PETRONAS Engineering Data Management System (P-EDMS)

Web Client User

PETRONAS

TRAINING TOPICS

01. Introduction

02. Access & Login

03. Functionality

04. Document Workflow

05. Document Review & Markup Guide

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INTRODUCTION

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INTRODUCTION

What is P-EDMS?

- Is an abbreviation from **PETRONAS Engineering Data Management System** for Project and Plant Operations.

- **P-EDMS** is web-based for online documents management.

- **P-EDMS** leverages on PETRONAS Technical Standard (PTS) and Industry Best Practice for Work Processes and Technical Specifications.

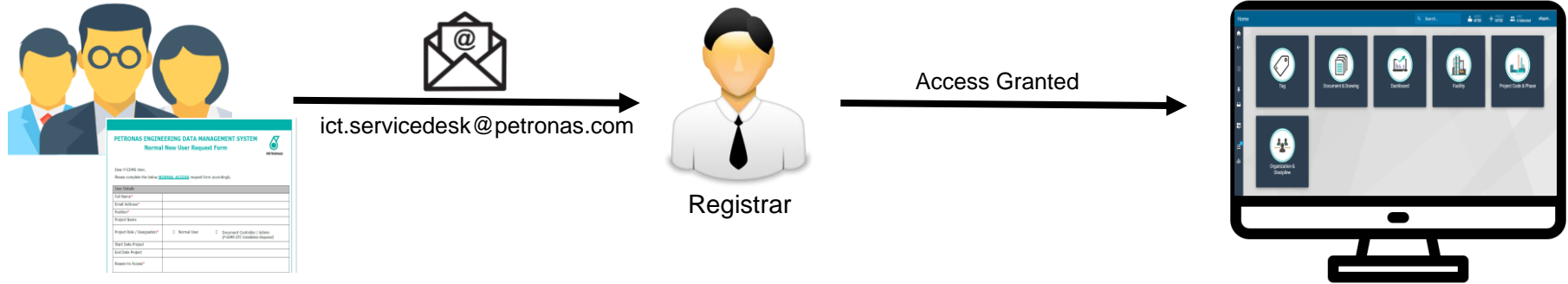- **P-EDMS** was endorsed in May 2014 as Standardized engineering solution Group wide.
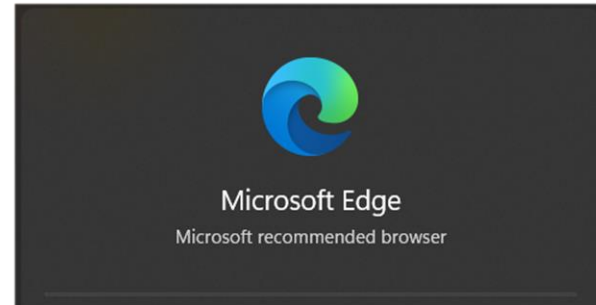
ACCESS & LOGIN

PETRONAS

ACCESSING P-EDMS

Workflow for P-EDMS Access Request

ict.servicedesk@petronas.com

Access Granted

Registrar

PEDMS Access

1. Launch Microsoft Edge from your Desktop

Microsoft Edge
Microsoft recommended browser

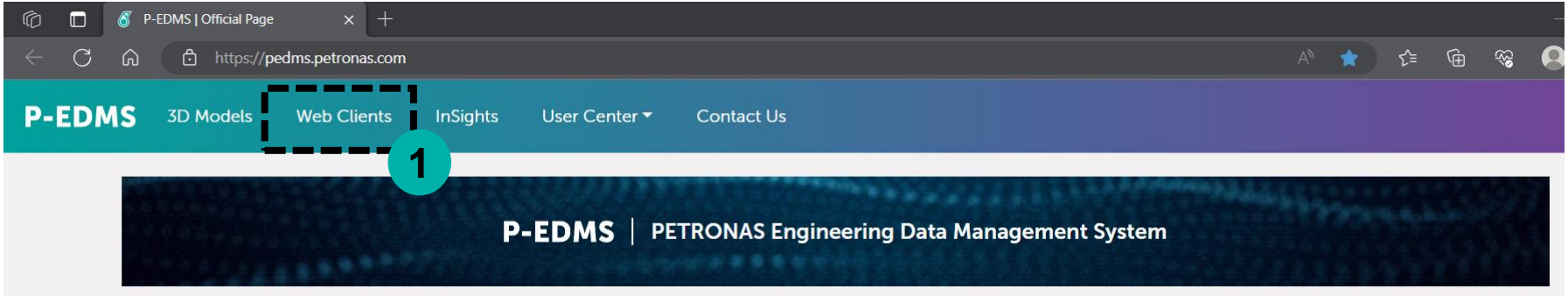2. Type https://pedms.petronas.com/ into the address bar and press Enter key.

ACCESSING P-EDMS
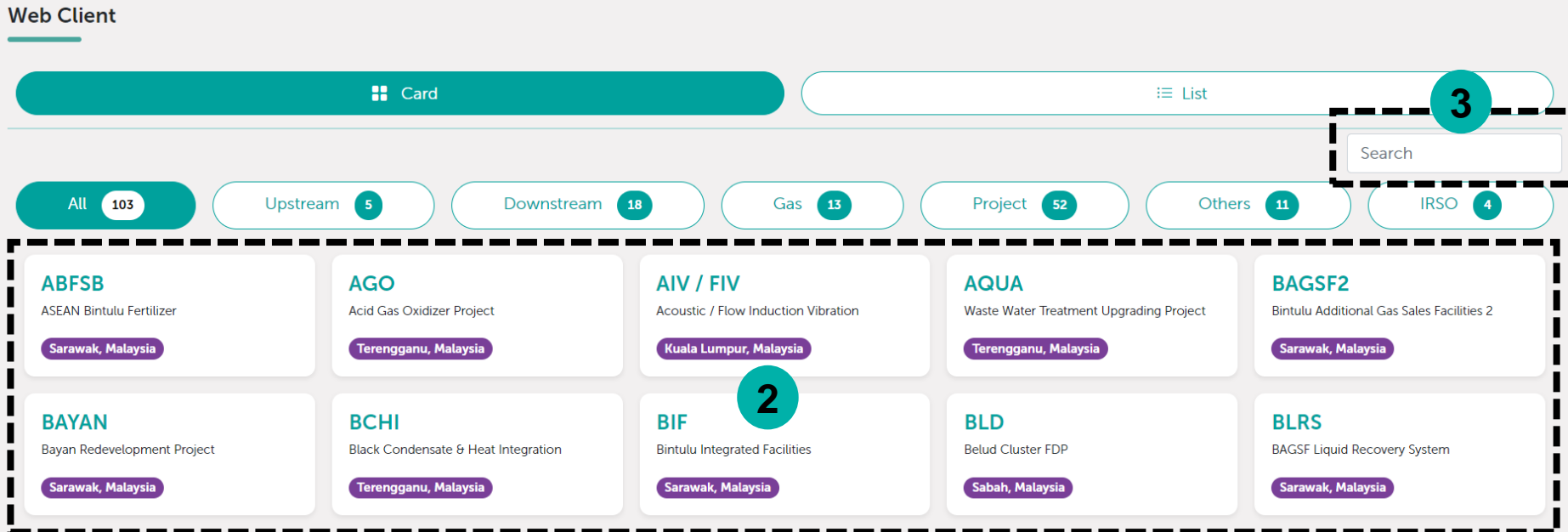
- This is P-EDMS Landing Page.
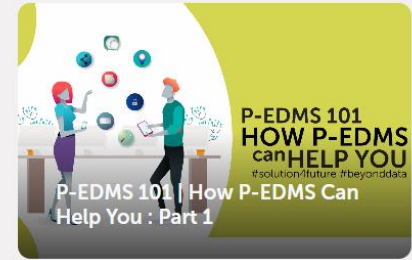
ACCESSING TO SPECIFIC O&M / PROJECT

