The Shall's® Version 1.0

User's Guide

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Version 1.0

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Chapter 1

Introducing the Shall's

The Shall's® is a comprehensive tool that will track and help solve all requirements that must be met to deliver a complete and signed off project. The Shall's will build a requirements matrix that is eventually signed off by your customer and demonstrates how all requirements are met and satisfied prior to starting your project. The Shall's bundle also creates:

- Requests for information for scope changes or clarification of a requirement
- Acceptance Data Packages
- Skeleton Operator Manual
- Acceptance Test Plans and Procedures
- Instant reporting in multiple formats
- Built-in document compare and much more

The Shall's® is the leading workgroup database software for quickly creating and sharing solutions adapted to your business needs. Powerful features, broad platform support, and an easy-to-use interface make The Shall's indispensable for any company who needs to track and manage project requirements, and information.

About This Guide

This *User's Guide co*ntains an introduction to The Shall's features and provides step-by-step instructions on the most common tasks. To send your feedback on this guide, go to www.theshalls.com and contact or email technical support.

Using The Shall's Documentation

The Shall's documentation provides a learning path to productivity, installation instructions, and more.

The following manual is included:

- *The Shall's User's Guide (this manual*): contains key concepts and basic procedures

- *Installation: c*ontains installation instructions and a list of the features in the current version

The Shall's Overview

The Shall's has many features to aid in tracking customer requirements, cutting project logistical hours and cost associated with requirement traceability. A simple user interface will aid in the creation of the following documentation:

Reports

- System Compliance Matrix (SCM)
- Quality Inspection Report (QIR)
- Analysis Report
- Non-compliance Report (NCR)
- Design Report
- Similarity Report

Documents

- Operations and Maintenance Manual (O&M Manual)
- First Article Acceptance Test (FAAT)
- Acceptance Test Procedures (ATP)
- Statement of Work (SOW)
- In-house Product Requirements

The Shall's is a valuable tool for government contracting, pharmaceuticals, military contracts, chemical and gasses plants, and a key to developing in-house specifications and requirements for your own products. The import and export capabilities supports multiple formats and both Windows and Macintosh platforms. Automating tasks such as creating draft documents, comparing documents between revisions, instant reporting with added team distribution and customer distribution. The Shall's search capabilities and sorting is made easy with an easy-to-use toolbar.

Chapter 2

Installation

To install on a Windows based platform, insert the cd. Go to the "The Shall's" folder and select "The Shall's" .exe file. Right click on the file and choose "Open". This is a typical installation and the user will be prompted where to store the operating files and folder.

Chapter 3

Program Information Interface

The following pages will demonstrate the user interface with “The Shall’s Program Information” page. This is the default page when opening the program.

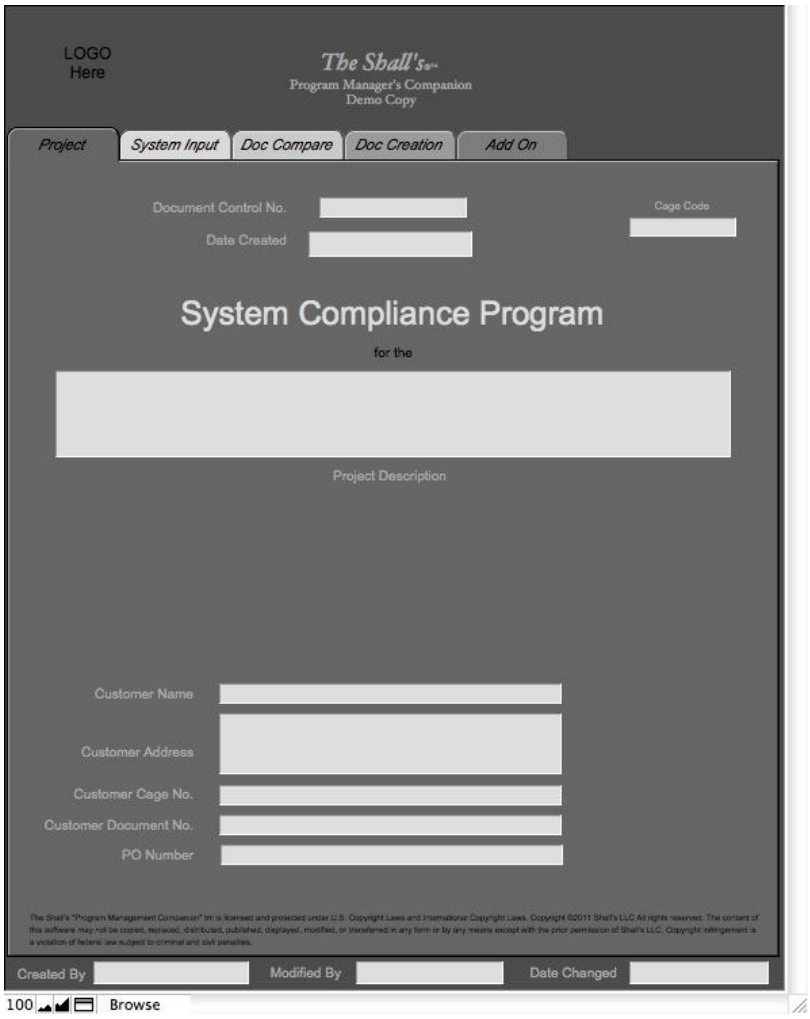


Figure 1 Program Interface Page

Figure 2 Toolbar

Program Input

To begin using The Shall's, click new record on the tool bar. A box will appear around the LOGO here field. Right click with your mouse and a list of options will appear.

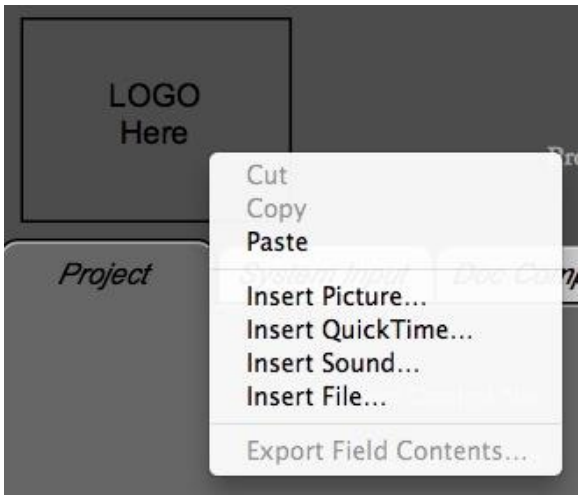


Figure 3 LOGO Here

This field is referred to as a "bucket" type field. Insert your company logo by choosing the "Insert Picture" line and your logo will be resized to fit the logo field. The proportions of the company logo will be constrained and the image will not be distorted. Next press the tab key.

Figure 4 Company Name Field

The Company Name field will highlight. Type in your company name and press the tab key.

Figure 5 Company Address Field

Type in your company address, phone or contact information, and web site if applicable. Once you type in the street address, press enter to continue filling in your address information. When complete press the tab key.

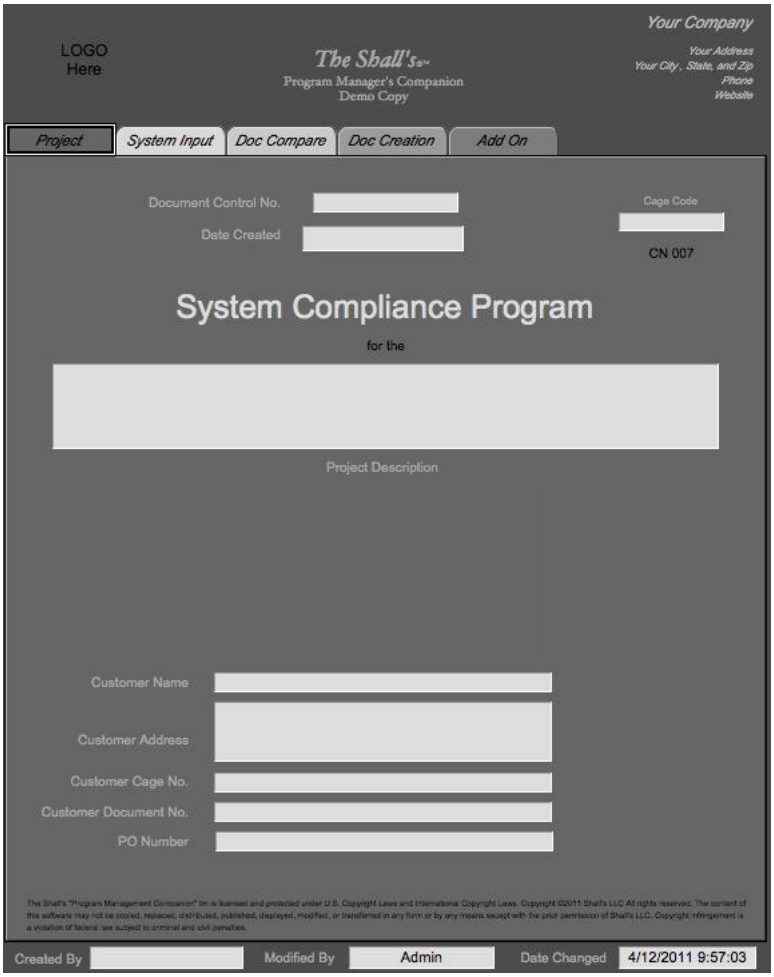


Figure 6 Tabbed Layout Fields

The "Project" tab will highlight. The tabs are used for navigation after the program information has been input. Press the tab key and the Document Control No. field will highlight. Enter your DCN number for the project you are inputting if applicable. Press the tab key and the Cage Code field will highlight. Enter you company cage code if applicable. Press the tab key and a drop down calendar will appear in the Date Created field. The default value will be the date information is being input.

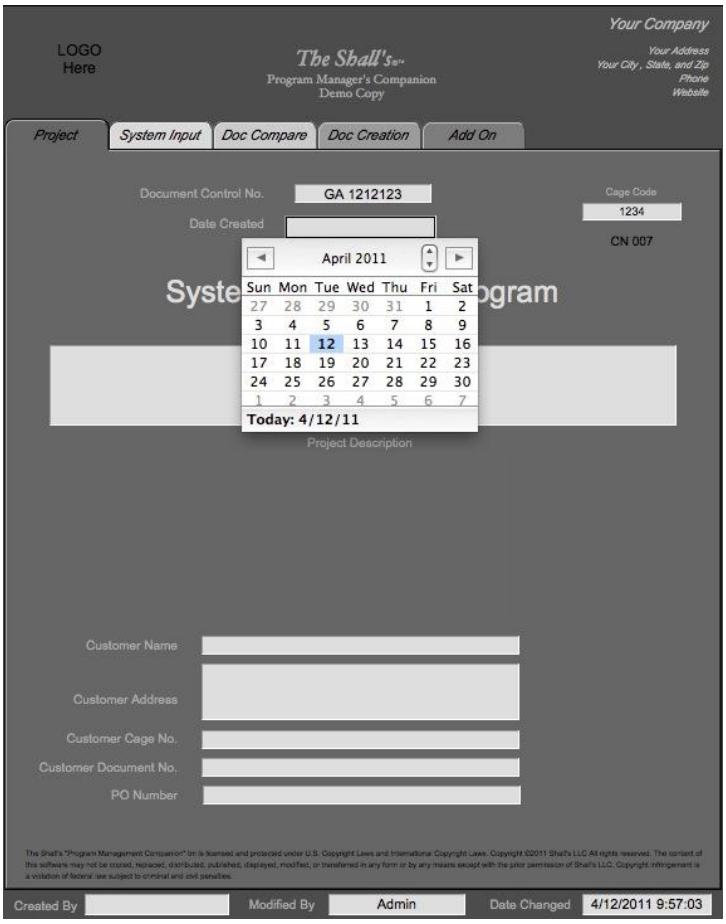


Figure 7 Drop Down Calendar Field

Click on the appropriate day and press the tab key. The project field will highlight. Enter the project name and press the tab key. Repeat this process to enter the Customer Name, Customer Address, Customer Cage Code, Customer Document Number, and PO number as seen in figure 8.

