

ioXpress™ 2006

BASIC AND WORKFLOW



INSTALLATION & USER GUIDE

The screenshot shows the ioXpress 2006 web application interface. The header includes the ioXpress logo, the tagline "up-to-date knowledge for a safer enterprise", and a "COMPANY LOGO HERE" placeholder. The navigation bar contains "Libraries", "Modules", "Communication", "Manager", and "Tasks". The main content area is divided into several sections: "News" with a welcome message, "Alerts" (no alerts), and "New Documents" table. A sidebar on the left offers actions like "View Library", "Add Document", and "Search Action Item". A right sidebar shows "Available Sites" and "Action Items".

File Type	File Name	Author	Summary	Library	Category	Date Published
	MAXOptimizer Sample	Daniel Nguyen	this is document for Nguyen		Transfer	02/09/06
	polymer reactor rev.1	henry o2og		Affected Documents	P&IDs	01/25/06
	polymer reactor revised chart	henry o2og		Affected Documents	P&IDs	01/25/06
	polymer reactor routine 2	henry o2og		Affected Documents	P&IDs	01/25/06
	polymer reactor	henry o2og		Affected Documents	P&IDs	01/25/06

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Definitions

- **Action Item:** An action assigned to a user
- **Cart:** A folder where documents can be collected in order to perform library assignment, download, checkout or delete functions
- **Category:** Sub-folder under the library folder
- **Field:** A section of a form for input of data that contains a title block and field type
- **Form:** Set of fields for input of raw data or links to files
- **Library:** Folder where documents are stored under categories
- **Module:** A database record produced by completing a dynamic form (i.e., software feedback) or workflow (MOC)
- **Workflow:** A set of forms linked by a set of business rules*
- **Workflow Task:** One step of the workflow process*

*This is not applicable to ioXpress Basic

1. User's Guide

This user guide is intended to help you familiarize yourself with ioXpress. Specifically, this chapter describes what ioXpress does, identifies installation and user computer settings requirements, and highlights an overview of ioXpress' user interface.

1.1 What is ioXpress?

ioXpress is a web-based workflow process and knowledge management solution (see figure 2.1). ioXpress is designed to help companies to leverage "unstructured" corporate data for business advantage and learning. ioXpress can administer workflow, manage data and documents, enable knowledge sharing, and enhance communication. All document collections are categorized, centralized, and managed through a secure web-based database platform.

ioXpress can be configured to implement your specific business processes at any number of site locations.

You can create libraries and categories to store information and design custom dynamic forms to track and enter data as needed. ioXpress integrates custom user interfaces based on the security and access privileges of the user.

There are two versions of ioXpress: (a) Basic and (b) Workflow.

The Basic version is a web-based knowledge management system that manages unstructured data including electronic documents and dynamic forms. Examples of data that can be managed and indexed by ioXpress include:

- Engineering Drawings (AutoCAD and Visio). Note that AutoCAD requires a separate license.
- Databases
- Email
- HTML
- ASCII text
- Portable Document Format (PDF)
- All Microsoft Office documents

Documents can be added directly into ioXpress or can be sent via email and stored in libraries and library categories for easy access. ioXpress' powerful search capability with full text indexing of all documents allows for quick retrieval of any document making it an excellent tool for management of all plant information such as engineering data, process safety information (PSI), procedures, records, and reports.

ioXpress users can create dynamic forms to facilitate data input and links to documents in the digital library. These forms provide a practical and efficient infrastructure to capture and manage information such as engineering relief and vent sizing data (including basic process data, sizing calculations, and final device specifications) and business data.

The ioXpress Workflow version adds a workflow and business rules engine that enables management of entire business processes such as management of change (MOC), compliance

assurance, task management, and incident investigation. Each workflow module has a separate manual describing the specific workflow.

The ioXpress MOC module is a comprehensive visual workflow that guides the user through a step-by-step process for standard MOC functions such as MOC initiation, approvals, process hazard analysis (PHA), pre-startup safety review (PSSR), start-up authorization, etc. The ioXpress workflow engine is based upon prevalent industry norms and best practices. This workflow engine can easily and cost-effectively be configured to conform to a site's specific procedures.