1. Click on Web Clients.

2. List of O&M and projects sites will appear.

3. Search specific O&M or projects site in search box

LOGGING IN P-EDMS

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Login to P-EDMS Web

Sign in with

PETRONAS ID

Sign in with Local Credentials

Username

Password

☐ Keep me signed in

Sign In

PETRONAS USER

1. Click PETRONAS ID
2. Enter PETRONAS email and password
3. Follow instructions as required by MFA in Authenticator app
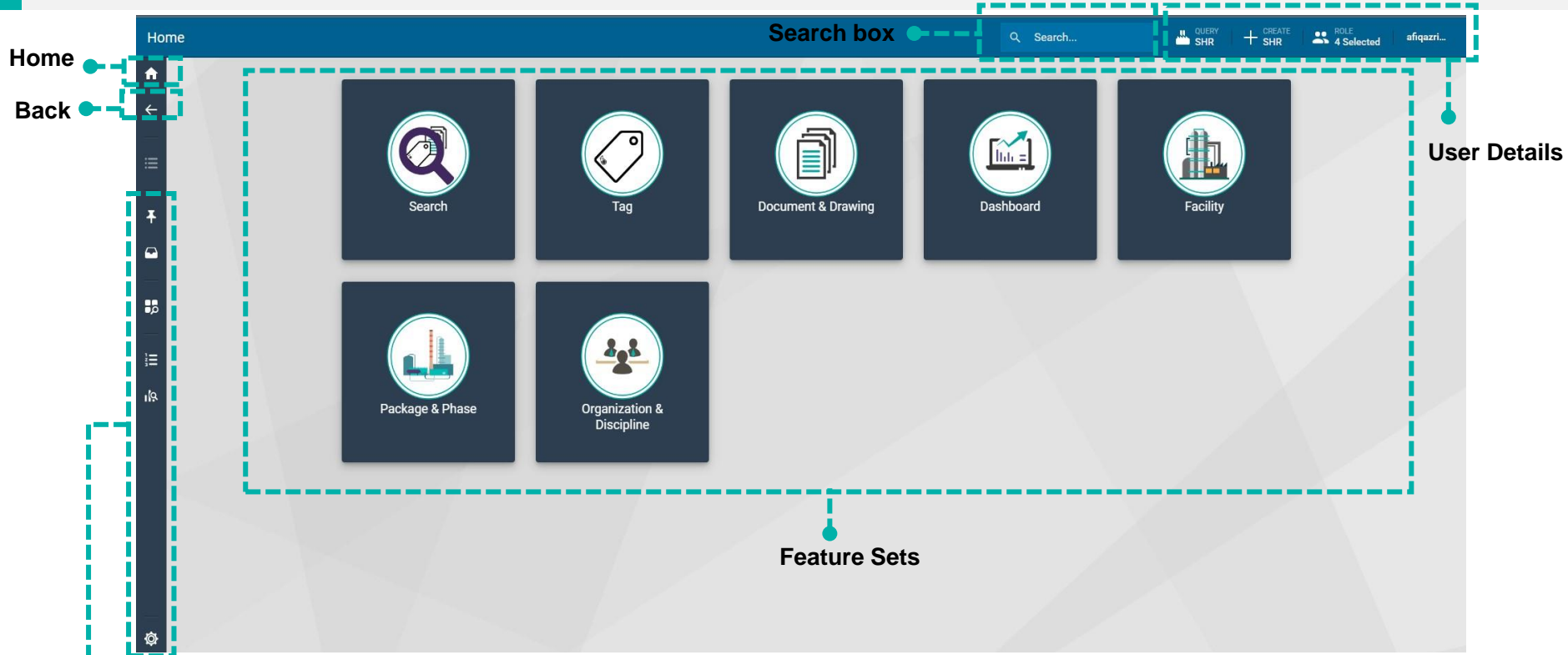
NON-PETRONAS USER

1. Type Username & Password
2. Once credentials are entered, click SIGN IN

P-EDMS HOME PAGE

Search box

Home

Back

User Details

Feature Sets

Icon	Name	Function Details.
	Pins	Provide quick access to items that have pinned
	Notifications	Alerts for changes that has been made to an object that have registered
	Search Bar	Search for objects in the system based on parameters
	To Do List	List all user task
	Advanced Search	Performs details search using specific search criteria
	Setting	Display system settings that can use to customize user experience

