

IMPACT Database User Guide (Integrated, Management, Planning and Control Tool)

HOW TO CREATE A WORK PACKAGE

Login to IMPACT, the database is accessible through the link provided here:

<https://www-esh.fnal.gov/pls/apex/f?p=129:1:6776227628010::::>

You need permission to add and edit work packages in the DB.

If you have issues logging into the database, please contact kathy@fnal.gov to get access.

Revision History

| Name | Description | Date |
|----------------|--|----------------|
| Kathy Vuletich | Initial Release | September 2019 |
| Kathy Vuletich | Added “Authorizing Supervisor” step, see p.17. | December 2019 |

CLICK ON A TOPIC

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DATABASE FIELD DEFINITIONS

WKPG – Work Package Screen

| Field Name | Required or Optional? | Field Type | Description |
|----------------------------|-----------------------|---------------------------|--|
| Job Title | Required | Manual text field | Enter the title for the job you will be creating a work package for. Short and descriptive title. |
| Work Package Status | Required | Dropdown list | Select the status of the job. <ul style="list-style-type: none"> - New: Initial entry of new job - Revised: Previous job entered and has been revised - Completed: Job has been completed and closed out - Cancel: Job has been canceled, or will not be completed |
| Managed By Org | Required | Dropdown list | Select the organization that is managing the work being performed. Likely this is YOUR organization. |
| Performed For Org | Required | Dropdown list | Select the organization that the work is being performed for. Can also be the same org as Managed By. |
| TM/CC/SC/Owner | Required | Pre-populated select list | This field will default to your name, but you can choose a different person if they are responsible for planning this job. |
| Phone | N/A | N/A | Automatically populated with phone number of TM/CC/SC/Owner. |
| Email | N/A | N/A | Automatically populated with email of TM/CC/SC/Owner. |
| Pager | N/A | N/A | Automatically populated with pager of TM/CC/SC/Owner |
| Est Start Date | Required | Date Field | Select the estimated start date of the job |
| Est End Date | Required | Date Field | Select the estimated end date of the job |
| Actual Start Date | Optional | Date Field | Select the actual start date of the job, when known |
| Actual End Date | Optional | Date field | Select the actual end date of the job, when known |

| | | | |
|------------------------|-----------------|---------------------|---|
| Project Name | Optional | Dropdown list | List contains the projects currently in progress at Fermilab, if the job is for a project then select it from the list |
| Project Number | Optional | Manual text field | Enter a number associated with this job, some D/S/P have a numbering system to track jobs. |
| Po Contract# | Optional | Dropdown list | If a contract# is associated with this job, select it from the list. This list is connected with the PO DB. |
| Release # | Optional | Dropdown list | If a release # is associated with this job, select it from the list. This list is connected with the PO DB. |
| Job Description | Optional | Manual text field | Enter in a more detailed description of the job being performed. |
| Locations | Required | Select List/Shuttle | Select the locations where the job is going to occur. The field allows you to select one or many locations. |
| Print | N/A | Action Button | Click the “print” button to print the entire work package |
| Sign-off Sheet | N/A | Action Button | Click the “sign-off sheet” button to print out a generic sign-off sheet used for pre-job walk downs or other activities. |
| Attachments | N/A | Action Button | Attach documents to this work package. |
| Hyperlinks | N/A | Action Button | Link web pages to the work package |
| Cancel | N/A | Action Button | Clicking ‘cancel’ will take you back to the previous screen, the home page. |
| Create / Save | N/A | Action Button | When clicked, the work package will be initially submitted to the database, or your changes will be saved. A green alert box will appear in the upper right corner of the screen to confirm your actions. |

HA – Hazard Analysis Screens

| Field Name | Required or Optional? | Field Type | Description |
|----------------------------|-----------------------|---------------|--|
| Edit | N/A | Action Button | Clicking ‘edit’ will take you into the HA edit screen where you will complete your HA or edit it. |
| Print | N/A | Action Button | Clicking ‘print’ will open a new browser tab with the ability to print the entire HA. |
| Submit for Approval | N/A | Action Button | Clicking the ‘Submit for Approval’ button will send your HA into the workflow process. Once the process is started, it cannot be stopped unless your supervisor approves or rejects the HA. |
| Clone | N/A | Action Button | Clicking ‘clone’ will make a complete copy of an HA. You must then edit the HA and save your changes. The new clone will have a new ID number (the old HA will not be replaced or deleted; it will still exist in the list). |
| Locations | N/A | Action Button | When multiple locations are selected for a job, the ‘locations’ button gives you the opportunity to narrow down your HA to be applicable to one or many of those locations. Default is set to many, so if the HA is applicable to all locations, no actions are necessary. |
| Edit Form Header | Required | Action Button | This will open a dialog box where you are required to enter an “Authorizing Supervisor” to approve the HA. You may also update the HA Title, Start Date, End Date, and Prepared By. |
| Attachments | N/A | Action Button | Attach documents to this HA |
| Hyperlinks | N/A | Action Button | Link web pages to this HA |
| People to Notify | N/A | Action Button | This will open a dialog box where you can add people to notify of this HA. Whether it be workers |

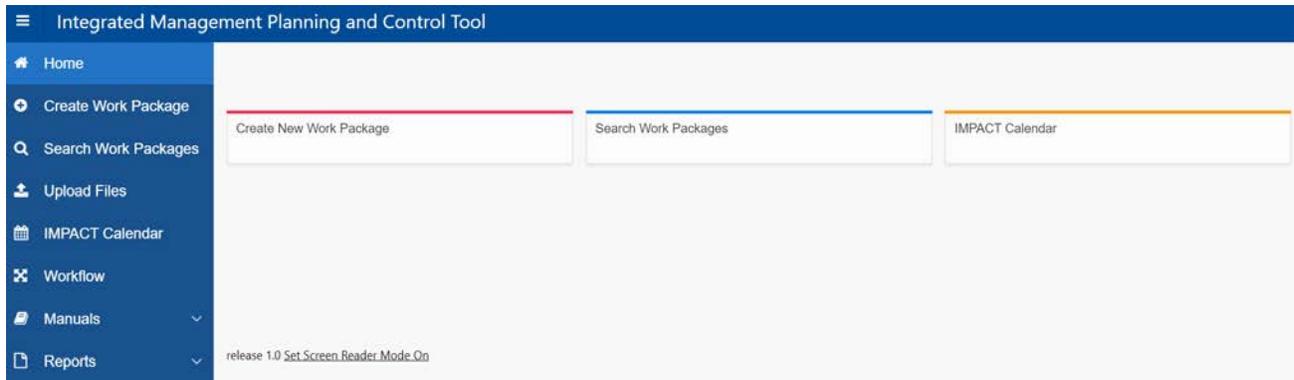
| | | | |
|---------------------------|-----|---------------|--|
| | | | involved in the job, or others that need to know about the HA. |
| Governing Chapters | N/A | Action Button | This will open a dialog box where you can access the FESHM chapters that govern the HA process and provides you with additional information as necessary. |
| Read-Only Text | N/A | N/A | The bottom part of the HA screen contains the read-only information regarding the HA. At the top is information about the work package, and then the bottom half contains information specific to the HA, including all hazards chosen, steps in the process, and workflow status. |

Forms/Permits/Applications Screens

| Field Name | Required or Optional? | Field Type | Description |
|----------------------|------------------------------|-------------------|---|
| Edit | N/A | Action Button | Clicking 'edit' will take you into a blank edit screen. Until the F/P/A is digitized this feature will not function. |
| Print | N/A | Action Button | Clicking 'print' will open a new browser tab with the ability to print the entire F/P/A. |
| Clone | N/A | Action Button | Clicking 'clone' will make a complete copy of an F/P/A. The new clone will have a new ID number (the old F/P/A will not be replaced or deleted; it will still exist in the list). |
| Download Form | N/A | Action Button | Clicking 'download form' will open a new tab where the F/P/A will appear. For eJulie for example, the new tab will take you to the online eJulie system. |
| Locations | N/A | Action Button | When multiple locations are selected for a job, the 'locations' button gives you the opportunity to narrow down your F/P/A to be applicable to one or many of those locations. Default is set to many, so if the F/P/A is |

| | | | |
|---------------------------|-----|---------------|--|
| | | | applicable to all locations, no actions are necessary. |
| Attachments | N/A | Action Button | Attach documents to this F/P/A |
| Hyperlinks | N/A | Action Button | Link web pages to this F/P/A |
| People to Notify | N/A | Action Button | This will open a dialog box where you can add people to notify of this F/P/A. Whether it be workers involved in the job, or others that need to know about the F/P/A. |
| Governing Chapters | N/A | Action Button | This will open a dialog box where you can access the FESHM chapters that govern the F/P/A process and provides you with additional information as necessary. |
| Read-Only Text | N/A | N/A | The bottom part of the F/P/A screen contains the read-only information regarding the F/P/A. At the top is information about the work package, and then the bottom half contains workflow status when applicable. |

DATABASE FUNCTIONS OVERVIEW



Home – The home tab is the landing page for IMPACT. On the landing page there are several options for the user to engage in. Each are listed below.