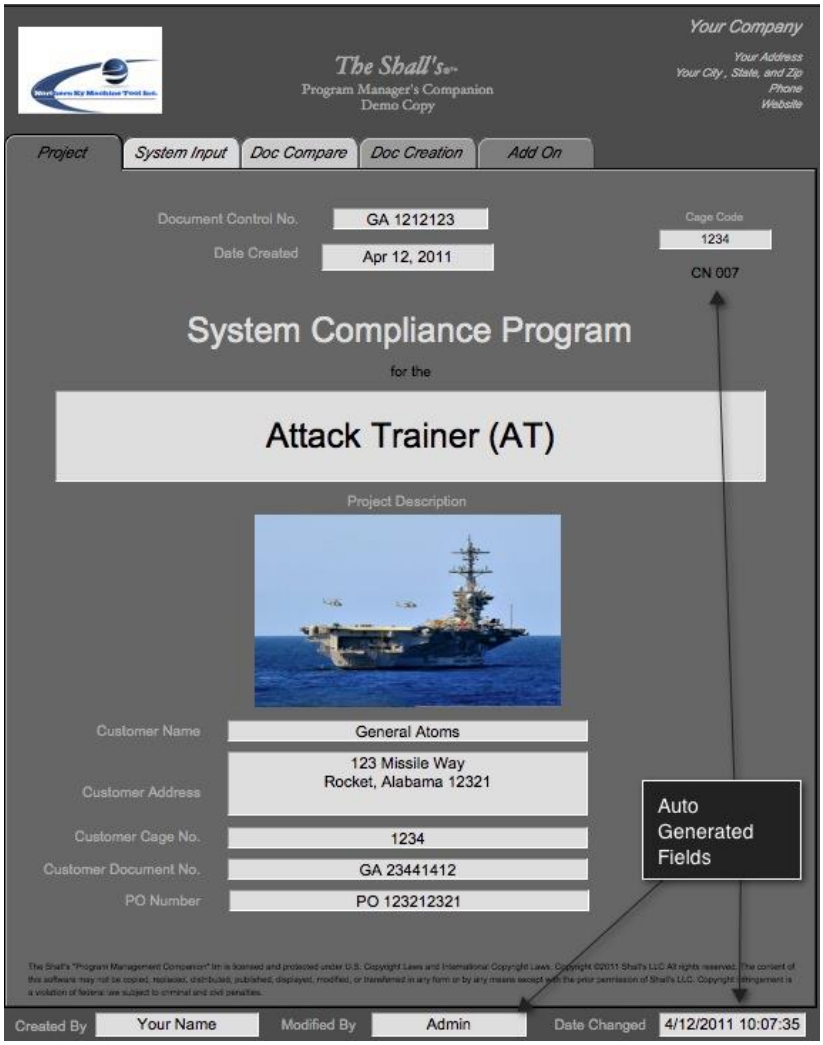


Figure 8 Completed Program Interface Page

Enter the user name in the created by field and the program information page is complete. The modified by and date changed fields are auto generated and cannot be changed. This is pertinent program information that will migrate into the system.

Chapter 4

System Input Page

Select the System Input tab as seen in figure 9 by selecting the System Input tab. This page is where all the customer requirements are input. Click on the Formatted Customer Specification box and right click on your mouse.

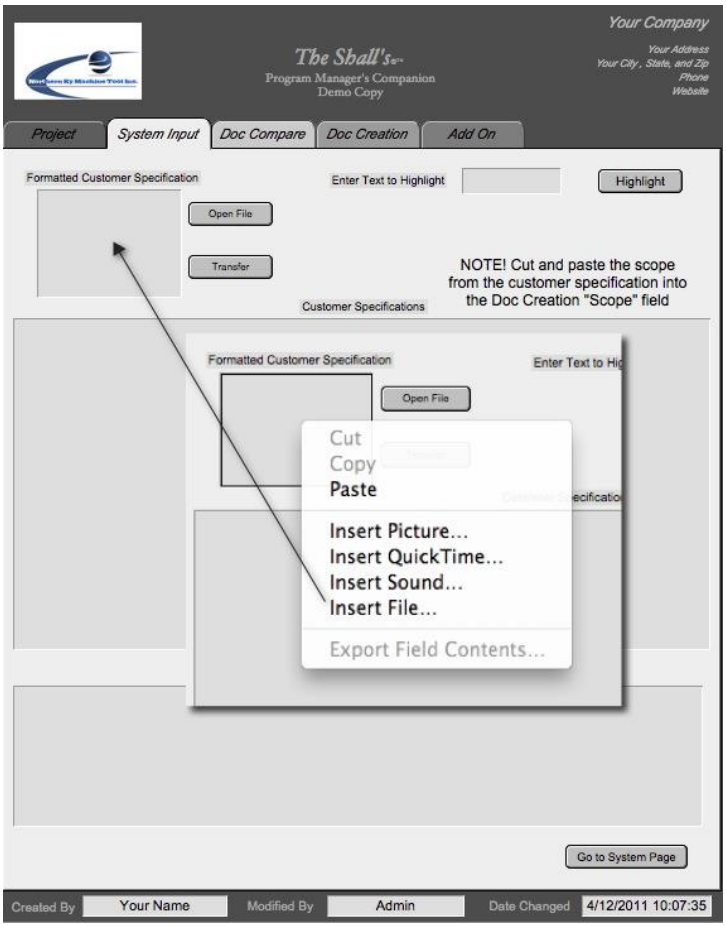


Figure 9 Specification Bucket

Choose the Insert File line. This is where the customer specifications are stored. There are several formats that can be input. Microsoft Word, any version. A test file, .pdf, or .rtf. When working with a word file, it may be preferential to convert to a text file prior to pasting into the field. PDF format can be converted into a MS Word document, but caution must be used due to some information not being formatted.

You can insert a PDF document, and cut and paste, around the heard and footer information. In video demonstration one, we are using a .txt converted format.

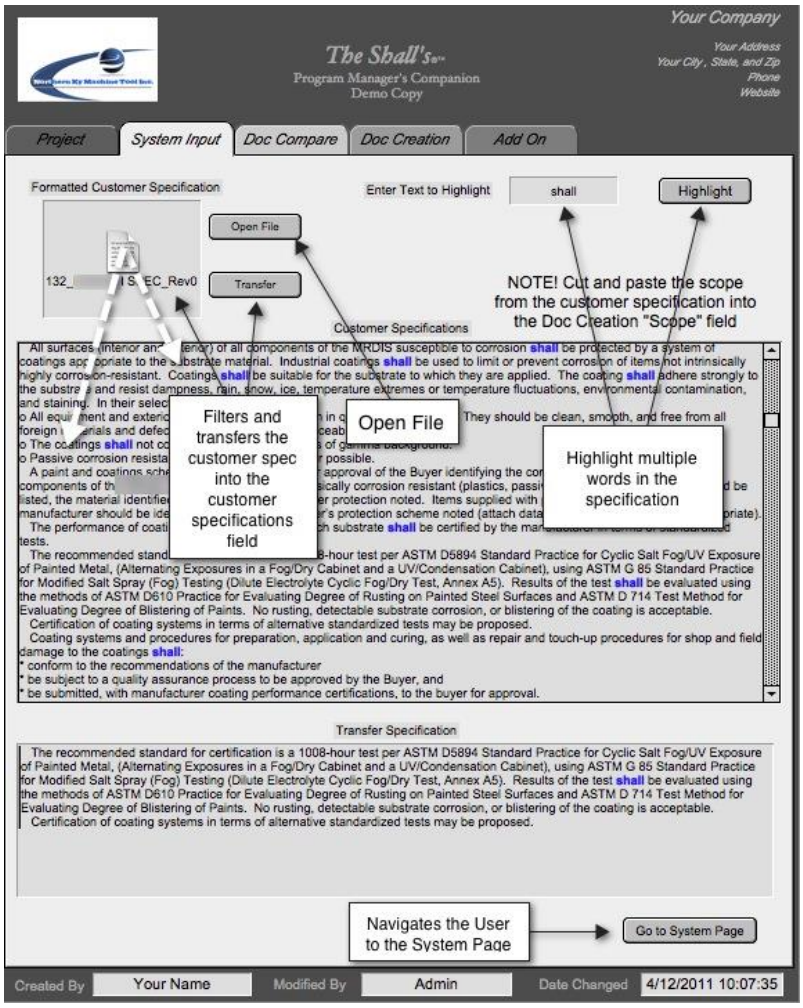


Figure 10 System Input Tools

System Input Page Tools

There are several tools on the system input page as illustrated in figure 10.

- The Open file button will open the file that is contained in the formatted customer specification bucket.
- The transfer button filters the document and moves it into the customer specifications field for separation.
- The highlight button will highlight any word that is typed into the text to highlight field as seen in blue.

- The go to system page navigates the user to the system page for requirement validating and report creation.

View the "Video Demonstration One" at this time.

Chapter 5

Document Compare

The Shall's has incorporated a very powerful tool to help track changes in customer specification revisions. Different revisions may contain the following:

- Modified Text
- Deleted Text
- Added Text

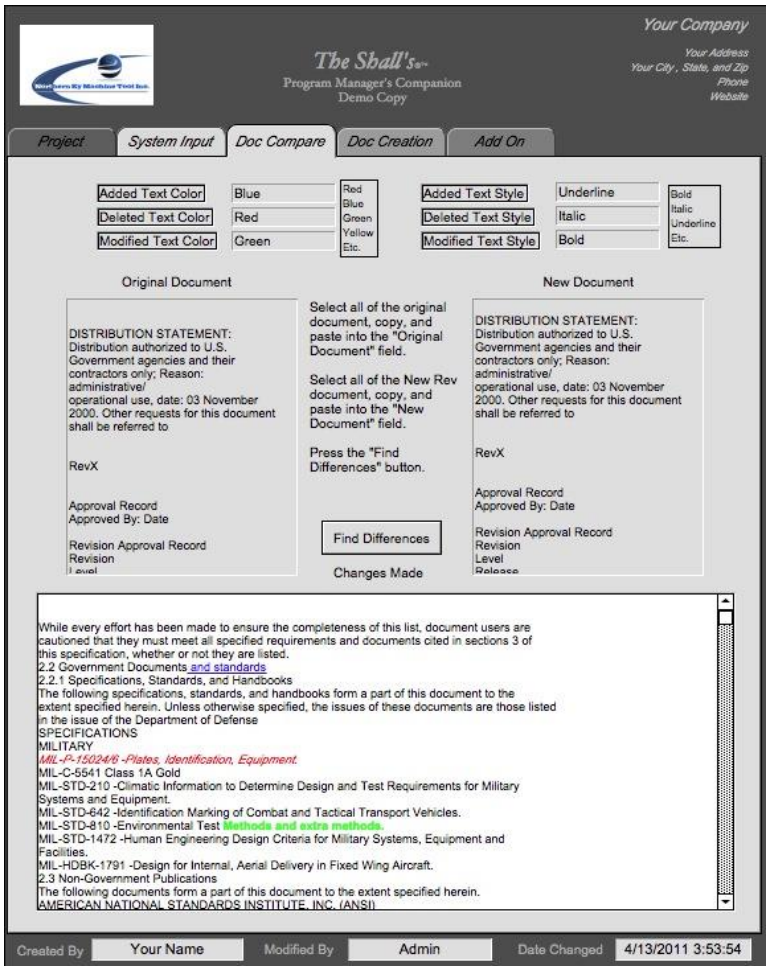


Figure 11 Document Compare Page

The user may select which color for the type of modification, and style to make it easier for the user to identify document changes. Select and copy the text from *"The Program Managers Companion"*

Revision A of your customer specification. Paste it into the Original Document field. Select and copy all of the text from the new revision and paste it into the New Document Field. Press the Find Differences button. View "Video Demonstration Two" at this time.

