External User's Manual – ARCHEO Technical archive ORLEN Group

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1. Introduction

1.1 Purpose of the document

This document is intended for ORLEN Group contractors, hereinafter referred to as Documentation Providers.

1.2 Glossary

ARCHEO - ORLEN Group Technical Archive, also known as the system.

Document attributes - a set of fields that describe each document.

Document - a collection of business information contained in attributes and a document file stored in a document repository.

Documentation provider - an external or internal user tasked with providing documentation for a given project/investment task.

Filter - a set of criteria (e.g., document attributes) completed by the user, thanks to which the system, when searching for content or generating a report, can narrow down the number of search results or report rows.

Tile - a representation of the number of possible cases on the main screen of the ARCHEO system in the form of a properly described square. The tile can refer to cases of a single process or cases appropriately filtered - meeting specific requirements.

File - a set of data collected in one place and available to the user as a whole. A file can be, for example, a document in the following formats: .pdf, .jpg, .jpeg, .png, .tif, .tiff, .gif, .doc, .docx, .txt, .rtf, .ppt, .pptx, .xls, .xlsx but also an AutoCAD project.

Process - this is a business process model that is a definition of its flow, task performers, permissions and forms. It should be considered as a template. It consists of states, events (user forms) and conditions.

Case - is a specific launch of a specific process, filling the template with specific values. For example, the process 'Documentation transfer' is one while the documentation transfer cases can be thousands. A case is an instance of a process.

Case state - the status given to a case according to its current process transition path. The case moves to the next state after an event is performed on it.

External user - a person with an account in the ARCHEO system who is not also an employee of ORLEN CG.

Event - is an action of the process in the form of a form, the completion and execution of which moves the case from one state to another.

1.3 For whom is the ARCHEO application intended?

The ARCHEO system is an application designed for ORLEN CG subcontractors to transfer and archive project documentation in the system. The system's functionalities have been distributed according to the rights of individual users. Thanks to such a procedure, a specific user has access only to the issues and functionalities that concern him.

2. Use of the application

2.1 Logging into the application

After creating an account in the system, the Provider will receive an email notification with information on how to set the application password for its user. In order to log in to the application, the Documentation Provider must go to the address in their web browser:

https://archeo.orlen.pl

The start screen of the application, which includes login fields, is shown in Figure 1. This screen is used to log the Contractor into the system.

Techniczne Archiwum geupa CELER	•	
Login Your login		
Password your password	Ø	
Log in	-	
or		
â Log in via SSO		
Can't log in?		

Figure 1: ARCHEO system login page

In order to log in an external provider, it is necessary to provide:

- Login (this is the email address to which the Documentation Provider received an email with instructions to set a password)
- **Password** (set by the Supplier according to the instructions received)

and then pressing the Login button.

NOTE: For in-house documentation providers, logging into the system will be done using domain data.

After providing correct data, the Documentation Provider is redirected to the home page with a tile view. Otherwise, the system displays an appropriate message, indicating that the login data is not correct. After entering incorrect data three times, the account will be locked. To unlock it, use the password change function described in the next section. If the account is still locked after changing the password, contact the System Administrator. The System Administrator's e-mail address can be seen by clicking on the link **Can't log in?**

2.2 Password change

If a user has forgotten his password or wants to modify it, he can use the password change functionality. To do so, click on the link **Can't log in?** visible on the login page. Then the system will display a window containing information on login problems, the System Administrator's email address and the **Change Password** link (Figure 2).

	-	
Login Your login		
Can't log in? Change password if you don't rem If you are having trouble logging in contact Paperless Support.	ember it. , please	
ê Log in via SSO		
Can't log in?		

Figure 2: Window visible after clicking "Can't log in?"

Clicking on the **Change Password** link will bring up another window (Figure 3) where the user can enter **the Email assigned to the account or username**. After entering the Email or username, click the **Send Password Reset Link** button and the system will automatically send a message with a link reset**ting** the old password to the user's email address.

Contracting of the second seco	
Change password	×
O Enter the username or email address you use to log in to ARCHE We will send you a link to reset your password.	EO.
Email or username *	
Enter email or username	
Send password rese	st link

Figure 3: "Change password" window with "Send password reset link" button

When you receive the email, click on the link contained in it, which will take you to the password change page (Figure 4).

The password should contain: at least 8 characters, at least one lowercase and uppercase letter, a number and a special character. Newpassword * Enter new password
Newpassword *
Enter new password
New password again *
Retypenewpassword
Sava

Figure 4: Change password page

An identical string of characters must be entered in the **New Password** and **New Password** again fields. In addition, the password to be set must include:

- \checkmark 8 characters minimum,
- ✓ At least one lowercase letter,
- ✓ At least one uppercase letter,
- \checkmark at least one number,

✓ At least one special character.

Once the fields are filled in correctly and the **Save** button is clicked, the password will be updated and the user will be able to log into the system using it.

2.3 Language selection

The application offers the possibility to work with ARCHEO in three languages: Polish, English and Czech. We can choose the default language on the login page or inside the application.

To change the language on the login page, click on the button marked with the icon^(D) (in the upper right corner of the login window) and then select the language version of the system (Figure 5).

	۲
Login	Polski
admin	Contraction Contra
Password	Český
Log in	-
or	
△ Log in via SSO	
Can't log in?	

Figure 5: Language selection on the login page

When you select a language, the translation of the login screen changes and when you log in, the ARCHEO system is presented in the selected language.

If you want to change the language of the system while already logged into the application, just expand the **Language** item in the main menu on the left side of the screen and select the system language (Figure 6).



Application during the filling		
11		
isic		
Asic Handover of documentation	Giving opinions of documentation	Documentation lend

Figure 6: Language selection in the ARCHEO system

2.4 Home page of the application

After logging into the ARCHEO system, the user has in front of him/her **the Home Page of** his/her profile (**Błąd! Nie można odnaleźć źródła odwołania.** 7).

	Home			
C Session time 29:59	Saved			
 Language Dostawca KR 	Application during the filling			2
+ Add new issue	11			
	Basic			
	Handover of documentation	Giving opinions of documentation	Documentation lend	3
	197	43	17	

Figure 7: Home Page

On the left side of the screen is a drop-down **Main Menu** [1]. Its content depends on the permissions assigned to the user. The central part of the page contains tiles divided into two groups: **Saved** [2] and **Basic** [3].

- The first group named **Saved** is occupied by personalized tiles (case list views) created by the user. By default, each new user does not have defined views. Creation of views is possible using the **Save as tile** option available from the issue list level.

- The second group, named **Basic**, is occupied by basic views of the lists of cases in which a particular Documentation Provider may be involved.

The numbers displayed on each tile indicate the current number of cases to be taken up by the Documentation Provider.

2.5 How to navigate the issues?

First, select an area of interest. Let's assume that the Documentation Provider wants to deal with **Handover of documentation**.

In order to reach detailed information on a particular case from the **Handover of documentation** category, click on the tile representing this type of cases, then you will be redirected to the screen with **the Detailed list of cases** to be executed in this area (Figure 8).