Create Work Package – Located on the left navigation menu and the home tab, click this option to create a brand new work package.

Search Work Packages – Located on the left navigation menu and the home tab, click this option to search the DB.

Upload Files (to an Existing Work Package) – Located on the left navigation menu, click this option to upload files to existing work packages.

IMPACT Calendar – Located on the left navigation menu and the home tab, click this option to view a calendar of scheduled and on-going jobs. Keep in mind this calendar is still under construction and some features may not be working correctly or be available for use.

Workflow – Located on the left navigation menu, for those with roles in the workflow process click this option to go directly to the workflow tool to see your open tasks.

Manuals – Located on the left navigation menu, this feature links to FESHM, FRCM, the QAM, and the IMPACT user guides, all manuals that govern the processes contained within IMPACT.

Reports – Located on the left navigation menu, this feature is currently only displaying change logs for the system. Clicking on the carrot will expand the list. You will be able to see changes made to the DB in these reports.

HOW TO ENTER A NEW WORK PACKAGE

1. Click on “Create New Work Package” from the left navigation or home tab.
2. Enter all information about the work being performed.
3. When finished, click “[Create](#)”.

WKPG

Work Package # -

Delete
Cancel
Create

| | | | |
|--|--------------------------------------|----------------------------------|------------------------------------|
| Job Title * ? | Work Package Status * ? | Managed By Org * ? | Performed For Org * ? |
| <input type="text"/> | ~Select~ ▾ | ~Select~ ▾ | ~Select~ ▾ |
| TM/CC/SC/Owner * ? | Phone | Email | Pager |
| Vuletich, Kathy 16253N ^ | | | |
| Additional Contact Info ? | | | |
| | | | |
| Est Start Date * ? | Est End Date * ? | Actual Start Date ? | Actual End Date ? |
| DD-MON-YY 📅 | DD-MON-YY 📅 | DD-MON-YY 📅 | DD-MON-YY 📅 |
| Project Name ? | Project Number ? | PO Contract# ? | Release# |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Job Description ? | Comments ? | | |
| | | | |
| Locations * ? | | | |
| Filter | | | |
| <div style="display: flex; justify-content: space-between;"> <div style="width: 80%;"> <ul style="list-style-type: none"> 1 Che Che Pinqua - Kuhn Barn / 2nd Floor [070] (Jack Hawkins) [FE] 1 Che Che Pinqua - Kuhn Barn / Ground Floor [070] (Jack Hawkins) [FE] 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] (Jack Hawkins) [FE] 1 Che Che Pinqua - Kuhn Barn [070] (Jack Hawkins) [FE] 1 Sauk Blvd - Aspen East / 2nd Floor [036] (Jack Hawkins) [FE] 1 Sauk Blvd - Aspen East / Attic [036] (Jack Hawkins) [FE] 1 Sauk Blvd - Aspen East / Basement 1st Level Below [036] (Jack Hawkins) [FE] 1 Sauk Blvd - Aspen East / Ground Floor [036] (Jack Hawkins) [FE] 1 Sauk Blvd - Aspen East [036] (Jack Hawkins) [FE] 1 Sauk Circle - Residence / 2nd Floor [020] (Jack Hawkins) [FE] </div> <div style="width: 15%; text-align: right;"> ↶ ↷ ⏪ ⏩ ⏴ ⏵ ⏶ ⏷ </div> </div> | | | |

/f?n=129-20-1726161288

4. Success in creating a new work package

A green confirmation box stating ‘Action Processed’ will appear in the upper right corner.
 A Work Package # will also be assigned to your work package.
 2 new tabs will appear on the top of the screen, “Add Form”, and “HA”.

Integrated Management Planning and Control Tool

✓ Action Processed. ✕

WKPG
Add Form
HA

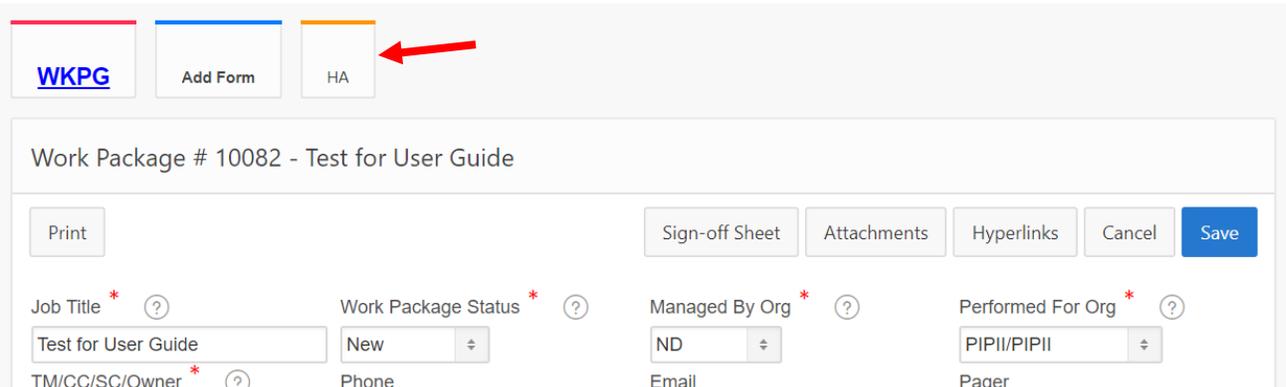
Work Package # 10082 - Test for User Guide

Print
Sign-off Sheet
Attachments
Hyperlinks
Cancel
Save

| | | | |
|---|--|--|--|
| Job Title * ? <input type="text" value="Test for User Guide"/> | Work Package Status * ? <input type="text" value="New"/> | Managed By Org * ? <input type="text" value="ND"/> | Performed For Org * ? <input type="text" value="PIPII/PIPII"/> |
| TM/CC/SC/Owner * ? <input type="text" value="Vuletich, Kathy 16253N"/> | Phone <input type="text" value="5182"/> | Email <input type="text" value="kathy@fnal.gov"/> | Pager <input type="text"/> |
| Additional Contact Info ? <input style="width: 100%; height: 30px;" type="text"/> | | | |
| Est Start Date * ? <input type="text" value="13-SEP-19"/> | Est End Date * ? <input type="text" value="26-SEP-19"/> | Actual Start Date ? <input type="text" value="DD-MON-YY"/> | Actual End Date ? <input type="text" value="DD-MON-YY"/> |
| Project Name ? <input type="text"/> | Project Number ? <input type="text"/> | PO Contract# ? <input type="text"/> | Release# <input type="text"/> |

HOW TO CREATE AND SAVE A HAZARD ANALYSIS (HA)

1. Click on the HA tab in the work package you wish to add an HA to.



Work Package # 10082 - Test for User Guide

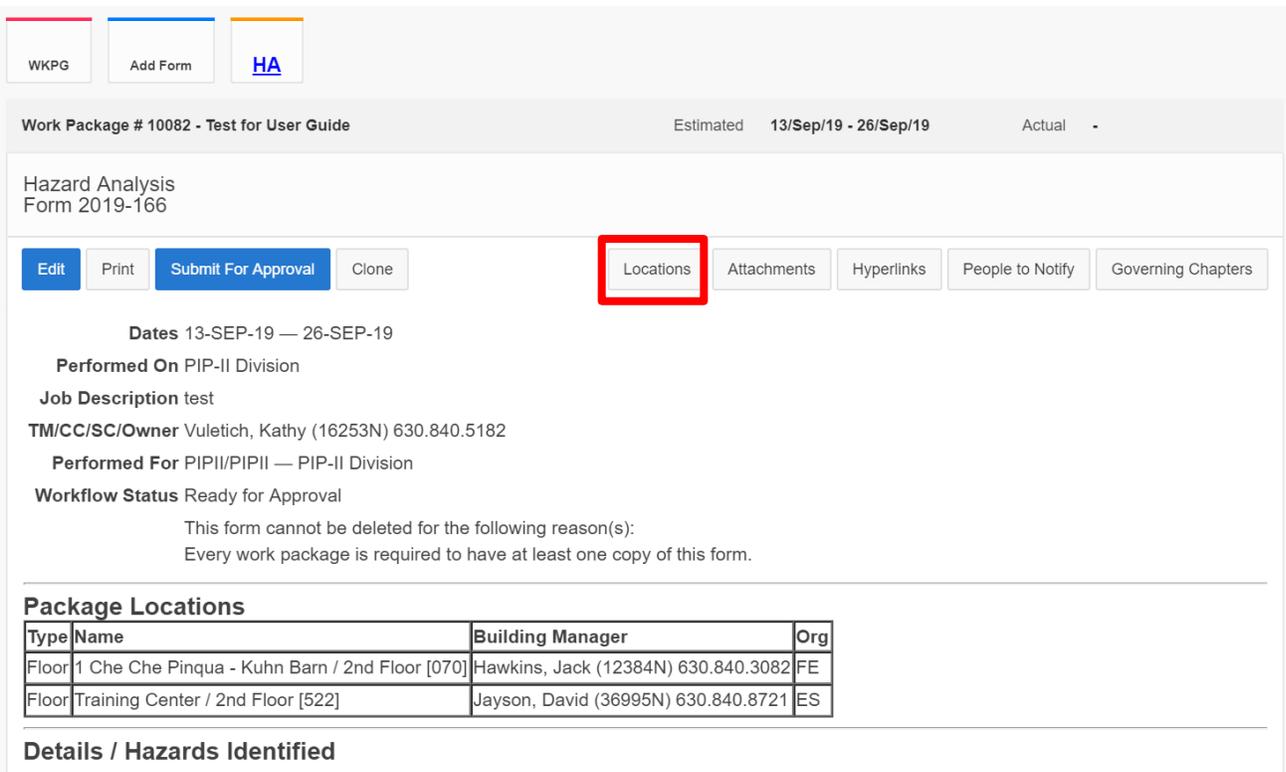
Print Sign-off Sheet Attachments Hyperlinks Cancel Save

