



Cumulus Control Center Guide: Documents

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INTRODUCTION

The **Documents** tab in Cumulus Control Center is the central location for managing files attached to assets across your site. It provides a consolidated view of all documents stored in the system — including uploaded drawings, and any other supporting files — without needing to navigate to individual asset records.

This guide covers how to navigate the Documents tab, view and download files, upload new documents, and manage document associations with assets.

This guide assumes familiarity with Cumulus Control Center navigation and asset management. For information on uploading drawings directly within an activity, refer to the Activities Guide.

PURPOSE

The Documents tab allows you to:

- View all documents stored in Control Center across all assets
- Upload new documents and associate them with specific assets
- Download or preview existing documents.
- Manage and update document records, including replacing files.
- Access documents when working in the Cumulus Mobile App.

KEY TERMS

Term	Definition
Document	Any file uploaded to Control Center and associated with an asset, activity, or site record. Supported file types include PDF, images, and common office formats.
Completion Report	A document automatically generated by the Cumulus Mobile App upon completion of a workflow. It contains a traceable record of all operations performed, results captured, and signatures collected.
Drawing	An engineering document (typically a PDF) linked to one or more assets. Drawings are accessible to field users in the Cumulus Mobile App. See also the Activities Guide for drawing management within an activity.



Term	Definition
Document Association	The link between a document record and one or more assets or activities. A document can be associated with multiple assets.
Replace File	The action of uploading a new version of a file to an existing document record, replacing the previous file while retaining the record and its associations.

PREREQUISITES

Before working with the Documents tab, ensure the following:

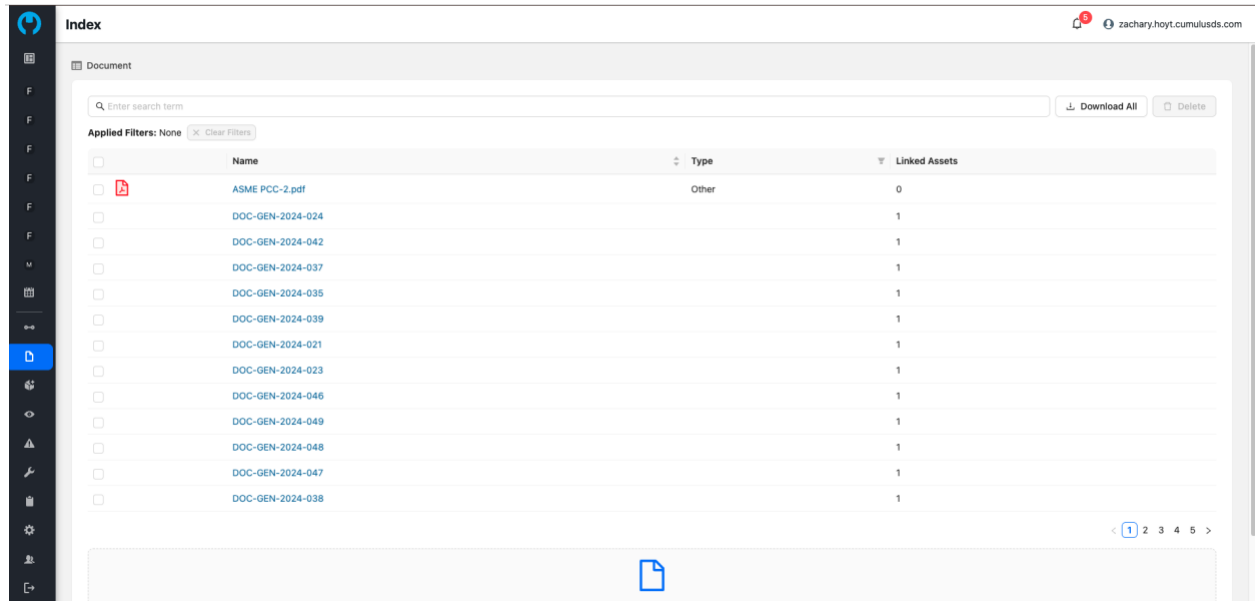
- You have a Cumulus Control Center login with the appropriate document permissions for your role. Permissions:
 - Document Editors: Allows the user to create and edit documents in Control Center
 - Document Viewers: Allows the user to view documents in Control Center
- At least one workflow must have been completed by a field user in the Cumulus Mobile App.