	Handover of docum Main page > Handover of	Handover of documentation Main sage > Handover of documentation									
C Session time 29:52	Quantity: 198	8" Save as tile	Export data	Y Filter							
Language Polski	Active filters: Open	ned X With an action to be p	erformed by me $ imes$								
 English Český 	Project No.	Project name	Parent folder	Destination folder	Issue Id	State	Last action	Is closed			
Dostawca KR	D001	DEMO	Branża elektryczna	Dokument EX	52493	Documentation to transfer	20:22 06/08/2024	🖸 Open			
+ Add new issue	PDIOKR	Statyczny 10KR	Statyczny 10KR (PD10KR)	Etap 1 Obszar KR	52196	Forwarded documentation	08:01 22/07/2024	🗇 Open			
00	PDIOKR	Statyczny 10KR	Statyczny IOKR (PDIOKR)	Etap 1 Obszar KR	52190	Forwarded documentation	14:54 24/07/2024	🗂 Open			
	Projekt 11.12	РЈК 11.12	PIA	Analizy techniczne i koncepcje	51735	Forwarded documentation	08:55 27/06/2024	🗂 Open			
	1234566	testuprawnienadmin	testuprawnienadmin (1234566)	testuprawnieniaadminetap	49611	Forwarded documentation	12:16 06/04/2022	🗂 Open			
	ANW001	Obszar Nawozów	Obszar Nawozów (ANW001)	Magazyn Canwilu	46544	Forwarded documentation	12:13 25/06/2024	🕤 Open			
	123	Projekt Nowy KR	Re1	1	46537	Complete documentation	11:27 31/10/2023	🗗 Open			
	PR AR 01	Projekt AR	Kategoria AR	Typ 1 AR	46527	Transfer report delivered	08:11 07/10/2021	🗗 Open			
ß	PR AR 01	Projekt AR	Projekt AR (PR AR 01)	Etap 1 AR	46507	Forwarded documentation	11:48 19/11/2021	🗂 Open			
E+ Log out	ANW001	Obszar Nawozów	Obszar Nawozów (ANWOO1)	Amoniak część wspólna	46503	Forwarded documentation	14:48 01/10/2021	🗂 Open			

Figure 8: Detailed list of cases

The detailed list of cases includes basic information about each case on it.

These include:

- Project number the unique number of the investment project,
- Project name the name of the project to which the documentation is submitted,
- Parent folder the folder in the archive where the destination folder is located,
- Destination folder the exact location in the project resources to which the documentation will be transferred,
- Case number a unique identifier of the case,
- Status the state in which the case is currently located,
- Last action the exact date and time of the last event performed on the case,

• Is closed - the padlock and status informs the user about the status of the case, if it is closed it means that the process of the case has been completed and the case has been closed/archived. By default, closed cases (closed padlock) are not displayed in the list.

Depending on the type of tile you enter, the list as well as the column designations may differ. Above **the Detailed list of cases** there is information about the number of cases on the list. When scrolling down the list of cases, the next records of the list are read.

Some cases may be displayed in yellow or red. When colored in yellow, it means that the deadline for the case is approaching, i.e. there are 7 or fewer days left to complete the case. When a case is colored red, it means that the deadline for the case has already passed.

2.5.1 How do I filter the cases in the list?

Select one of the created (Saved) or basic (Basic) tiles to go to the list of cases (Figure 9).

C Session time 29:59 Saved			
Hanguage			
	rzekazania Przekazan	o Wypożyczenie	
② Dostawca KR	dokumenta	acje dokumentacji - Oczekujace na	
+ Add new issue		uzupełnienie	
88 Main page	40	1	
Hanudocu	dover of Giving opin umentation of documentation	nions Documentation lend]←
▶ 198	B 44	18	
			1

Figure 9: Tile selection

In the list of cases in the upper right corner is the **Filter** button (Figure 10).

ORLEN «	De Ma	ocumentation lend	l n lend						+ Add a ca	ase
 Session time 29:56 Language Dostawca KR 	q	uantity: 18 Active filters: Open	ed X With an action to be	performed by me $ imes$				^{1º} Save as tile	E Export data	Iter
+ Add new issue		Issue Id	The applicant	State	Area	Task name	Task number	Created	Is closed	
Main page		52401	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PD10KR	14:32 30/07/2024	🗂 Open	
		52150	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PD10KR	08:09 11/07/2024	🗗 Open	
		52149	Dostawca KR	Application during the filling	1 Obszar KR	Statyczny 10KR	PD10KR	08:06 11/07/2024	🗗 Open	
		51839	Dostawca KR	Request approved	ANWIL - SUR	Projekt KR 30.07	KR3007	15:22 07/05/2024	🗗 Open	
		51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	13:17 07/05/2024	🗂 Open	
								15-00		

Figure 10: Filter button

After clicking on the filter button, the search/filter panel for cases expands (Figure 11).

***********	Documentation I Main page > Documen	lend station lend		Filter data	3 ×			
C Session time 29:52	Quantity: 18						Visible matters Opened Closed Stated humo	
② Dostawca KR	Active filters: 0	ipened X With an action t	o be performed by me X				With an action to be performed	d by me
+ Add new issue	Issue Id	The applicant	State	Area	Task name	Task number	Issue Id	+ *
88 Main page	52401	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDIOKR	Created	+
	52150	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDIOKR	Last action	+
							Started by	+
	52140	Dostawce KR	Application during the filling	1 Obszar KR	Statyczny 10KR	PDIOKR	Modified by	+
	51839	Dostawca KR	Request approved	ANWIL - SUR	Projekt KR 30.07	KR3007	State	+
	51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Contract number	+
							Area	+
	51832	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Stage	+
	51826	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Category	+
b	51806	Dostawca KR	Application during the filling	PKN - SUR	PZO - Zakład wodno-ściekowy	PKN002	Document type	+
							Prototype of document	+
	51805	Dostawca KR	Application during the filling	ANWIL - Plan Generalny	Plan Generalny	ANWPG001	Task number 2	0+ -
[→ Log out	51804	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	× Restore to defaults	V Ready

Figure 111: Case search/filter panel

The search/filter panel includes, among other buttons:

- **Done** [1] is used to search/filter,
- Restore to defaults [2] used to restore the default filtering,
- **x** [3] used to close the filtering panel.

By completing more fields in the filtering panel of the list of cases, the Documentation Provider is able to limit the number of records displayed. Among others, the following basic filters are available:

- **Open** (automatically selected in the primary process tiles),
- Closed,
- Started by me,

- With an action to be performed by me (automatically selected in the basic process tiles),
- Case no,
- Created,
- Recent action,
- Launched by,
- Changed by,
- Status.

To apply the filter, fill in the appropriate fields and click the **Done** button [1] (located at the bottom of the panel).

The availability of additional fields in the filter depends on which tile you select, as each process has its own specific and key search attributes.

Restoring the default view of the list is possible by clicking the **Restore to Default** [2] button.

The filtering screen can be closed using the \mathbf{x} [3] button in the upper right corner of the filtering panel.

2.5.2 How do you create your own tile?

To customize the tiles, the user must go to the selected list of cases and use filtering (Figure 10). Then, in the filtering panel, select which conditions you want the selected cases to meet and confirm with the **Done** [1] button (Figure 11). Finally, the selected conditions must be saved as a tile using the **Save as tile** button, provide a name for the tile and press **Save** (Figure 12).

	Documentation I Main page > Document	lend ratios lend			+ Add a case							
C Session time 29:59	Ouenthy 12 P Save as tile e Export data											
Dostawca KR	Active finers: Opened X With an action to be performed by me X State Application during the filling X											
+ Add new issue	Issue Id	The applicant	State	Area	Task name	Task number	Created	Is closed				
88 Main page	52149	Dostawca KR	Application during the filling	1 Obszar KR	Statyczny 10KR	PDIOKR	08:06 11/07/2024	D Open				
	51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	13:17 07/05/2024	🗗 Open				
	51832	Dostawca KR	Save Application during the fill The n	the view as a tile	rojekt AR	PR AR 01	15:30 06/05/2024	D Open				
	51826	Dostawca KR	Application during the file	Application during the filling	ojekt AR	PR AR 01	10:08 06/05/2024	🗗 Open				
	51806	Dostawca KR	Application during the filling	Cancer Sa	ZO - Zákład wodno-ściekowy	PKN002	11:49 25/04/2024	D Open				
	51805	Dostawca KR	Application during the filling	ANWIL - Plan Generalny	Plan Generalny	ANWPG001	10:19 25/04/2024	🖸 Open				
	51804	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	09:54 25/04/2024	🗂 Open				
	37663	Dostawca KR	Application during the filling	Obszar - KR	Projekt ObszarKR	KRO1	09:39 19/01/2018	C Open				
	37364	Dostawca KR	Application during the filling	MK Obszar	MK_Projekt2	2	13:23 06/12/2017	C Open				
[→ Log out	31259	Dostawca KR	Application during the filling	ANWIL - Inwestycje Majątkowe	KW Statyczny 001	StatANVKW001	14:01 16/10/2017	🖒 Open				

Figure 12: Saving a custom tile

× «	Home				
C Session time 29:50	Saved				
LanguageDostawca KR	Do przekazania	Przekazano dokumentacje	Wypożyczenie dokumentacji - Oczekujące na	Application during the filling	
+ Add new issue	1	40	uzupełnienie 1	12	
	Basic Handover of documentation	Giving opinions of documentation	Documentation lend		
	198	44	18		

The created tile will appear on the home page in the **Saved** section (Figure 13).