Job Title * ? Work Package Status * ? Managed By Org * ? Performed For Org * ?

Test for User Guide New ND PIP-II/PIP-II

TM/CC/SC/Owner * ? Phone Email Pager

2. The HA screen will appear, as seen below.
 - a. If you have one location attached to this job, **go directly to step 3**
 - b. If you have multiple locations to this job, to narrow down the scope of the HA click on the “[Locations](#)” button, as highlighted below.



Work Package # 10082 - Test for User Guide Estimated 13/Sep/19 - 26/Sep/19 Actual -

Hazard Analysis Form 2019-166

Edit Print Submit For Approval Clone Locations Attachments Hyperlinks People to Notify Governing Chapters

Dates 13-SEP-19 — 26-SEP-19

Performed On PIP-II Division

Job Description test

TM/CC/SC/Owner Vuletich, Kathy (16253N) 630.840.5182

Performed For PIP-II/PIP-II — PIP-II Division

Workflow Status Ready for Approval

This form cannot be deleted for the following reason(s):
Every work package is required to have at least one copy of this form.

Package Locations

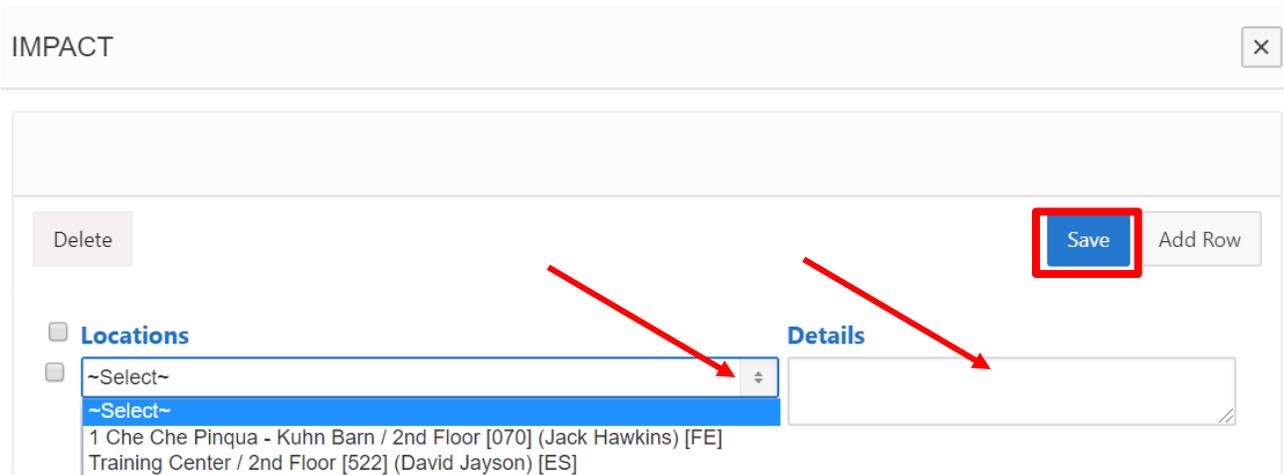
| Type | Name | Building Manager | Org |
|-------|--|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / 2nd Floor [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor | Training Center / 2nd Floor [522] | Jayson, David (36995N) 630.840.8721 | ES |

Details / Hazards Identified

- i. The locations dialog box will appear as seen below, click on “[Add Row](#)”.



- ii. A new row will appear as seen below, click on the “[Locations](#)” dropdown list and select the location.
- iii. Enter in any details about this location in the “[Details](#)” text field.
- iv. When finished click “[Save](#)” as seen below.



The HA screen will refresh and only the location(s) you selected will appear in the “Location” list.

Go to step 3.

3. Click “[Edit Form](#)” on the HA screen.

WKPG
Add Form
HA

Estimated **26/Dec/19 - 31/Dec/19**
Actual -

Hazard Analysis
Form 2019-1635

Edit Form
Print
Clone

Edit Form Header
Locations
Attachments
Hyperlinks
People to Notify
Governing Chapters

Dates 26-DEC-19 — 31-DEC-19

Performed On Applied Physics and Superconducting Technology Division

Authorizing Supervisor Missing

Prepared By Vuletich, Kathy (16253N) 630.840.5182

Job Description testing for content for the user guide

TM/CC/SC/Owner Vuletich, Kathy (16253N) 630.840.5182

Performed For APS-TD — Applied Physics and Superconducting Technology Division

Workflow Status This Form is not ready for approval for the following reasons:

- Required Authorizing Supervisor is Missing
- Form Contains No Data

This Form cannot be deleted for the following reason(s):
Every work package is required to have at least one copy of this this Form.

Package Location

| Type | Name | Building Manager | Org |
|-------|--|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |

4. The HA edit form appears. There is an **optional field** on the top of the screen you may edit.

a. [Additional Details](#) – You may enter any additional information in this text field.

Hazard Analysis - Form 2019-1635

Cancel
* Fields are required only when submitting for approval. You may leave required entries empty and finish them later.
Save Form Data

Additional Details

5. **Hazard Identification** – The next section of the form is a series of check boxes. These check boxes are hazards you may encounter when performing your work. Check the box next to all that apply.

Check the boxes next to all types of work and known hazards you may encounter on this job.

Industrial Hazards

- Flammable Gas Areas
- Working within Magnetic Field areas
- Hot/Cold work environments
- Structural Demolition
- Excavation
- Scaffold Erection
- Scaffold Use
- Ladder Use
- Steel Erection
- Fall Protection - Fall Exposures >4 feet (>6 feet for construction)
- Heavy Equipment Operation (crane, boom lift, excavator)
- Critical Crane Lift
- Rotating Equipment
- High Pressure air/fluids
- Welding/Cutting/Brazing/Grinding
- Lead Work (Lead paint, moving bricks, cutting sheets, soldering)
- Chemical Use (if checked attach or link SDS to the HA) [Upload Files](#) [Add Hyperlinks](#)
- Non ionizing radiation (lasers, RF, UV, magnets)

6. **Personal Protective Equipment (PPE) Identification** – Next is a similar checkbox section, and now you will choose what PPE is needed for the job. Check the box next to all that apply.

Check the boxes next to all types of PPE and Controls you will need for this job.

Personal Protective Equipment (PPE)

- Hardhat
- Bump cap
- Steel-toed boots
- Steel-toed shoes
- Gloves - leather
- Gloves - chemical
- Gloves - electrical
- Gloves - Cryogenic
- High visibility clothing
- Safety goggles
- Safety goggles - chemical
- Safety goggles - impact/face shield

7. **Controls Identification** – The last checkbox section is for controls required for the job. Check the box next to all that apply.

Controls

- Danger tape & signage
- Barricades - solid
- Barricades - soft (caution tape)
- Road Closure
- Soil/erosion control
- Site dust control

8. **Work Tasks Identification** – Document all of the work tasks that are required for the job

- a. indicate whether they are **critical** steps
- b. outline the **hazard details** of each step
- c. and finally the **mitigations**.