Chapter 6

System Input

From the system input tab, press the Go to System Page button. This is the section of The Shall's that all of the requirements will be addressed and the method of compliance agreed upon.

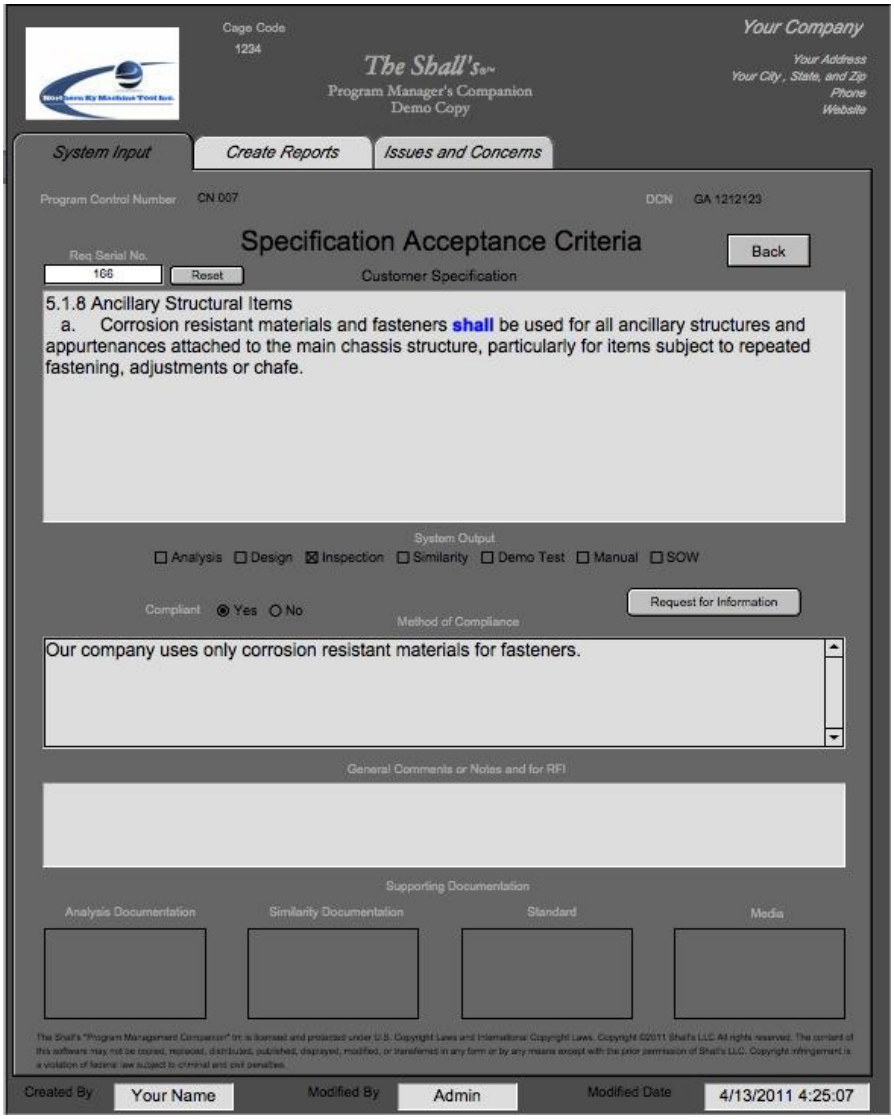


Figure 12 System Input Compliance Page

System Input Page

The System Input Page stores all of the customer requirements that were entered from the System Input Tab of the Program Information Page. Each shall is one record and has it's own page for information.

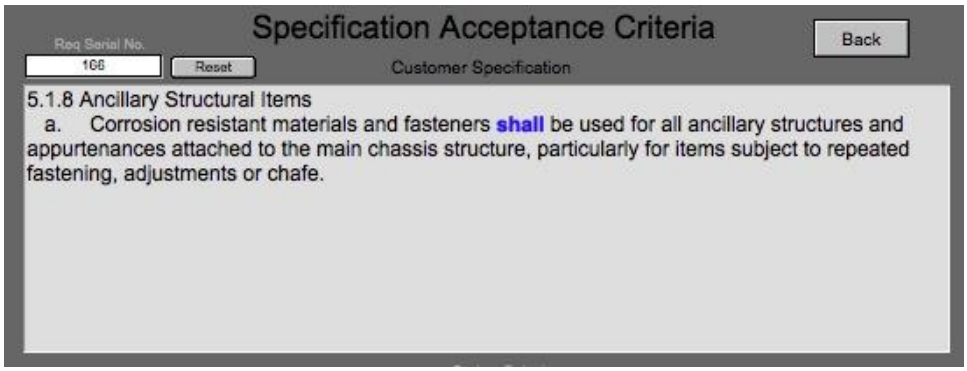


Figure 13 Customer Specification Criteria Section

Specification Window

Once the requirement is received, a Requirement Serial Number is auto generated for use in requirement identification when exported into an Excel spreadsheet. The serial numbers can be reset if the user chooses in order to start an new project. The back button will navigate you back to the System Input Tab on the Program Information Page, or you can navigate using the layout dropdown menu.

System Output

In most cases, the customer will supply your company with a Requirements Matrix to identify the method of compliance they would like for your company to use for validation. The System Output selection boxes distributes the requirements into all the necessary buckets to be pulled as needed. It is best to fill in this section, using the customer matrix if provided, during the time that your team discusses compliance methods of the requirements.

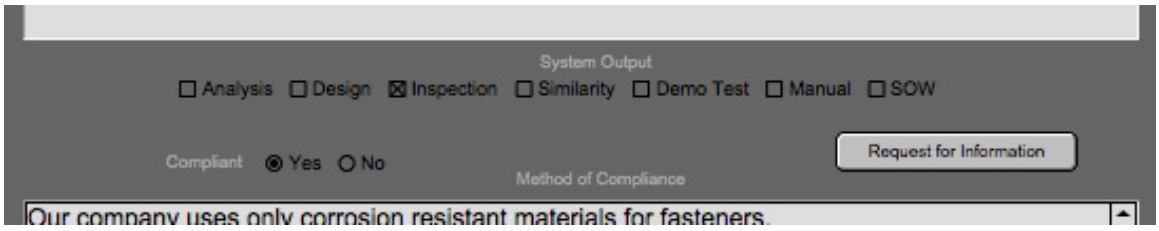


Figure 14 System Output

There are seven options available for each requirement:

- Analysis
- Design
- Inspection
- Similarity
- Demo Test
- Manual
- SOW

Each item should be checked accordingly based on the customer matrix. The last two items, Manual and SOW are checked off by user discretion. For Manual, this indicates that this particular requirement will also be addressed in the Operations and Maintenance manual. The SOW check box indicates a requirement that will be outsourced and a SOW will have to be prepared.

Once all the proper information has been addressed, and you have all the necessary information, you have the option of selecting Compliant, yes or no. If further information or clarification is needed from the customer, you can press the Request for Information button that will be discussed later in the users manual.

Method of Compliance

Once the method of compliance is agreed upon, enter it into The Method of Compliance text box.

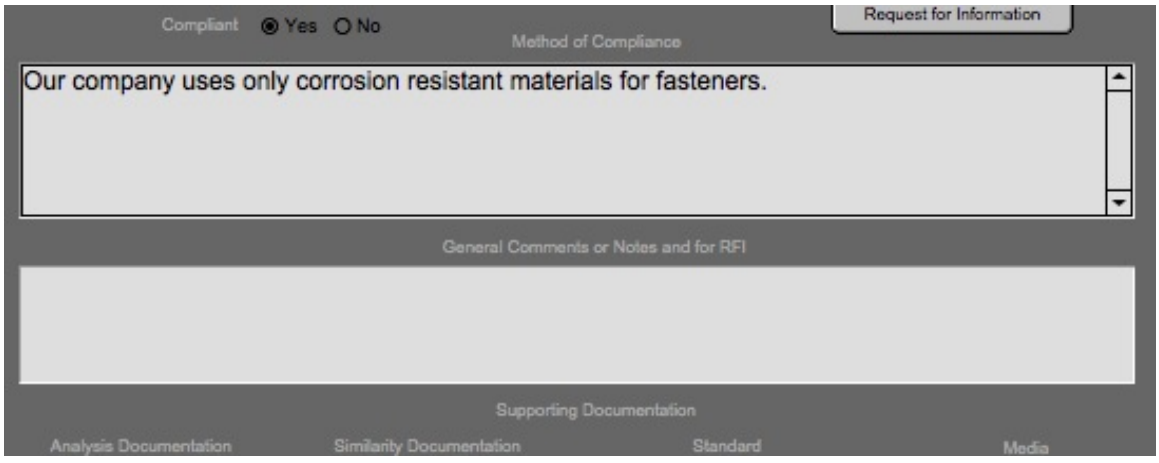


Figure 15 Method of Compliance Test Box

Once the method of compliance is entered, the user may add additional comments or notes in the General Comments or Notes and RFI text box. This text box is also carried into the Request for Information when used.

Supporting Documentation

The final stage of the requirement compliance is supporting documentation. There are four buckets that can be utilized for pertinent information for traceability.

- Analysis Documentation
- Similarity Documentation
- Standard(s)
- Media

To add supporting documentation to a bucket, hover your mouse over the bucket and right click. Choose the desired media and paste it into the bucket. In the media bucket the following can be accepted:

- Video (quick time only)
- Photo (multiple formats)
- Audio (wav file)

When all the requirement pages are filled in and completed, all of your reports are now available, draft documentation is now available.

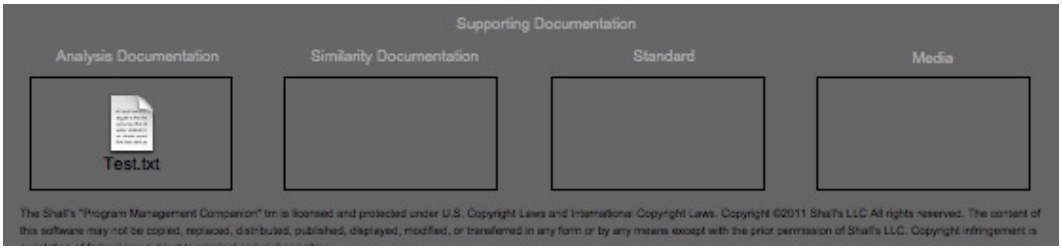


Figure 16 Supporting Documentation

In order to open any file that is stored in the supporting documentation buckets, you must right click with your mouse and export to your desktop. You will also be given

the option to print and/or email. Video and audio can be played and viewed directly from the bucket or exported to your desktop for viewing.

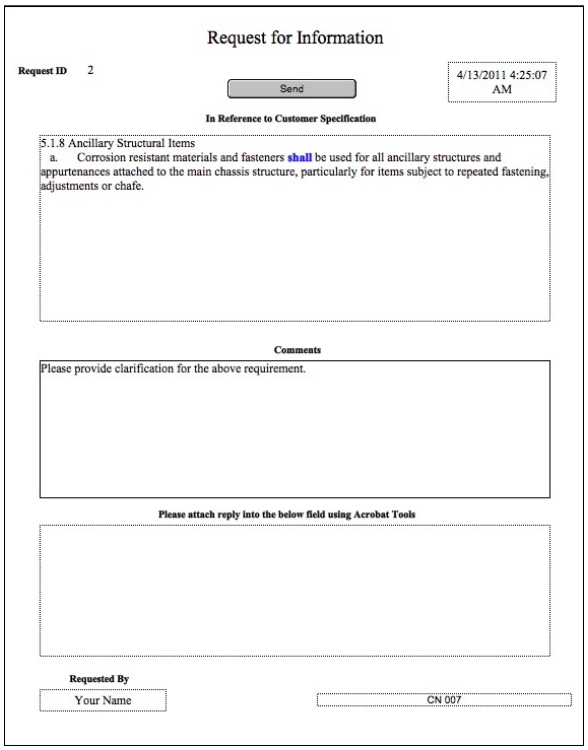
Chapter 7

Request for Information

On some occasions, a requirement may be unclear or have several interpretations. In this case, the customer must be contacted to clarify the requirement. This clarification should always be in writing. The Shall's has automated this process.

