P3Web User Guide

How to Use the P3Web Browser-Based Application

Version: 4.15.0.0

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Welcome to P3Web!

P3Web is a powerful, browser-based interface that is designed to present Paradigm compliance management tasks to users in a simple, easy-to-use format. P3Web is designed “in-house” by Interax Group and has existed in many iterations since its first release in June of 2010. Since then, the product has grown in scope and usability to the point that it is now virtually a complete browser-based compliance management tool to extend the Paradigm 3 application database. The development schedule is very aggressive at this stage, as more and more functionalities are rolled out to meet user demand. The development schedule is scheduled to continue through the end of 2021.

This document will guide you through an introduction to the use and, in some cases, administration of the P3Web browser-based application.

Accessing P3Web

Once you have received the hyperlink or URL information from your System Administrator, you can gain access to the web application.

Figure 1 - P3Web Home Page

Read-Only Access

The default access to P3Web is as a read-only user. The read-only user does not have to log in and is permitted access to any resources that are directly linked in the “Direct Links” menu on the left side of the user interface.

Viewing Direct Links

Clicking on a direct link in the menu will immediately take the user to the linked resource and allow them to view items and browse permitted items and subfolders. Read-Only users will only see CURRENT documents, while Authenticated Users will see all permitted versions.

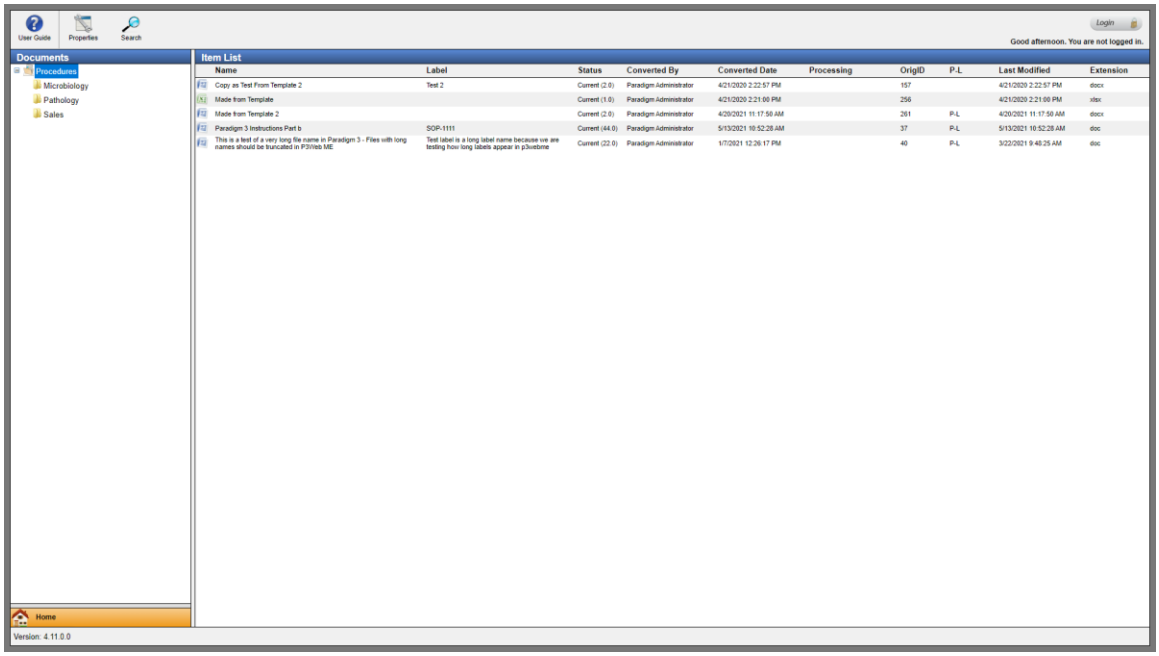


Figure 2 - P3Web Direct Link Access

Managing Direct Links

Administrators can manage Direct Links in P3Web using the “P3Web Administration” page. Click the “Cog” icon on the toolbar to be brought to the Administration page and select the “Direct Links” tab.