Figure 13: Newly created tile

2.5.3 How to remove a custom tile?

To delete a custom tile, simply hover over the tile with the mouse cursor and press the \mathbf{x} button that appears, located in the upper right corner of the tile (Figure 14).

Session time 29:18	Home			
Language Dostawca KR	Do przekazania	Przekazano dokumentacje	Wypożyczenie dokumentacji - Oczekujące na uzupełnienie	Application × during the fillin
Add new issue	1	40	1	12
	Handover of documentation	Giving opinions of documentation	Documentation lend	
	198	44	18	

Figure 14: Deleting a custom tile

A message will then be displayed confirming the action of deleting the tile, which must be confirmed with the **Yes** button (Figure 15).

Documentation lend	Attention Are you sure you want to delete the tile? Application during the filling
18	No

Figure 15: Message confirming the action of deleting a tile

2.5.4 How to filter cases with checkboxes "Open","Closed", "Started by me" and other possible combinations?

To view cases that have been hidden, use the filtering panel to filter cases with the **Opened** and **Closed** boxes checked (Figure 16).

*******	Documentation Man page > Docume	lend Intation lend					Filter data	×
C Session time 29:54	Quantity: 28 Active filters:	Opened X Closed X		Visible matters Opened Closed Started by me				
Dostawca KR				With an action to be performed by me	1			
+ Add new issue	Issue Id	The applicant	State	Area	Task name	Task number	Issue Id	+ 1
88 Main page	52401	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDIOKR	Created	+
	52150	52150 Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDIOKR	Last action	+
							Started by	+
	52149	Dostawca KR	Application during the filling	1 Obszar KR	Statyczny IOKR	PDIOKR	Modified by	+
	52138	Dostawca KR	Application rejected	Obszar ST	Projekt OST	POST	State	+
	52034	Dostawca KR	Application rejected	ANWIL - Inwestycje Majątkowe (Investments)	CR	PD0001	Contract number	+
							Area	+
	51887	Dostawca KR	Shared documents	Obszar - KR (test)	Kontrole KD 1305	KKD1305	Stage	+
	51839	Dostawca KR	Request approved	ANWIL - SUR	Projekt KR 30.07	KR3007	Category	+
	51838	Dostawca KR	The application submitted	Obszar – KR	Projekt ObszarKR	KR01	Document type	+
			ŀ,				Prototype of document	+
	51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Task number	+ -
[+ Log out	51832	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	× Restore to defaults	✓ Ready

Figure 16: Filtering panel with "Opened" and "Closed" boxes checked.

A list of all issues on which the user can perform an event or could have performed an event will be displayed to the user. The list of issues retrieved in this way can be saved by the user as their own tile using the **Save as tile** button, giving it their own name.

The documentation provider can also search for cases started by him by additionally checking the box **Started by me** (Figure 17).



Figure 17: Filtering panel for cases with "Open", "Closed" and "Started by me" boxes checked.

To generate a list of issues that have been registered by a given user and on which he/she has the ability to perform events (in this case, we will not see issues on which we do not have actions to perform), check the boxes **Open**, **Started by me** and **With action to be performed by me** (Figure 18).

**********	Documentation & Main page 3 Document	end lation lend					Filter data 3		
C Session time 29:56	Quantity: 18			Visible matters Opened Closed					
Canguage Dostawca KR	Active filters: 0	pened X Started by me X		Started by me With an action to be performed by me					
+ Add new issue	Issue Id	The applicant	State	Area	Task name	Task number	Issue Id	+ ^	
88 Main page	52401	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PD10KR	Created	+	
	52150	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PD10KR	Last action	+	
	52149	Dostawca KR	Application during the filling	1 Obszar KR	Statyczny 10KR	PDIOKR	Started by Modified by	+	
	51839	Dostawca KR	Request approved	ANWIL - SUR	Projekt KR 30.07	KR3007	State	+	
	51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Contract number	+	
							Area	+	
	51832	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Stage	+	
	51826	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Category	+	
	51806	Dostawca KR	Application during the filling	PKN - SUR	PZO - Zakład wodno-ściekowy	PKN002	Document type	+	
							Prototype of document	+	
	51805	Dostawca KR	Application during the filling	ANWIL + Plan Generalny	Plan Generalny	ANWPG001	Task number	+ -	
[→ Log out	51804	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	× Restore to defaults	Ready	

Figure 18: Filter panel with checkboxes for "Open", "Started by me" and "With action to be performed by me"

Additional possible filtering combinations:

- **Open** + **With action to be performed by me** a list of cases on which the user can perform an event will be generated,
- **Closed** a list of cases that have been closed will be generated.
- Closed + Established by me a list of cases registered by the user and closed/processed will be generated.

2.5.5 How to search for cases created on a given day?

To do this, use the filter panel on the list of cases and select the date range of interest in the **Created** fields (Figure 19).

**************************************	Documentation I Main page > Document	lend Itabion lend					Filter data	×
C Session time 29:57	Quantity:15			Visible matters Opened Cosed Started by me With an action to be performed by me				
Canguage Dostawca KR	Active filters: 0	opened X Closed X						
+ Add new issue	Issue Id	The applicant	State	Area	Task name	Task number	Issue Id	+ ^
88 Main page	52401	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDICKR	Created 01/01/2023 🖾 09/08/2024	×
	52150	Dostawca KR	Request approved	1 Obszar KR	Statyczny 10KR	PDIOKR	Last action	+
	52149	Dostawca KR	Application during the filling	1 Obszar KR	Statyczny IOKR	PDIOKR	Started by	+
	52138	Dostawca KR	Application rejected	Obszar ST	Projekt OST	POST	Modified by	+
	52034	Dostawca KR	Application rejected	ANWIL - Inwestycje Majątkowe (Investments)	CR	PD0001	Contract number	+
	51887	Dostawca KR	Shared documents	Obszar - KR (test)	Kontrola KD 1305	KKD1305	Area	+
	51839	Dostawca KR	Request approved	ANWIL - SUR	Projekt KR-30,07	KR3007	Stage	+
	51838	Dostawca KR	The application submitted	Obszar - KR	Projekt ObszarKR	KROI	Document type	+
	51835	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	Prototype of document	+.
E+ Log out	51832	Dostawca KR	Application during the filling	Obszar AR	Projekt AR	PR AR 01	× Restore to defaults	✓ Ready

Figure 19: Search screen for cases created on a given day

Set the values in the fields so that the first date in the field on the left is earlier than or equal to the second date. After filling in the fields, press the **Done** button.

2.5.6 How to navigate to the selected case, view its details and execute the event?

Detailed information and the control center of the selected case are displayed after clicking on the row representing it in the **list of cases of a given process** (Figure 20).

×	Handover of document Main page > Handover of docu	andover of documentation an page > Handover of documentation								
 Session time 29:48 Language Dostawca KR 	Quantity: 198 Active filters: Opened	X With an action to be per	formed by me $ imes$				8ª Save as tile	Export data	Y Filter	
+ Add new issue	Project No.	Project name	Parent folder	Destination folder	Issue Id	State	Last action	Is closed		
Bo Main page	D001	DEMO	Branża elektryczna	Dokument EX	52493	Documentation to transfer	20:22 06/08/2024	🗂 Open		
	PDIOKR	Statyczny 10KR	Statyczny 10KR (PD10KR)	Etap 1 Obszar KR	52196	Forwarded documentation	08:01 22/07/2024	🗂 Open		
	PDIOKR	Statyczny 10KR	Statyczny 10KR (PD10KR)	Etap 1 Obszar KR	52190	Forwarded documentation	14:54 24/07/2024	🗂 Open		
	Projekt 11.12	PJK 11.12	PiA	Analizy techniczne i koncepcje	51735	Forwarded documentation	08:55 27/06/2024	🗂 Open		
	1234566	testuprawnienadmin	testuprawnienadmin (1234566)	testuprawnieniaadminetap	49611	Forwarded documentation	12:16 06/04/2022	🗗 Open		
	P _{NW001}	Obszar Nawozów	Obszar Nawozów (ANW001)	Magazyn Canwilu	46544	Forwarded documentation	12:13 25/06/2024	🗂 Open		
	123	Projekt Nowy KR	Re1	1	46537	Complete documentation	11:27 31/10/2023	🗂 Open		
	PR AR 01	Projekt AR	Kategoria AR	Typ 1 AR	46527	Transfer report delivered	08:11 07/10/2021	🗗 Open		

Figure 20: Indication of how to enter the case details

The red box indicates the area you need to click on to access the details of a case. When you click on the line representing the case, the case details screen is displayed (Figure 21).