Request for Information

As seen in figure 12 and figure 14, there is a request for information button on the System Input page. By pressing this button, the requirement and RFI notes will be exported to a RFI form.


Request for Information

Request ID 2

Send

4/13/2011 4:25:07 AM

In Reference to Customer Specification

5.1.8 Ancillary Structural Items
a. Corrosion resistant materials and fasteners **shall** be used for all ancillary structures and appurtenances attached to the main chassis structure, particularly for items subject to repeated fastening, adjustments or chafe.

Comments

Please provide clarification for the above requirement.

Please attach reply into the below field using Acrobat Tools

Requested By

Your Name

CN 007

Figure 17 Request for Information

As illustrated in figure 17, the RFI form contains the Customer Requirement, Your Comments, and a section for reply. Type the user name in the "Requested by" field.

A request number is auto generated along with a time and date stamp. When all the pertinent information is filled in, press the send key.

Exporting an RFI

Once the send key is pressed, several options are given. The file will be saved as a PDF file.

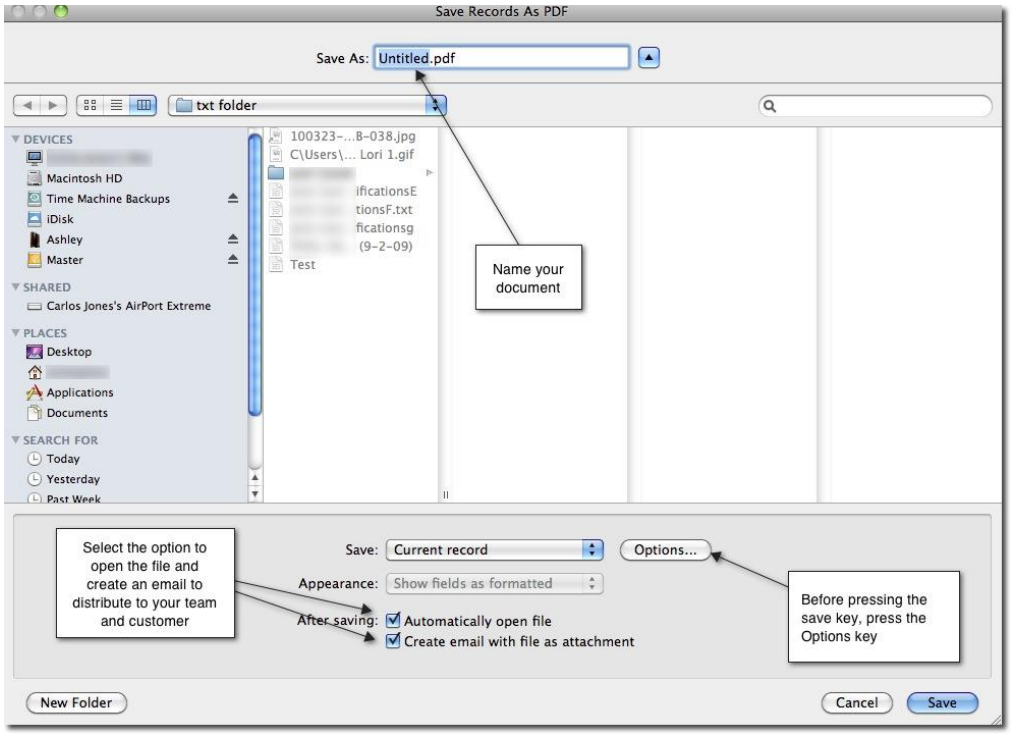


Figure 18 RFI Sending Features

Once you have named your document, and selected the necessary options, press the Options button.

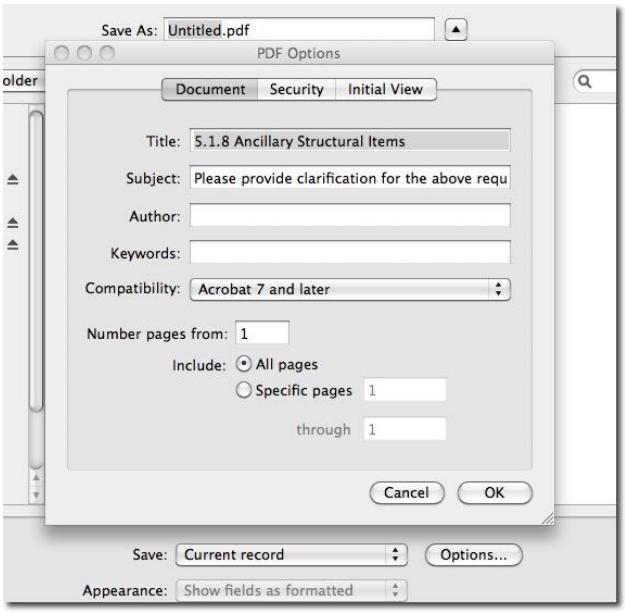


Figure 19 RFI Options

The title and subject are automatically filled in. The user may type in an author and any keywords if necessary. Click OK and press the Save key. Several things happen at once. The PDF is save to the location the user chose. An email window opens and the user can choose whom to distribute the RFI to, and the PDF RFI opens for review. The RFI's are auto numbered, but the tracking method should be the requirement—not the auto number feature.

Chapter 8

Create Reports

Another powerful tool that The Shall's is equipped with is the ease of generating multiple system reports in a Microsoft Excel Spreadsheet, customized the way the user would like to view the information. The Create Reports page also contains the XML templates for creating your draft program documentation. Revision levels are kept consistent by updating automatically once a report button is pressed.

Create Reports Page

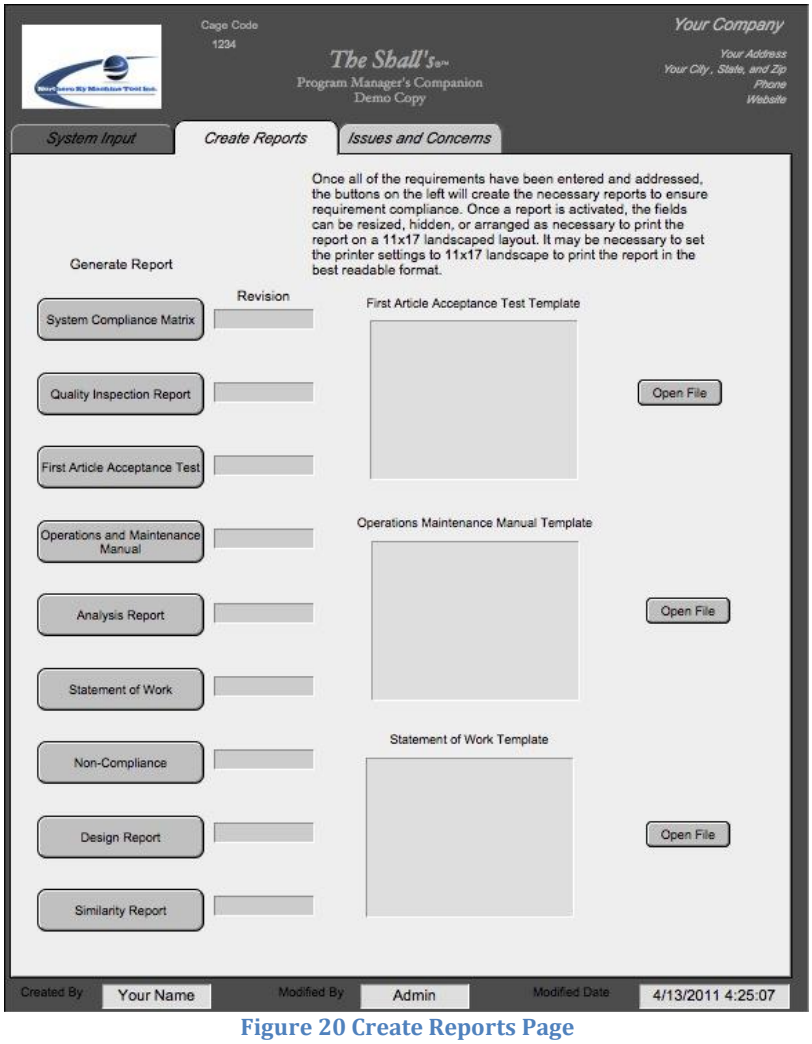
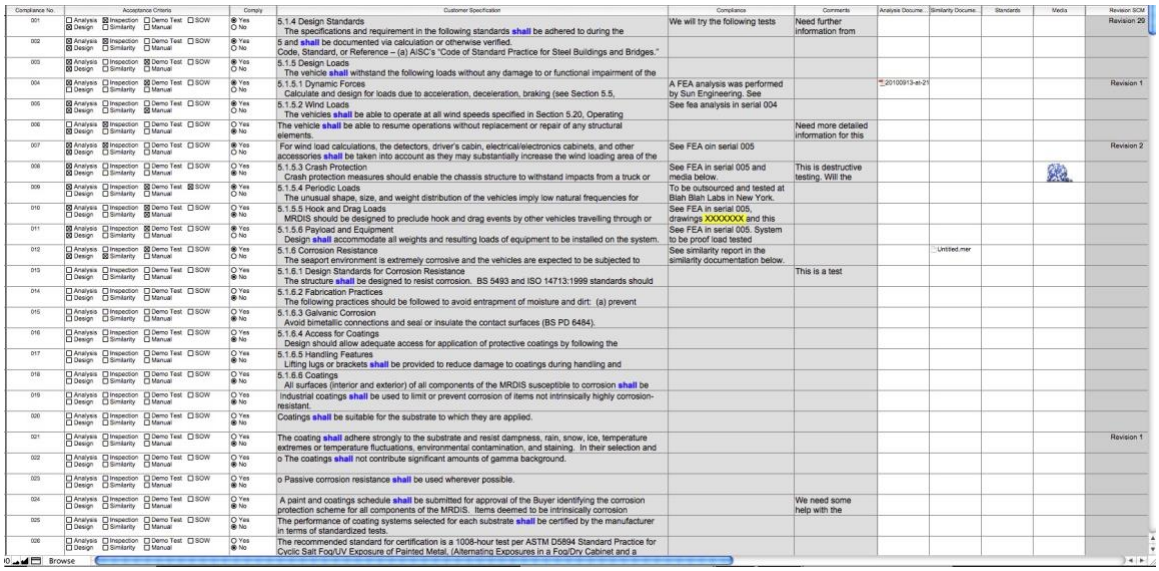


Figure 20 Create Reports Page

It is best to view the reports on an 11x17 landscape format that can be accomplished using the page setup tool on the toolbar. When creating reports, there are multiple records of information available. The first button will create the System Compliance Matrix.