SEARCH DOCUMENT

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SEARCH BY DOCUMENT AND DRAWING
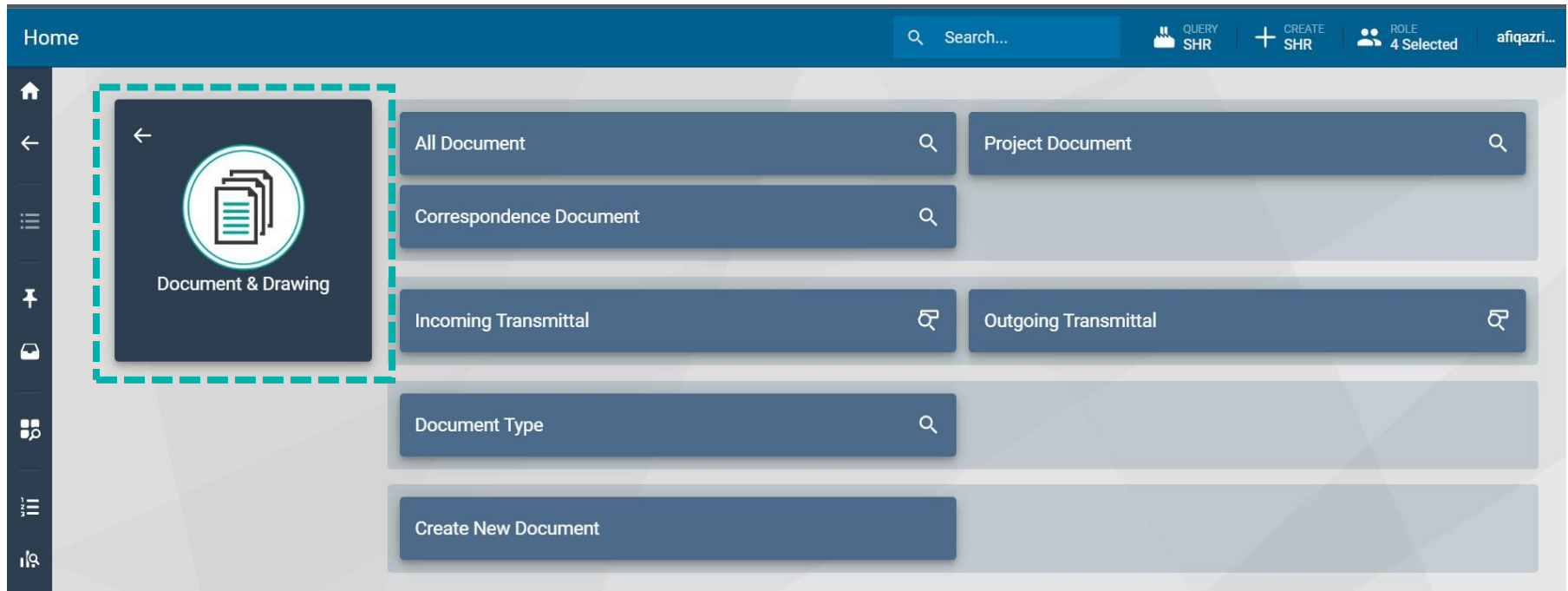
- **All Documents** - To search all document (master index)

- **Project Document** – To search project documents only

- **Correspondence Document** – To search correspondence documents only

- **Incoming/Outgoing transmittal** – To search related transmittals

- **Document Type** – To search by document type

- **Create New Documents** – to create new documents (Validity for Admin Role)

SEARCH BY SEARCH BOX
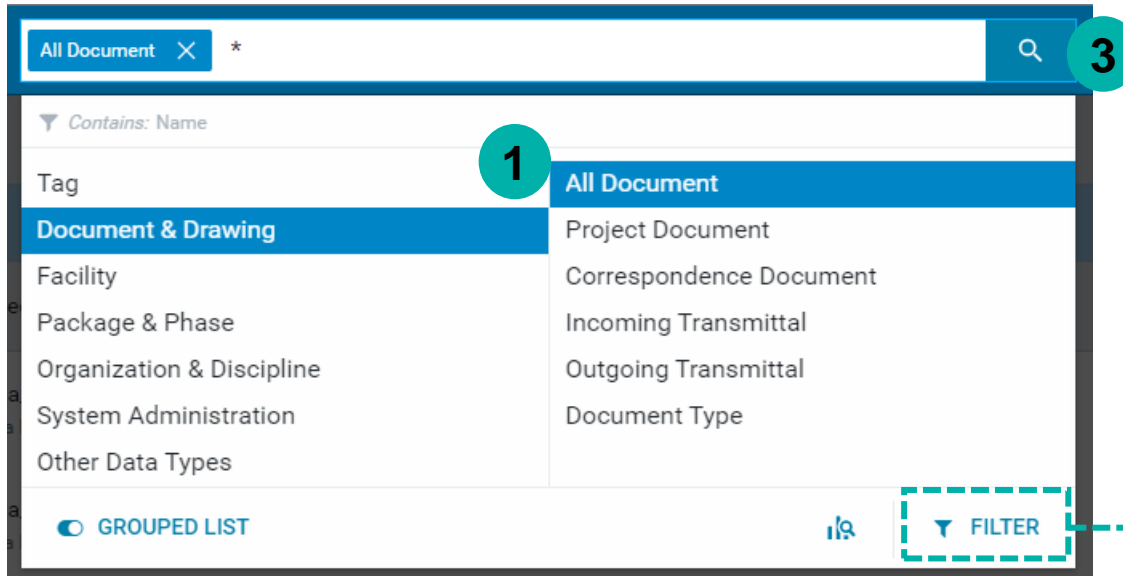
1. Select Documents by which category (Defined specifically criteria)
2. Use filter option to narrowing search
3. Press 'Search' Button