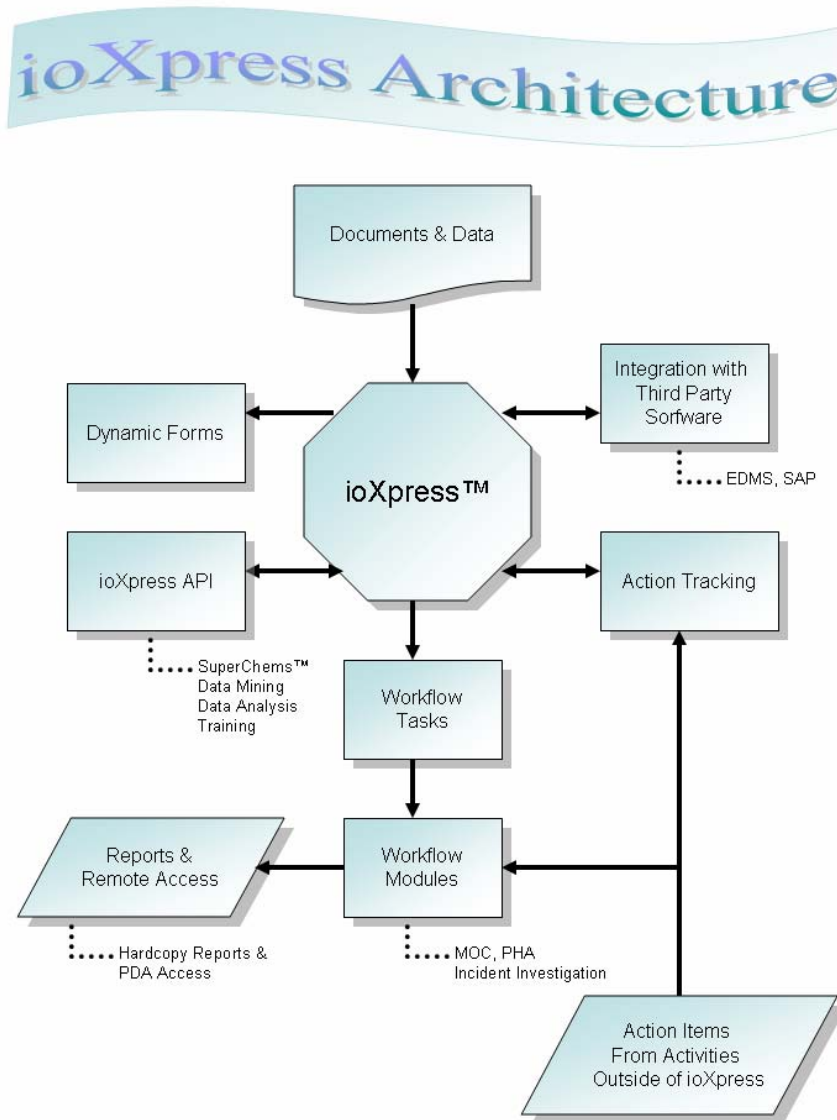


Figure 1.1: ioXpress Architecture

1.2 ioXpress User Interface

After login, a general user interface (see Figure 1.2a for the Basic version and Figure 1.2b for the Workflow version) is displayed with appropriate information based on the user assigned privileges and current work status.

The screenshot shows the ioXpress user interface. At the top, there is a navigation bar with 'Libraries', 'Modules', 'Communication', 'Manager', and 'Tasks'. The user 'Daniel Nguyen' is logged in. The main content area is divided into sections: 'News' (welcome message), 'Alerts' (no alerts), and 'New Documents'. The 'New Documents' section contains a table with the following data:

File Type	File Name	Author	Summary	Library	Category	Date Published
	HAZOPtimizer Sample	Daniel Nguyen	this is document for MOC 1040	Nguyen	Transfer	02/09/06
	polymer reactor rev 1	henry ozog		Affected Documents	P&IDs	01/25/06
	polymer reactor redlined change	henry ozog		Affected Documents	P&IDs	01/25/06
	polymer reactor redline 2	henry ozog		Affected Documents	P&IDs	01/25/06
	polymer reactor	henry ozog		Affected Documents	P&IDs	01/25/06

On the right side, there are sections for 'Available Sites' and 'Action Items'. The 'Available Sites' table shows:

Site	Primary Site	Current Login
houston	No	-
salem	Yes	Yes
pittsburgh	No	-
st louis	No	-

The 'Action Items' section lists: 'List All Overdue Action Items' (2), 'List All Action Items Due Today' (0), 'List All Action Items Due Within a Week' (0), and 'List All Open Action Items' (2).

Figure 1.2a: ioXpress General User Interface

The ioXpress user interface is divided into six different regions or working areas. Table 1.1 describes the purpose and functionality of each region.