Compliance No.	Acceptance Criteria	Comply	Customer Specification	Compliance	Comments	Analysis Docume...	Similarity Docume...	Standards	Media	Revision SCM
001	☐ Analysis ☒ Inspection ☐ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5.1.4 Design Standards The specifications and requirement in the following standards **shall** be adhered to during the	We will try the following tests	Need further information from					Revision 29
002	☒ Analysis ☒ Inspection ☐ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5 and **shall** be documented via calculation or otherwise verified. Code, Standard, or Reference – (a) AISC's "Code of Standard Practice for Steel Buildings and Bridges."							
003	☒ Analysis ☐ Inspection ☒ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5.1.5 Design Loads The vehicle **shall** withstand the following loads without any damage to or functional impairment of the							
004	☒ Analysis ☐ Inspection ☒ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5.1.5.1 Dynamic Forces Calculate and design for loads due to acceleration, deceleration, braking (see Section 5.5,	A FEA analysis was performed by Sun Engineering. See		20100913-at-21				Revision 1
005	☒ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☒ Design ☐ Similarity ☒ Manual	◉ Yes ○ No	5.1.5.2 Wind Loads The vehicles **shall** be able to operate at all wind speeds specified in Section 5.20, Operating	See fea analysis in serial 004						
006	☐ Analysis ☒ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	The vehicle **shall** be able to resume operations without replacement or repair of any structural elements.		Need more detailed information for this					
007	☒ Analysis ☒ Inspection ☐ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	For wind load calculations, the detectors, driver's cabin, electrical/electronics cabinets, and other accessories **shall** be taken into account as they may substantially increase the wind loading area of the	See FEA oin serial 005						Revision 2
008	☒ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.5.3 Crash Protection Crash protection measures should enable the chassis structure to withstand impacts from a truck or	See FEA in serial 005 and media below.	This is destructive testing. Will the					
009	☒ Analysis ☐ Inspection ☒ Demo Test ☒ SOW ☐ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5.1.5.4 Periodic Loads The unusual shape, size, and weight distribution of the vehicles imply low natural frequencies for	To be outsourced and tested at Blah Blah Labs in New York.						
010	☒ Analysis ☐ Inspection ☒ Demo Test ☐ SOW ☐ Design ☐ Similarity ☒ Manual	○ Yes ◉ No	5.1.5.5 Hook and Drag Loads MRDIS should be designed to preclude hook and drag events by other vehicles travelling through or	See FEA in serial 005, drawings XXXXXXX and this						
011	☒ Analysis ☐ Inspection ☒ Demo Test ☐ SOW ☒ Design ☐ Similarity ☐ Manual	◉ Yes ○ No	5.1.5.6 Payload and Equipment Design **shall** accommodate all weights and resulting loads of equipment to be installed on the system.	See FEA in serial 005. System to be proof load tested						
012	☐ Analysis ☐ Inspection ☒ Demo Test ☐ SOW ☒ Design ☒ Similarity ☐ Manual	◉ Yes ○ No	5.1.6 Corrosion Resistance The seaport environment is extremely corrosive and the vehicles are expected to be subjected to	See similarity report in the similarity documentation below.			Untitled.mer			
013	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.1 Design Standards for Corrosion Resistance The structure **shall** be designed to resist corrosion. BS 5493 and ISO 14713:1999 standards should		This is a test					
014	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.2 Fabrication Practices The following practices should be followed to avoid entrapment of moisture and dirt: (a) prevent							
015	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.3 Galvanic Corrosion Avoid bimetallic connections and seal or insulate the contact surfaces (BS PD 6484).							
016	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.4 Access for Coatings Design should allow adequate access for application of protective coatings by following the							
017	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.5 Handling Features Lifting lugs or brackets **shall** be provided to reduce damage to coatings during handling and							
018	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	5.1.6.6 Coatings All surfaces (interior and exterior) of all components of the MRDIS susceptible to corrosion **shall** be							
019	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	Industrial coatings **shall** be used to limit or prevent corrosion of items not intrinsically highly corrosion-resistant.							
020	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	Coatings **shall** be suitable for the substrate to which they are applied.							
021	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	The coating **shall** adhere strongly to the substrate and resist dampness, rain, snow, ice, temperature extremes or temperature fluctuations, environmental contamination, and staining. In their selection and							Revision 1
022	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	o The coatings **shall** not contribute significant amounts of gamma background.							
023	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	o Passive corrosion resistance **shall** be used wherever possible.							
024	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	A paint and coatings schedule **shall** be submitted for approval of the Buyer identifying the corrosion protection scheme for all components of the MRDIS. Items deemed to be intrinsically corrosion		We need some help with the					
025	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	The performance of coating systems selected for each substrate **shall** be certified by the manufacturer in terms of standardized tests.							
026	☐ Analysis ☐ Inspection ☐ Demo Test ☐ SOW ☐ Design ☐ Similarity ☐ Manual	○ Yes ◉ No	The recommended standard for certification is a 1008-hour test per ASTM D5894 Standard Practice for Cyclic Salt Fog/UV Exposure of Painted Metal, (Alternating Exposures in a Fog/Dry Cabinet and a							

Browse

Figure 21 The Shall's SCM Report

This particular SCM has 173 requirements. Each time the user generates a new SCM it raises the revision level by one. The program defaults to a print setup page, however it is recommended that the user export the SCM into a Excel spreadsheet for distribution. To customize the layout prior to exporting, right click your mouse in the header area and select "Modify Table View" .

Modify Table View

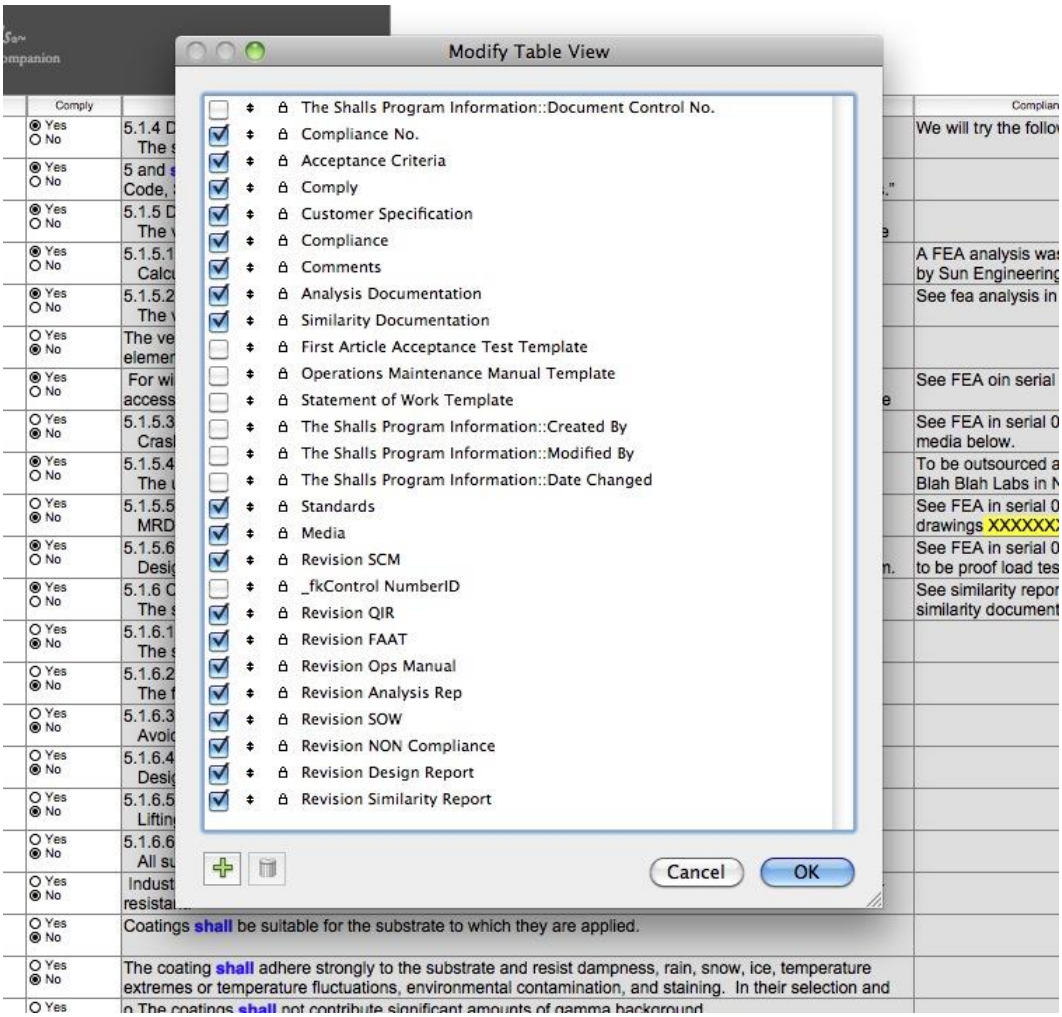


Figure 22 Modify Table View

This table view give the user the opportunity to completely customize the SCM with the information necessary to distribute to the team and to the customer by simply checking or unchecking what you want in your report. Once all selections have been made, select File, Export Records, Name the SCM, select Excel Workbook, check automatically open file, and create email with file as attachment.

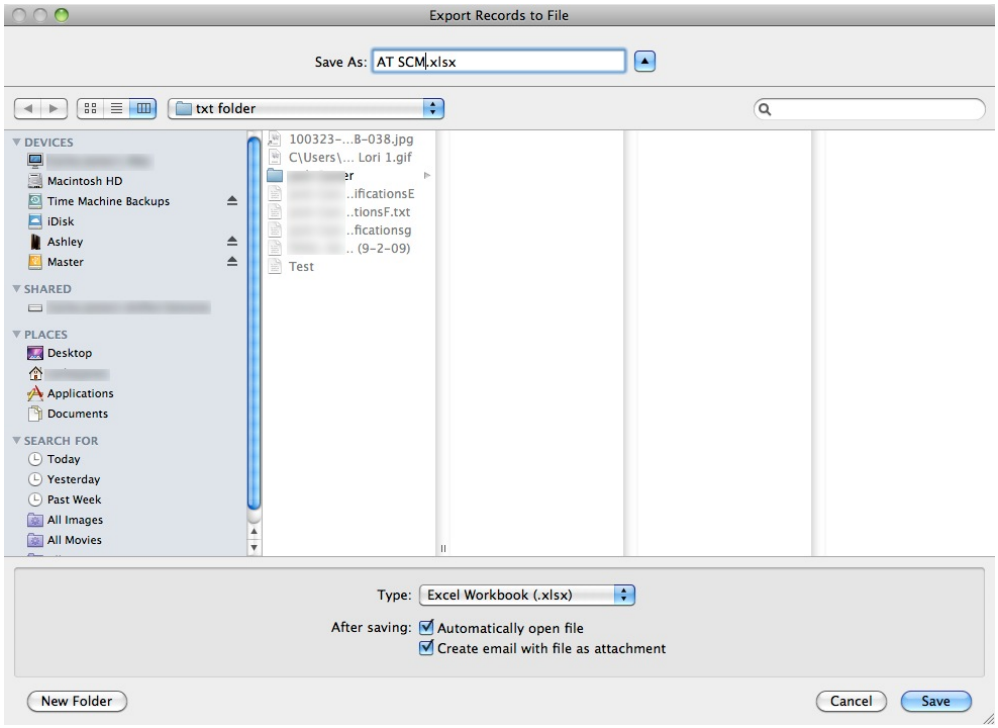
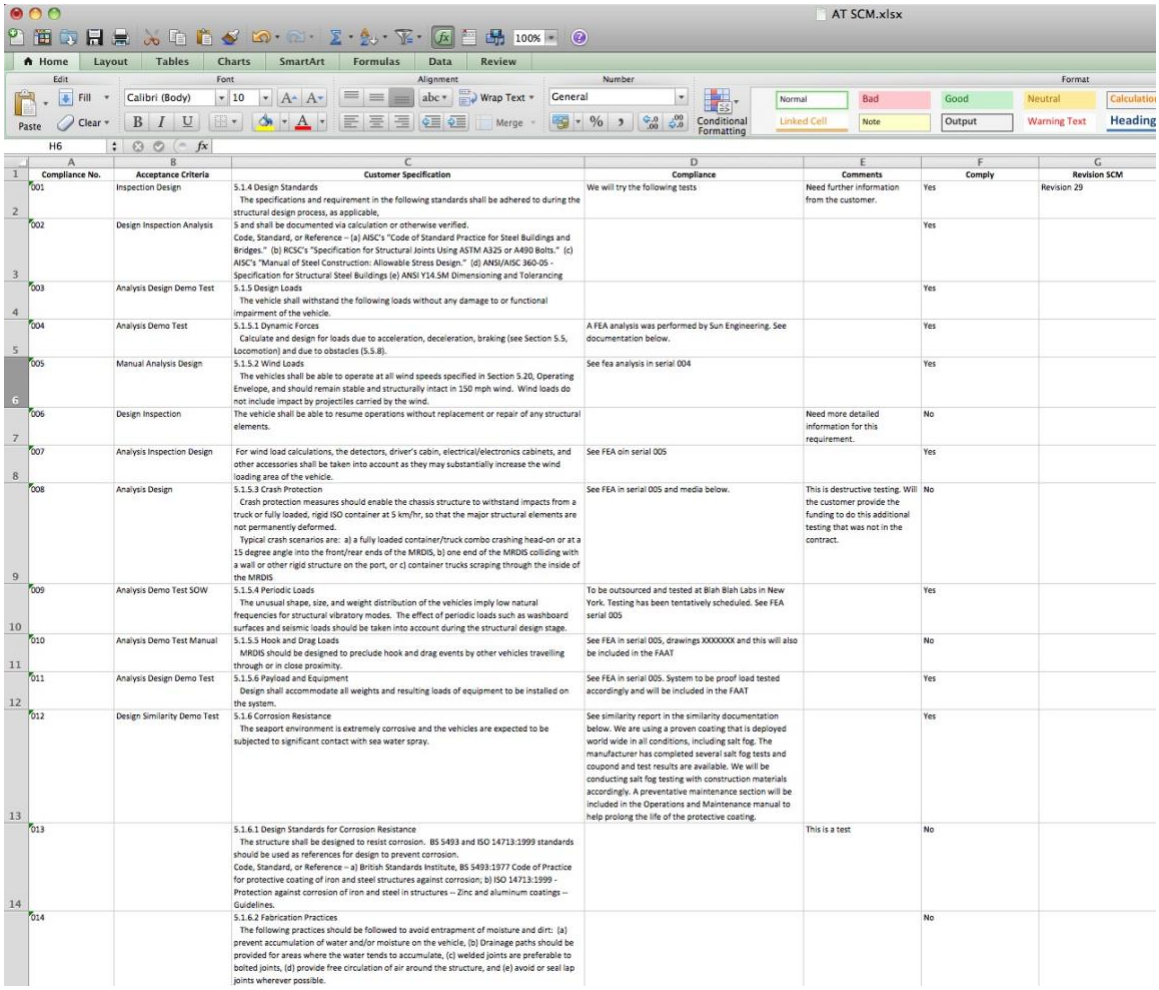