CETTER	«	Issue 52493 Handover of documentation (D Main page > Handover of documenta	ocumentation to transfer) tion > Issue 52493
C Session time 29:59		General	
Dostawca KR		Basic information	
1		Issue Id	52493
+ Add new issue		Created	2024-08-06 20:22:57
BB Main page		Started by	Uzytkownik Systemowy
		Implementer of the project	Projektów Realizator
		Area	ANWIL - Inwestycje Majątkowe (Investments)
		Project	DEMO (D001)
		Stage	Dokumentacja wykonawcza
		Category	Działka Podstawowa
		Document type	Branża elektryczna
		Prototype of document	Dokument EX
		Deadline for submission of the documents	2024-08-18
		Iteration amendments	0
[→ Log out			

Figure 21: Information about the selected case

The central part of the screen displays **General** (basic) information about the case. Depending on the status of the case and the level of authorization, the Documentation Provider also sees process event execution buttons in the event buttons section (in the upper right corner). Using

these buttons, the user is able to process cases. For example, a logged-in Documentation Provider in a **Documentation Transfer** process case, being in the state of **Transfer Protocol Delivered**, has the ability to execute **the Confirm acceptance of protocol** event.

2.5.7 Why don't you see the cases on the list?

As mentioned earlier, each basic tile corresponds to an individual process and contains a list of cases on which the currently logged-in user can execute events. If the executable events have already been performed or the case has been closed (the process has gone to the end), the case in the default view will not be displayed in the list of cases of the process (Figure 22).

CITEEN «	Handover of documentation Main page > Heindover of documentation
 Session time 29:45 Language Dostawca KR 	Quantity: 0 F Serve as life <pre></pre>
+ Add new issue	
	₽ No data to display
E+ Log out 1 € 202400003 354504 WEW	
3.0.20240808.154504.WEW	

Figure 22: Empty list of cases

In this case, make the appropriate filtering described in section 2.5.1, e.g., with the **Opened** and **Closed** options.

2.6 What functionality does the main menu provide?

The Main Menu includes an item that allows you to go to the **Home Page of** the system (the tile view on the main screen of the application). The figure below shows the **Main Menu** in one of its variants (Figure 23).

ORLEN	«	Home					
C Session time 29:59		Saved					
Language Dostawca KR Add new issue		Do przekazania	Przekazano dokumentacje	Wypożyczenie dokumentacji - Oczekujące na uzupełnienie	Application during the filling		
BB Main page		1	40	1	12		
[ş		Basic Handover of documentation 198	Giving opinions of documentation 44	Documentation lend 18			
C+ Log out 3.0.20240808154504.WEW							

Figure 23: Main Menu

What items will be visible in the menu depends on the rights and functions of the user in the system.

3. Processes

3.1. Handover of documentation

As part of the process, the Documentation Provider will deliver successive documentation files to folders that have been defined by the project implementer on the ORLEN CG side. After the Documentation Provider adds the documents and submits them to the manager, there will be a quantitative verification of the documents on the ORLEN CG side and generation of the documentation transfer protocol. The transfer of documentation is completed with the confirmation of acceptance of the protocol by the Documentation Provider.

How to transfer the documentation?

To transfer documentation, select a case in the state of **Documentation to transfer** (Figure 25) from the Handover of documentation tile (Figure 24) and then execute the **Forward documentation** event (Figure 26).



Figure 24: Documentation Transfer tile

ORLEN «	Handover of docume Main page > Handover of doc	ntation sumentation									
C Session time 28:43	Quantity: 198		8º Save as tile	Export data Y Filter							
 Language Dostawca KR 	Active filters: Opened X With an action to be performed by me X										
+ Add new issue	Project No.	Project name	Parent folder	Destination folder	Issue Id	State	Last action	Is closed			
CO Main page	D001	DEMO	Branża elektryczna	Dokument EX	52493	Documentation to transfer	20:22 06/08/2024	🗗 Open			
	PDIOKR	Statyczny 10KR	Statyczny 10KR (PD10KR)	Etap 1 Obszar KR	52196	Forwarded documentation	08:01 22/07/2024	🗗 Open			
	PDIOKR	Statyczny 10KR	Statyczny 10KR (PD10KR)	Etap 1 Obszar KR	52190	Forwarded documentation	14:54 24/07/2024	🗂 Open			
	Projekt 11.12	PJK 11.12	PIA	Analizy techniczne i koncepcje	51735	Forwarded documentation	08:55 27/06/2024	d Open			
ß	1234566	testuprawnienadmin	testuprawnienadmin (1234586)	testuprawnieniaadminetap	49611	Forwarded documentation	12:16 06/04/2022	🗂 Open			
	ANWOOT	Obszar Nawozów	Obszár Nawozów (ANWOD1)	Magazyn Canwilu	46544	Forwarded documentation	12:13 25/06/2024	🖆 Open			
	123	Projekt Nowy KR	Re1	1	46537	Complete documentation	11:27 31/10/2023	🗗 Open			
	PR AR 01	Projekt AR	Kategoria AR	Typ 1 AR	46527	Transfer report delivered	08:11 07/10/2021	🗗 Open			
	PR AR 01	Projekt AR	Projekt AR (PR AR 01)	Etap 1 AR	46507	Forwarded documentation	11:48 19/11/2021	🗂 Open			
[→ Log out	ANW001	Obszar Nawozów	Obszar Nawozów (ANW001)	Amoniak część wspólna	46503	Forwarded documentation	14:48 01/10/2021	C Open			

Figure 25: Documentation Transfer Case in the state of Documentation to be Transferred

×	Issue 52493 Handover of documentation (D Main page > Handover of documenta	ocumentation to transfer) ation > Issue 52493	Forward documentation
C Session time 29:57	General		
Language			
② Dostawca KR	Basic information		
Add new issue	Issue Id	52493	
	Created	2024-08-06 20:22:57	
Main page	Started by	Uzytkownik Systemowy	
	Implementer of the project	Projektów Realizator	
	Area	ANWIL - Inwestycje Majątkowe (Investments)	
	Project	DEMO (D001)	
	Stage	Dokumentacja wykonawcza	
	Category	Działka Podstawowa	
	Document type	Branża elektryczna	
	Prototype of document	Dokument EX	
	Deadline for submission of the documents	2024-08-18	
	Iteration amendments	0	
			Ν
			v9
[→ Log out			
3.0.20240808.154504.WEW			

Figure 26: Forward Documentation button

The Documentation Transfer Form (Figure 27) contains a required field in which to add the documentation to be transferred using the **Choose File** button [1]. Multiple files can be added at once in this field. A maximum of 100 files can be added at one time, with each individual file not exceeding 100MB.

In addition, fill in the **details** [2] of the added documents:

- Study number according to the Supplier,

- Revision no,
- Development phase.

ORIEN	«	Issue 52493: Forward documentation Handover of documentation (Documentation to transfer) Main page 3 Handover of documentation > Issue 52403
C Session time 29:48		Contract/ugreenent/order number
A Language		UM060624(0001
② Dostawca KR		The number of development by Supplers *
+ Add new issue		
00 Main nage		No revision *
00 man page		
		Drivispinent phase *
		Sinect value ·
		is the box you can add up to 100 documents. Each can have a maximum of 100 MB. Winningtofore you complete the operation, make sure that all attached documents were sent. A trash icon appears next to a correctly loaded document.
		Choose file 0
Log out		Cancel 3 Execute
3.0.20240808.154504.WEW		

Figure 27: Documentation Transfer Form

After completing the form, press the **Execute** button [3].