Table 1.1: ioXpress user interface regions

Region	Description
Top	Includes menus for accessing document libraries, modules, communication, site/user administration (administrators only), and tasks. The top right hand window area allows user access to login/logout, user registration/profile, help, and changes to site location.
Left	Includes functions specifically applicable to the currently selected feature (Basic). In the Workflow version the available modules (i.e., MOC) can be selected from the left column.
Middle	Main working space to perform the most common activities
Right	Displays the status of action items and site login. The Workflow version also displays workflow tasks.
Bottom	ioMosaic contact information.
Top Left	Click on the ioXpress logo at any time to return to the general user interface

The screenshot shows the ioXpress Workflow User Interface. At the top, there is a navigation bar with 'Libraries', 'Modules', 'Communication', 'Manager', and 'Tasks'. The user is logged in as Daniel Nguyen. The main content area is divided into several sections: 'News' with a welcome message, 'Alerts' (no alerts), 'MOC Status' (12 records open, 3 tasks waiting), and 'Actions' (Start a new MOC, Search for MOCs, Search for my action items, Generate a report). A sidebar on the right contains 'Available Sites' (Houston, Salem, Pittsburgh, St. Louis) and 'Workflow Tasks' (1030 HSE Approval, 1017 PHA Complete). The footer includes 'Contact | Legal | About ioMosaic' and '©2003-2006 ioMosaic Corporation. All rights reserved.'

Figure 1.2b: ioXpress Workflow User Interface (using MOC as an example)

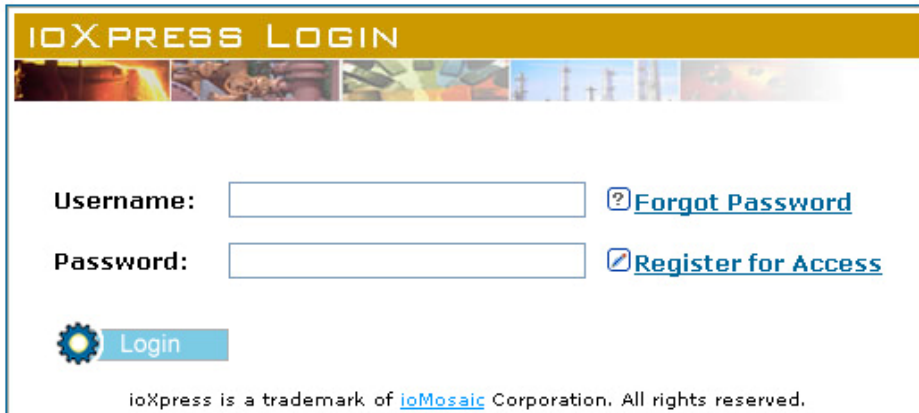
1.2.1 Login/Logout

Note: You must register with ioXpress before being able to login for more information.

All users are required to login before being able to access the workflow or any other ioXpress system features.

- To login enter your **Username**. Your **Username** is your email address.
- Enter your **Password**.

If you forget your password, you can retrieve it by clicking on the **Forgot Password** link and following the instructions. Note that the password is case sensitive.



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Figure 1.3: Login screen

After login, you will be directed to a general greeting page as illustrated in Figure 1.2.

1.2.2 Registration

Any one can register for access to ioXpress.

- To register, complete the **New Registration** form (see Figure 1.4) and click on the **Register** button.

Note: After registration, both the registered user and the administrator will receive an email notification. The user account will not work until an administrator activates it.

New Registration

* --Indicates Required Field

User Profile

First Name: *

Last Name: *

Title

Company Name:

Site: *

Address1:

Address2:

City:

State:

Zip:

Provinces:

Country:

Industry:

Work Phone:

Work Ext:

Fax Number:

Comments:


Logon Info

Email: *

Password: *

Confirm password *

Welcome to our Knowledge Manager



ioXpress Knowledge Manager is a web-based enterprise application for corporate electronic information management. Developed by [ioMosaic Corporation](#), ioXpress is designed to help companies effectively manage their information, enable knowledge sharing, and enhance communication.

- ioXpress serves as a knowledge manager for creation, editing, storage, and retrieval of reusable documents within a corporate environment. All document collections are categorized, centralized, and managed through a secure database platform.
- ioXpress provides access to discreet data management through customizable form modules. The data records can be linked to documents stored within the system to provide complete integration.
- ioXpress has other features to provide additional functionality such as discussion forums and task lists.
- ioXpress links to third-party software that can provide workflow and data transmission capability.