Figure 23 Export Records to File and Distribution

The workbook will open with the exported information in their proper columns. There will be very little to do other than adjust the size of some of the columns and word wrap the requirements. When all adjustments are made, save your changes and close the document. Send the email with the attachment for distribution.



AT SCM.xlsx

Compliance No.	Acceptance Criteria	Customer Specification	Compliance	Comments	Comply	Revision SCM
001	Inspection Design	5.1.4 Design Standards The specifications and requirement in the following standards shall be adhered to during the structural design process, as applicable,	We will try the following tests	Need further information from the customer.	Yes	Revision 29
002	Design Inspection Analysis	S and shall be documented via calculation or otherwise verified. Code, Standard, or Reference – (a) AISC's "Code of Standard Practice for Steel Buildings and Bridges." (b) RCSC's "Specification for Structural Joints Using ASTM A325 or A490 Bolts." (c) AISC's "Manual of Steel Construction: Allowable Stress Design." (d) ANSI/AISC 360-05 - Specification for Structural Steel Buildings (e) ANSI Y14.5M Dimensioning and Tolerancing			Yes	
003	Analysis Design Demo Test	5.1.5 Design Loads The vehicle shall withstand the following loads without any damage to or functional impairment of the vehicle.			Yes	
004	Analysis Demo Test	5.1.5.1 Dynamic Forces Calculate and design for loads due to acceleration, deceleration, braking (see Section 5.5, Locomotion) and due to obstacles (5.5.8).	A FEA analysis was performed by Sun Engineering. See documentation below.		Yes	
005	Manual Analysis Design	5.1.5.2 Wind Loads The vehicles shall be able to operate at all wind speeds specified in Section 5.20, Operating Envelope, and should remain stable and structurally intact in 150 mph wind. Wind loads do not include impact by projectiles carried by the wind.	See fea analysis in serial 004		Yes	
006	Design Inspection	The vehicle shall be able to resume operations without replacement or repair of any structural elements.		Need more detailed information for this requirement.	No	
007	Analysis Inspection Design	For wind load calculations, the detectors, driver's cabin, electrical/electronics cabinets, and other accessories shall be taken into account as they may substantially increase the wind loading area of the vehicle.	See FEA oin serial 005		Yes	
008	Analysis Design	5.1.5.3 Crash Protection Crash protection measures should enable the chassis structure to withstand impacts from a truck or fully loaded, rigid ISO container at 5 km/hr, so that the major structural elements are not permanently deformed. Typical crash scenarios are: a) a fully loaded container/truck combo crashing head-on or at a 15 degree angle into the front/rear ends of the MRDIS, b) one end of the MRDIS colliding with a wall or other rigid structure on the port, or c) container trucks scraping through the inside of the MRDIS	See FEA in serial 005 and media below.	This is destructive testing. Will the customer provide the funding to do this additional testing that was not in the contract.	No	
009	Analysis Demo Test SOW	5.1.5.4 Periodic Loads The unusual shape, size, and weight distribution of the vehicles imply low natural frequencies for structural vibratory modes. The effect of periodic loads such as washboard surfaces and seismic loads should be taken into account during the structural design stage.	To be outsourced and tested at Blah Blah Labs in New York. Testing has been tentatively scheduled. See FEA serial 005		Yes	
010	Analysis Demo Test Manual	5.1.5.5 Hook and Drag Loads MRDIS should be designed to preclude hook and drag events by other vehicles travelling through or in close proximity.	See FEA in serial 005, drawings XXXXXXX and this will also be included in the FAAT		No	
011	Analysis Design Demo Test	5.1.5.6 Payload and Equipment Design shall accommodate all weights and resulting loads of equipment to be installed on the system.	See FEA in serial 005. System to be proof load tested accordingly and will be included in the FAAT		Yes	
012	Design Similarity Demo Test	5.1.6 Corrosion Resistance The seaport environment is extremely corrosive and the vehicles are expected to be subjected to significant contact with sea water spray.	See similarity report in the similarity documentation below. We are using a proven coating that is deployed world wide in all conditions, including salt fog. The manufacturer has completed several salt fog tests and coupond and test results are available. We will be conducting salt fog testing with construction materials accordingly. A preventative maintenance section will be included in the Operations and Maintenance manual to help prolong the life of the protective coating.		Yes	
013		5.1.6.1 Design Standards for Corrosion Resistance The structure shall be designed to resist corrosion. BS 5493 and ISO 14713:1999 standards should be used as references for design to prevent corrosion. Code, Standard, or Reference – a) British Standards Institute, BS 5493:1977 Code of Practice for protective coating of iron and steel structures against corrosion; b) ISO 14713:1999 - Protection against corrosion of iron and steel in structures – Zinc and aluminum coatings – Guidelines.		This is a test	No	
014		5.1.6.2 Fabrication Practices The following practices should be followed to avoid entrapment of moisture and dirt: (a) prevent accumulation of water and/or moisture on the vehicle, (b) Drainage paths should be provided for areas where the water tends to accumulate, (c) welded joints are preferable to bolted joints, (d) provide free circulation of air around the structure, and (e) avoid or seal lap joints wherever possible.			No	

Figure 24 SCM Exported into an Excel Workbook

Repeat the same procedures for any reports that the user would like to generate. Customize to your needs, and distribute as necessary with a few clicks of the mouse.

Chapter 10

Document Creation

Another powerful tool is The Shall's capability of creating draft documentation for final editing. Customer requirements are distributed in such a way that selected requirements are imported into XML word documents and ready for edit. Once the draft documents are created, they are completely customizable. The Shall's is also reverse capable meaning that the user can create their own company products that can include a Statement of Work for outsourcing. A First Article Acceptance Test for product validation and compliance, and the Operations and Maintenance Manual.

Creating Documents on Demand

To create a document, the user must first create a report. There are report buttons for the following documents:

- Operations and Maintenance Manual
- First Article Acceptance Procedures
- Statement of Work

Each document has a strict field order that must be followed. Starting with the FAAT report, go to the Create Reports tab on the System Input page and create a FAAT report. The field order for exporting is as follows:

Program Information Page

- Owners Name
- Address
- Project
- Customer Name
- Customer Address
- Scope of Work

System Input Page

- Customer Specification

Select File, Export Records, and in the save as field, name your document and use the .doc extension.

NOTE: The Save As file extension must be saved using the .doc extension and the Type must be XML

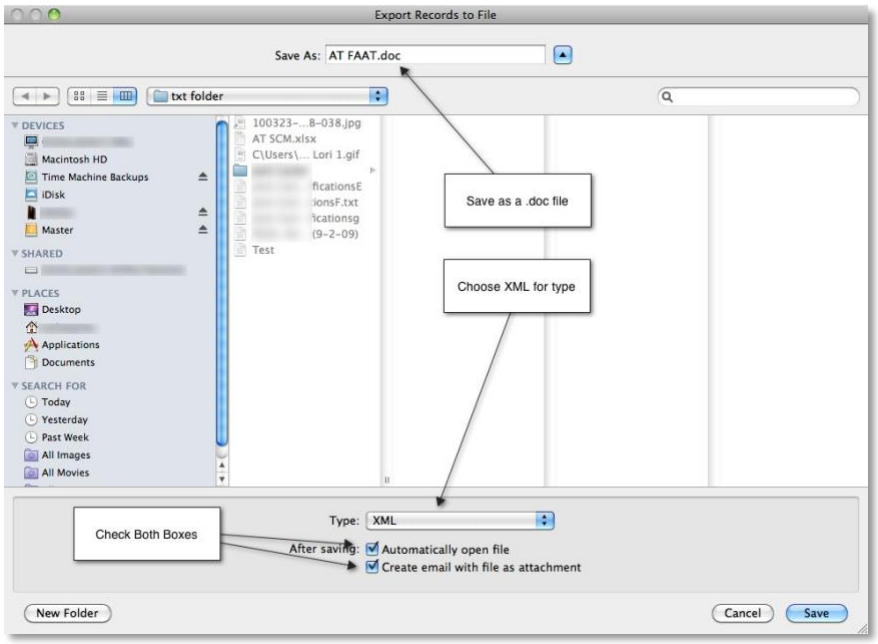


Figure 25 Export to Create Document File

Click the save button. The specify XML and XSL Options box will appear. For grammar, leave as illustrated in figure 26. Select the File button and click specify to locate the FAAT.xsl that is in your template file that loaded with the program.

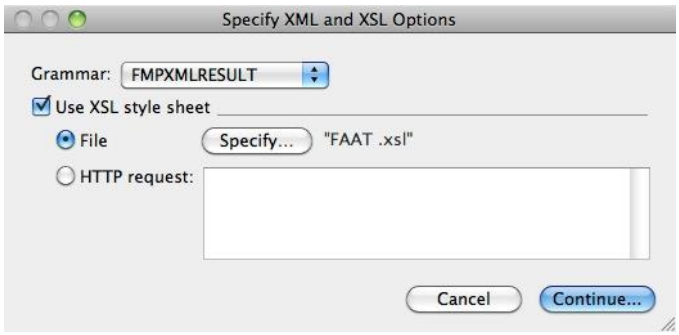


Figure 26 Specify XML and XSL Options

Click continue. To follow the proper order of the fields to be exported into the FAAT document, select the Program Information in the drop down menu. Then select the first field, "Owner Name". You can click on the move button or double click on the field to move it into the field export order box.