NAVIGATING THE DOCUMENTS TAB

To access the Documents tab, select **Documents** from the navigation bar on the left side of Control Center.

The screenshot shows the Cumulus Control Center interface. The left sidebar is dark with 'Documents' highlighted. The main area has a top navigation bar with filters for System, Subsystem, Activity, Asset Type, Contractor, and Permanence. Below this is a dashboard with five circular progress indicators: Unstarted (3), In Progress (9), Ready for QC (4), Complete (52), and Failed (2). Underneath, there are sections for 'Rejected (1)', 'Ticket Types', and 'Construction Progress' with progress bars for 'Flanges' (11.1%) and 'Test Packs' (0%).

The Documents page loads, displaying a list of all documents stored in the system. Each row shows the document name, type, and Linked Asset count.



Searching Documents

Use the search controls at the top of the Documents page to narrow the list.

- Enter a document name or asset ID in the **Search** field to find a specific file.
- Use the **Document Type** filter to limit results by file category (e.g., Drawing, Completion Report).
- Sort any column within the table to get results ascending or descending alphabetically

Viewing, Replacing and Downloading a Document

- Select a document name from the list to open its detail record.
- The detail record shows the file name, associated assets, and a file preview (where available.)
- Select **Download** to save the file to your computer.
- Select **Upload New File** to replace the document in the browser.

Replacing a Document File

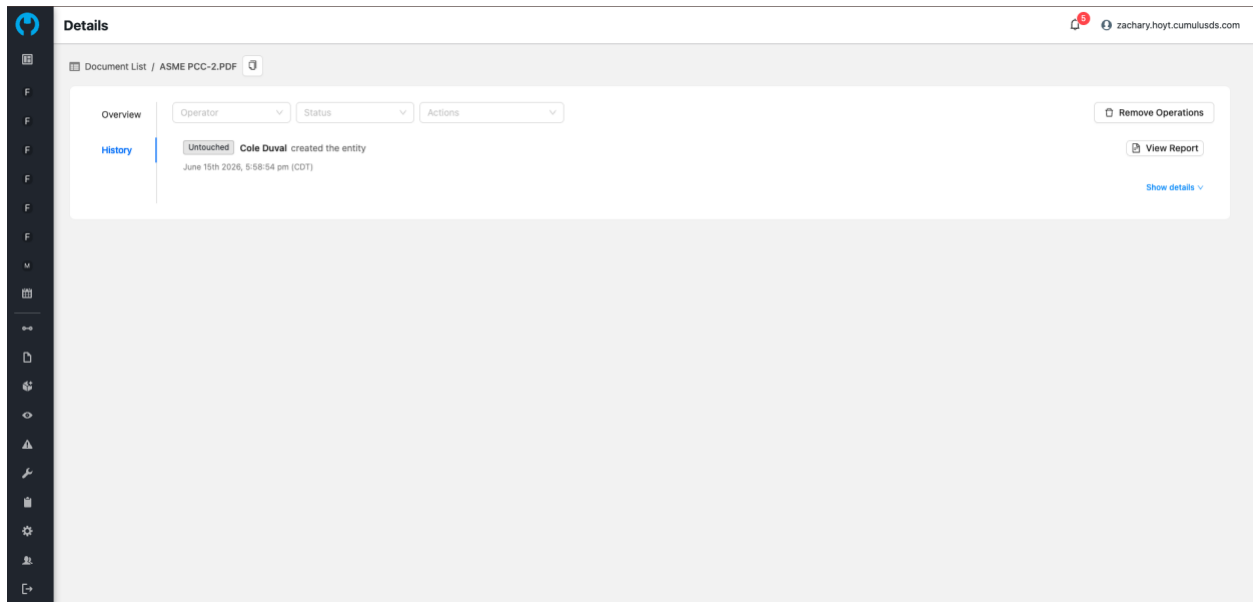
If a document needs to be updated with a newer version, use the Replace File option to swap the file while keeping the existing record and all its associations intact.