As a web-based .NET application, ioXpress Knowledge Manager allows users to securely share information from any location, and can be deployed via a corporate intranet. It can produce significant returns in the form of cost savings and productivity gains for both small and large multinational organizations. Our [brochure](#) for ioXpress contains more information on the capabilities and functionality of the application.

Figure 1.4: User Registration form

As soon as your user account is activated, you will receive an email notification indicating that the account is now active.

1.3 Profile

You can change your profile any time. The **Profile** link, located on the top right corner of the main ioXpress window, is always accessible.

Update Registration

* --Indicates Required Field

User Profile

First Name: * Daniel
 Last Name: * Nguyen
 Title: partner
 Company Name: iomosaic
 Site: * saalem
 Address1: 93 Stiles Road
 Address2:
 City: Salem
 State: NH
 Zip: 03079
 Province:
 Country: USA
 Industry: Chemicals
 Work Phone: 603-893-7009
 Work Ext: 103
 Fax Number: 603-893-7885
 Comments:

Logon Info

Email: * nguyen@iomosaic.com
 Password: *
 Confirm password: *

User Status

Active?

User Permissions and Groups

Group	Description
<input checked="" type="checkbox"/> Admin	Administrators of the application
<input type="checkbox"/> Managers	Managers of the application
<input checked="" type="checkbox"/> End User	End users who have read access
<input type="checkbox"/> special permission	special permission
<input type="checkbox"/> Workflow Users	Workflow Users

Organization Chart

- ioMosaic
 - houston
 - pittsburgh
 - saalem
 - st louis
 - Daniel Nguyen
 - Georges Melhem
 - henry ozog
 - Sanjeev Saraf
 - Tao Yao

Update User

Figure 1.5: User Registration Form

You can change or update your user information or password, except for the site location (see Figure 1.5). After making changes to your user profile, you and the ioXpress administrator will each get an email notification of the change.

Note: Even though a user may change his or her email address, the unique user ID (hidden from user) will remain the same.

1.3.1 Document Libraries

Libraries are used to store, manage, search, and retrieve digital information. You can store any type of data in the library and create multiple categories within each library to keep data organized. Users can add single or multiple documents at a time, as well as download multiple documents or even entire libraries. The ability to link documents to each other and to dynamic forms makes the organization of common or related data very efficient. Sharing and emailing

selected documents as well as being able to export library and category lists to Excel are additional beneficial features of the ioXpress library function.

1.3.2 Dynamic Forms Modules

Modules can be used to manage your structured data with dynamic database forms. ioXpress is equipped with a forms engine and the capability to create dynamic forms to facilitate data input and linking to documents and other data objects in the digital library. These forms provide a practical and efficient infrastructure to capture and manage information such as engineering (including basic process data, calculations, and specification sheets) and business data. Dynamic Forms Modules are easy to create and can be populated with multiple field (data) types. Dynamic Forms Modules are also easy to search, print, copy, email, and export to Excel. Dynamic Forms Modules become more powerful with the ioXpress Workflow and business rules engines. The ioXpress Workflow management of change (MOC) module is an excellent example of a Dynamic Forms Module with workflow. The ioXpress Workflow module guides the user through a visual step-by-step process for standard workflow functions. Specific features can be configured for virtually any client-specific specifications.

1.3.3 Reporting

ioXpress has a powerful reporting engine, supported by Microsoft SQL Reporting Services. There are two types of ioXpress reports: (a) pre-defined and (b) general reports. Pre-defined reports are customized based on user-specific needs while general reports are intended for users to build on their own. You may also export any structured data from ioXpress into Excel spreadsheets.

1.3.4 Communication

There are four main ioXpress forms of communication:

URLs:

Private and common URLs can be created to provide users with information links.

Forums:

ioXpress forums serve as message boards for information sharing. New threads can be added to forums as well as replies to threads, making information and knowledge sharing easily available to all users.

Email:

Emails can be sent to all active users on the system.

News and broadcast:

The news and broadcast feature allows anyone to post news on the homepage to inform users up front about recent events.

1.3.5 System Management

All site and user administration is managed under the “**Managers**” menu. The **Managers** menu is only visible to a user who has administrator privileges.

Administration is divided into four main areas: (a) user and group management; (b) document library management; (c) module management; and (d) system management.

ioXpress uses form authentication with two security layers: (a) site organization chart and (b) assigned group permissions. All users are given individual user profiles with specific permissions. Different groups on ioXpress are given different permissions. There are four main groups:

- **Administrative** group, whose users serve as administrators of the system and can perform all tasks,
- **Manager** group, whose users can perform specified tasks,
- **End User** group, which has read access only, and
- **Workflow User** group, whose users can perform workflow functions.