9. To add more rows to the work tasks identification table, click “**Add More Rows**”. Rows will be added in 3’s.

Complete the table below by identifying the work tasks and their associated hazards and mitigation that will reduce risk of the hazards.

| Step # | Critical Step | Process Step | Hazard Details | Mitigation Details |
|--------|---------------|-----------------------------|----------------------------------|--------------------------|
| 1 | Yes ▼ | This is my process step | Here are my hazard details | Here are the mitigation |
| 2 | No ▼ | This is my 2nd process step | Here are my hazard details again | And more mitigation |
| 3 | Yes ▼ | This is my 3rd process step | Here are these hazards | And even more mitigation |

 * Fields are required only when submitting for approval. You may leave required entries empty and finish them later.

10. When you have filled out the form, click “**Save Form Data**” to save your form.

NOTE: clicking Save Form Data does NOT submit the HA to workflow. Submitting HA to workflow is a separate step.

11. The HA screen has been updated and shows the information you entered. The hazards you selected will show in the [Details/Hazards Identified](#) section, and your work tasks will show in the [Hazard / Mitigation](#) table at the bottom of the screen.

Dates 13-SEP-19 — 26-SEP-19

Performed On PIP-II Division

Job Description test

TM/CC/SC/Owner Vuletich, Kathy (16253N) 630.840.5182

Performed For PIP-II/PIPII — PIP-II Division

Workflow Status Ready for Approval

This form cannot be deleted for the following reason(s):
Every work package is required to have at least one copy of this form.

Location

| Type | Name | Details | Building Manager | Org |
|-------|--|----------------------|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / 2nd Floor [070] | details entered here | Hawkins, Jack (12384N) 630.840.3082 | FE |

Details / Hazards Identified

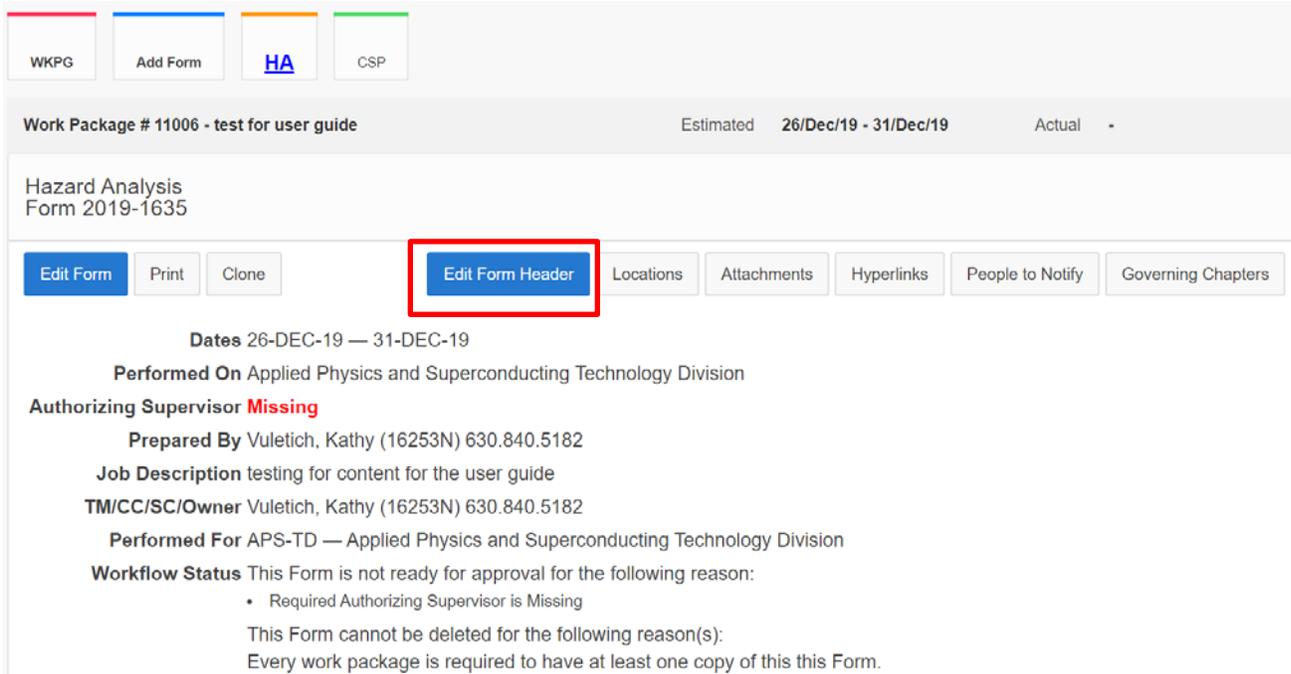
Industrial Hazards ✓ Welding/Cutting/Brazing/Grinding

Hazard / Mitigation

| Step # | Critical Step | Process Step | Hazard Details | Mitigation Details |
|--------|---------------|-----------------------------|----------------------------------|--------------------------|
| 1 | Yes | This is my process step | Here are my hazard details | Here are the mitigation |
| 2 | No | This is my 2nd process step | Here are my hazard details again | And more mitigation |
| 3 | Yes | This is my 3rd process step | Here are these hazards | And even more mitigation |

HOW TO SUBMIT HA TO WORKFLOW

1. To submit your HA to workflow for review and approval, on the HA screen you are required to first click on “[Edit Form Header](#)”.



The screenshot displays the IMPACT DB interface for a Hazard Analysis (HA) form. At the top, there are four tabs: WKPG, Add Form, HA (selected), and CSP. Below the tabs, the work package is identified as "Work Package # 11006 - test for user guide" with an estimated date range of "26/Dec/19 - 31/Dec/19". The form title is "Hazard Analysis Form 2019-1635". A row of action buttons is visible, including "Edit Form", "Print", "Clone", "Edit Form Header" (highlighted with a red box), "Locations", "Attachments", "Hyperlinks", "People to Notify", and "Governing Chapters". Below the buttons, the form details are listed: "Dates 26-DEC-19 — 31-DEC-19", "Performed On Applied Physics and Superconducting Technology Division", "Authorizing Supervisor Missing", "Prepared By Vuletich, Kathy (16253N) 630.840.5182", "Job Description testing for content for the user guide", "TM/CC/SC/Owner Vuletich, Kathy (16253N) 630.840.5182", "Performed For APS-TD — Applied Physics and Superconducting Technology Division", and "Workflow Status This Form is not ready for approval for the following reason: Required Authorizing Supervisor is Missing". A warning message states: "This Form cannot be deleted for the following reason(s): Every work package is required to have at least one copy of this this Form."

2. The dialog box below will appear. Choose an Authorizing Supervisor by clicking on “[Authorized By](#)” carrot and select the appropriate person from the employee directory.
NOTE: This is REQUIRED to be able to submit your HA to workflow.
3. There are other fields you also may update on this screen.
 - a. [Title](#) – You may enter a unique title for your Hazard Analysis, or leave as-is.
 - b. [Start Date / End Date](#) – You may change the start and end dates of when this HA is applicable. They may differ from the work package dates you entered. Otherwise leave as-is. Changing these dates will only affect this HA, not the work package dates.
 - c. [Prepared By](#) – You may change the person who prepared the HA and enter their name here, if it is different than the TM/CC/SC/Owner. Otherwise leave as-is.
 - d. [Not Required](#) – This field shall only be changed to “Yes” if you already have a paper copy of an HA from a sub-contractor, or for another reason and you are not required to complete the electronic HA.

IMPACT
×

Edit Form 2019-1635 Header

Title *

Start Date Enter ONLY if different than the package Start Date ?

End Date Enter ONLY if different than the package End Date ?

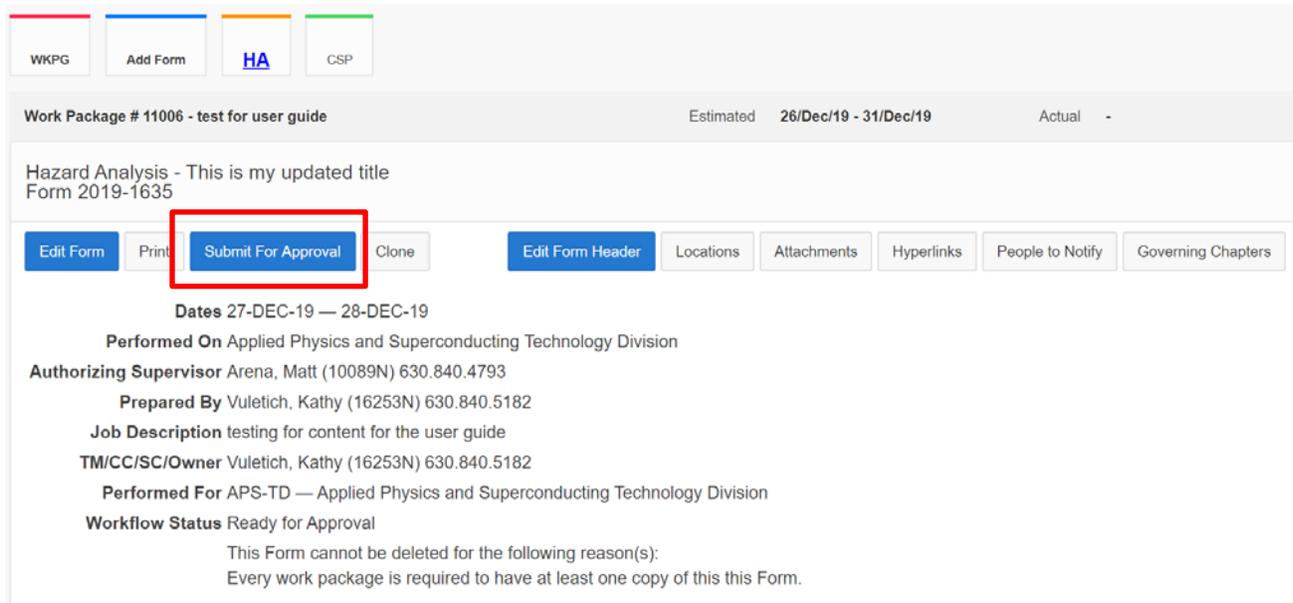
Authorized By * ?