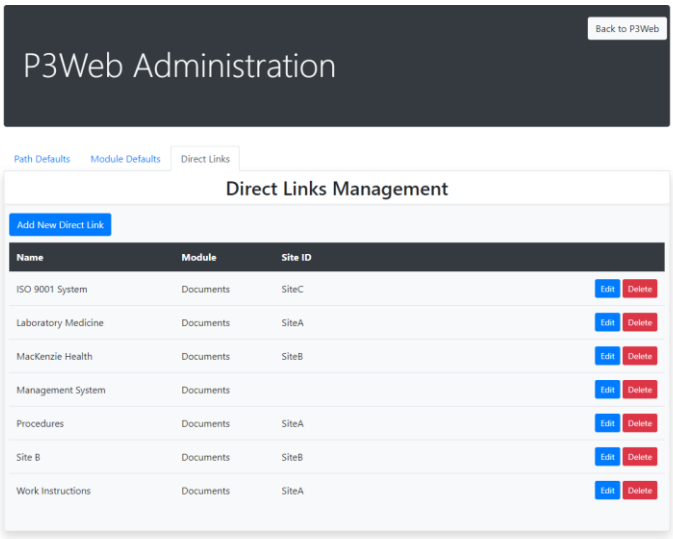


Figure 3 - P3Web Administration - Direct Links

To add direct links to the home page, Open the “Add New Direct Link” button. Browse in any module to locate the folder you wish to add and click “Submit”. Conversely, you can remove/edit existing folder entries as well.

In some cases, multiple P3Web sites may be used to accommodate different client needs. If this is the case, you can specify a “SiteID” for the folder so that it will only appear for P3Web installs that include the same SiteID in their configuration settings. This option can also be set during the “Add New Direct Link” or “Edit Direct Link”

processes. You can also create a comma-separated list of SiteIDs for any folder that may be accessible to multiple site pages!

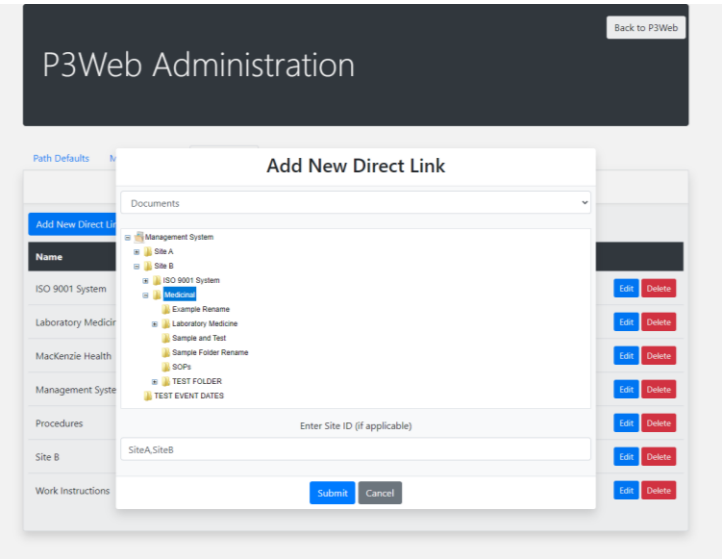
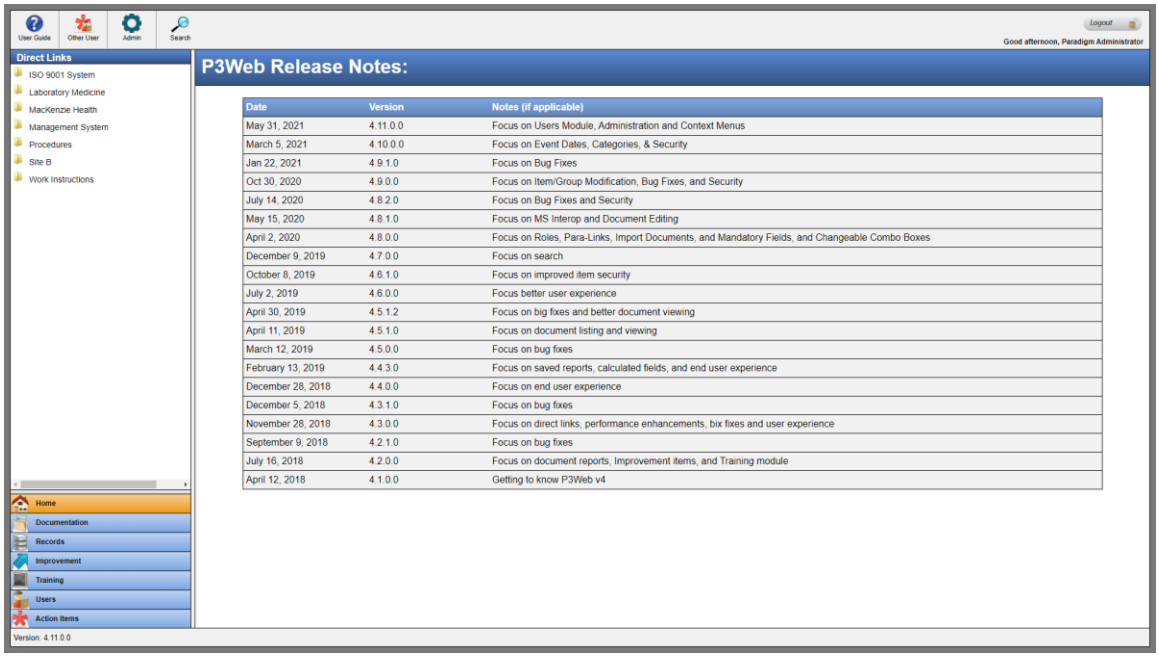