Document library management enables administrators to create and modify libraries and categories. Libraries and/or categories may also be merged, renamed, or deleted.

Only administrators can create forms/tabs using the ioXpress Dynamic Forms Engine. Module management provides a very flexible environment for managing structured data.

Finally, the system management allows administrators to restore deleted data, change system settings, manage data units, and import/export data to/from ioXpress.

1.3.6 Task Management

There are two types of tasks: action items and workflow tasks. Action items can be assigned automatically by completing specific fields on forms can be assigned manually, or can be imported from Excel. All automatically generated action items have 30 days as deadline. A reminder is sent the responsible person three days prior to his or her action item's due date.

Workflow tasks are actions that an individual must take to advance the MOC workflow. Each task in the workflow has a designated person (or organizational function) responsible to complete the required information and submit the form to advance the workflow.

1.4 How to use the search features

ioXpress can search the contents of any Microsoft office document, AutoCAD drawing, PDF document, HTML document, ASCII files, forums, and all Dynamic Forms Module data.

There are two main types of search: (a) Basic (document) search and (b) Advanced search. Basic search is located in the top left corner (see Figure 1.7) and is visible to the user at all times after user login.

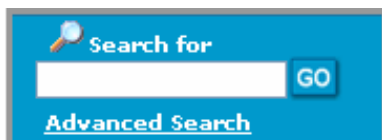


Figure 1.6: Basic Search

Figure 1.7: Advanced Search

- To start a search, simply enter **your search text** in the **Search for** text box and click on the **Go** button.
- To use the advanced search feature, click on the **Advanced Search** link, located right below the basic search textbox. Advanced search allows the user to search within the Forums, Modules/Forms, Documents, and URLs. Certain items may be excluded from the search. Users can also refine their search criteria using AND, OR, AND NOT, and NEAR keywords.



1.5 How to use the Document Cart

The Document Cart is located on the top right hand corner, below the main window drop-down menu bar (Figure 1.8). It allows ioXpress users to collect various documents and perform various functions on all of these documents simultaneously. The user can then reassign the documents into different libraries/categories, download them at once, check out the documents, or simply delete the entire contents of the cart.



Figure 1.8: Quick access tool bar

To add and manage document(s) within the Cart:

- Navigate to any document(s).
- Right-click on the expanding-down icon  and select **Add to Cart**.
- Repeat for all desired documents.
- Click on the **Cart** icon  to go to your collected bin of documents.
- Follow instructions within the Document **Cart** for appropriate actions

1.6 How to use the Favorites Feature

The Favorites feature allows a user to keep track of “Favorite” links or URL items. These links do not have to be within ioXpress.

To add a page to your list of favorite pages/links:

- Go to the page that you want to add to your **Favorites** list

- On the **Favorites** menu (see Figure 1.8), click **Add to Favorites**
- Type a description for the page you want to reference

To open one of your favorite pages, go to the **Favorites** menu and click on the page you want to open.

To remove or rename favorite links, click on the **Favorites** menu and select **Manage Favorites** and follow the instructions.

1.7 How to use Online Help

Online help is topic specific. On any given page, you can always click on the **Help** link located on the top right corner. A help window will pop up. There you can also search and navigate to other topics.

1.8 ioMosaic Contact and Support

For more information about ioXpress, please visit us at <http://www.iomosaic.com>.

Mailing Address	Technical Support	Sales and Email Support
ioMosaic Corporation 93 Stiles Road Salem, NH 03079	Telephone 603.893.7009 Fax 603.893.7885	Sales sales@iomosaic.com Support support@iomosaic.com

2. ioXpress Libraries and Categories

Libraries are used to manage digital information. Users can add any type of data or document to a library and/or create multiple categories within each library to keep documents organized. Users can add single or multiple files at a time, or get multiple files or entire libraries copied to their computer from ioXpress. The ability to link documents to each other and to dynamic forms makes the organization of common or related documents very efficient. Sharing and emailing selected documents and data as well as being able to export library and category lists to Excel are additional features of the ioXpress Library functions.

Figure 2.1 and Table 2.1 illustrate and describe all the generic functions designed for end users. Library setup and management are reserved functions and can only be performed by administrators.

