From first setup to a checked shipping list

A practical training manual for administrators, procurement teams, workshop managers, workers, quality teams and dispatch.

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Use a representative test project first. This pack explains the current core workflows; it does not certify a workshop, approve work or replace company requirements. Some options depend on licensed modules, role and project type. Consumable Orders / AI receiving remains under development on the main platform and is outside this core pack.

COMPANY ADMINISTRATOR

Set up your workshop

Configure named physical machines, their real capabilities and your company approval rules before starting production.

1 Open Administration → Setup

Sign in with your company email and PIN. Open Machine setup. Subscriber registration does not require machine routes: configure the workshop here before the first job.

2 Choose each machine’s operation

Name the machine and choose Cutting, Drilling only or Rolling. Select its materials. Use All sizes and No weight limit only when appropriate. Section cutters need actual loading limits, kerf and any dead zone. An existing beam or angle line is not silently changed to drilling only.

3 Set stock and coil requirements

Enter purchased section stock lengths for section cutters. CFLC rolling is coil-fed: no standard stock or loading maximum is required; finished-section limits are optional. Enter actual coil details in the project CFLC supply plan. Plasma and plate-laser sheet sizes belong in the RFQ.

COMPANY ADMINISTRATOR

Set up your workshop

Continue the workflow, then check the saved result.

4 Save machines and production rules

Save machines, then reopen a machine by its name to check it. Saved cards collapse; new machines open for setup. Save Production setup separately: choose who allocates, submits and reviews work. Collapsing a card neither saves nor discards a draft.

5 Recheck routes and programme dates

After machine changes, reopen active jobs, recheck and approve routing. Physical machines have separate Gantt rows with proposed dates: adjust them and Save programme. Adding a machine does not calculate its duration or prove capacity loading.

CHECK BEFORE YOU CONTINUE

Reopen Setup and confirm saved operations, material choices and real limits. Minimum finished part length means the smallest piece the machine handles, not the purchased stock length.

IF SOMETHING DOES NOT MATCH

If no route fits, check the actual size, length and weight limits. All sizes and No weight limit are separate choices. Do not copy another workshop’s capacities or bypass a real limit.

ADMINISTRATOR / EDITOR

Import KSS, drawings or Excel

Use one reviewed project ZIP to link materials, assemblies, PDF drawings and optional IFC models, or keep the mapped Excel workflow.

1 Choose the project and phase

Select the exact destination in Projects. Choose Import project ZIP on its dashboard. This is the single project ZIP upload location. Check Import target against KSS source; Excel imports remain available in their existing sections.

2 Prepare KSS, PDFs and optional IFC

Read the Tekla export guide. Include one metric Tekla KISS 1.0 KSS, a text-based one-page PDF per active mark and an optional matching phase IFC. Use A - MARK - Assembly.pdf or W - MARK - Description.pdf. IFC models link from this same ZIP. ZIP limit: 32 MB; PDF: 20 MB; IFC: 32 MB.

3 Review drawings and 3D previews

PDF first: check both lists, drawing previews, model previews and the model reference. Marks and quantities must match. Printed rounding retains history; real revisions block import until explicitly reviewed. Fasteners remain separate from cutting tonnage. A visual model does not confirm drilling requirements.

ADMINISTRATOR / EDITOR

Import KSS, drawings or Excel

Continue the workflow, then check the saved result.

4 Confirm and verify the combined import

The final checkbox does not approve revisions. For intended revisions, confirm Use revised PDF values and recheck. Resolve checks, then Import project & link all files. Wait for the Completed receipt: included PDFs and models verify before the lists and links save together.

5 Open models or use mapped Excel

Find saved models under Production → 3D models, Work allocation and current assigned worker lines. Changed linked drawings require model review. For Excel, match worksheet, headers, range, fields, units and weight basis; review before importing. Recheck routing after either method.

CHECK BEFORE YOU CONTINUE

Check the Completed receipt, saved counts, one material line, assembly, PDF and included model. Quantities must not be multiplied twice. Read the detailed 3D guide before using measurement tools.

IF SOMETHING DOES NOT MATCH

A preview or failed upload is not a completed import. Resolve unreadable tables and ambiguous identities. Confirm missing drawings as cancelled marks only after verifying cancellation. Models remain reference geometry; use issued PDF dimensions.

PROCUREMENT / ADMINISTRATOR

Buy material with clear approvals

Connect reviewed material requirements, real supply units, supplier choices and receipts to the same project.