After the event is executed, the case can be **forwarded for verifiy** which will place the case with the project manager on the ORLEN CG side, or **additional documents** can be **forwarded** if additional documentation is needed. After each step of the documentation transfer is performed, the attached files are saved in the case and until the case is submitted for verification, the supplier can modify, delete and add them.

What if there is a need for additional documentation?

When the entered documentation is not complete, the user transferring the documentation can attach additional documents by executing the **Forward additional documents** event. To do this, press the **Forward additional documents** button (Figure 28).

DRIEN	«	Issue 52493 Handover of documentation (Fe Main page > Handover of documenta	orwarded documentation) ation > Issue 52493
C Session time 28:09		General	
Language			
② Dostawca KR		Basic information	
+ Add new issue		Issue Id	52493
		Created	2024-08-06 20:22:57
Main page		Started by	Uzytkownik Systemowy
		Implementer of the project	Projektów Realizator
		Area	ANWIL - Inwestycje Majątkowe (Investments)
		Project	DEMO (D001)
		Stage	Dokumentacja wykonawcza
		Category	Działka Podstawowa
		Document type	Branża elektryczna
		Prototype of document	Dokument EX
		Deadline for submission of the documents	2024-08-18
		Iteration amendments	0
[→ Log out			

Figure 28: Forward further documents button

After selecting the button, the system will display a form that will allow you to submit additional documents (Figure 29). To add further documents, just use the **Choose File** button. The rules for attaching further files are the same as when performing this step for the first time.

CELLEN	«	Issue 52493: Forward additional documents Handover of documentation (Kowarded documentation) Man piaes 714/00444 documentation)
Session time 20:59 Language Obstawca KR Add new issue Main page		Contractingreement/order number UM00082-040001 The number of development by Suppliers * 1 Revision number * 123 Development phase *
		 In the case of the need for additional documentation, use the form below: At most 100 documents on the attached to the finds. Size of each file should not exceed 100 MB. Mease need: Before closing on the finan button please mass sure that of the servers 100 dB. Mease need: Before closing on the finan button please mass sure that do the servers that the servers. This is indicated by a green circle rable neet to the upleaded file name.
		Choose file
Log out		Cancel

Figure 29: Form of event Submission of further documents

To execute the event press the **Execute** button. To cancel the execution of the event, press the **Cancel** button. After transferring more documents, the case again goes to the **Transmitted documentation** status, from which you can transfer the documentation for verification or add the missing documents again.

To delete a document mistakenly attached to the **Transmit Documentation** or **Subsequent Documents** event form, click on the "trash" icon displayed next to the document selected for deletion.

How to submit documentation for quantitative verification?

In order to submit the documentation for quantitative verification, execute the **Forward to verify** event (Figure 30).

GRITAN	«	Issue 52493 Handover of documentation (F Main page > Handover of document	orwarded documentation) ation > Issue 52493
C Session time 29:56		General	
Language			
Dostawca KR		Basic information	
+ Add new issue		Issue Id	52493
00 Main page		Created	2024-08-06 20:22:57
oo Main page		Started by	Uzytkownik Systemowy
		Area	ANWIL - Inwestycje Majątkowe (Investments)
		Project	DEMO (D001)
		Stage	Dokumentacja wykonawcza
		Category	Działka Podstawowa
		Document type	Branża elektryczna
		Prototype of document	Dokument EX
		Deadline for submission of the documents	2024-08-18
		Iteration amendments	0
Log out 0.20240809103103.WFW			

Figure 30: Submit button for verification

The system will display a form (Figure 31) that requires confirmation of the documentation transfer. If the attached documentation is quantitatively complete, check the required box **I** confirm enclose documentation and then press the Execute button.

OTI III	«	Issue 52493: Forward to verify Handover of documentation (Forwarded documentation) Main page > Handover of documentation > Issue 52403	
C Session time 29:51			
 Language Dostawca KR 		• By checking the box below, you acknowledge that the technical documentation which was attached is complete quantified. The accompanying documentation will be verified quantitatively. In the absence of completeness, the case will be withdrawn in order to complete the missing documents.	
+ Add new issue		I confirm enclose documentation *	
Log out s n 20240809 103103 WFW		Cancel	

Figure 31: Event form Submit for verification

How to complete the documentation?

If the documentation submitted by the Documentation Provider does not pass quantitative verification on the part of ORLEN CG, the system will send an email notification to the

Documentation Provider with the relevant information and the case that has been established will return to the Documentation Provider this time in the state **Documentation pending completion** (Figure 32). The case will be available to the Documentation Provider from the **Handover of documentation** tile.

() () () () () () () () () () () () () (Handover of doc Main page > Handover	andover of documentation								
C Session time 29:56	Quantity: 33						an Save as tile	xport data Y Filter		
LanguageDostawca KR	Active filters: 0	pened X With an actio	ed \times With an action to be performed by me \times State: Complete documentation \times							
+ Add new issue	Project No.	Project name	Parent folder	Destination folder	Issue Id	State	Last action	ls closed		
Main page	projekt 25.09	super nazwa	super nazwa (projekt 25.09)	Realizacja	42479	Documentation pending completion	09:36 12/09/2018	🗂 Open		
	KR01	Projekt ObszarKR	Projekt ObszarKR (KRO1)	Realizacja	41701	Documentation pending completion	10:50 23/03/2018	🗂 Open		
	123	Projekt Nowy KR	Projekt Nowy KR (123)	Realizacja	41699	Documentation pending completion	12:08 22/03/2018	🗂 Open		
	UNPKR	Unipetrol KR	Část elektro (Electrical)	Systémy katodové ochrany (Cathodic protection systems)	31288	Documentation pending completion	11:05 18/12/2017	🗂 Open		
	UNPKR	Unipetrol KR	Část elektro (Electrical)	Sitě dodávek elektřiny (Power supply lines)	31287	Documentation pending completion	11:47 23/01/2018	🗂 Open		
	UNPKR	Unipetrol KR	Část elektro (Electrical)	Ostatni (Other)	31286	Documentation pending completion	11:49 23/01/2018	🗂 Open		
	UNPKR	Unipetrol KR	Část elektro (Electrical)	Elektrické sítě a systémy (Electric networks and systems)	31284	Documentation pending completion	11:52 23/01/2018	🗗 Open		
	UNPKR	Unipetrol KR	Část elektro (Electrical)	Dokument EX (Ex Document)	31283	Documentation pending completion	09:35 18/10/2017	🗂 Open		
	KR01	Projekt ObszarKR	Projekt ObszarKR (KRO1)	Realizacja	31279	Documentation pending completion	09-03 18/10/2017	🗂 Open		
[→ Log out	KR01	Projekt ObszarKR	Projekt ObszarKR (KRO1)	Realizacja	31271	Documentation pending completion	07:46 18/10/2017	🗂 Open		
WAY SCHEME DOWN TO A CONTRACT										

Figure 32: Documentation awaiting completion

After entering the details of such a case, we have the opportunity to see the comments and acknowledgment (Figure 33).

	Handover of documentation (D Main page > Handover of documenta	ocumentation pending completi ation > Issue 41701	Confirm comments acceptant
C Session time 29:20	General		
Language	_		
② Dostawca KR	Basic information		
+ Add new issue	Issue Id	41701	
-	Created	2018-03-22 14:57:20	
Main page	Started by	Uzytkownik Systemowy	
	Implementer of the project	Realizator Projektów	
	Area	Obszar - KR	
	Project	Projekt ObszarKR (KRO1)	
	Stage	Realizacja	
	Category	No data	
	Document type	No data	
	Prototype of document	No data	
	Deadline for submission of the documents	2018-03-23	
	Iteration amendments	1	
► Log out			

Figure 33: Confirm Receipt of Comments button

After clicking on the **Confirm comments acceptance** button, a form is displayed (Figure 34) with fields for **Comment** from **reviewer** [1], **Deadline for consideration of comments** [2] from the person reviewing the submitted documentation, and **Iteration of corrections** [3] (correction counter, if any). On the form after reviewing the comments, we must check the box **I confirm review of the above comments** [4], and then press the **Execute** button.