DOCUMENT LISTING

Filter button
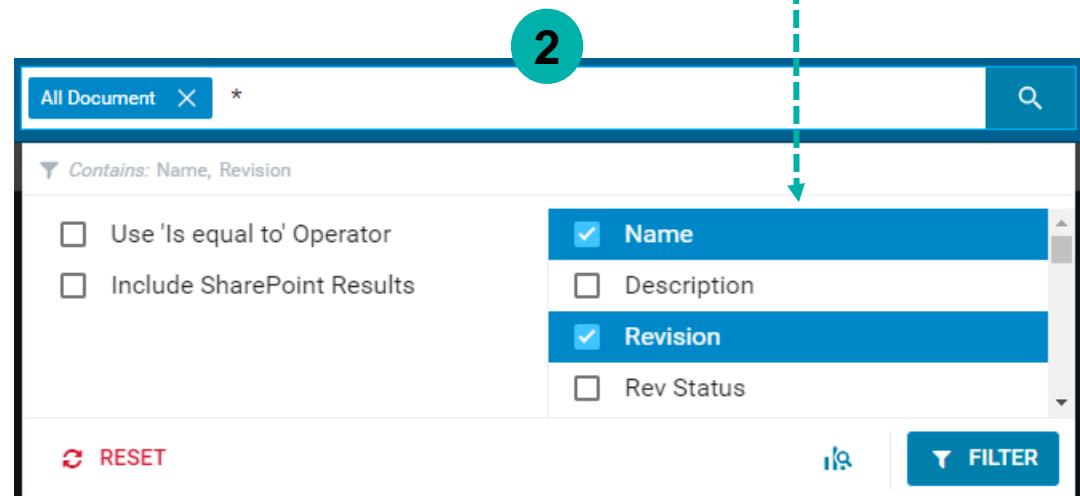
Results : All Document

All Document ✕ SHR

☐ All..	Name	Description	Revi...	
☐	SHR-000-EXE-K001-43-MEC-CAL-0001	STRENGTH CALCULATION - DECOMPOSER LLI R-43-01	A	
☐	SHR-000-EXE-K001-43-MEC-DGA-0001	GENERAL ARRANGEMENT DETAILS DRAWING AND FOUND...	A	
☐	SHR-000-EXE-K001-43-MEC-DWG-0001	DECOMPOSER (R-43-01) MISCELLANEOUS DETAILS	A	
☐	SHR-000-EXE-K001-43-MEC-DWG-0008	EQUIPMENT DATA SHEET- DECOMPOSER LLI R-43-01	A	
☐	SHR-000-EXE-K001-43-MEC-ITP-0001	INSPECTION AND TEST PLAN	A	
☐	SHR-000-EXE-K001-43-MEC-PRC-0001	SURFACE PREPARATION AND PAINTING PROCEDURE	A	
☐	SHR-000-EXE-K001-43-MEC-PRC-0013	WELDING PROCEDURE	A	
☐	SHR-000-EXE-K001-43-MEC-PRC-0018	NON DESTRUCTIVE TEST PROCEDURE	A	
☐	SHR-000-EXE-K001-43-MEC-QAA-0001	PROJECT QUALITY ASSURANCE PLAN	A	
☐	SHR-000-EXE-K001-43-MEC-VDR-0001	LIST OF VENDOR DOCUMENTS AND DRAWINGS	A	
☐	SHR-000-EXE-K001-43-PMG-VDR-0001	LIST OF VENDOR DOCUMENTS AND DRAWINGS	B	
☐	SHR-000-EXE-K001-43-QAC-PRC-0006	SOLUTION ANNEALING PROCEDURE FOR DISH HEAD	A	
☐	SHR-000-EXE-K001-43-QAC-PRC-0011	HYDROSTATIC TEST PROCEDURE	A	
☐	SHR-000-EXE-K001-43-QAC-PRC-0012	PMI PROCEDURE	A	
☐	SHR-000-EXE-K002-00-MEC-CAL-0001	MECHANICAL CALCULATION-SECOND REACTOR	A	
☐	SHR-000-EXE-K002-00-MEC-DGA-0001	SECOND REACTOR ASSEMBLY DWG	A	
☐	SHR-000-EXE-K002-00-MEC-DLP-0001	FOUNDATION LAYOUT AND LOADING PLAN	A	
☐	SHR-000-EXE-K002-00-MEC-PRC-0003	FERRITE TEST PROCEDURE	A	
☐	SHR-000-EXE-K002-00-MEC-PRC-0004	IMPACT TEST PROCEDURE	A	
☐	SHR-000-EXE-K002-00-MEC-PRC-0007			

Page 1 of 72

1 - 25 of 1793 items

List of Document

Total Document

FILTER DOCUEMENT

1. Click on Filter button to use the filter. It will only shows filtered document

   a. Suggest to always set Operator to 'Contains'
   b. Suggest to always set Filters Logic to 'Or'

2. To further trim down the search, apply more Filter on other Column accordingly.

'Contains' filter returns result that contains the keyword.
'Is equal to' operator give result that have exact match to the keyword.

VIEW DOCUMENT

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VIEW DOCUMENT

1. To view the documents, click on the View and markup button.

NOTE : If the Documents may contain several file attachments, a window will appear prompting the user to choose which file to be viewed.

VIEW DOCUMENT DETAILS

1. Click on the Show the detail form button.
2. The Document details will then be displayed as shown below such as General info, PBS, Revision and Reference Number

SAVE DOCUMENT

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SAVE SINGLE DOCUMENT

1. Select the document
2. Click Save File As...

SAVE MULTIPLE DOCUMENTS

1. In the document list, click action button from one of the document
2. Select document
3. Click Save File As...

PIN DOCUMENT

PETRONAS

PIN SINGLE DOCUMENT

1. Select the document
2. Click Pin

PIN MULTIPLE DOCUMENT

1. In the document list, click action button from one of the document
2. Select document
3. Click Pin
4. All the documents has been added to pins list

PRINT DOCUMENT

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PRINT DOCUMENT

1. View the file
2. Click Print
3. In prompt windows, click print.

DOCUMENT WORKFLOW

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P-EDMS WORKFLOW

Contractor DC
Prepares eTRM & uploads to PETRONAS SMFT

DC receives Transmittal and documents

PMT DC
Downloads eTRM and document

Validate Transmittal — NO / YES

1) Uploads eTRM and documents to P-EDMS
2) Attaches workflow to the document

1) Receives notification
2) Generate consolidated CSR & attach to the document
3) Publish consolidated markup to PDF & attach to document
4) Create outgoing transmittal
5) Drag & drop approved document to the created outgoing transmittal
6) Generate TRM report and TRM structure
7) Upload outgoing TRM to PETRONAS SMFT

Complete the to-do-list item

Document Reviewers
1) Receives Email notification
2) Perform review / markup

Complete the to-do-list item

Document Consolidator
1) Receives Email notification
2) Perform document review/update markup

Complete the to-do-list item

Document Approver
1) Receives Email notification
2) Review consolidated comments
3) Update CRS Response Status code

Complete/ reject to-do-list item

rejected

completed

DC = Document Controller
eTRM = Electronic Transmittal
TRM = Transmittal
CRS = Consolidated Response Sheet

DOCUMENT REVIEW AND MARKUP GUIDE

PETRONAS

REVIEWER EMAIL NOTOFICATION

1. Once your P-EDMS ID assigned with the document as Reviewer, you will receive email notification as below.

FYA: (2/7) - TO REVIEW, SHR-000-EXE-PDT-ICT-SPN-0001

PS   **PEDMS Support**
To   Afiq Azri Zainudin (EXT/DIGITAL)

↩ Reply   ↩ Reply All   → Forward   ⬛   ···

Fri 8/7/2022 10:10 AM

P-EDMS Workflow Notification

Dear AFIQ AZRI B. ZAINUDIN,

A document is submitted to P-EDMS for your action **(2/7)** - **TO REVIEW**:

You can access the document from the link below:

Document Number	Title	Rev	Status	Class	Review Return Code	Message From Previous Step
SHR-000-EXE-PDT-ICT-SPN-0001	Testing Specifications and Procedures_Demo	A	IFR	X		

Note: This document's task is due on 7/15/2022. Click here to open workflow task.

Thank you

PROJECT SAHARA ROSE - PROVISION OF EPCC SERVICES FOR MELAMINE PLANT FOR PETRONAS CHEMICALS FERTILISER KEDAH SDN BHD

PETRONAS Engineering Data Management System (P-EDMS)

[THIS IS SYSTEM AUTO-GENERATED NOTIFICATION]
Do not reply to this email as it is a system generated notification. If you are experiencing any technical issues, please contact PETRONAS ICT Service Desk at 8-351-3333/+603-2331 3333 or email us at ict.servicedesk@petronas.com For enquiries regarding PETRONAS Group ICT, please email ask.ict@petronas.com