Figure 4 – Adding a Direct Link

To edit or delete a Direct Link, simply click the appropriate button next to the link in the list.

Viewing Release Notes

All users can view release notes for P3Web since version 4.1. To access the release notes, click the version number at the bottom left of the user interface.



Date	Version	Notes (if applicable)
May 31, 2021	4.11.0.0	Focus on Users Module, Administration and Context Menus
March 5, 2021	4.10.0.0	Focus on Event Dates, Categories, & Security
Jan 22, 2021	4.9.1.0	Focus on Bug Fixes
Oct 30, 2020	4.9.0.0	Focus on Item/Group Modification, Bug Fixes, and Security
July 14, 2020	4.8.2.0	Focus on Bug Fixes and Security
May 15, 2020	4.8.1.0	Focus on MS Interop and Document Editing
April 2, 2020	4.8.0.0	Focus on Roles, Para-Links, Import Documents, and Mandatory Fields, and Changeable Combo Boxes
December 9, 2019	4.7.0.0	Focus on search
October 8, 2019	4.6.1.0	Focus on improved item security
July 2, 2019	4.6.0.0	Focus better user experience
April 30, 2019	4.5.1.2	Focus on big fixes and better document viewing
April 11, 2019	4.5.1.0	Focus on document listing and viewing
March 12, 2019	4.5.0.0	Focus on bug fixes
February 13, 2019	4.4.3.0	Focus on saved reports, calculated fields, and end user experience
December 28, 2018	4.4.0.0	Focus on end user experience
December 5, 2018	4.3.1.0	Focus on bug fixes
November 28, 2018	4.3.0.0	Focus on direct links, performance enhancements, bix fixes and user experience
September 9, 2018	4.2.1.0	Focus on bug fixes
July 16, 2018	4.2.0.0	Focus on document reports, Improvement items, and Training module
April 12, 2018	4.1.0.0	Getting to know P3Web v4

Figure 5 - P3Web Release Notes

Logging in to P3Web

In many cases, it may be necessary to officially log into P3Web so that you can address Action Items, and add/edit documents, Records, Improvements or Training. You must

have a user account in Paradigm 3 to be able to log into P3Web. Click the “Login” button at the top right of the user interface to log in. P3Web is also compatible with “Windows Authentication” and SAML 2.0 SSO, allowing known users to be passed directly into Paradigm and authenticated as soon as they hit the URL.