- Open the document detail record.
- Select **Replace File**.
- Select the new file from your computer and confirm the upload.
- The old file is replaced. All existing asset and activity associations remain unchanged.



Document History

- Click on the History tab to see all revisions, upload date, and who uploaded the document
- Just like in the Asset index history you get all filters available to view the document history page



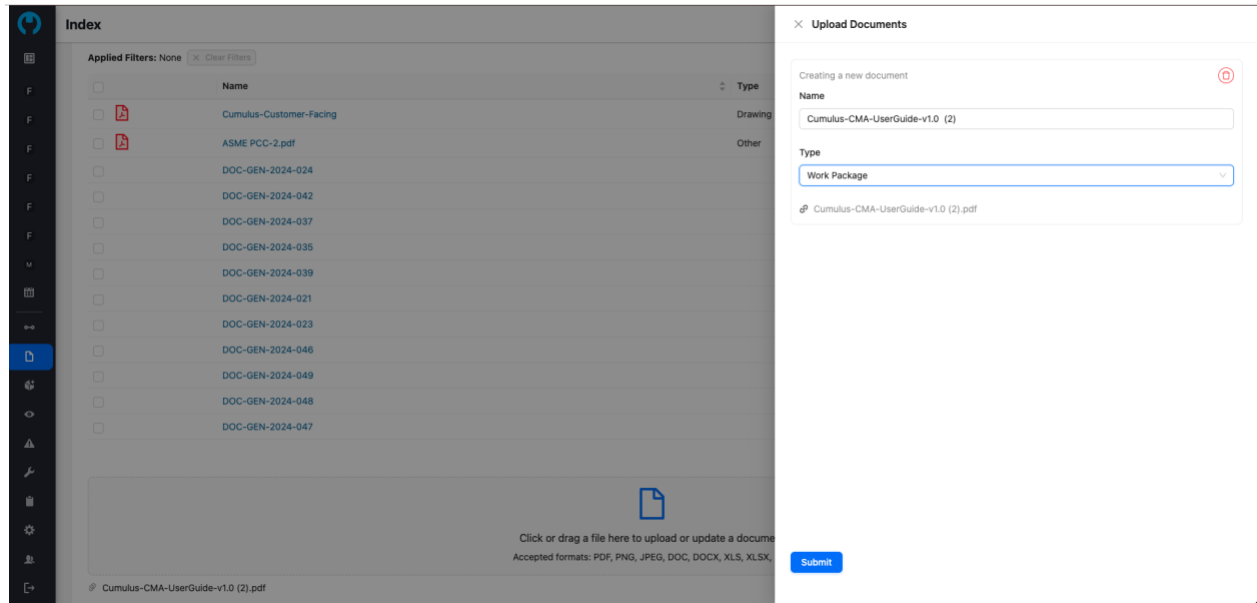
UPLOADING DOCUMENTS

New documents can be uploaded to Control Center and associated with assets or activities directly from the Documents tab, or by via the Bulk import assets feature in the asset index.

Uploading a New Document from the Documents tab

- From the Documents page, users have the option to drag and drop files into the upload section at the bottom of the screen or simply click in the area to bring up their file browser.
- Select or drag over a singular or any number of documents into the page
- Enter a document name for each document in the pop-up window, if different from the file name.
- Select the **Document Type** from the dropdown (e.g., Drawing, Procedure, Completion Report).
- Select **Submit** to upload the file.