	«	Issue 41701: Confirm comments acceptance Handover of documentation (Documentation pending completion) Main page 3 Mandover of documentation 3 lasse 41701	
C Session time 29:44			
Eanguage		Second sign a sast of the comments submitted to the submitted accumentation, as well as the expected date of their inclusion.	
Dostawca KP		Comments deadline Bratolo amendments	
0		2 23/03/2018 3 1	
+ Add new issue			
88 Main page		Comment verifying person	
		oaso o	
		I have read the above comments *	
_			
Log out		Cancel	kecute

Figure 34: Comments on the submitted documentation

At this point, the case returns to the **Submitted Documentation** status. Further actions include the same steps as those described in the section "**How to submit documentation for quantity verification?**". Note that in order to add a new version of any file, you must first remove its previous version from the event form.

Acceptance of the handover protocol

The last step in the Documentation Submission process is the **Confirm Acceptance Protocol** event. In order to complete the process, the Documentation Provider must confirm the acceptance and submission of the protocol. To trigger the event on a case in the **Documentation Complete** or **Transfer report delivered** state, he selects the **Confirm Acceptance Protocol** button (Figure 35).

DITEN	«	Issue 46527 Handover of documentation (* Main page > Handover of document	Transfer report delivered) tation > issue 46527
Session time 28:41 Language Dostawca KR Add new issue Main page		Handover of documentation (C) Man page 3 Handover of adoument Openant Issue (d) Created Started by Implementer of the project Area Project Starge Category Document type Prototype of document Deadline for submission of the documents	randsr report delivered) usen > tesse 48327 2021-10-07 08:09:03 Uzytkovnik Systemowy Projektów Realizator Obzaz AR Projekt AR (PR AR 01) Etap 1 AR Kategoria AR Typ 1 AR No data 2021-10-31 0
E+ Log out			

Figure 35: Confirm acceptance of protocol button

On the event form (Figure 36), the **Documentation Transfer Protocol** [1] field contains the **documentation transfer** protocol. The supplier's task is to download it and read it and then check the box **I confirm acceptance of the protocol** [2].

DELLEN	~	Issue 46527: Confirm acceptance protocol Handover of documentation (Transfer report delivered) Main page > Handover of documentation > Issue 46527		
Session time 29:51 Language Dostawca KR Add new issue Main page		0	Documentation transfer protocol brak poka2 png Number of the sent documents I I confirm acceptance of the protocol *	
[+ Log out		Cancel		Execute

Figure 36: Event form Confirm acceptance of protocol

To confirm the completion of the case, click the **Execute** button. Similar to the previous screen, there is also an option to cancel the execution of the event by clicking on the **Cancel** button. Executing the event will move the case to the "**Documentation complete**" or "**Documentation transferred**" state. Confirmation of acceptance of the protocol is done only once.

Acceptance Protocol

The acceptance protocol will be generated on the ORLEN CG side and sent to the Documentation Provider by traditional means.

3.2 Giving opinions of documentation

As part of this process, the Documentation Provider, if necessary, will have to respond to the opinions issued regarding the documentation it has provided. This is done on the Opinions of the documentation in the state Awaiting a response from the Documentation Provider. We will be informed of this situation by email.

How to take into account the comments sent by the ORLEN CG?

If our documentation has not received a positive opinion, it is sent to us as a Documentation Opinion case in the state **Awaiting response for the Documentation Provider's reply**. After going to the details of the case, we have the option to execute the consideration of comments (Figure 37).



Figure 37: Case awaiting response from Documentation Provider

After pressing the **Include comments** button, a form is displayed containing all the submitted comments and opinions to the documentation.

The form for this event consists of two steps:

- 1) Presentation of a summary of comments and opinions on documents (Figure 38),
- 2) Attach revised documents (Figure 39 and 40).

CRIEN	~	Issue 45229: Include comments Oliving optimisma of documentation Awaiting for documentation provider's reply) Mana page 2 Group approval of adocumentation > hssa 4329							
C Session time 29:52					① Document notes	⑦ Corrected documents			
 Language Dostawca KR 		③ Below is a list of the optimized in	opinions to the submitt	ted documentation.			Comments deadline 26/06/2024		
+ Add new issue		Principal remarks							
88 Main page		Komentarz do dokumenta Komentarz do dokumenta Komentarz do dokumenta	ncji * Joji * Joji *						
		Rows: 1 3 Issuing opinions the document PL_Protokol.przekaz ania_dokumentacji_t echnicznej_2021- 02:16_UT-32- 16.docx	4 Attaciment to opinion	Instructions from principal	estructions from principal	Type of attention Type of attention No comments	Opinion to document z	ant	
Log out		Cancel						Back Next step	

Figure 38: Form for consideration of comments - Step 1

In step one, at the top of the form, you will find the **Principal's Comments** [1] (if any) and **the Deadline for Consideration of Comments** [2]. Lower down, you will see a list of opinions containing **the** Document under **review** [3] (with the possibility of downloading the document), **Opinion attachment** [4] (if added), **Instructions from the Principal** [5], **Type of comment** [6] and **Document feedback** [7] (content of the opinion) submitted to the Documentation Provider as requiring a response from the Provider. At this step, the Supplier only reads the comments and opinions, but does not complete any fields. At the bottom of the form, there is a **Next Step** button for moving to the next step (Figure 39).

CRITERI	«	Issue 45229: Include comments Oriving opinions of documentation (Awaiting for documentation provider's reply) Main page Sofrey generated documentations Taise 42279
C Session time 29:53		O Document notes O Corrected documents
 Language Dostawca KR 		Piesse respond to the comments in the "Document notes" tab (step 1) and attach the corrected files below.
+ Add new issue		
Hain page		There's nothing here yet! Attach corrected documents from disk.
		By checking the box below, you confirm that responded to all the comments and refer the matter for further processing.
		2 _ Looffm to take all comments *
← Log out		Cancel Back Execute

Figure 39: Form for consideration of comments - Step 2

Moving to step two, we go to the section completed by the Documentation Provider referring to the comments and opinions with which he became familiar in the previous step. At any time

it is possible to return to step one to revisit the comments or to recall the opinions of the Opinions Providers, to do so press the **Return** button located at the bottom of the form.

In step two (Figure 39), at the top of the form, there is an **Add Documents** field [1], through which you should attach the appropriately revised documents after addressing the comments from step one, and at the bottom of the form you will see the **I Confirm Consideration of All Comments** field [2].

If you need to attach more than one file, you can select several files from the disk and add them simultaneously. Adding the documents will cause the records to appear in the list of step two (Figure 40). Next to each document you will see the optional **Revision Number** field [1] and the required **Documentation Provider Comment** field [2]. After attaching all the documents and responding to the comments, **confirm the inclusion of all comments** [3]. Finally, press the **Execute** button, which will forward the revised documentation back to the project implementer on the ORLEN CG side.

DRITEN	«	ue 45217: Include comments imp opinions of documentation Insuiting for documentation provider's reply) app Domog domon of documentation > Issue 4517						
C Session time 29:50			Document notes O Corrected documents					
LanguageDostawca KR		O Please respond to the comments in the "Document notes" tab (step 1) and attach the corrected	Thes below.					
+ Add new issue								
88 Main page		Rows: 1 Document Revision number ~	Comments by occument provider ~	alues for new records 🕲				
		Residon number ORLEN.txt	Comments by document provider *	8 DELETE				
			+ Add document					
		\bigcirc By checking the box below, you confirm that responded to all the comments and refer the matter	r for further processing.					
		Confirm to take all comments *						
[→ Log out		Cancel		Back Execute				

Figure 40: Form for consideration of comments with added documents - Step 2

After the Documentation Provider has responded to the opinions and comments, the case is sent again to the project implementer. The implementer has the opportunity to resend the documentation to us with further comments. In such a situation, an additional field with such comments will appear on the form for consideration of comments. Further procedure is exactly the same as described above.