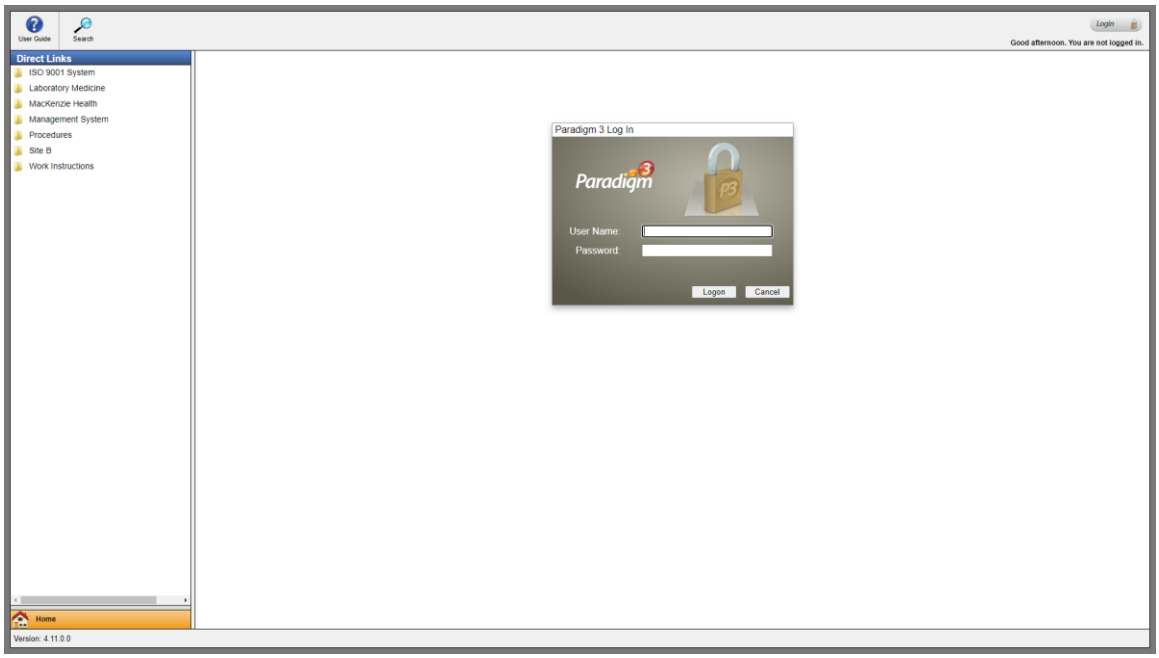


Figure 6 - P3Web Login

Once the user has successfully logged in, they will be taken, by default to their Action Items view. The default module can be set in the configuration settings file for P3Web so that users can be taken to any desired module or even back to the Home page on successful login.

Once logged in, all available modules will be displayed on the lower-left panel. Users can click on any module button to change the current module.

Browsing P3Web

Items and Folders

Read-Only Users can browse P3Web by selecting a Direct Link from the left panel. Authenticated users can select a desired module to browse that specific module’s folder structure. Clicking on any node of the folder structure tree will display the items contained in that node, while clicking “View” or double-clicking on an item will display the selected item.

Depending on your authentication state, you may see the same folder in a different way. For example, in the Documents module, read-only users will only see CURRENT items, while authenticated users will see all available items.