1 Open the correct Procure workspace

Choose the project and phase, then Procure. Saved status bars show progress for each stage. Open a bar to work on it; a completed purchasing stage is not a quality or dispatch approval.

2 Review routes, stock and plate sheets

Check profiles, quantities, lengths, grades and line-total mass. Review section cutting against saved machines and purchased stock lengths. Select actual plate sheet sizes and quantities in the RFQ using your nesting result. A material list or model does not prove plate nesting or hole requirements.

3 Choose CFLC in-house or outsourced

Review each CFLC profile and grade. Outsourced buys supplier-cut-and-rolled sections. In-house uses your roller: roll and cut, cut blanks then roll, or roll before a separate cut. Confirm actual coils, strips or sheets, dimensions and quantities; price each whole unit. Existing raw stock needs a reference.

PROCUREMENT / ADMINISTRATOR

Buy material with clear approvals

Continue the workflow, then check the saved result.

4

Compare quotations and save the supplier

Review quoted quantities, units, price basis, lead time and totals, then Save supplier selections. Check the confirmation before creating the PO. Sending RFQs or POs is a deliberate action; importing or comparing does not send them. Changed raw requirements need another review.

5

Receive the original ordered units

Record actual partial or full receipts, delivery references, certificates and heat numbers. CFLC receiving keeps the registered PO’s coils, strips or sheets and dimensions, even after demand changes. Outstanding quantities remain visible. Categories classify rows; they do not change purchasing or routing.

CHECK BEFORE YOU CONTINUE

Reopen saved selections, POs and receipts. Confirm that raw CFLC prices and received counts use the same whole-unit basis. Keep outstanding certificates separate from supplier-selection saving.

IF SOMETHING DOES NOT MATCH

A stale plan or quote needs review before new purchasing. Existing issued POs retain their original evidence; use the supply-revision workflow for order changes. Do not invent coil width, developed blank width or kilograms from the finished profile.

WORKSHOP MANAGER / WORKER / REVIEWER

Allocate, submit and approve work

Plan and allocate the job, review separate machine operations, then submit and approve the actual completed work.

1 Open Production and the linked records

Choose the project and phase. Production contains Gantt planning, Work allocations, 3D models and Cutting lists. Live operator cutting lines open the named cutting queues. Check linked PDFs and available models; an import does not record completed work.

2 Review cutting, drilling and rolling

In Machine operations, check the issued drawing and confirm drilling Required or Not required. The saw cuts to length before a drilling-only line. Internal CFLC follows its reviewed Procurement sequence. Imported profiles and visual models do not infer holes or approve machining instructions.

3 Allocate and plan the handover

Assign quantities separately to boilermakers and welders. Check coverage and still-to-allocate values without counting historical approvals again. Boilermakers can see the saved welding allocation on their work line, including remaining unallocated quantities, so the next handover is clear.

WORKSHOP MANAGER / WORKER / REVIEWER

Allocate, submit and approve work

Continue the workflow, then check the saved result.

4 Record and submit actual completion

Record cutting and each required downstream operation in its own queue. Upstream quantities limit later stages. Workers open their assigned PDF or View 3D model, then submit finished work when company rules allow it. Office-only rules require the office to submit. Quantities stay pending until reviewed.

5 Review and confirm approved work

The reviewer checks trade, project, person and completed quantity, then approves or declines. Verify saved approved quantity and weight. Subscriber workspaces track weight only; per-tonne payment controls are specific to the maintained Arctig workspace. Machine stages do not replace inspection acceptance.

CHECK BEFORE YOU CONTINUE

Ready for fabrication waits for the required drilling and rolling stages, even when cutting is complete. Allocation may be planned ahead. Check the actual welding handover, submitted quantities and saved approvals.

IF SOMETHING DOES NOT MATCH

Correct downstream completion before reducing its upstream cutting or rolling. A changed source or route needs review before new production; safe reductions retain history. Keep pending work, approved work and quality release separate.

QUALITY TEAM / PROJECT ADMINISTRATOR

Maintain QCP and Data Book records

Use the project's selected quality requirements to collect inspection evidence and prepare its handover records.

1 Check the project system type

Basic projects do not require QCP, Data Book or traceability. Custom and Full projects use their chosen requirements. Confirm whether phases have separate packs or one combined QCP/Data Book before collecting records.

2 Open Data Book and the QCP

Select the project and phase, then Data Book. Open the Electronic QCP where required. Check the actual inspection rows, responsibilities and approval requirements saved for this job.