Prepared By * ?

Not Required * ?

4. When complete, click “[Apply Changes](#)”.

- To submit your HA to workflow for review and approval, back on the HA screen click on “[Submit For Approval](#)”.



The screenshot shows the IMPACT DB interface for a Hazard Analysis (HA) form. At the top, there are tabs for 'WKPG', 'Add Form', 'HA', and 'GSP'. Below the tabs, the work package is identified as 'Work Package # 11006 - test for user guide' with an estimated date range of '26/Dec/19 - 31/Dec/19'. The form title is 'Hazard Analysis - This is my updated title Form 2019-1635'. A row of action buttons is visible, including 'Edit Form', 'Print', 'Submit For Approval' (highlighted with a red box), 'Clone', 'Edit Form Header', 'Locations', 'Attachments', 'Hyperlinks', 'People to Notify', and 'Governing Chapters'. Below the buttons, the form details are displayed, including dates (27-DEC-19 to 28-DEC-19), the performing division (Applied Physics and Superconducting Technology Division), the authorizing supervisor (Matt Arena), the preparer (Kathy Vuletich), the job description (testing for content for the user guide), and the workflow status (Ready for Approval). A note at the bottom states: 'This Form cannot be deleted for the following reason(s): Every work package is required to have at least one copy of this this Form.'

- The status at the bottom of the screen will update indicating you have submitted the HA to workflow.

Workflow Submitted for Review/Approval.

- Emails to SMEs and your supervisor will automatically be sent from IMPACT indicating they have an action to perform.
- After the system refreshes (5 to 10 minutes) the bottom of the screen will then update with the specific status of each role responsible for acting. The status will update as people complete their actions in the workflow.

Workflow

| Div/Sect | Role | Role Type | Status | Workflow | Submitted |
|----------|------------|-----------|----------|-----------------------------|-------------------|
| FE | WPC_IH | REVIEW | Reviewed | View Report | 02-Dec-2019 15:15 |
| | Supervisor | APPROVE | Running | View Report | 11-Dec-2019 12:10 |

9. Once all roles have completed their actions in the workflow, the “[Approvals](#)” section will update with the final disposition in the status field.

Workflow

| Div/Sect | Role | Role Type | Status | Workflow | Submitted |
|----------|------------|-----------|----------|-----------------------------|-------------------|
| FE | WPC_IH | REVIEW | Reviewed | View Report | 11-Dec-2019 10:33 |
| | Supervisor | APPROVE | Approved | View Report | 11-Dec-2019 10:50 |

10. If the HA is rejected for any reason, you will receive a communication email from IMPACT.



FermiPoint Workflow Notification

Your Work Planning & Control Form 2019-141 Hazard Analysis was rejected by Eric D McHugh.

Comments: Eric D McHugh (Rejected) 8/27/2019 11:30 AM - 8/27/2019 2:15 PM

11. The IMPACT system will re-open the HA, and you can edit the HA and resubmit to workflow. The “Submit For Approval” button will reappear on the HA Screen. Click the “[Submit For Approval](#)” button when ready to resubmit for review and approval.
12. The “[Approvals](#)” table at the bottom of the HA screen will update showing the rejection and resubmittal of the workflow.

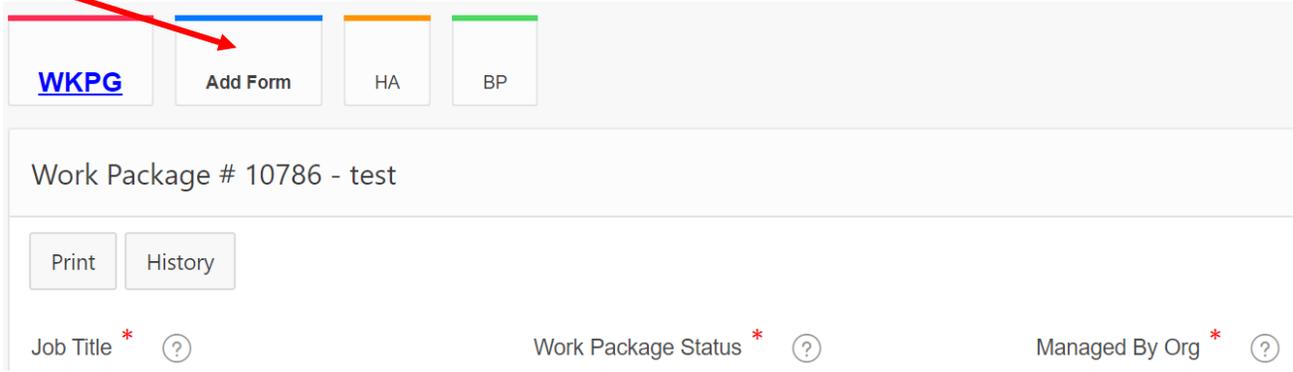
Approvals

| Div/Sect | Role | Role Type | Status | Workflow |
|----------|------------|-----------|----------|-----------------------------|
| FE | WPC_CSG | REVIEW | Reviewed | View Report |
| PPD | WPC_CSG | REVIEW | Reviewed | View Report |
| FE | WPC_EPG | REVIEW | Reviewed | View Report |
| PPD | WPC_EPG | REVIEW | Reviewed | View Report |
| FE | WPC_IH | REVIEW | Reviewed | View Report |
| PPD | WPC_IH | REVIEW | Reviewed | View Report |
| | Supervisor | APPROVE | Rejected | View Report |
| FE | WPC_CSG | REVIEW | Running | View Report |
| PPD | WPC_CSG | REVIEW | Running | View Report |
| FE | WPC_EPG | REVIEW | Running | View Report |
| PPD | WPC_EPG | REVIEW | Running | View Report |
| FE | WPC_IH | REVIEW | Running | View Report |
| PPD | WPC_IH | REVIEW | Running | View Report |