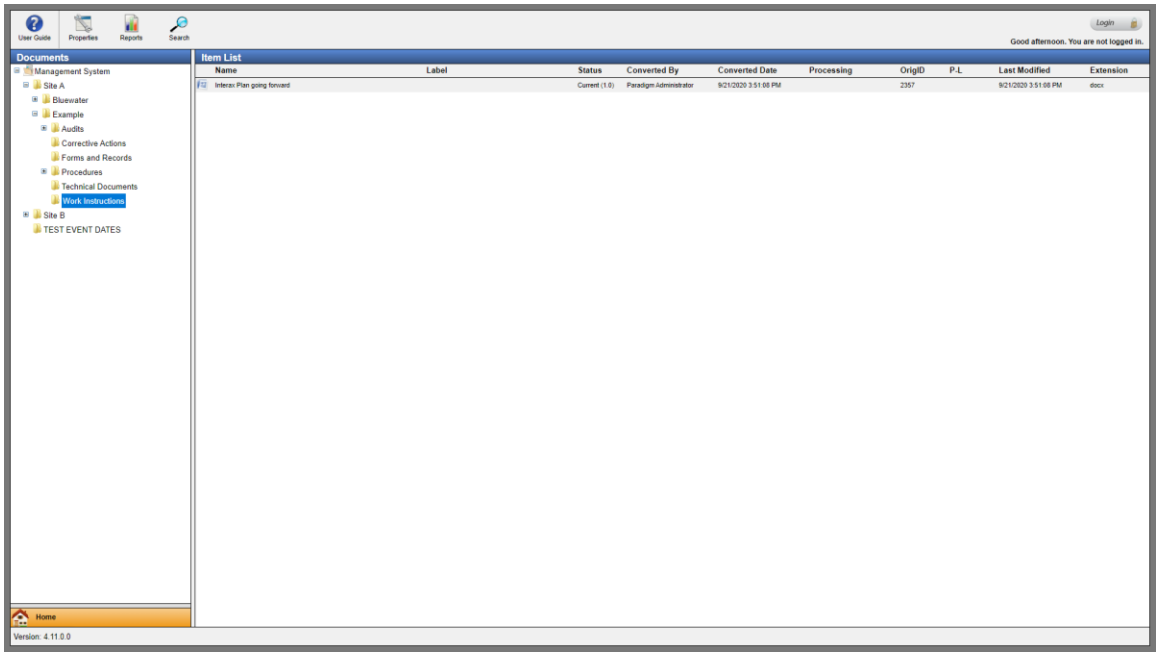


Figure 7 - Browsing as Read-Only

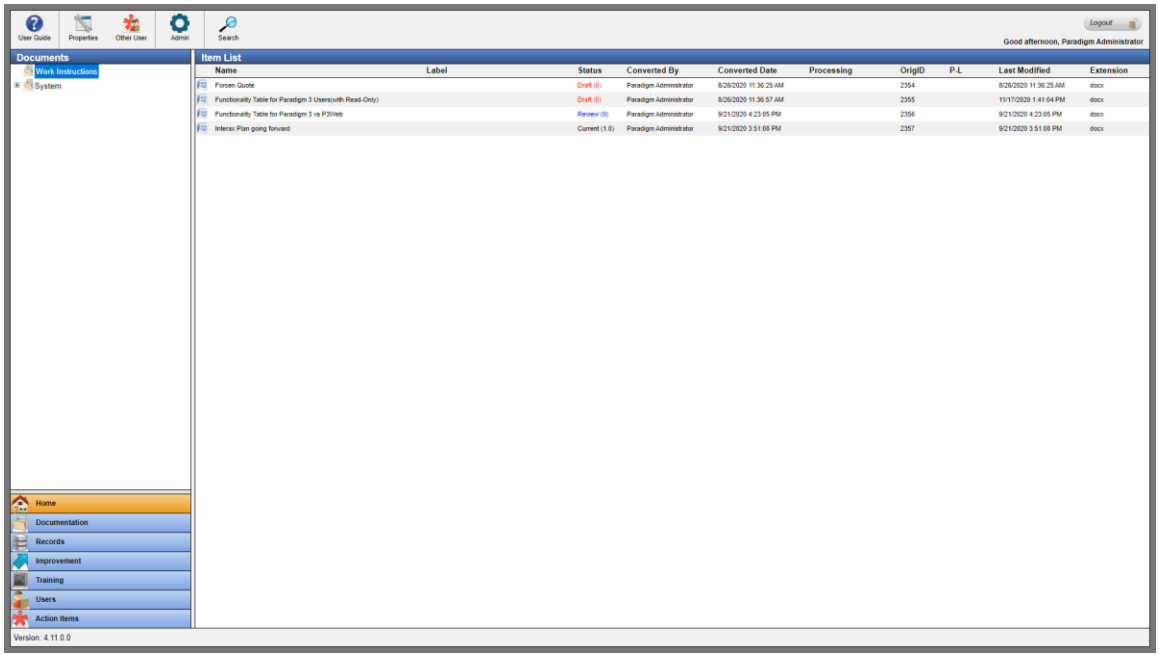


Figure 8 - Browsing as Authenticated User

Viewing Item/Folder Properties

Users can view the properties of any selected item or folder. Select the desired item/folder and click the “Properties” button to open the Properties dialog. The Properties dialog will display the item/folder’s general properties, transaction history and, if applicable, roles and members.