- On your email, Click **here** in the email link to directly open TO-DO-LIST

OPEN & VIEW DOCUMENTS FROM DOCUMENT LIST (1/2)
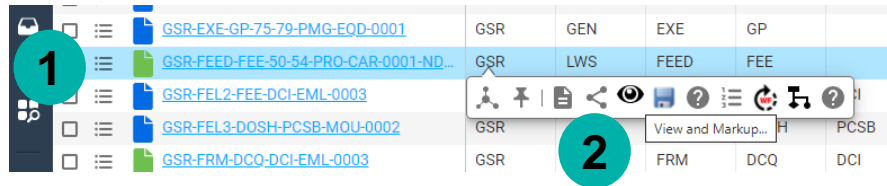
1. Hover over the document number to display the tooltip.
2. Click on the 'eye' icon to display the file
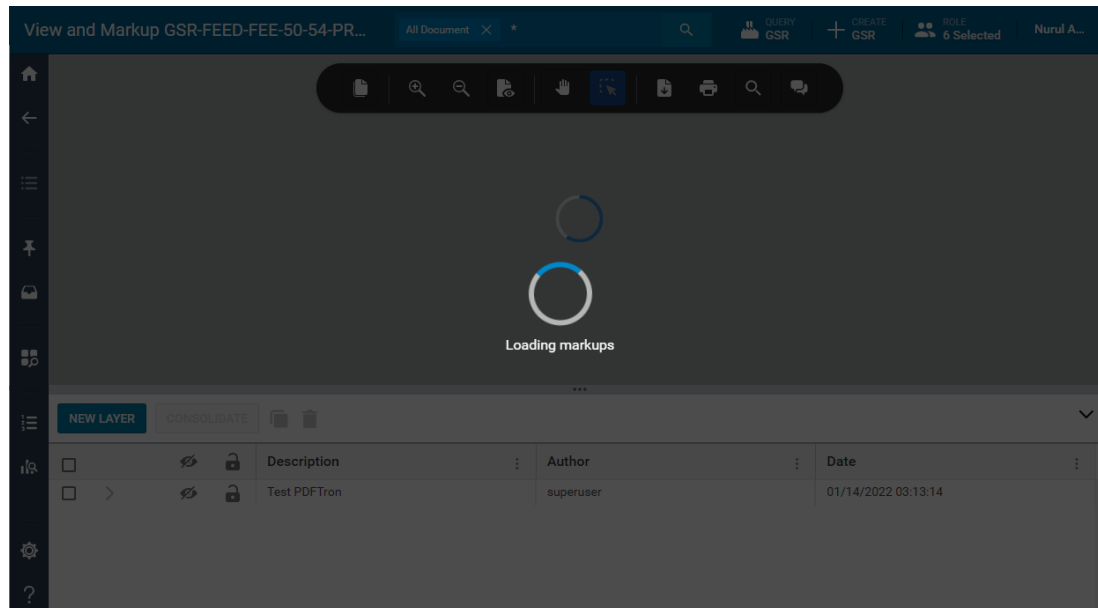
NOTE:
- **Loading of file may take a little time depending on file size and/or page number.**
- **The loading circle on top shows the overall loading, while the loading circle at the back shows the file loading.**
- **Viewing a file will also automatically open the markup layers.**

OPEN & VIEW DOCUMENTS FROM TO-DO-LIST (2/2)

1. Click on To-Do list (or follow the link in the notification email
2. Click on 'Action' button
3. Click on Document Tab
4. Click on the eye icon to display the file

DOCUMENT VIEWER INTERFACE

PDF floating control

FILE VIEWER & MARKUP PANEL

To create new markup layer

Markup layer details

MARKUP LAYER PANEL

For viewing file only, minimize this pane using this arrow

FAMILIARIZING WITH THE FILE VIEWER CONTROLS
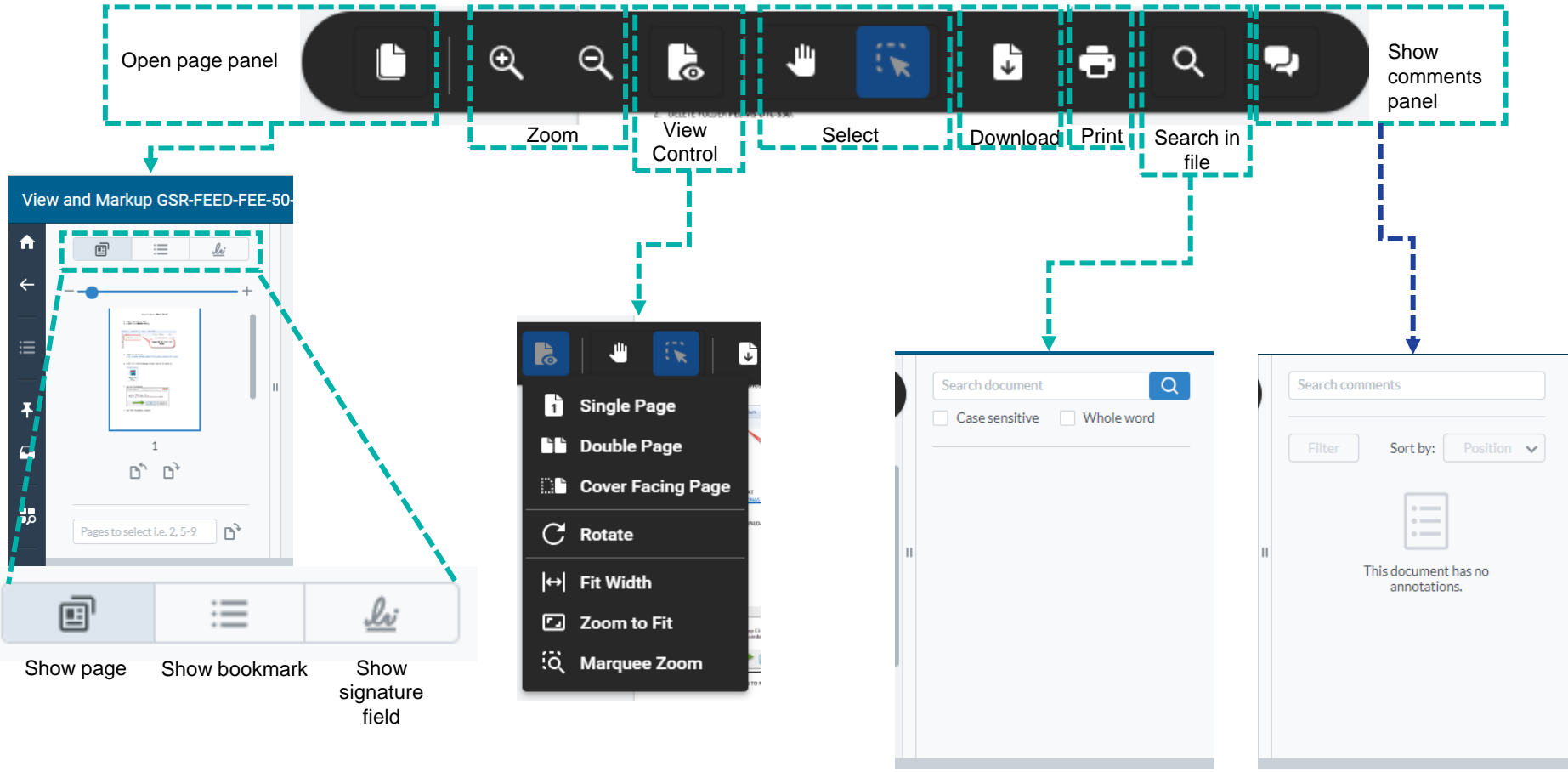
Open page panel

Zoom

View Control

Select

Download

Print

Search in file

Show comments panel

View and Markup GSR-FEED-FEE-50-

1

Pages to select i.e. 2, 5-9

Show page

Show bookmark

Show signature field

Single Page

Double Page

Cover Facing Page

Rotate

Fit Width

Zoom to Fit

Marquee Zoom

Search document

Case sensitive   Whole word

Search comments

Filter   Sort by: Position

This document has no annotations.