Libraries	Modules
	Library List
	Documents by Title
	Documents by Author
	Documents by Category
	Documents by Attribs
	Documents by TreeView
	New Documents
	Add a Document
	Add Multiple Documents
	Get Multiple Documents
	Manage Shared Documents
	Manage Checkin/Checkout

Figure 2.1: Library Menu

Table 2.1: Document function summary

Library menu	Description
Library List	List of libraries arranged in alphabetical order with sorting options and direct hot links
Documents by Title	List of documents arranged by title in alphabetical order with sorting options and direct hot links
Documents by Author	List of documents arranged by author names in alphabetical order with sorting options and direct hot links
Documents by Category	List of documents arranged by library categories in alphabetical order with sorting options and direct hot links
Documents by Attributes	List of documents arranged by document attributes in alphabetical order with sorting options and direct hot links
Documents by Tree View	List of documents arranged in a "tree-view/folder" hierarchy

New Documents	List of the most recent 100 documents added to ioXpress, arranged chronologically by time/date added
Add a Document	Function that allows a user to upload a document into ioXpress
Add Multiple Documents	Function that allows a user to upload multiple documents to a library/category. Special user computer settings are required for this function (see section 3.9)
Get Documents	Function that allows a user to download multiple documents at a time. Special user computer settings are required for this function (see section 3.12).
Manage Shared Documents	Function that allows a user to share a document with some one who is not a registered ioXpress user
Manage Check-in/Check-out	Function that allows a user to check-in/check-out documents to/from ioXpress

2.1 How to Create a Library

Creating a library requires administrative privileges (See Section 7.3).

2.2 How to Create a Category

Creating a category requires administrative privileges. Before creating a category, a library where your newly created category belongs, must be first created (See Section 7.3).

2.3 How to Merge Libraries and/or Categories

Merging libraries and/or categories requires administrative privileges. You must select two or more libraries and/or categories in order to perform a merge.

2.4 How to Delete a Library and/or Category


Deleting libraries and/or category requires administrative privileges.

2.5 How to Rename a Library and/or Category

Renaming libraries and/or category requires administrative privileges.

2.6 How to Download a Document

To download a document:

- Go to the **Library List** under the **Libraries** menu (and through search or any document listing).
- Right-click on the button  after the document's summary and click on **Download**.

Alternatively, you can also download your document in its **update (document properties)** mode through the **Action List** menu.

Note: Even if the document is currently checked out, you can still download the most recent version of the document.

2.7 How to Upload a Document

In order to upload a document to ioXpress you must be part of a user group that allows document updating. Libraries and categories must be created before documents can be uploaded.

To upload a document:

- Go to **Add a Document** under the **Libraries** menu.
- Select the **Library** and **Category** from the drop down lists.
- Navigate to your chosen document by clicking on the **Browse** button.
- The title, author, and published date are filled in automatically. However, you can change them if desired (see Figure 2.2).
- Enter a **Summary Description** for the document (recommended).
- Assign the **Document Attributes** (if any).
- Assign the **Organizational Permissions** for the document. If document access is allowed for all sites, simply click on the **Top Level**.
- Assign the **Group (object)** permissions. To assign permission to all user groups, select **“Click here to Check all”**.
- Click the **Upload File** button.

Note: If you upload a file with the same file name to the same library and/or category, the uploaded document will replace the existing document and an additional newer version is created.

The screenshot shows the 'Upload File' form. At the top is an 'Upload File' button. Below it are two dropdown menus: 'Library' (set to 'Select a Library') and 'Category'. A 'File to upload:' field with a 'Browse...' button is next. The 'Title:' field is empty. The 'Author(s):' dropdown is set to 'Daniel Nguyen', and the 'Published Date:' is '3/31/2006'. A 'Summary:' text area is below. The 'Organization Chart & Permissions' section shows a tree view with folders for 'houston', 'pittsburgh', 'saalem', 'st.louis' and users 'Daniel Nguyen', 'Georges Melhem', 'henry ozog', 'Sanjeev Saraf', and 'Tao Yao'. The 'Object Permissions' table is as follows:


Group	Description
<input type="checkbox"/> Admin	Administrators of the application
<input checked="" type="checkbox"/> Managers	Managers of the application
<input type="checkbox"/> End User	End users who have read access
<input type="checkbox"/> special permission	special permission
<input type="checkbox"/> Workflow Users	Workflow Users

Figure 2.2: Upload Document Screen

2.8 How to Update a Document

In order to update a document in ioXpress you must be part of a user group that allows document updating. Libraries and categories must have existed before adding documents to them.