HOW TO ADHOC ADD A PERMIT

1. From the work package, click on “[Add Form](#)” tab.



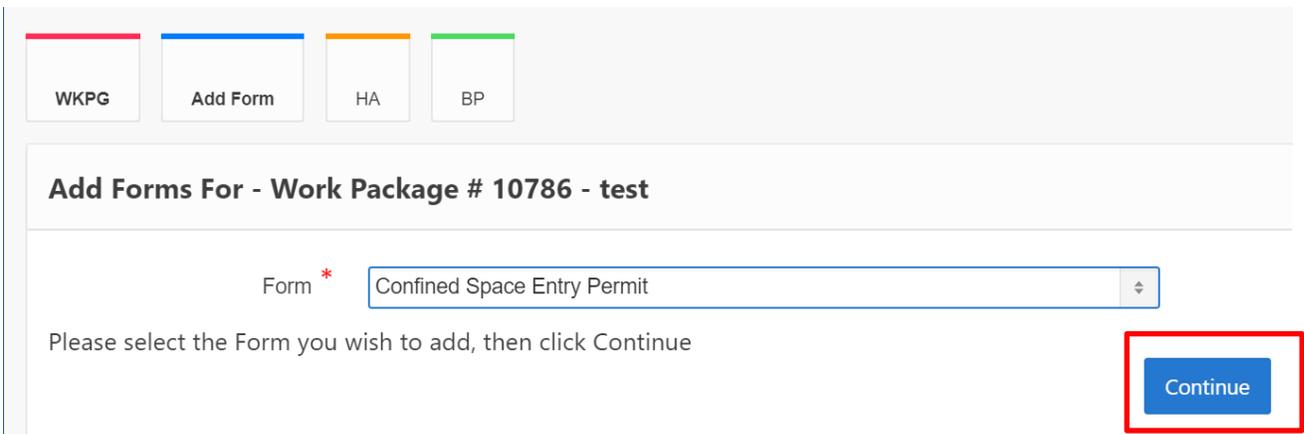
WKPG **Add Form** HA BP

Work Package # 10786 - test

Print History

Job Title * Work Package Status * Managed By Org *

2. Select the form from the dropdown list you wish to add to your work package.
3. Click “[Continue](#)”.



WKPG **Add Form** HA BP

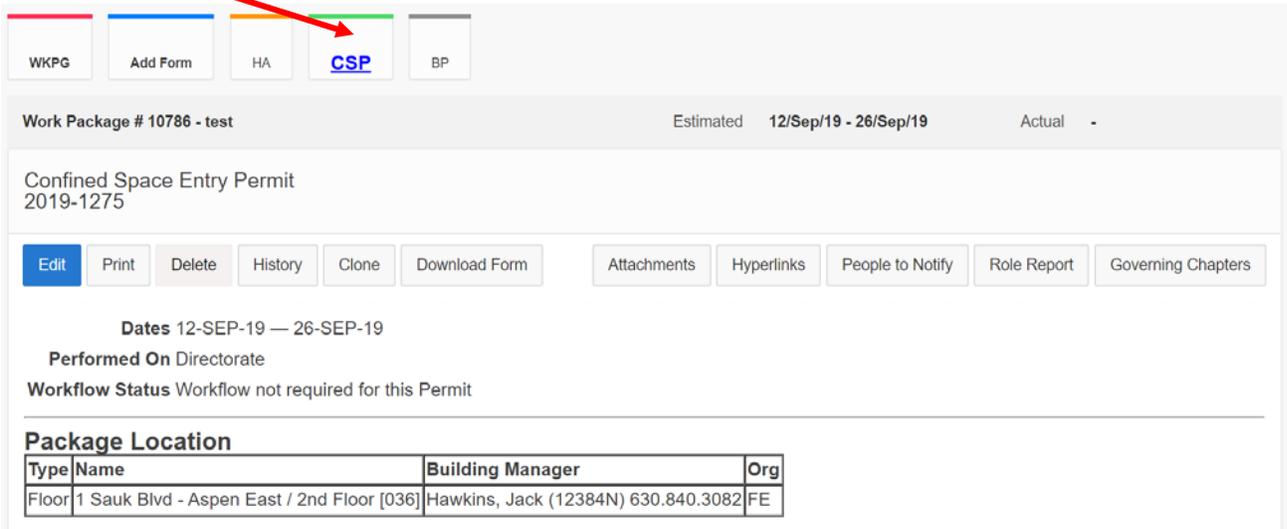
Add Forms For - Work Package # 10786 - test

Form *

Please select the Form you wish to add, then click Continue

Continue

- The work package adds a new tab for the permit you selected, and takes you to that tab.



Work Package # 10786 - test Estimated 12/Sep/19 - 26/Sep/19 Actual -

Confined Space Entry Permit
2019-1275

Edit Print Delete History Clone Download Form Attachments Hyperlinks People to Notify Role Report Governing Chapters

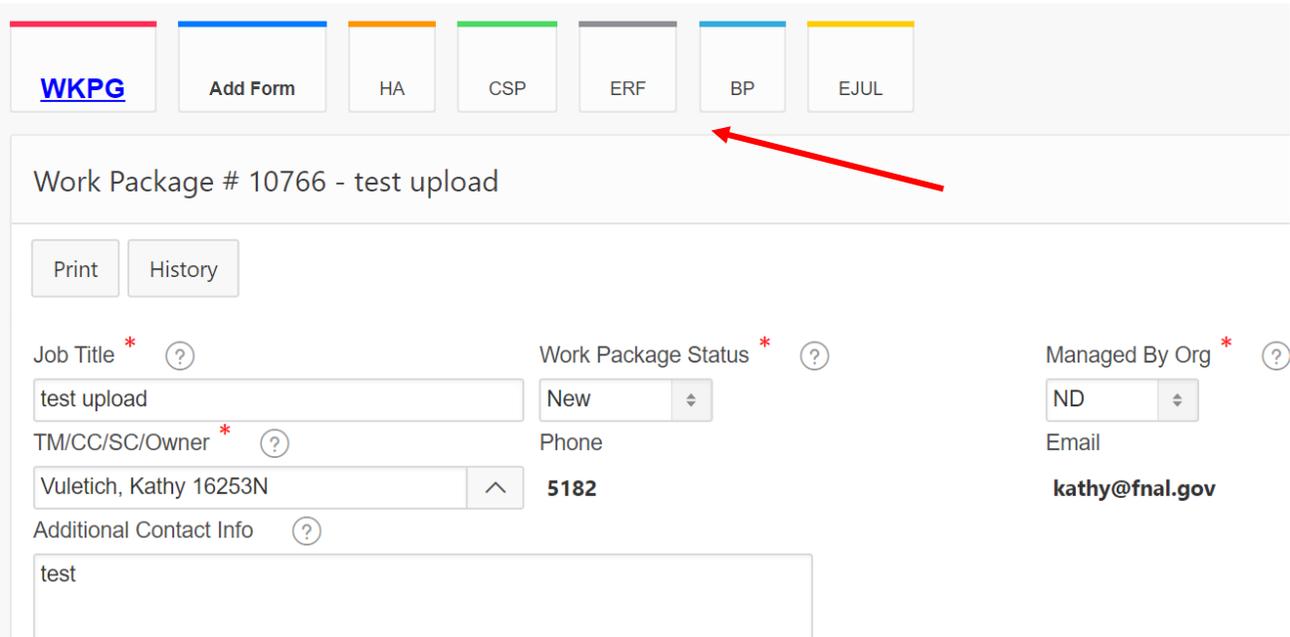
Dates 12-SEP-19 — 26-SEP-19
Performed On Directorate
Workflow Status Workflow not required for this Permit

Package Location

| Type | Name | Building Manager | Org |
|-------|--|-------------------------------------|-----|
| Floor | 1 Sauk Blvd - Aspen East / 2nd Floor [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

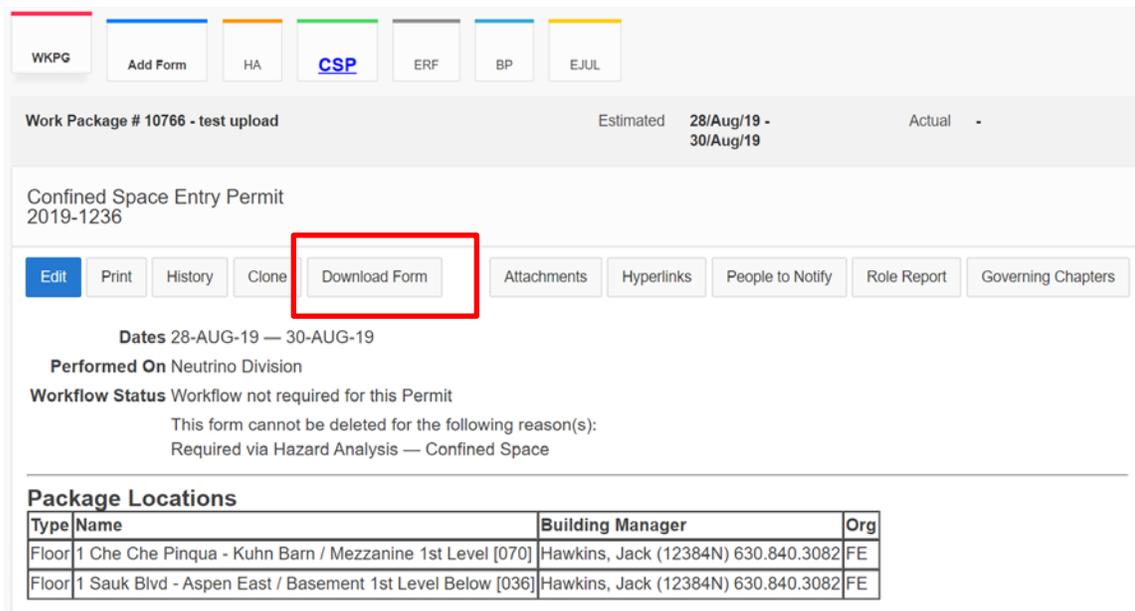
HOW TO DOWNLOAD / ACCESS A PERMIT

1. From any screen in your work package, click on the tab for the permit you wish to download.



The screenshot shows a navigation bar with tabs: WKPG, Add Form, HA, CSP, ERF, BP, and EJUL. The 'BP' tab is highlighted with a blue border and a red arrow points to it. Below the tabs, the page title is 'Work Package # 10766 - test upload'. There are 'Print' and 'History' buttons. The form contains fields for Job Title (test upload), Work Package Status (New), Managed By Org (ND), TM/CC/SC/Owner (Vuletich, Kathy 16253N), Phone (5182), and Email (kathy@fnal.gov). An 'Additional Contact Info' field contains the text 'test'.