CREATING MARKUPS

1. On the Mark-up panel, click New Layer button
2. Create Markup File prompt will appear. Fill in the fields with the details and click finish
3. New markup layer is created

NOTE:

PDFTron force you to create and save a markup layer before commenting on the file. PDFTron will autosave markups during commenting

CREATING MARKUPS

- Once a markup layer is created, the markup tools will be available at the bottom of the page.
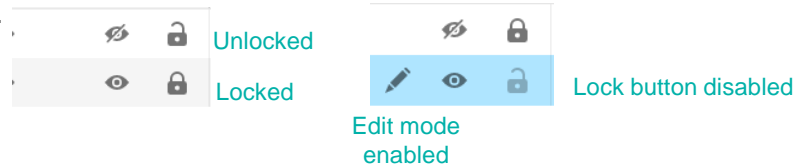

Markup tools
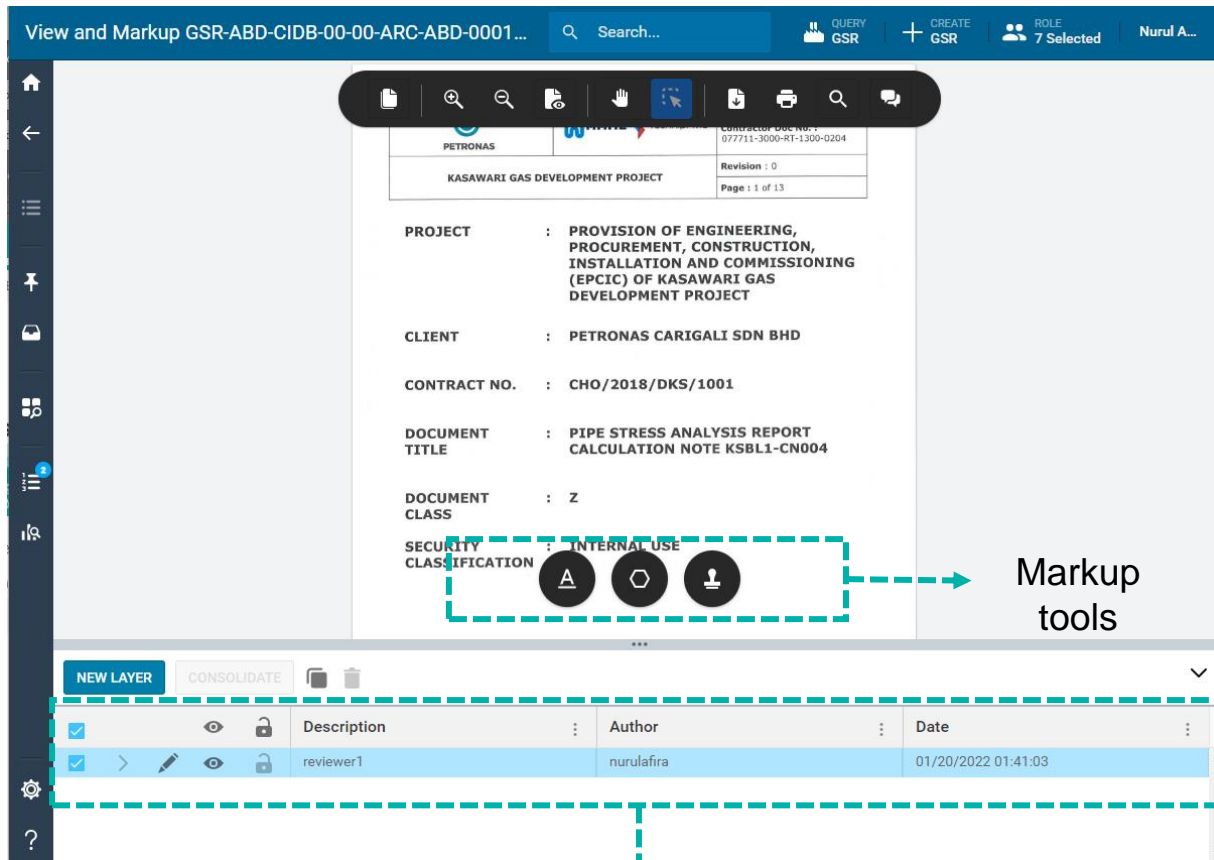
New markup layer

MARKUP PANEL CONTROL

1. Enable Edit button. If the pencil is not displayed, the layer could not be edited. You can only edit your markup layer.

2. Hide/unhide button. To view others' markup layer, click to show 'eye' icon.
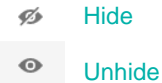
3. Lock layer button. Layers can be locked when not in Edit mode. While Edit mode is on, layers cannot be locked. Locked layers cannot be edited, deleted or consolidated.

TEXT MARKUP TOOL

1. Highlight a block of text

2. Underline text

3. Strikethrough text

4. Squiggle underline text

5. Insert new text

6. Insert textbox with arrow

- Your comment shows up on the comment pane when you enable it from the floating control

Click on '…' to open additional menu on the comment. You can Edit or Delete the markup

You can also reply to a comment by typing in the textbox and clicking 'Post'

ADDITIONAL TEXT MARKUP TOOL

1. Add a comment/reply to the mark-up
2. Change the style, color, size & opacity of the text

- Clicking on the markup gives more editing option:

1 2 3 4
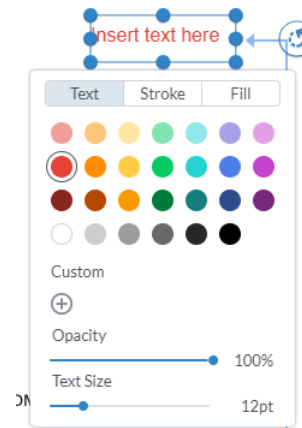
3. Delete markup
4. Insert a URL or link to page

ADDITIONAL TEXT MARKUP TOOL

Right clicking on the file while in Edit layer/create markup mode give more options for text markup