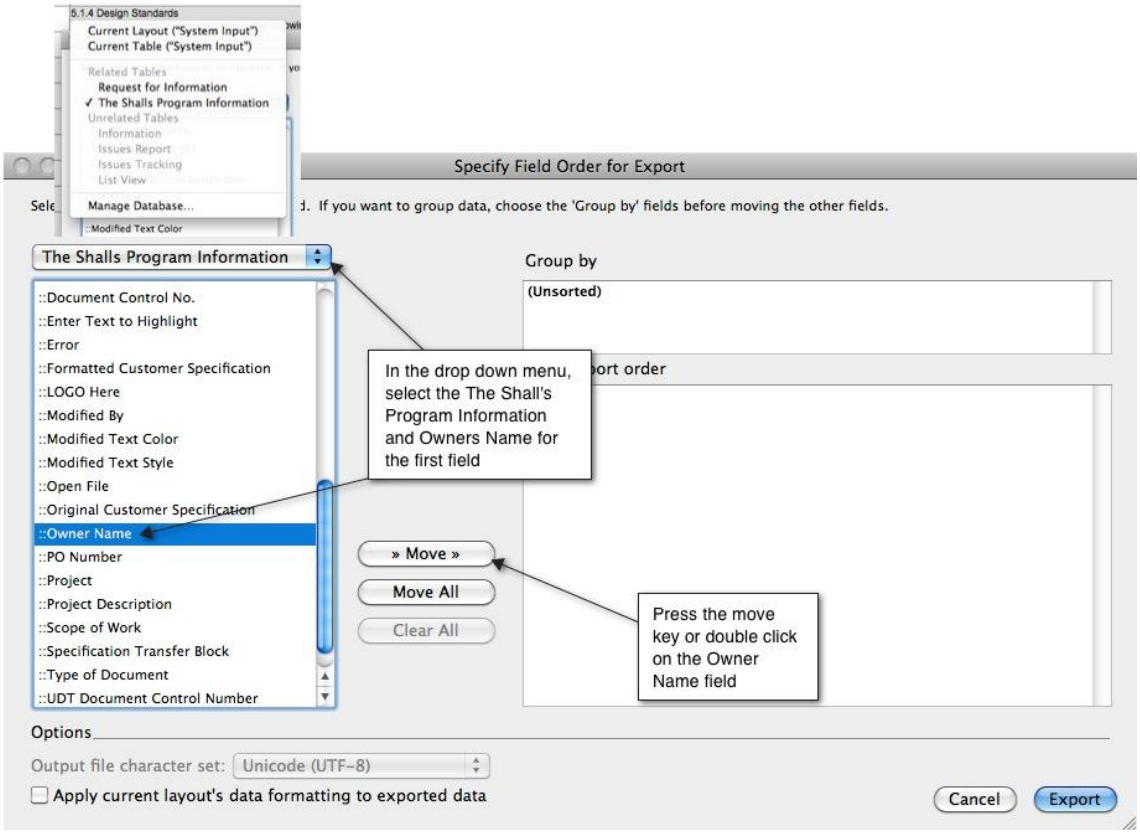


Figure 27 Field Export

Move the rest of the fields into the Field Export Order box. The end result should look like figure 28.

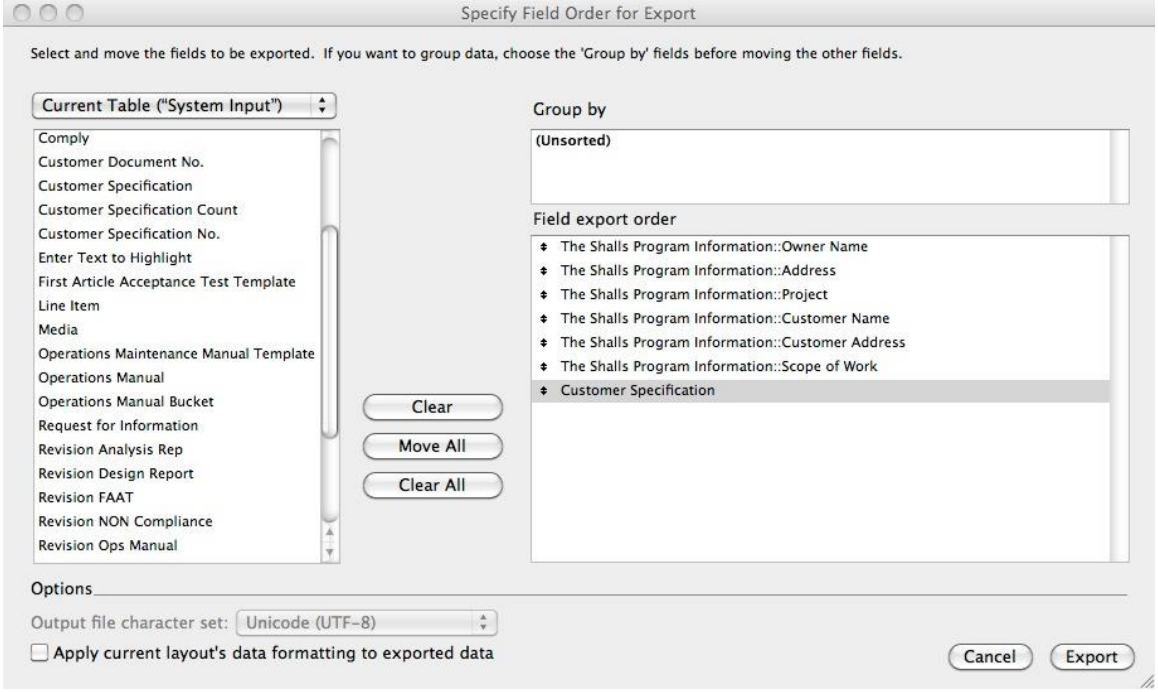


Figure 28 Field Export Order for the FAAT

Click on the export key. Allow several seconds for the document to be generated. Figure 29 is an example of the FAAT document created with over two hundred requirements. The Header information is not displayed. The user can add their company logo or The Shall's LLC can customize style sheets as an option.

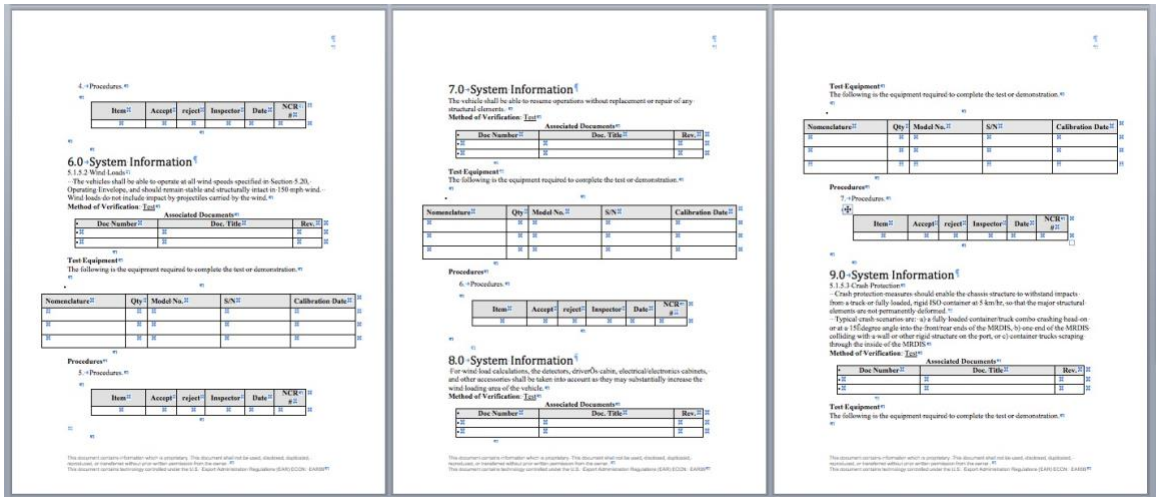


Figure 29 FAAT Automated Document

Chapter 11

Import and Export

Whenever you create a report you simply press one of the report buttons. A report will be generated along with a revision number. A better method would be to export the document directly into a spreadsheet. The spread sheet will have the necessary column and uses the same language as The Shall's. Click on your desired button. Choose file, send, and choose excel. The following screen is what you will see.

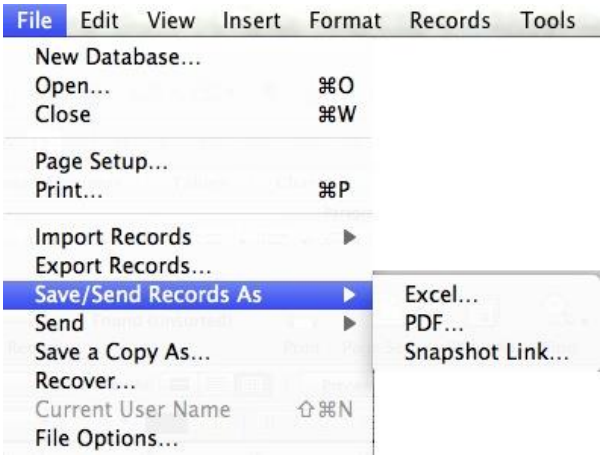


Figure 30 Select Send/Excel

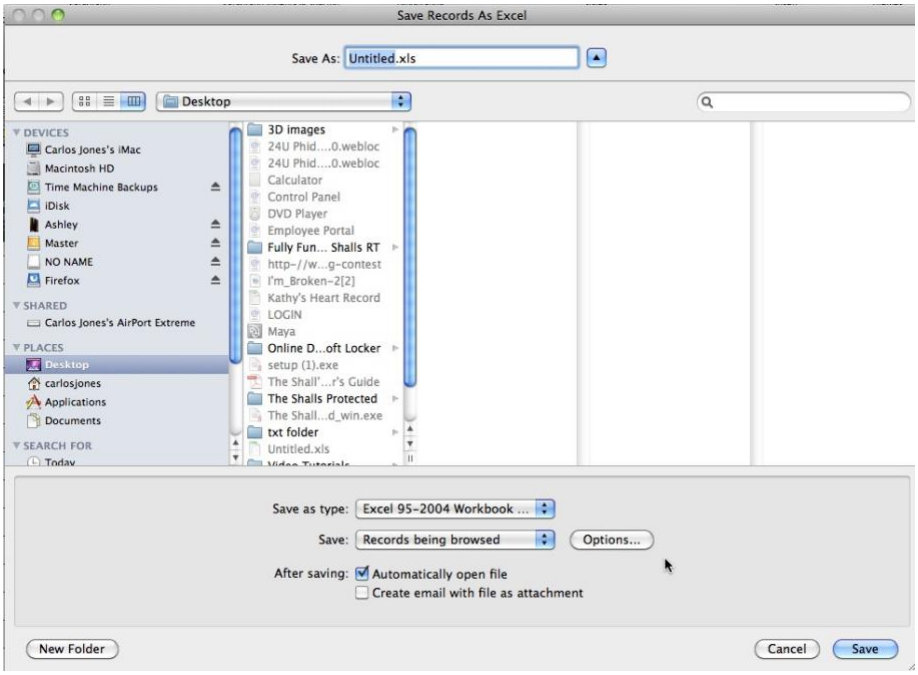


Figure 31 Exporting

Title the export and check off the boxes above to auto open or auto send email. It is good practice to open the document and look at it. Be sure to name your spreadsheet.