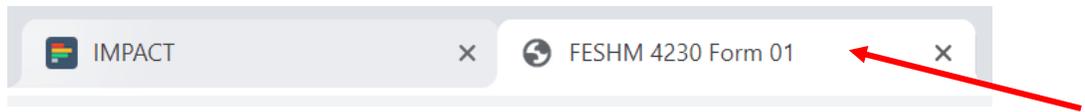
2. Click on “Download Form”.



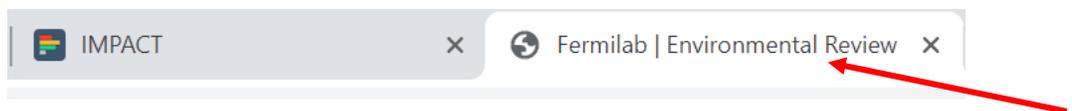
The screenshot shows the 'CSP' tab selected in the navigation bar. The page title is 'Work Package # 10766 - test upload'. The permit details are: 'Confined Space Entry Permit 2019-1236'. The 'Download Form' button is highlighted with a red box. Other buttons include Edit, Print, History, Clone, Attachments, Hyperlinks, People to Notify, Role Report, and Governing Chapters. The dates are 28-AUG-19 to 30-AUG-19. The permit is performed on the Neutrino Division. The workflow status is 'Workflow not required for this Permit'. A warning message states: 'This form cannot be deleted for the following reason(s): Required via Hazard Analysis — Confined Space'. Below this is a table of Package Locations.

| Type | Name | Building Manager | Org |
|-------|---|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor | 1 Sauk Blvd - Aspen East / Basement 1st Level Below [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

3. If the permit is in paper form, a new browser tab will open to a copy of the permit.



4. If the permit resides in an external DB, a new browser tab will open to the external DB.

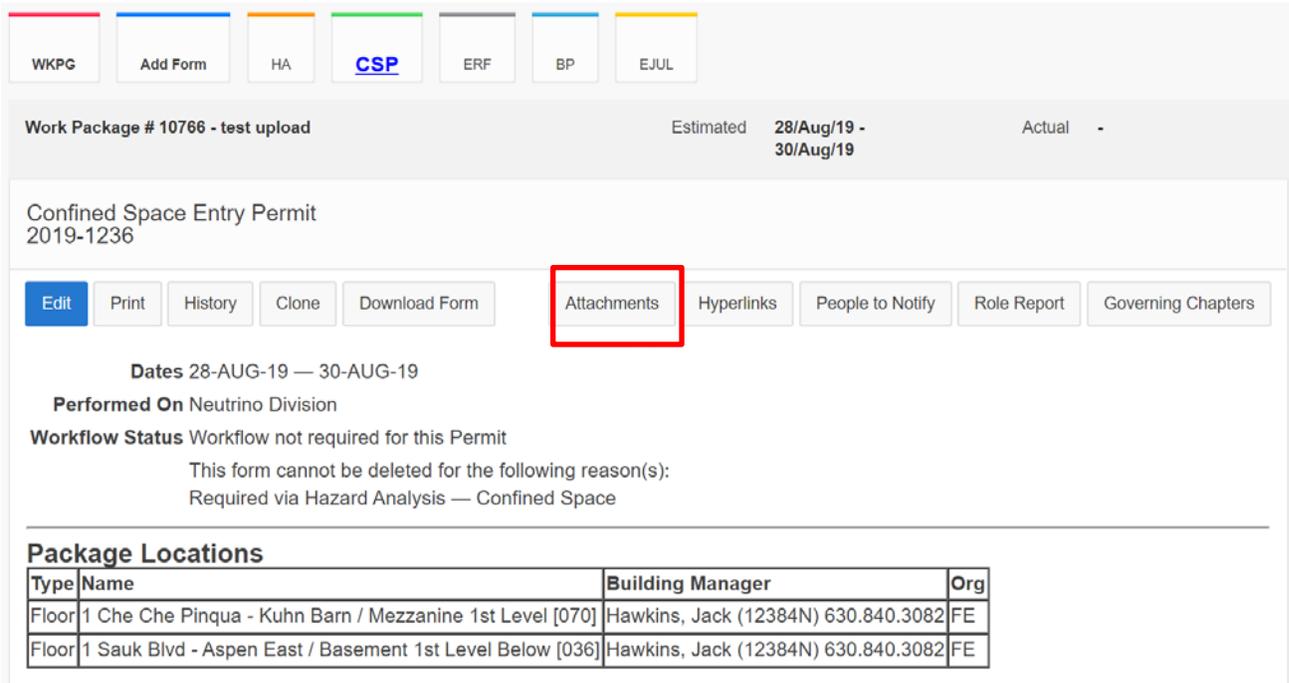


NOTE: For the Pilot of the IMPACT tool, permits are **NOT** yet able to go through workflow.

Please process permits and approvals of permits external to the IMPACT system as you have been.

HOW TO ATTACH DOCUMENTS

1. On any tab in your work package, click “[Attachments](#)”. This will attach a document to that particular tab.



WKPG Add Form HA **CSP** ERF BP EJUL

Work Package # 10766 - test upload Estimated 28/Aug/19 - 30/Aug/19 Actual -

Confined Space Entry Permit
 2019-1236

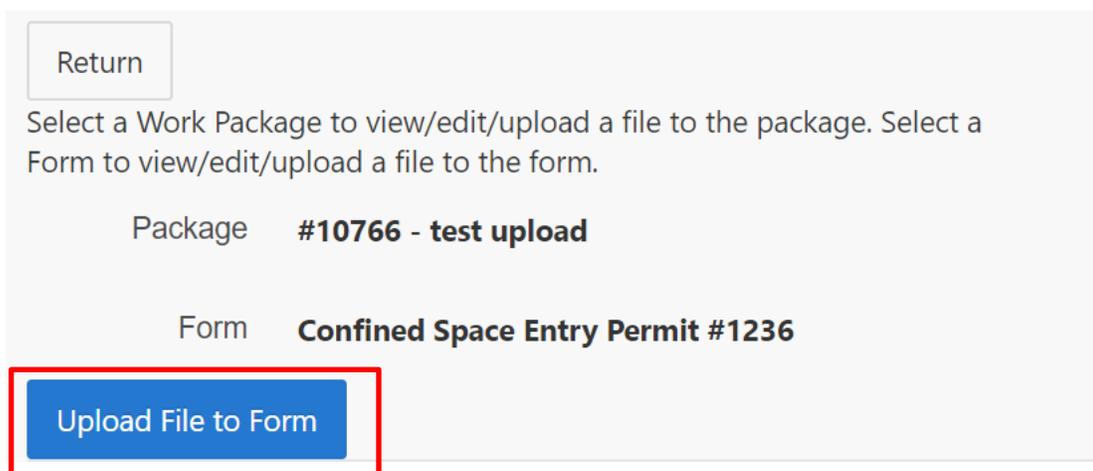
Edit Print History Clone Download Form **Attachments** Hyperlinks People to Notify Role Report Governing Chapters

Dates 28-AUG-19 — 30-AUG-19
 Performed On Neutrino Division
 Workflow Status Workflow not required for this Permit
 This form cannot be deleted for the following reason(s):
 Required via Hazard Analysis — Confined Space

Package Locations

| Type | Name | Building Manager | Org |
|-------|---|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor | 1 Sauk Blvd - Aspen East / Basement 1st Level Below [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

2. Click on “[Upload File to Form](#)”.



Return

Select a Work Package to view/edit/upload a file to the package. Select a Form to view/edit/upload a file to the form.