1 2 3 4 5 6

1. Pan tool – move the page around
2. Note tool – add a note or long comment
3. Highlight text tool – highlight a block of text
4. Free Hand tool – draw freely
5. Free Hand Highlight tool – highlight text/image freely
6. Free Text tool – add a new text field

nurulafira
Jan 20, 10:25 AM 1
change this

nurulafira
Jan 20, 10:29 AM
the graphic should be updated to reflect the changes

Reply...   Post
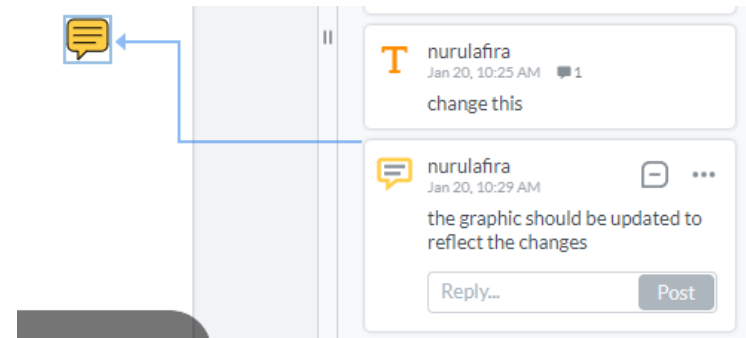
Note tool:
Click on the Note icon, add comment/note in the Comment panel on the right

DRAWING/SHAPE TOOL
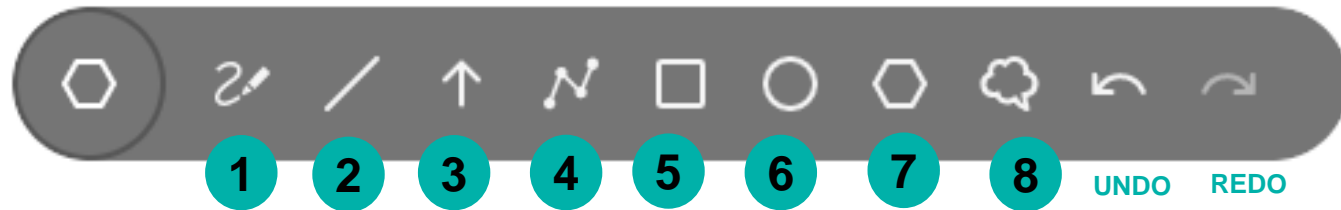
1. Free drawing tool
2. Draw straight Line
3. Include Arrow
4. Draw connected line tool (double-click to end the line)
5. Draw a square/rectangle
6. Draw circle or oval
7. Draw polygon (click at each point of the polygon and double-click to close the shape)
8. Draw cloud (click at each point of the cloud area and double-click to close the cloud)

DRAWING/SHAPE TOOL
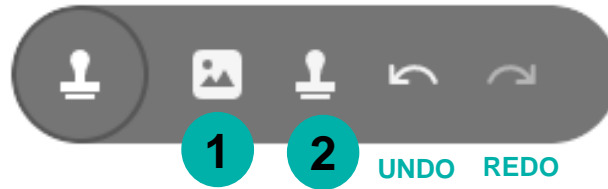
1. You can add in notes to the shape on the comment panel
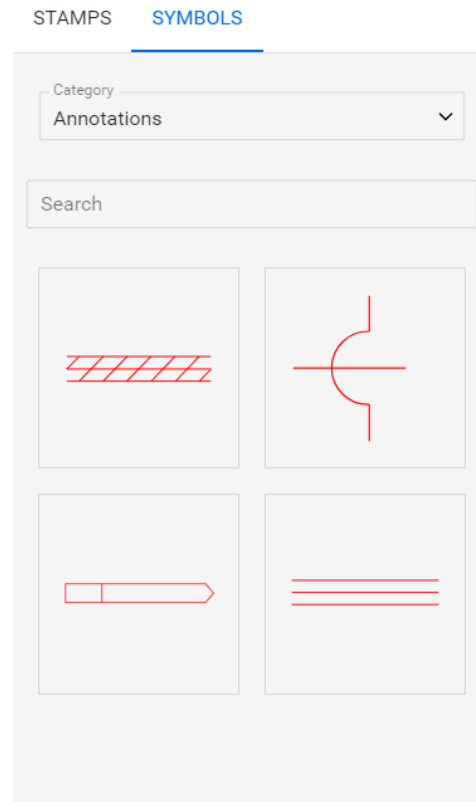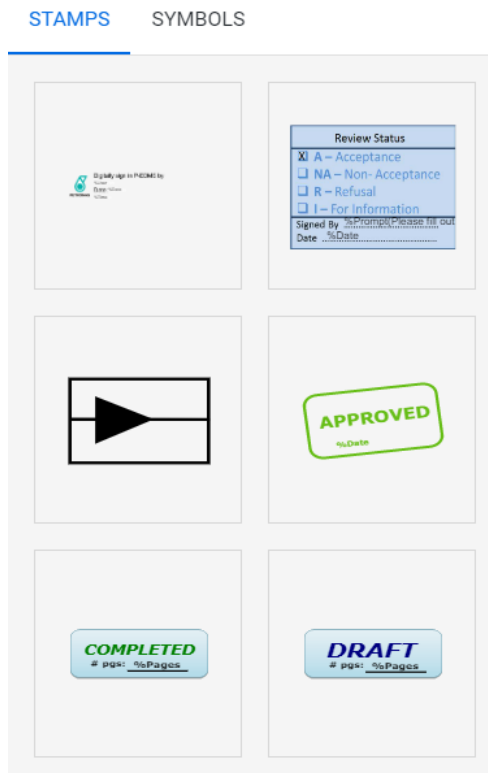
STAMP TOOL

1   2   UNDO   REDO
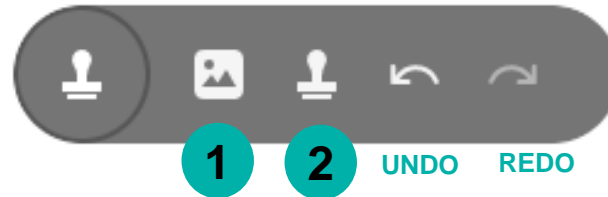
1. Stamp image (click on the icon, and then where on the document you want the image to appear, choose image file (.jpg, .png) > Open. Resize and adjust the picture accordingly

STAMP TOOL

1 **2** UNDO REDO

2. Insert stamp (click on the icon, choose from pre-configured stamp or symbol on the right panel)

E-SIGNATURE

1 **2** UNDO REDO

2. Insert stamp (click on the icon, choose from pre-configured stamp or symbol on the right panel)

STAMPS   SYMBOLS

E-Signature

Digitally signed in P-EDMS by
AFIQ AZRI B. ZAINUDIN ----> Name
Date: October 13, 2022 ----> Date
9:36:08 AM ----> Time