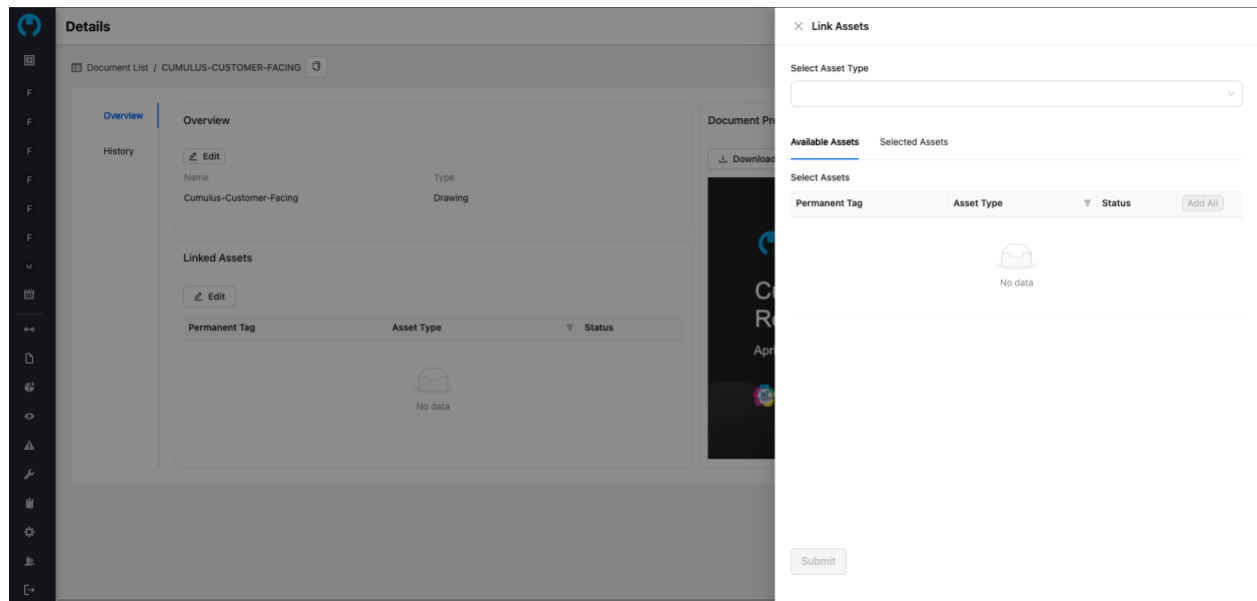
Note: After uploading, the document record is created but not yet associated with any asset or activity. Complete the association step below to make the document available within asset records.



Associating a Document with an Asset

Once a document is uploaded, you can link it to one or more assets.

- Open the document detail record from the Documents list.
- Select **The Edit button** under the linked asset header.



- First select the correct asset type of the asset you wish to link this document to

