



Cumulus User Guide:

Importing Connections with Activities

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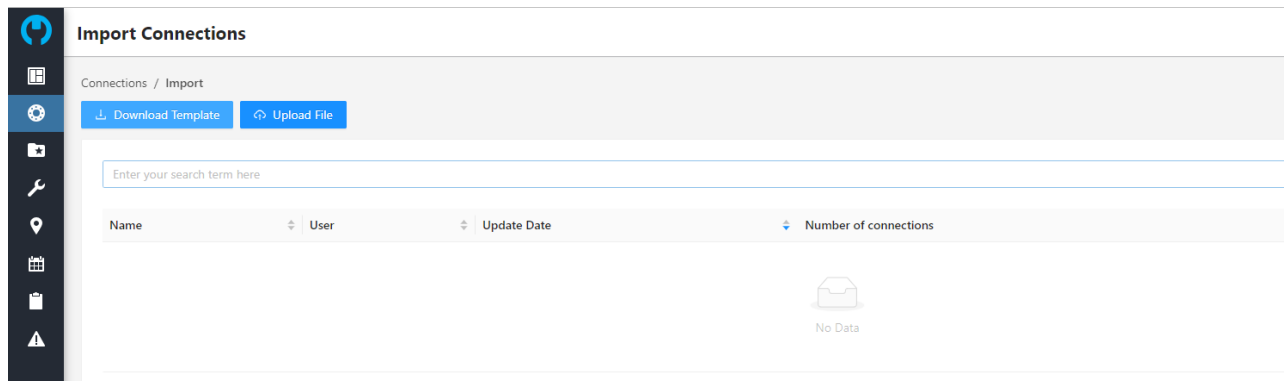
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INTRODUCTION

The provided work instruction delineates the process of efficiently creating and associating connections with Activities using a streamlined spreadsheet import method, as integrated into our system with the release of Control Center v1.82.0. This novel functionality eliminates the previous manual approach of first establishing an Activity via the web application and then associating connections separately. By allowing users to define and link connections directly through a spreadsheet, we significantly expedite and simplify the workflow. This enhancement not only minimizes the potential for errors but also promises a more intuitive, time-saving experience for users, thereby optimizing their interaction with the system and ensuring more accurate data management.

Cumulus Connection Import Template is accessed in the Connections Importing section of Control Center. For detailed instructions on additional Cumulus Control Center functionality, please contact Cumulus at support@cumulusds.com.



PREPARING YOUR SPREADSHEET

Ensure you are working from the most recent version of the Import spreadsheet. Users with Admin credentials on a given site may download this most recent import template. This spreadsheet has column BP titled "Activity Name".

Once it has been validated that the most recent version of the Import spreadsheet is being used, the User may:

- Fill out the Connection column with either new or existing connection details.
- Fill out the Activity column with either new or existing activity details.



	A	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP
1	Permanent Joint ID	Cleaning Solution	Pre/Post	Dissolver Flange	Cryo Service	Project Name	Record Number	Client Name	Startup System	Residual Bolt Lead (N)	Temporary Joint ID	Construction Class	Turnover System Status	Activity Name
2	REQUIRED The unique joint identifier - each joint must be uniquely identified.	OPTIONAL Field captures information about any cleaning solution required to be used on the joint.	OPTIONAL TRUE/FALSE. One can be used as a hold point trigger in Workflow Builder. Determine if the joint requires pre assembly or post assembly test.	OPTIONAL TRUE/FALSE. Can be used as a hold point trigger in Workflow Builder. This identifies if the flanged joint is made up of dissimilar materials.	OPTIONAL TRUE/FALSE. Can be used as a hold point trigger in Workflow Builder. This identifies if the joint is used to convey cryogenic fluids.	OPTIONAL The name of the project associated with activity on the joint (e.g. 2020-FAB-1A).	OPTIONAL This field captures a document number that will be used to generate an integrated report (ITR) of the lightning activity.	OPTIONAL This captures the name of the client/operating the work is being performed for.	OPTIONAL In construction, the start-up system name number may be recorded.	OPTIONAL This is the required target residual bolt period value coded in sections if the tightening method is Twinning.	OPTIONAL During work activities, an alternative to the permanent joint ID is a contract joint identifier ID.	OPTIONAL Describes the designated construction class of the joint.	OPTIONAL Describes the status the joint is in the construction turnover phase to the owner/operator.	OPTIONAL Activity to associate the joint with.
3	Permanent Joint ID	Cleaning Solution	Pre/Post	Dissolver Flange	Cryo Service	Project Name	Record Number	Client Name	Startup System	Residual Bolt Lead	Temporary Joint ID	Construction Class	Turnover System Status	Activity Name
4	TRAIN-001		FALSE	FALSE	FALSE									ACTIVITY 1
5	TRAIN-002		FALSE	FALSE	FALSE									
6	TRAIN-003		FALSE	FALSE	FALSE									
7	TRAIN-004		FALSE	FALSE	FALSE									
8	TRAIN-005		FALSE	FALSE	FALSE									
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IMPORTING THE SPREADSHEET INTO THE DATABASE

Upload your prepared Connection data spreadsheet into the database using your regular import method.

For more information on this topic, refer to the *Cumulus Control Center User & System Configuration Guide*.

UNDERSTANDING THE ASSOCIATION OUTCOMES

There are several conditions which may take place. The bullets below outline the various conditions which may be present and their expected outcomes.

- **New Connection + New Activity:** A new Connection and Activity are created. The Connection is associated with the new Activity.
- **New Connection + Existing Activity:** The Connection is associated with the existing Activity.
- **Existing Connection (not in an Activity) + New Activity:** A new Activity is created and the existing Connection is associated with this new Activity.
- **Existing Connection (already in an Activity) + Empty Activity Name:** The Connection remains in its current Activity without any change.
- **Existing Connection (already in an Activity) + New Activity:** A new Activity is created, but the Connection remains in its current Activity. It will not be moved to the new Activity.



IMPORTANT NOTES

In addition to the provided information above, please take note of the below information.

Maintaining Connection-Activity Associations: The Connection upload process will not change any previously established Activity associations.

Removing Connections from Activities: To remove Connections from Activities, you must access the Activity User Interface (UI) and manually make the changes there. The spreadsheet import process does not support this action.

Other Activity Functions: All other functions related to Activities remain unchanged and should be executed as you've done in the past.

COMPLETING THE IMPORT PROCESS

Once your spreadsheet has been imported, review the Activity associations to ensure they have been created or modified as per your requirements. Use the Activity UI for any necessary adjustments.

The screenshot displays the 'Activities' interface. The top section, 'Activity Information', shows a table with one entry: 'Flange Connections' with 'Routine Maintenance' as the activity type and 'Open' as the status. The bottom section, 'Associated Connections', features a search bar and a table with three rows of connection data.

Permanent Tag	Connection Status	Temporary Tag	System	Subsystem	Contracting Company
EWGW9KBSAXO	WorkInitiated	TEST-000009			
DEMO12346	WorkInitiated	DEMO-TAG-000021			
X62KLKAXBEJ	WorkInitiated	TEST-000006			

SUPPORT

If you have questions pertaining to functionality covered in this documentation please contact

Cumulus at support@cumulusds.com.