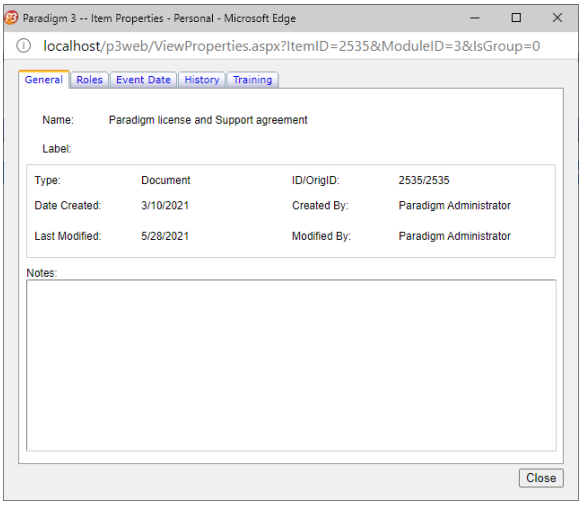


Figure 9 - Item/Folder Properties Dialog

P3Web Action Items

The Action Items view defaults to display all open Action Items for the currently logged in user.

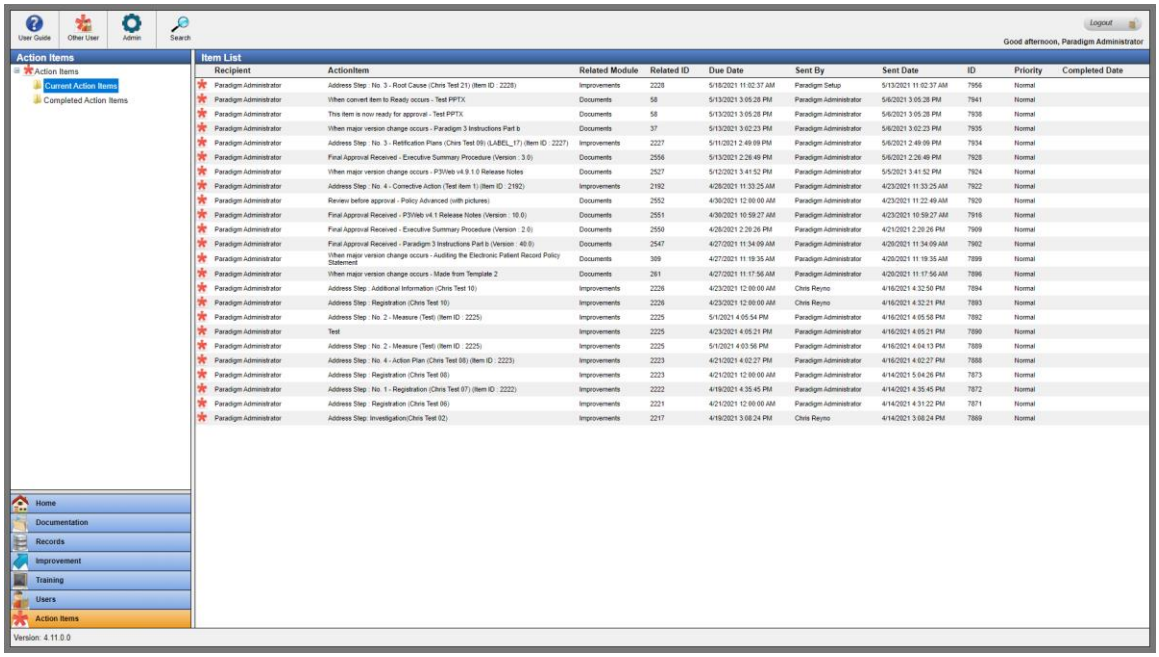


Figure 10 - Action Item Listing

Viewing an Action Item

Users can either double-click an item from the list view or highlight an item and click the "View" button on the P3Web Toolbar. They can also use the mouse right click and view option. The selected Action Item will open in a new pop-up window.