3.3 Documentation lend

As part of this process, a Documentation Provider with an account in the system, if necessary, will have the opportunity to borrow documentation located in the ORLEN CG archive.

How to launch a documentation rental case?

To start a new Document Lending case, select Add New Issue from the left menu (Figure 41).

CORTER O	«	Home					
C Session time 29:59		Saved					
Language Dostawca KR		Do przekazania	Przekazano dokumentacje	Wypożyczenie dokumentacji - Oczekujące na uzupełnienie	Application during the filling		
Re Main page	-	0	42	1	12		
		Pasia					
		Handavar of	Civing eninions	Desumantation			
		documentation	of documentation	lend			
		197	43	18			
				D ₂			
Et log out							
o 20240800 402102 MIEM							

Figure 41: Starting a new case

We will be taken to a page where we can launch the Documentation Lending case. To do this, press the **Run** button (Figure 42).

ORTEN	«	Add a new case	
 Session time 29:41 Language Dostawca KR 		Q. Search for an action Documentation lend An external user or employee GIC then is made on behalf of external user request for access to those resources. Selects totater and documents, in the next step Administrator AdD/HO werky the application, II can also outcource consultations indicated to you AdD/HO	Run
+ Add new issue			

Figure 42: Launching a Documentation Lending Case

Once the process is started, the document rental request form is displayed (Figure 43).

DRLEN	~	Complete the application					
C Session time 29:58		The applicant Dostawica KR					
② Dostawca KR		③ Select the folder from which you want	to get documents:				
+ Add new issue		Area *		Project *		Stage	
Main page		<select></select>	v]	<select></select>	~	<select></select>	~
		Category <select></select>	~)	Document type <select></select>	~	Prototype of document <select></select>	~
		Project data					
		Task name		Task number		Contract number	
		① Substantiation (in case of inference in a case of inference in a case of inference in a case of the case of t	someone else's behalf, please provide yo	our target recipient).			
		*					
► Log out 3.0.20240809.103103.WEW		Cancel					Execute

Figure 43: Documentation rental request form

On this form, indicate the exact path in the Digital Archive where the documentation you want to borrow is located. In addition, you should enter **a Justification of** the reason for the loan. Optionally, you can enter the **Number of** the **contract** with which the loan will be associated.

The last step on this form is to press the **Execute** button. In case the indicated folder is empty, the system will inform us by writing an error message at the top of the screen (Figure 44).

	*	Complete the application		S ERROR: brak dokumentów w wybranym folderze.	3s					
C Session time 29:59		The applicant Dostawca KR								
② Dostawca KR		③ Select the folder from which you want to get	et documents:							
+ Add new issue		Area *		Project *				Stage		
Main page		1 Obszar KR	~	Test 123 (TST123)		×	~	<select></select>	~	
		Category		Document type				Prototype of document		
		<select></select>	~	<select></select>		`	<u>~</u>]	<select></select>	~	
		Project data								
		Task name		Task number				Contract number		
		③ Substantiation (in case of inference in some	eone else's behalf, please provide	your target recipient).						
		test								
								la		
Log out		Cancel							Execute	

Figure 44: Error when selecting an empty folder

When the indicated folder contains documents, the **Document Lending** case is launched in **the** state of **Application in the process of filling** (Figure 45). At this stage of the case, we have the

option of submitting an already completed request, selecting specific documents for loan, or changing the folder in case we mistakenly selected the wrong folder when launching the loan case.

₹ «	Issue 51805 Documentation lend (Applicat Main page > Documentation lend >	ion during the filling) Issue 51805
C Session time 29:59	General	
Language		
② Dostawca KR	Basic information	
+ Add new issue	Issue Id	51805
	Created	2024-04-25 10:19:32
Main page	Started by	Dostawca KR
	The applicant	Dostawca KR
	Area	ANWIL - Plan Generalny
	Project	Plan Generalny (ANWPG001)
	Stage	Dane pozyskane z urzędów
	Category	No data
	Document type	No data
	Prototype of document	No data
	Task name	Plan Generalny
	Task number	ANWPG001
	Contract number	KR2504002
	Substantiation	Dla siebie - KR
E+ Log out		
9 N 20240B00 102102 WEW		

Figure 45: Documentation Lending Case Launched

How to change the documentation folder?

If you use the **Change Folder** button, a form analogous to the one during launch for indicating a new folder is displayed (Figure 46). It contains the data entered during launch.

ORLEN	«	Issue 51805: Change folder Documentation lend (Application during the filling) Main page 2 Documentation lend 3 Issue 51805				
C Session time 29:51		O Correct the previous application, if necessary				
		ken t		Project *	State	
C Dostawca KR		ANWIL - Plan Generalny	~	Plan Generalny (ANWPG001)	Dane pozyskane z urzędów	~
+ Add new issue						
SS Main page		Category		Document type	Prototype of document	
00		<select></select>	~	<select></select>	<select></select>	~
		③ Project data				
		Task name		Task number	Contract number	
		Plan Generalny		ANWPG001	KR2504002	
		Substantiation *				
		Dla sieble - KR				
← Log out		Cancel			E	xecute

Figure 46: Changing the folder

Changing the path and pressing the **Execute** button will pull the list of documents from the newly designated folder.

How to indicate the documents to be lent?

Selecting the **Select Documents** button (Figure 45) will display a list of all available documents for loan in the selected folder (Figure 47).

* «	Issue 51805: Select documents Documentation lend (Application during the filling) Main page > Documentation lend > issue 51805				
Session time 29:53	③ Select the documents to which access is requesting. And	also are applying only for access to the electronic version or the p	aper.		
Dostawca KR	Rows: 11				
Add new issue	Folder	2 Archival number	3 File name	Share an electronic version	5 Please provide a paper versi
Main page	Folder	Archival number	File name		
	ANWIL - Plan Generalny\Plan Generalny (ANWPG0011)Dane po	zyskane z urzędów SAC/ANWPG/2018/00000009		Share an electronic version	
	Folder	Archival number	File name		
	ANWIL - Plan Generalny\Plan Generalny (ANWPG001)\Dane po	zyskane z urzędów SAC/ANWPG/2017/000000006	410.png	Share an electronic version	
	Folder	Archival number	File name		
	ANWIL - Plan Generalny\Plan Generalny (ANWPG001)/Dane po	zyskane z urzędów SAC/ANWPG/2022/00000001	GetHistoryFortssue142675.sql	Share an electronic version	
	Folder	Archival number	File name		
	ANWIL - Plan Generalny\Plan Generalny (ANWPG001)\Dane pc	zyskane z urzędów SAC/ANWPG/2016/000000004	kise_nomop5.pdf	Share an electronic version	
	Folder	Archival number	File name		
	ANWIL - Plan Generalny/Plan Generalny (ANWPG001)/Dane po	zyskane z urzędów SAC/ANWPG/2016/000000005	kier_nomszkiot4.pdf	Share an electronic version	
	Folder	Archival number	File name		
	ANWIL - Plan Generalny\Plan Generalny (ANWPG001)\Dane po	zyskane z urzędów SAC/ANWPG/2016/00000006	kier_nomzarz4.pdf	Share an electronic version	
log put					-
0800 103103 1051	Cancel				Exec

Figure 47: Document selection

Each document is described by a set of fields. The first [1] contains the exact path to the document in the Digital Archive. The next [2] contains the archive number assigned by the system. The next field [3] is the document name. All of these fields are non-editable fields. For each document, there is an option to check the box **Please provide an electronic version** [4], and if there is also a paper version there is an option to check the box **Please provide a paper version** [5].

The selection of documents to be loaned is done by checking the appropriate check boxes next to the documents of interest and pressing the **Execute** button. Again, we are transferred to the **General** tab of **the Document Lending** case in the state of **Request in the process of completion**. As long as we do not execute the **Apply** event (Figure 45), it is possible to change the selected documents at any time, as well as change the folder. Note that you can only ever apply to the contents of one folder per case.