Package **#10766 - test upload**

Form **Confined Space Entry Permit #1236**

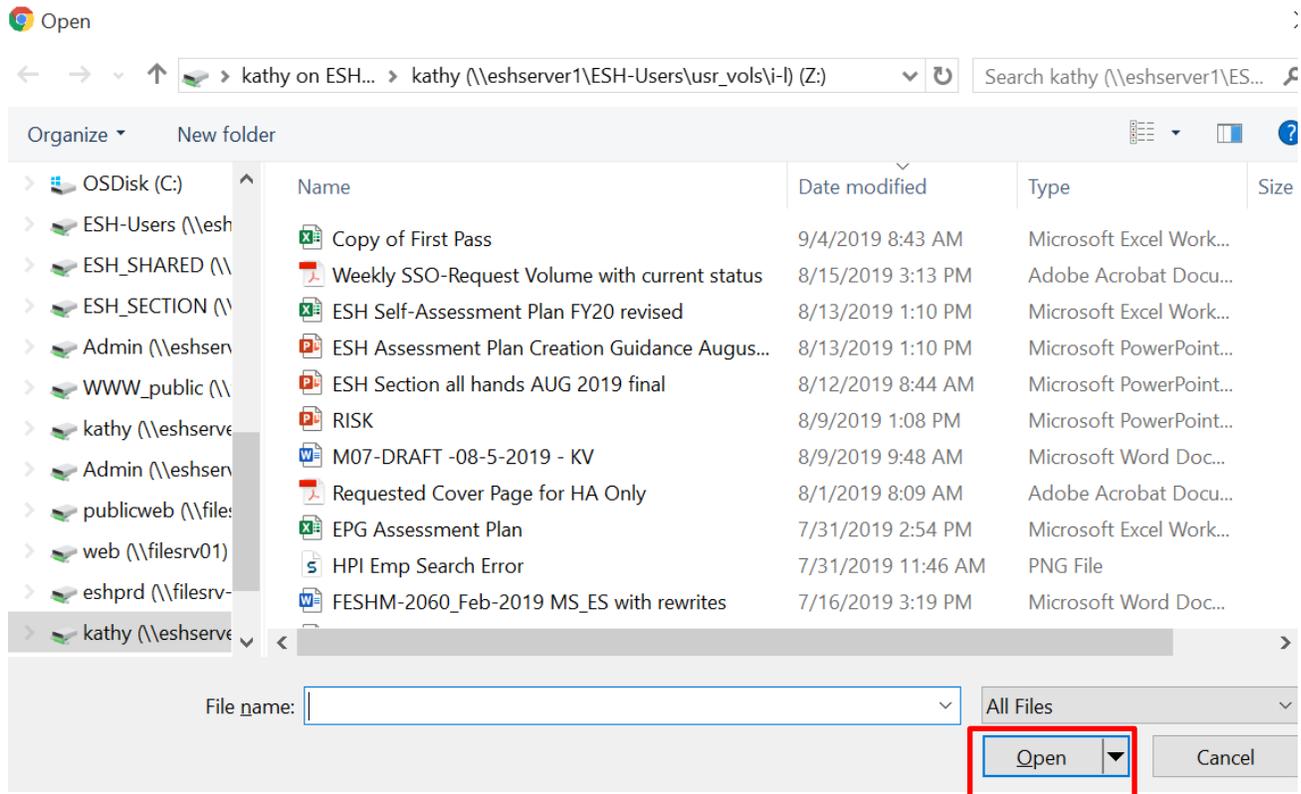
Upload File to Form

3. Click on “Choose File”.

Form Attachements

| | |
|-------------|---|
| Content | <input type="button" value="Choose File"/> No file chosen |
| Description | |

4. Select the file from your computer to attach and click “Open”.



5. Enter a “Description” in the text field – optional.
6. Click “Create”.

Form Attachements

Cancel Create

Content Choose File EPG Assessment Plan.xlsx

Description Enter a description in this field if you like.

7. The file has been attached and is visible in the table.

Return

Select a Work Package to view/edit/upload a file to the package. Select a Form to view/edit/upload a file to the form.

Package **#10766 - test upload**

Form **Confined Space Entry Permit #1236**

Upload File to Form

Actions ▾

| Edit | Package Title | Form Title ↑≡ | Package Download | Form Download | Document/Image | Uploaded By | Uploaded | Delete | Description |
|---|---------------|-----------------------------|------------------|---|--|-------------|----------------------|---|--|
|  | test upload | Confined Space Entry Permit | - |  |  EPG Assessment Plan.xlsx | kathy | 17-SEP-2019 09:20:02 |  | Enter a description in this field if you like. |

1 - 1

8. Click “[Return](#)” to go back to the tab.
9. The attached document now shows at the bottom of the screen.

WKPG
Add Form
HA
CSP
ERF
BP
EJUL

Work Package # 10766 - test upload Estimated 28/Aug/19 - 30/Aug/19 Actual -

Confined Space Entry Permit
2019-1236

Edit
Print
History
Clone
Download Form
Attachments
Hyperlinks
People to Notify
Role Report
Governing Chapters

Dates 28-AUG-19 — 30-AUG-19

Performed On Neutrino Division

Workflow Status Workflow not required for this Permit

This form cannot be deleted for the following reason(s):
Required via Hazard Analysis — Confined Space

Package Locations

| Type | Name | Building Manager | Org |
|-------|---|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor | 1 Sauk Blvd - Aspen East / Basement 1st Level Below [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

Document (Download)

EPG Assessment Plan.xlsx Enter a description in this field if you like.

10. To download a copy, click on “([Download](#))”.

HOW TO LINK TO WEB PAGES

1. On any tab in your work package, click “[Hyperlinks](#)”. This will add a hyperlink to that particular tab.

WKPG Add Form HA CSP ERF BP EJUL

Work Package # 10766 - test upload Estimated 28/Aug/19 - 30/Aug/19 Actual -

Confined Space Entry Permit
2019-1236

Edit Print History Clone Download Form

Attachments Hyperlinks

People to Notify Role Report Governing Chapters

Dates 28-AUG-19 — 30-AUG-19

Performed On Neutrino Division

Workflow Status Workflow not required for this Permit

This form cannot be deleted for the following reason(s):
Required via Hazard Analysis — Confined Space

Package Locations

| Type | Name | Building Manager | Org |
|-------|---|-------------------------------------|-----|
| Floor | 1 Che Che Pinqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor | 1 Sauk Blvd - Aspen East / Basement 1st Level Below [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

2. Click on “[Add Row](#)”.

Hyperlinks

URL Description Hyperlink

No data found.

Delete

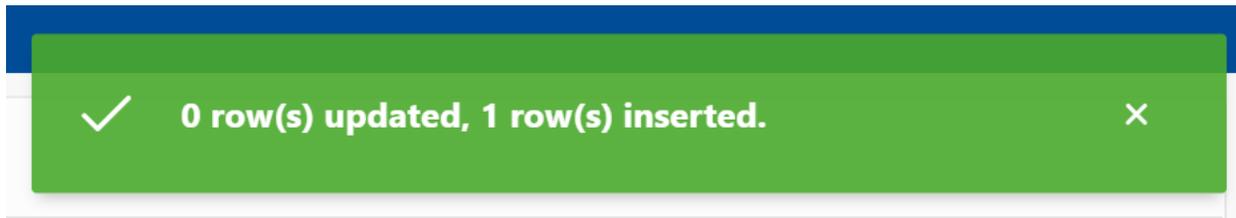
Save Add Row Close

3. Type in or copy the hyperlink, including the http or https at the beginning, in the “URL” field.
4. Type in a “Description” in the next text field.
5. Click “Save”.

Hyperlinks

| <input type="checkbox"/> URL | <input type="checkbox"/> Description | <input type="checkbox"/> Hyperlink |
|---|--|------------------------------------|
| <input type="checkbox"/> https://www.fnal.gov | <input type="checkbox"/> Fermilab Web Page | <input type="checkbox"/> |

6. The green confirmation box will appear in the upper right corner.



7. Click “Close” to go back to the tab.

Hyperlinks

| <input type="checkbox"/> URL | <input type="checkbox"/> Description | <input type="checkbox"/> Hyperlink |
|---|--|------------------------------------|
| <input type="checkbox"/> https://www.fnal.gov | <input type="checkbox"/> Fermilab Web Page | <input type="checkbox"/> |

8. The linked webpage is at the bottom of the screen in the “[Link](#)” section.
9. Click on the “[hyperlink](#)” to open the webpage.

WKPG
Add Form
HA
CSP
ERF
BP
EJUL

Estimated **28/Aug/19 - 30/Aug/19** Actual -

Work Package # 10766 - test upload

Confined Space Entry Permit
2019-1236

Edit
Print
History
Clone
Download Form

Attachments
Hyperlinks
People to Notify
Role Report
Governing Chapters

Dates 28-AUG-19 — 30-AUG-19

Performed On Neutrino Division

Workflow Status Workflow not required for this Permit

This form cannot be deleted for the following reason(s):
Required via Hazard Analysis — Confined Space

Package Locations

| Type | Name | Building Manager | Org |
|---------|---|-------------------------------------|-----|
| Floor 1 | Che Che Piqua - Kuhn Barn / Mezzanine 1st Level [070] | Hawkins, Jack (12384N) 630.840.3082 | FE |
| Floor 1 | Sauk Blvd - Aspen East / Basement 1st Level Below [036] | Hawkins, Jack (12384N) 630.840.3082 | FE |

Document ([Download](#))
EPG Assessment Plan.xlsx Enter a description in this field if you like.

Link
[Fermilab Web Page http://www.fnal.gov](http://www.fnal.gov)