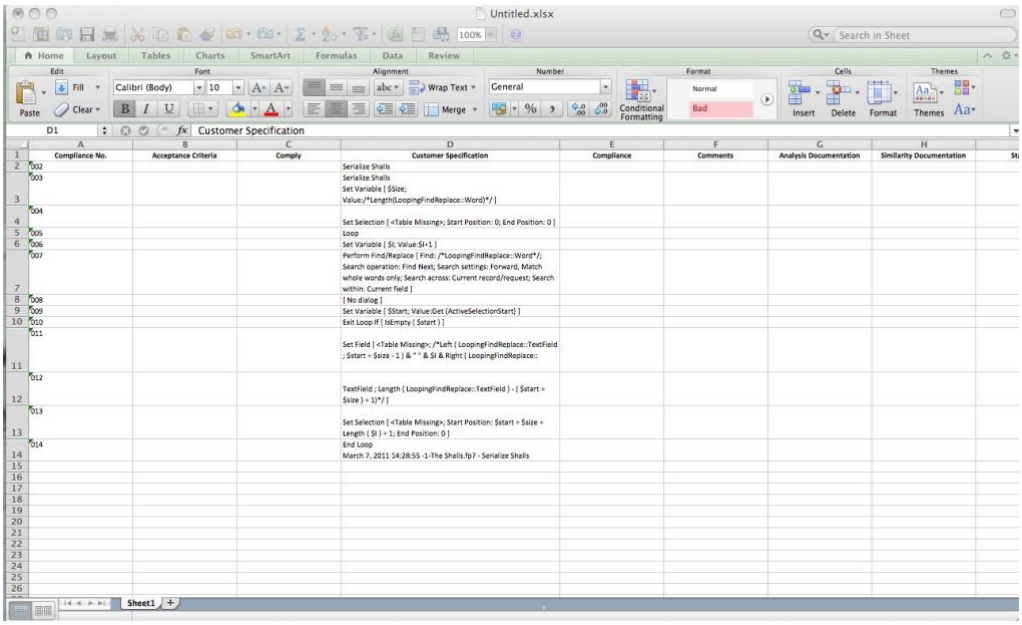


Figure 32 Excel Spreadsheet

I made this pretty fast and did not input much information. The nice thing about exporting incomplete, the users may take the spread sheet and fill in information.

Then you simply import it back into The Shall's and all markups are automatically entered as long as the marking up was done in the comment section in Excel or any other field in Excel.

Importing

You can set up The Shall's file to automatically update data imported from another file, such as a Microsoft Excel spreadsheet. Recurring import occurs automatically every time you open the file and the first time you view the layout containing the data from the external file. Later, you can run a script to update data.

When you set up recurring imports, The Shall's creates a new table for the imported data and a new layout to display the data. You can customize the layout in Layout mode later, if you wish.

With this option, you replace data in your file with data from the source file. For each field you import into, data from the first importable record (or row of data) in the source file overwrites fields in the first record in the target file. Data from the second importable record (or row of data) in the source file overwrites fields in the second record in the target file, and so on. When you replace data, FileMaker Pro doesn't examine or compare the data in the files.

You can choose whether to replace or not replace data on a field-by-field basis. Records in the target file are replaced with the same number of records from the source file.

Once you have generated a excel sheet and it has been marked up, by the team, or only half is done and you need the report for updating your team and your customer do the following:

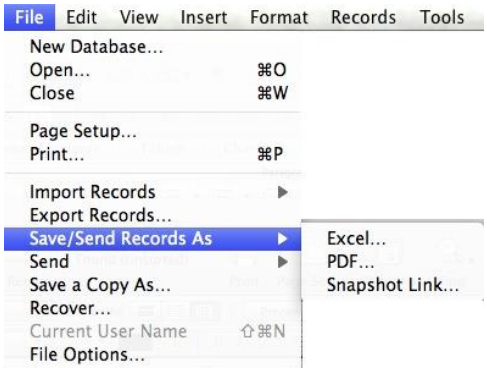


Figure 33 Importing

Be sure and select file, and makes sure that you check all files on the bottom of the open window. We will import the excel spread shat we just generated back into the System Compliance Field.

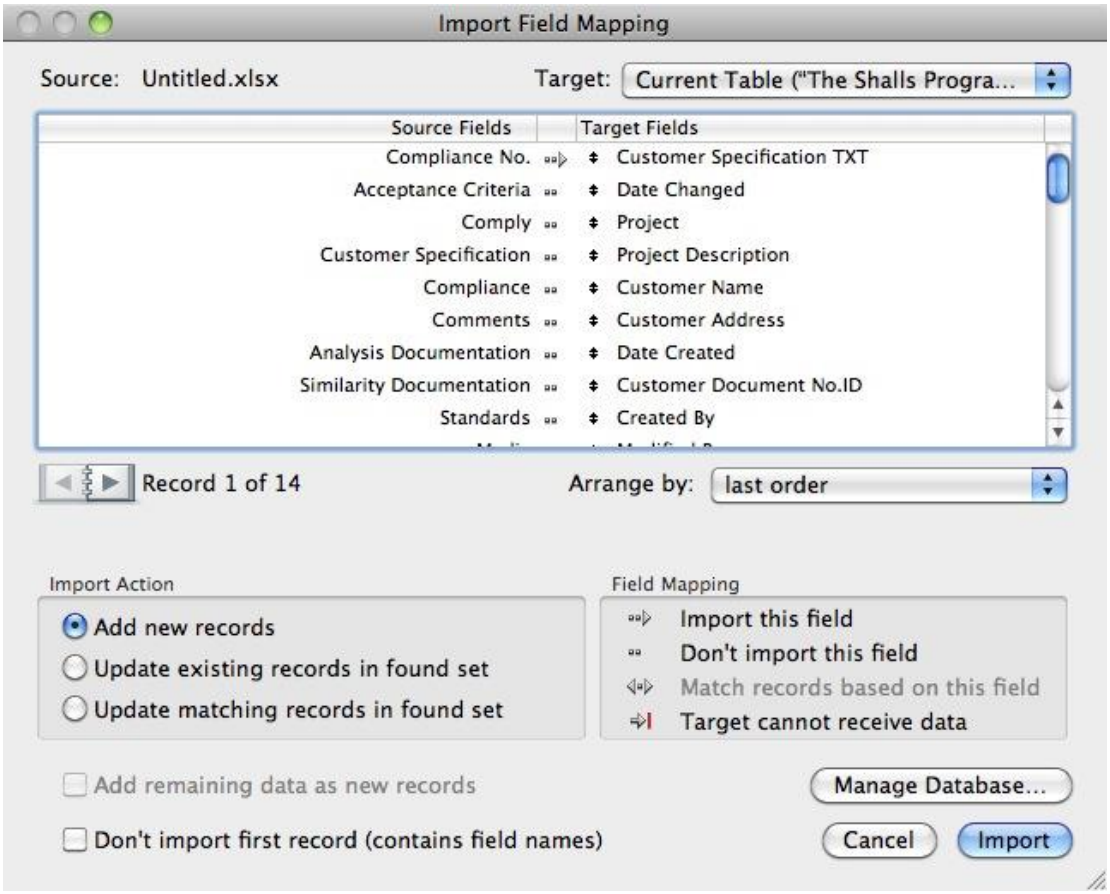


Figure 34 Import Fields

This is the screen that you will see once you choose your record, in this case I chose the excel spreadsheet as an example.

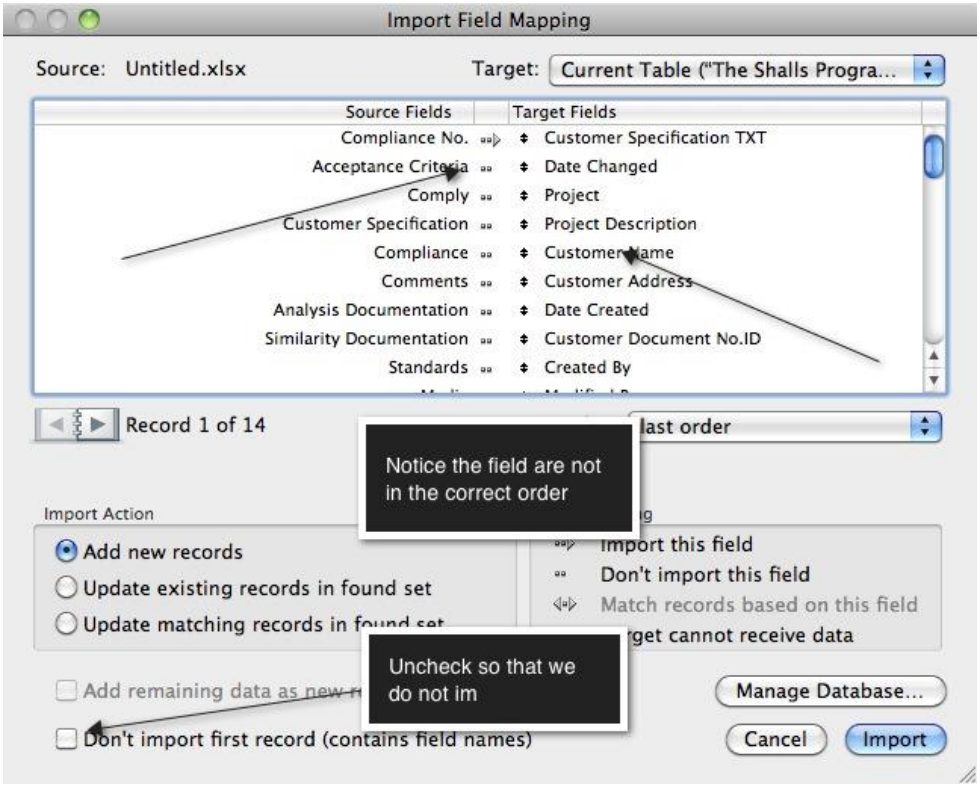


Figure 35 Field Import Table

You will notice that the top boxes displays the source and target documents. We are going to import the excel spreadsheet back into the SCM with a few changed that I have made.

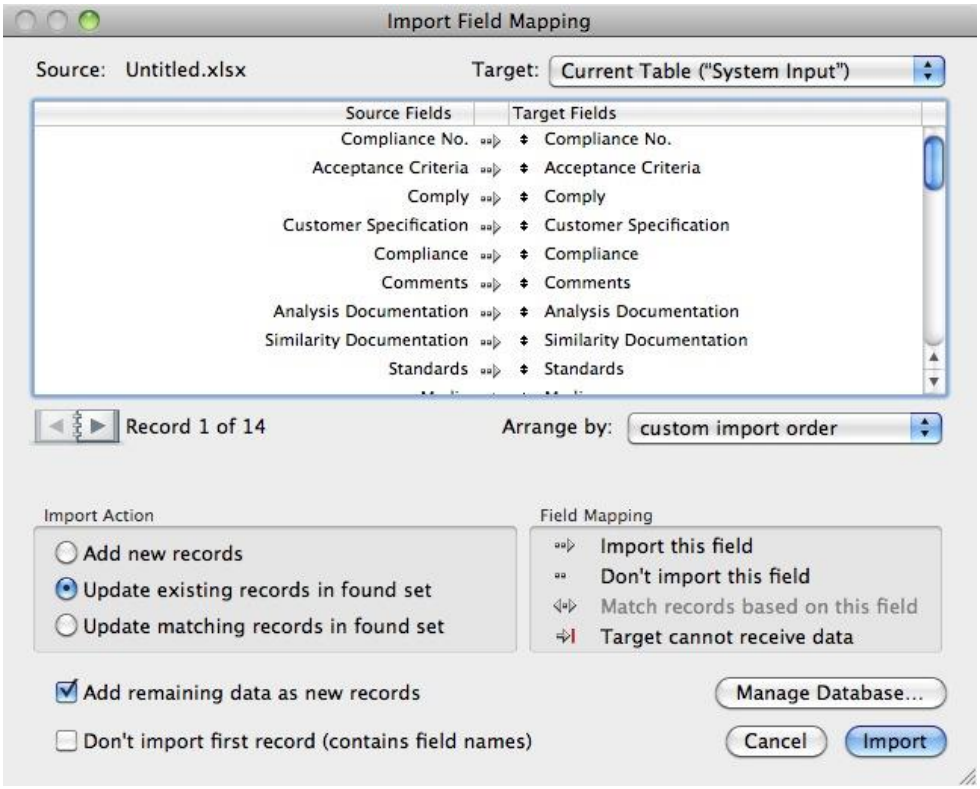


Figure 36 Final Import Setup

First, I need to line up the fields. To do so the user must have an arrow pointing at the appropriate field as seen in the Compliance Number Source Field.

This can be set up as recurring, however, it is just as easy to manually look at the updates. Once you line all the fields up, and the arrows are set up, press the import button. If you have extra fields in the document, just disregard them. Only use what you have to use. If the team decides to add a line item, then add that into the export on a blank line.

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