3 Collect supporting evidence

Review required drawings, WPS, personnel records, material certificates, paint records and other selected documents. Check material receiving and heat numbers. Keep evidence attached to the correct project or phase. A 3D view supports understanding; it does not perform an inspection or replace an issued drawing.

QUALITY TEAM / PROJECT ADMINISTRATOR

Maintain QCP and Data Book records

Continue the workflow, then check the saved result.

4 Review outstanding requirements

Use the Data Book's saved status and outstanding items. Existing files do not automatically prove inspection acceptance. FabStation registration is not a required project or QCP condition.

5 Review the printable handover pack

Check contents, document revisions, signatures and generated reports in the printable pack before close-out. Obtain required inspection and client approvals through the actual QCP workflow; this lesson does not certify compliance or approve a job.

CHECK BEFORE YOU CONTINUE

The selected project's required evidence, revision details and approvals agree with the pack. Unresolved inspection or certificate requirements remain visible for attention.

IF SOMETHING DOES NOT MATCH

If an item is missing, check its category, phase and selected requirements. Do not mark a job complete merely to hide outstanding quality work.

DISPATCH / ADMINISTRATOR / EDITOR

Prepare and export a shipping list

Select shippable assemblies and loose items, save a load, then export the saved quantities.

1 Open the project's Shipping list

Choose the project and phase, then Shipping list. Enter the load name or reference and, where needed, date, destination, customer reference, default lot, finish and loading notes.

2 Select marks and load quantities

Filter Assemblies, Loose items / parts, search or Selected. Tick rows or Select visible. Enter whole load quantities within the current project quantity. Selections can remain when filters change.

3 Review shipping details and drawings

Expand a selected line for load-specific description, lot, finish, length or area. Check linked drawings, known weight and missing measurements. A model can help identify the item, but linked assembly components must not be added again as loose shipping items.

DISPATCH / ADMINISTRATOR / EDITOR

Prepare and export a shipping list

Continue the workflow, then check the saved result.

4 Save and reopen the load

Choose Save shipping selection and wait for the saved-state confirmation. Reopen from Saved lists. If source quantities change, Refresh items, review the selections and save again. Resolve missing items and stale versions explicitly.

5 Export the saved PDF or Excel

Use Shipping documents → PDF or Excel. Both use the saved selection and list version, not unsaved changes. Shipping lists do not reserve stock, deduct inventory, record dispatch, complete production or approve QA release. Review other loads for overlapping quantities.

CHECK BEFORE YOU CONTINUE

Compare the exported mark, load quantity, unit weight and total weight with the saved load. Check missing weights and prevent double-counting assembly components.

IF SOMETHING DOES NOT MATCH

If export asks for a save, save the reviewed list first. After a concurrent edit, reload the newest saved version. Old lists without an export snapshot need review and a fresh save.

MANAGER / PLANNER

Read production reports correctly

Use recorded output, distinct machine activity and matching date filters when reviewing workshop performance.

1 Open Reports → Machine Production

Use the standard blue Reports header. Select dates, machine and project or phase; named physical machines remain separate. Use Refresh for newly recorded work. Both date boundaries are included in the company timezone.

2 Separate finished output and activity

Finished cutting output uses saved completion changes. A rolling machine that also cuts to length contributes finished output once. Separate drilling and rolling throughput is shown as machine activity, not additional finished tonnes. Planned work, purchased stock and running hours are not output.

3 Read pieces and weights together

Corrections reduce output on their recording date. Weight basis checks identifies blank, zero or unresolved imported weights. Review the source before confirming per-piece or row-total basis. Missing kilograms are not invented, and monthly comparisons remain incomplete while either period has exceptions.

MANAGER / PLANNER

Read production reports correctly

Continue the workflow, then check the saved result.

4 Check machine stages and programme dates

Each physical Gantt row uses its own cutting, drilling or rolling quantities. Removed or inactive historical machine routes remain visible for review. Proposed dates need Save programme before becoming confirmed commitments. A timeline is planning, not inspection acceptance or completed output.

5 Export the applied report and reconcile

PDF and Excel use the applied dates, machine and project filters, including matching activity records. Business Review combines current project controls and selected-period output. Workshop approved-work reports use their selected person and dates. Historical snapshots and locked figures remain preserved.

CHECK BEFORE YOU CONTINUE

Check the period, timezone, machine and project against the question. Compare pieces and kilograms with saved records. Do not add drilling or rolling activity to finished output and count the same steel twice.

IF SOMETHING DOES NOT MATCH

Missing weights and contradictory bases need source review. Older entries may lack physical-machine or weight snapshots. Read the separate activity section before comparing machine throughput with final workshop output.