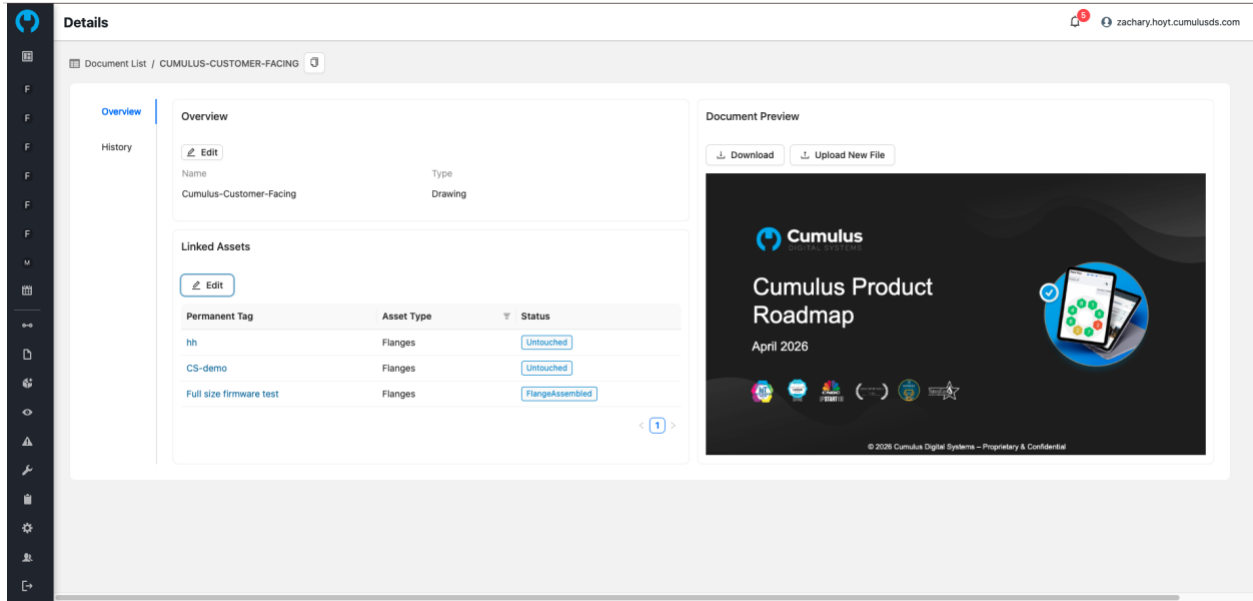


Permanent Tag	Asset Type	Status	Add All
micro firmware test	Flanges	Flange Torqued	+ Add
CS-demo	Flanges	Untouched	+ Add
hh	Flanges	Untouched	+ Add
CS-DEMO-2	Flanges	Flange Tagged	+ Add
Demo-Flange-3	Flanges	Flange Inspected	+ Add
In office demo flange	Flanges	Untouched	+ Add
In office demo flange-2	Flanges	Flange Torqued	+ Add

- Select the asset utilizing the filter and search bar, adding each asset desired link with the “+Add” button. When adding assets, you will see the number of available assets decrease and selected assets increase.
- Verify the assets on the selected assets screen prior to selecting tag submit.

Permanent Tag	Asset Type	Status	Remove All
Full size firmware test	Flanges	Flange Assembled	Remove
CS-demo	Flanges	Untouched	Remove
hh	Flanges	Untouched	Remove

- Clicking submit will update the Documents linked asset count and update the assets as well.



Associating a Document from a bulk upload

Documents can be associate to assets in bulk rather than one by one from the UI. To do this first you need to have all documents uploaded to the system and named properly first.

- Next on your import sheet, a column should be added automatically labeled “Associate Document”

M	N	O	P	Q	R	S	T	U	V	W	X
1	Pressure Rating	Flange Type	Connection Type	Corrosion Resistant	Required Torque/Value (lbf)	Number Of Bolts	Tightening Method	Shape	Associate Document	Associate Activities	
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
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41											

- In that document field you will need to input document you wish to link **exactly** as how it is named in the document tab.
- Fill out the import sheet as normal, and follow the import process as described in the Cumulus Control Center Guide: Index



- On the column mapper screen scroll to the bottom of the header mapping window and ensure “Associate Document” is mapped to “Document”

Connection Type	--	Connection Type	▼
Corrosion Resistant	--	Corrosion Resistant	▼
Required TorqueValue	--	Required TorqueValue (lbf-ft)	▼
		lbf-ft	▼
Number Of Bolts	--	Number Of Bolts	▼
Tightening Method	--	Tightening Method	▼
Shape	--	Shape	▼
Spreadsheet Association Header	--	Entity Type	
Associate Document	--	Document	▼
Associate Activities	--	Activities	▼

Confirm Columns

- Complete the import process by selecting submit and you can travel to the document in the documents tab or the asset index “documents” sub window to verify.

SUPPORT

If you have questions about the Documents tab or document management in Control Center, contact Cumulus Quality support.

- **Email:** support@cumulusquality.com
- **Subject line format:** Control Center — Documents — [brief description of issue]

For information on other Control Center tabs, refer to the relevant section of the Cumulus Control Center Guide.