter or reference.
4. Chapter and reference selection (if “Link to reference” is selected on point 3).

Internal links only work in the mobile application right now.

### Delete a chapter

A final reviewer 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.**



## 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.

The screenshot shows a web interface for managing chapters. On the left is a navigation menu with options: My account, Chapters (selected), Medias, Users, Groups, and Companies. The main area is titled 'Chapter list' and contains a table of chapters. At the top right of the main area are buttons for 'Reorder chapters', 'Add chapter +', and 'Publish'. The table has three columns: 'Name', 'Reorder', and 'State'. The 'Name' column contains hierarchical chapter titles. The 'Reorder' column contains up and down arrow icons. The 'State' column contains a checkmark and the word 'Ready'. A red arrow labeled '1' points to the 'Reorder chapters' button. Another red arrow labeled '2' points to the reorder arrows in the 'Reorder' column for the third chapter.

Name	Reorder	State
1 The Baseline of a Construction Contract <span>Free</span>	▲ ▼	✓ 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
3.1 Defining the Scope of works	▲ ▼	✓ Ready
3.1.1 Scope and Physical Conditions	▲ ▼	✓ Ready

## BOOK PUBLISHING

### Chapter validation process

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

1. Writers and Master Writer 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”.
6. Admin publish the book.

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

### Book Publishing

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

The screenshot shows a web application interface for publishing a book. On the left is a sidebar with navigation links: My account, Chapters, Medias, Users, Groups, and Companies. The main content area is titled "Publish book" and contains a form. The form has a "Version\*" field with the value "1.5.2-revised". Below it is a "Content\*" section with two radio buttons: "Free content" (unselected) and "Complete content" (selected). At the bottom right of the form are "Cancel" and "Submit" buttons.

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.