Confirmation of data and submission of application

After pressing the **Make application** button (Figure 45), all that remains is **Confirmation of the correctness of the data on the application** [1] and **Acceptance of the provision** [2] (Figure 48).



Figure 48: Submission of a request for rental documentation

Once both boxes are checked and the **Execute** button is pressed, the case changes its status to **The application Submitted** (Figure 49) and is forwarded to the appropriate person on the ORLEN CG side.

CRIEN «	Issue 51805 Documentation lend (The app Main page > Documentation lend >	lication submitted) Issue 51805
C Session time 30:00	General	
Language		
Oostawca KR	Basic information	
+ Add new issue	Issue Id	51805
	Created	2024-04-25 10:19:32
Main page	Started by	Dostawca KR
	The applicant	Dostawca KR
	Area	ANWIL - Plan Generalny
	Project	Plan Generalny (ANWPG001)
	Stage	Dane pozyskane z urzędów
	Category	No data
	Document type	No data
	Prototype of document	No data
	Task name	Plan Generalny
	Task number	ANWPG001
	Contract number	KR2504002
	Substantiation	Dla siebie - KR
Log out		
3.0.20240809.103103.WEW		

Figure 49: Case of Documentation Lending in the state Request submitted

Completion of the application

In case of some ambiguity, the submitted application may be returned for supplementation. In this case, the case will return to the applicant in the state **Awaiting completion**. In addition, he/she will be informed about it by email. The applicantion can only supplement the application (Figure 50).

×	Issue 50439 Documentation lend (Pending Main page > Documentation lend >	on complement) Issue 50439
C Session time 29:54	General	
Language		
② Dostawca KR	Basic information	
+ Add new issue	Issue Id	50439
	Created	2024-01-15 18:18:02
Main page	Started by	Dostawca KR
	The applicant	Dostawca KR
	Area	Obszar18082023
	Project	Projektlnwestycyjny18082 023 (Projekt18082023)
	Stage	Etap18082023
	Category	Kategoria18082023
	Document type	No data
	Prototype of document	No data
	Task name	ProjektInwestycyjny18082 023
	Task number	Projekt18082023
	Contract number	No data
	Substantiation	okok
[→ Log out		

Figure 50: Documentation Lending Case Pending Completion

After using the **Complete an Application** button, a form will be displayed, where the Applicant can enter additional justification for his/her application in the **Completion** comment field (Figure 51).

CRUCH	«	Issue 50439: Complete an application Documentation level (Pending on complement) Man page Documentation level Status
 Session time 29:51 Language Dostawca KR Add new issue Main page 		Comments of accepting person Unragi 1 Complement *
Log out		Cancel

Figure 51: Completing the application

Once the justification is entered and the **Execute** button is pressed, the case is again sent to the appropriate person on the ORLEN CG side in the **Request Submitted** state.

What if our application is rejected?

If a decision maker on the ORLEN CG side rejects our request, the case will be closed and change its status to **Application Rejected** (Figure 52). We can find such a case in the

Documentation Lending tile by filtering the cases after **the Closed** and Status 'Application Rejected' filters.

ORI	S EEN	«	Issue 52138 Documentation lend (Applicat Main page > Documentation lend >	ion rejected) Issue 52138
୯	Session time 29:54		General	
⊕	Language			
0	Dostawca KR		Basic information	
+	Add new issue		Issue Id	52138
_	Addition issue		Created	2024-07-10 11:10:30
88	Main page		Started by	Dostawca KR
			The applicant	Dostawca KR
			Area	Obszar ST
			Project	Projekt OST (POST)
			Stage	Etap OST
			Category	Kategoria OST
			Document type	Typ dokumentu OST
			Prototype of document	Podtyp dokumentu OST
			Task name	Projekt OST
			Task number	POST
			Contract number	UM1007/001
			Substantiation	Uzasadnienie TST 2
€	Log out			
_				

Figure 52: Rejected Documentation Lending Case

How do I pick up the borrowed documents?

If our request is accepted on the ORLEN CG side, we will be notified by email, and the **Documentation Lending** case will appear in our tile in the **Request Accepted** state (Figure 53). When the case is in this state the Documentation Provider can **RECEIVE the documents**.

DITEN	«	Issue 52401 Documentation lend (Request Main page > Documentation lend >	approved) Issue 52401
Session time 29:55		General	
Dostawca KP		Basic information	
Dostawca KR		Issue Id	52401
+ Add new issue		Created	2024-07-30 14:32:46
Main page		Started by	Dostawca KR
		The applicant	Dostawca KR
		Area	1 Obszar KR
		Project	Statyczny 10KR (PD10KR)
		Stage	Etap 3007
		Category	No data
		Document type	No data
		Prototype of document	No data
		Task name	Statyczny 10KR
		Task number	PD10KR
		Contract number	No data
		Substantiation	Uzasadnienie testowe
F→ Log out			
3.0.20240809.103103.WEW			

Figure 53: Accepted Documentation Lending Case

To receive electronically shared documents, go to the **Receive Documents** event. Next to each electronically shared document there is a link to download it (Figure 54).

ORLEN	«	Issue 52401: Receive documents Documentation lend (Request approved) Main page > Documentation lend > Issue 53401		
C Session time 29:56		Rows: 2		
Language		Folder	Archival number	File
② Dostawca KR		Folder	Archival number	
+ Add new issue		1 Obszar KR(Statyczny 10KR (PD10KR)\Etap 3007	SAC/10KR/2024/00000033	test-product.jpg
BB Main page		Folor 1 Obszar KRSItałyczny YOKR (POTOKRI)Etap 3007	Archival number SAC/10KR/2024/00000034	tatlat
		Location saper vension Pilki: IdLLS Destgone ng ve nastepulgosij (okalizacij): Archinum papierove S10/k111 12-321 Woods Diuge 127/328		
Log out 3.0.20240809.103103.WEW		Cancel		Executo

Figure 54: Link to download the document made available electronically

After clicking on the link, the system will download and save the document locally on your computer (Figure 55).

(C)	Issue 52401: Receive documents Documentation kend (Request approved) Main page 2 Documentation kend 2 Issue 52401		Recent download history test-product.jpg	×
C Session time 29:16	Rows: 2		74.6 KB + Done	
Language	Folder	Archival number	Full download history	
② Dostawca KR	Folder	Archival number		
+ Add new issue	1 Obszar KR(Statyczny 10KR (PD10KR)\Etap 3007	SAC/10KR/2024/00000033	test-product.jpg	
88 Main page	Fader 1 Destar KR(Staryczny 10KR (P010KR)(Etap 3007	Archival number SAC/10KR/2024/000000034	tst.txt	
	Lostion paper versos Piki Dostpono sa un następującej klakitaceji: Archwane palerowe 3108/111 Tr-321 Wrockw Druge 127/237		Ą	
→ Log out	Cancel			Execute

Figure 55: Saving a shared document

In the case of documents made available only in paper form, we do not have the possibility to preview them in the system. There is no link next to such documents in the **File** field, while all such documents are listed in the **Paper Version Location** section (Figure 56). There we can find information about where we can physically pick up paper versions of borrowed documents.

	¢	Issue 52401: Receive documents Documentation lend (Request approved) Main page > Documentation lend > Issue 52401			
C Session time 29:56		Rows: 2			
Language		Folder	Archival number	File	
② Dostawca KR		Folder	Archival number		
+ Add new issue		1 Obszar KR\Statyczny 10KR (PD10KR)\Etap 3007	SAC/10KR/2024/000000033	test-product.jpg	
88 Main page		Folder 1 Obszar KRRStatyczny 10KR (PD10KRI)Etap 3007	Archival number SAC/10KR/2024/00000034	tst.tst	
		Location paper version Pilit: Editation eight materipaijeel (Malitzed): Arisymun pipelerowe S10(8111 12-323 Woodaw Olivga 127/32F			
Log out 3.0.20240809.103103.₩EW		Cancel		Execute	

Figure 56: Paper documents

The ability to preview this event is possible for a maximum of 30 calendar days. After 30 days, the ability to receive documents will be revoked.

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