PETRONAS

Digitally signed in P-EDMS by
%User
Date: %Date
%Time

Review Status
X A – Acceptance
NA – Non- Acceptance
R – Refusal
I – For Information
Signed By %Prompt(Please fill out
Date %Date

APPROVED
%Date

COMPLETE TO-DO LIST

- After completing markups, proceed to complete To-Do list

  1. Click back button to return to To-Do list
  2. From the Task tab, expand 'Workflow Action'
  3. Click on 'Completed'

CONSOLIDATOR

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CONSOLIDATOR EMAIL NOTIFICATION

- Once your P-EDMS ID assigned with the document as Consolidator, you will receive email notification as below

FYA: (3/5) - TO CONSOLIDATE COMMENT, SHR-000-EXE-PDT-ICT-SPN-0001

PS	**PEDMS Support**	↩ Reply	↩ Reply All	→ Forward	🗂	⋯
	To ⚪ Afiq Azri Zainudin (EXT/DIGITAL)					Thu 7/7/2022 7:08 AM

P-EDMS Workflow Notification

Dear AFIQ AZRI B. ZAINUDIN,

A document is submitted to P-EDMS for your action **(2/7)- TO CONSOLIDATE COMMENT**:

You can access the document from the link below:

Document Number	Title	Rev	Status	Class	Review Return Code	Message From Previous Step
SHR-000-EXE-PDT-ICT-SPN-0001	Testing Specifications and Procedures_Demo	A	IFR	X		

Note: This document's task is due on 7/8/2022. Click here to open workflow task.

Thank you

PROJECT SAHARA ROSE - PROVISION OF EPCC SERVICES FOR MELAMINE PLANT FOR PETRONAS CHEMICALS FERTILISER KEDAH SDN BHD

PETRONAS Engineering Data Management System (P-EDMS)

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On your email, Click **HERE** in the email link to directly navigate TO-DO-LIST

CONSOLIDATE MARKUP LAYERS

- Open the file via To-Do-List. In the Markup Layer pane, ensure all layers to be consolidated are shown, and selected

1. Unhide all layers to be consolidated
2. Select the layers
3. Click on CONSOLIDATE button
4. Fill in the Markup File prompt and click Finish
5. New consolidated layer is shown and review layers automatically hidden. Add/edit comments using the markup tools and Comment panel.

CONSOLIDATE SINGLE MARKUP LAYER

1. Unhide the one markup layer
2. Select the layer
3. Click on copy icon button
4. Update the original description
5. Change type of markup to Consolidated
6. Click on copy button
7. Automatically Consolidated layer is created, you may continue to complete your consolidation and complete TDL

UPDATE CRS RESPONSE STATUS

1. Click action button
2. Select document tab
3. Click on Update CRS Response Status
4. Select Response Status
5. Click UPDATE to finish

NOTE : **Consolidator insert the Doc Response Status.**
(Approval can update the code later if necessary)

COMPLETE TO-DO-LIST

1. Click action button
2. Select Task tab
3. From the Task tab, expand 'Workflow Action'
4. Click on 'Completed'

APPROVER

PETRONAS

APPROVER EMAIL NOTIFICATION

- Once your P-EDMS ID assigned with the document as Approver, you will receive email notification as below

FYA: (2/7) - TO APPROVE, SHR-000-EXE-PDT-ICT-SPN-0001

PS	PEDMS Support		↩ Reply	↩ Reply All	→ Forward	📧	⋯
	To ○ Afiq Azri Zainudin (EXT/DIGITAL)					Fri 8/7/2022 10:10 AM	

P-EDMS Workflow Notification

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SHR-000-EXE-PDT-ICT-SPN-0001	Testing Specifications and Procedures_Demo	A	IFR	X		

Note: This document's task is due on 7/15/2022. Click here to open workflow task.

Thank you

PROJECT SAHARA ROSE - PROVISION OF EPCC SERVICES FOR MELAMINE PLANT FOR PETRONAS CHEMICALS FERTILISER KEDAH SDN BHD

PETRONAS Engineering Data Management System (P-EDMS)

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On your email, Click here in the email link to directly open TO-DO-LIST

UPDATE CRS RESPONSE STATUS

1. Click action button
2. Select document tab
3. Click Update CRS Response Status
4. Select Response Status
5. Click UPDATE to finish

NOTE : **Approval have authority to edit/finalize CRS response status made by Consolidator**

COMPLETE TO-DO-LIST

1. Click action button
2. Select Task tab
3. From the Task tab, expand 'Workflow Action'
4. Click on 'Completed'

DOWNLOAD/PUBLISH PDF WITH MARKUP

1. Unhide the comment layer
2. Click on the Download icon from the Floating Control
3. Choose either 'Markups As Comments' or 'Markups Flattened'
4. The file will be downloaded into your local
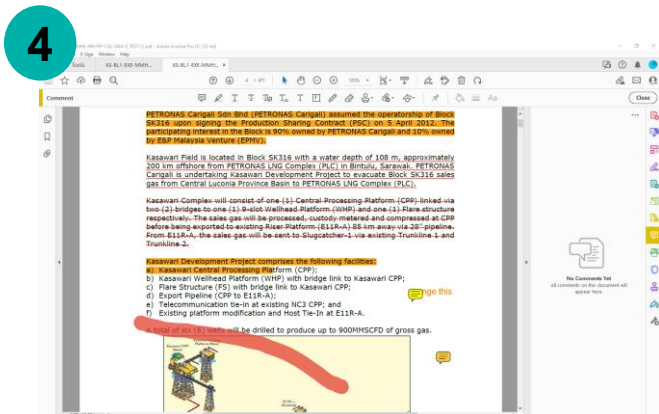
'Flatten makups' will embed the markups into the PDF file
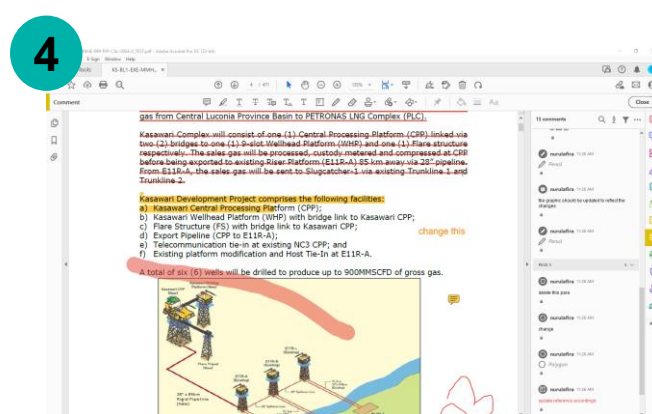
'Markups as comments' will generate a PDF with the comments layer traceable in Adobe Reader

Thank You

Any issues/request, kindly lodge ticket by email to :

ict.servicedesk@petronas.com.my

Do not forget to include in the email CC'ed our team :

p.edmssupport@petronas.com.my

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