To update a document:

- Go to **Library List** under the **Libraries** menu.
- Right-click on the button  after the document's summary and click on **Update**.
- Fill out the form as to what needs to be updated and click the **Modify Document** button.

2.9 How to Upload Multiple Documents

This feature requires the .NET framework to be present on the client computer as well as the appropriate user access privileges.

To upload multiple documents:

- Go to **Add Multiple Documents** under the **Libraries** menu.
- Select a **Library** and **Category**.
- The author, published date, and summary fields are automatically filled in. Change any one of these fields, if needed (see Figure 3.3).
- If you want to group the files together, click on the “**Group Files Together**” option. When this option is selected, each file will maintain and display hyperlinks to all other files it was grouped with.
- Check the **Document Attributes**, if applicable.
- Assign the **Group Permissions** for the files.
- Click the “**Select Files To Upload**” button to chose the required files for uploading.
- Click the upload icon  to begin uploading.
- Assign **Organizational Permissions**. This step requires administrator privileges. Select **Manager** from the main user interface menu and then select **Manage Libraries**. Select the documents from the library tree and click on **Apply Organizational Chart on a document**. Select the **Organizational Permission** and click the **Submit** button.


The screenshot shows a web interface for uploading documents. It features several sections:

- Library:** A dropdown menu with "Select a Library" as the current selection.
- Category:** A dropdown menu.
- Author:** A dropdown menu with "Tao Yao" selected.
- Published Date:** A dropdown menu with "07/18/2005" selected.
- Summary:** A large text area for entering document details.
- Group files together:** A checkbox that is currently unchecked.
- Document Attributes:** Three checkboxes labeled "Doc Attrib 2", "Doc Attrib 3", and "Doc Attrib 4", all of which are unchecked.
- Permissions:** A section with a link "Click Here to Select All" and four checkboxes: "Managers", "End User", "special permission", and "Workflow Users", all of which are unchecked.
- Buttons:** At the bottom left, there are two buttons: "Upload" (with a green up arrow icon) and "Stop" (with a red X icon). A "Show Error Log" link is also present.
- Upload Area:** On the right side, there are two large empty rectangular areas labeled "Files To be uploaded" and "Files That Have been Uploaded".

Figure 3.3: Uploading multiple documents

2.10 How to Checkout a Document

To checkout a document:


- Go to the **Library List** under the **Libraries** menu (or through search or any document listing).
- Right-click on the button  after the document's summary and click on **Checkout**.

Alternatively, you can also check out your document in its **Update** mode through the **Action List** menu.

Note: If the document is currently checked out, you are not allowed to check it out until it is checked back in.

2.11 How to Checkin a Document

To check in a document:

- Go to the **Library List** under the **Libraries** menu (or through search or any document listing).
- Select **Manage Checkin / Checkout**.
- Right-click on the button  next to the document name.
- Select **Check in**.

Alternatively, you can also check in your document in its **Update (document properties)** mode through the **Action List** menu.

2.12 How to Download Multiple Documents

Downloading multiple documents requires the .NET framework to be installed on the client computer.

To download multiple documents:

- Go to **Get Multiple Documents** under the **Libraries** menu.
- Select a **Library** to download from.
- Select a **Category** from within the library.
- Select the documents that you wish to download.
- Click the **Plus Signs** to add the checked files and categories to the download list.
- Click the **Select Directory to Download** to button and identify your desired directory where documents will be downloaded to.
- Click the **Download Files** button.

Note: You can download all the libraries or categories at once by simply clicking on the indicated buttons.

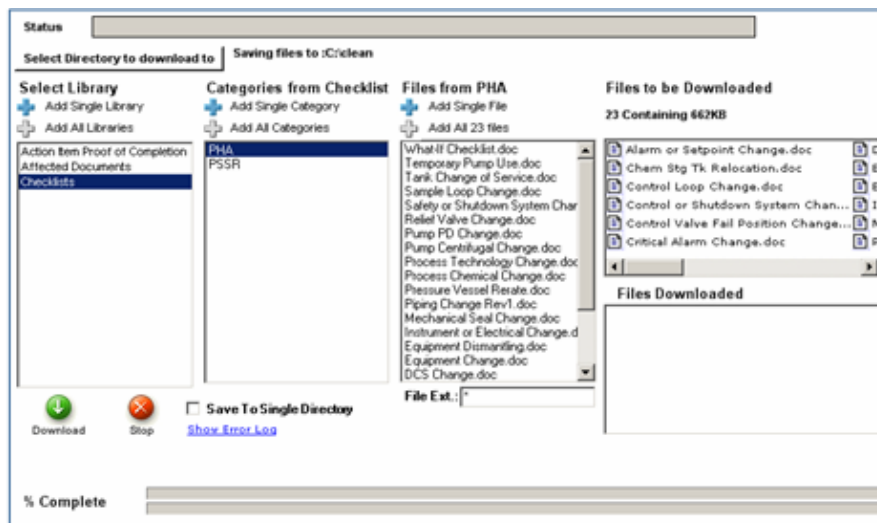



Figure 2.4: Get Multiple Documents Screen

2.13 How to Delete a Document

To delete a document:

- Go to the **Library List** under the **Libraries** menu (or through search or any document listing).
- Right-click on the button  after the document's summary.
- Click on **Delete** button.


Alternatively, you can also delete your document in its update (document properties) mode through the Action List menu.

Note: A deleted document is retained in the system until it is purged by someone with administrator privileges.

2.14 How to Share a Document File

Sharing a document allows you to “share” a document with someone outside of the ioXpress system. The person with whom you share the document will receive an email from ioXpress with an automatically generated temporary link and associated password. You can also set an expiration date when the “document share” expires. The default share time is seven days.

To share a document:


- Go to the **Library List** under the **Libraries** menu (or through search or any document listing).
- Right-click on the button  after the document’s summary.
- Click on **Share this File**.
- Enter the recipient’s email address.
- Fill in any description or explanation.
- Specify the **Expiration Date** when you want the document sharing to end.
- Click on the **“Send Message and Share File”** button.

Alternatively, you can also share your document in its **Update (document properties)** mode through **Action List** menu.

2.15 How to Email a Document

Downloading an emailed document link is only possible for registered ioXpress users. The registered user will receive your automatically generated document (or any other data object) link via e-mail.

To email a document or a data object:

- Go to the **Library List** under the **Libraries** menu.
- Right click on the button  after the document’s summary.
- Click on **Email** (assuming that you have a default email editor).
- Fill out the recipient’s **Email Address** and any applicable description.
- Click on **Send**.

The recipient must login in order to retrieve the data

About ioMosaic

Founded by former Arthur D. Little Inc. executives and senior staff, ioMosaic Corporation is the leading provider of safety and risk management consulting services. ioMosaic has offices in Salem, New Hampshire and Houston, Texas.

Since the early 1970's, ioMosaic senior staff and consultants have conducted many landmark studies including an audit of the Trans-Alaska pipeline brought about by congressional whistle blowers, investigation of the Bhopal disaster, and the safety of CNG powered vehicles in tunnels. Our senior staff and consultants have authored more than ten industry guidelines and effective practices for managing process safety and chemical reactivity and are recognized industry experts in LNG facility and transportation safety.

ioMosaic Corporation is also the leading provider of pressure relief systems design services and solutions. Its pressure relief system applications are used by over 250 users at the world's largest operating companies. It holds key leadership positions in the process industries' most influential and active pressure relief system design, and chemical reactivity forums, and plays a pivotal role in defining relief system design, selection, and management best practices.

Safety & Risk Management Consulting Services

- ◆ Auditing
- ◆ Calorimetry, Reactivity, and Large-Scale Testing
- ◆ Due Diligence Support
- ◆ Effluent Handling Design
- ◆ Facility Siting
- ◆ Fire and Explosion Dynamics
- ◆ Incident Investigation, Litigation Support, and Expert Witness
- ◆ Liquefied Natural Gas (LNG) Safety
- ◆ Pipeline Safety
- ◆ Pressure Relief Design
- ◆ Process Engineering Design and Support
- ◆ Process Hazards Analysis
- ◆ Process Safety Management
- ◆ Risk Management Program Development
- ◆ Quantitative Risk Assessments (QRAs)
- ◆ Structural Dynamics
- ◆ Training

Software Products:

ioXpress™ (ioXpress is a web-based enterprise application for corporate electronic information management).

SuperChems™ (SuperChems is an advanced tool for pressure relief design, consequence analysis, and thermal hazards assessment).

HAZOPtimizer™ is a software product for recording and managing process hazard analysis.

Salem Office

93 Stiles Road
Salem, New Hampshire 03079
Tel: 603-893-7009
Fax: 603-251-8384

Houston Office

2650 Fountain View Drive
Suite 410
Houston, Texas 77057
Tel: 713-490-5220
Fax: 832-553-7283

Email: sales@iomosaic.com
Web: www.iomosaic.com