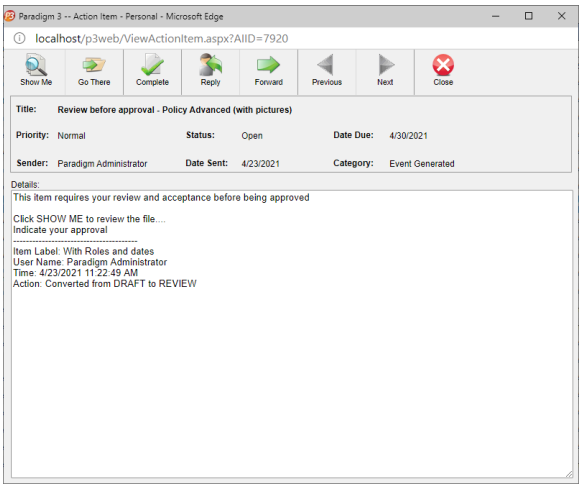


Figure 11 - Action Item

From this window, users can click "Show Me" (if applicable) to open the related item directly, without browsing or "Go There" (if applicable) to be taken directly to the related item folder location. Users can also complete the Action Item, reply to it, forward it to another user, or toggle back and forth between other Action Items

Completing an Action Item

When a user clicks the complete button, the “Complete Action Item” modal dialog will appear. If the Action Item requires selection of a result, they will be presented here in a drop-down field. A “Comments” field is also available for the user to add comments on the Action being requested.

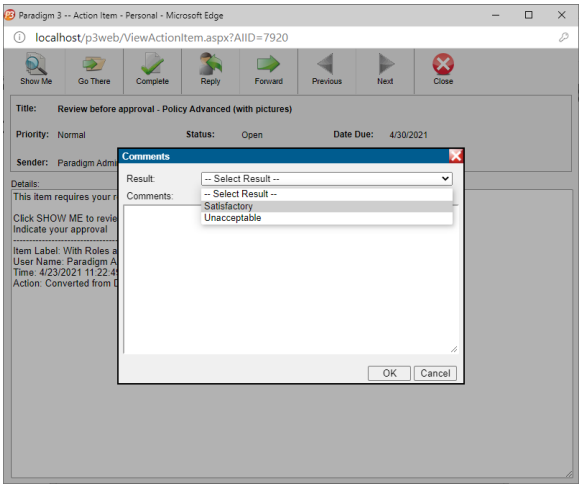


Figure 12 - Action Item: Select Result

Once the user completes the Action Item a confirmation message will appear, and the Action Item will be closed and removed from the “Open Action Items” view.

The Action Item can also detect whether password authentication is enabled for not. If the option is enabled, a password prompt will appear. Successful entry of the user’s password will pass the user to the “Complete Action Item” dialog as usual.

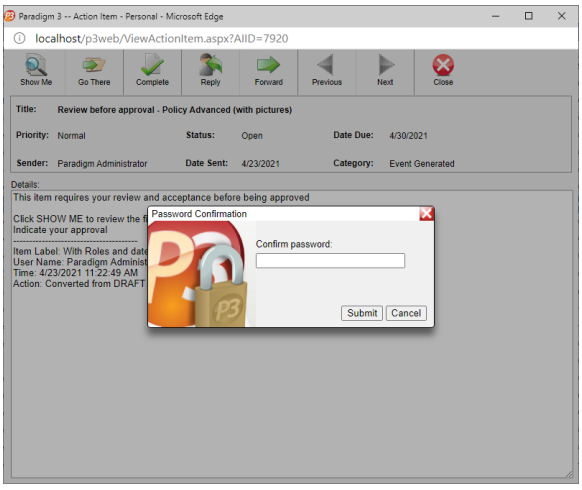


Figure 13 - Action Item Password Authentication

Other Users’ Action Items

Administrators can view and manage the Action Items of other users. Click on the “Other User” button on the toolbar to be prompted on which user/entity Action Item lists you wish to view or manage.

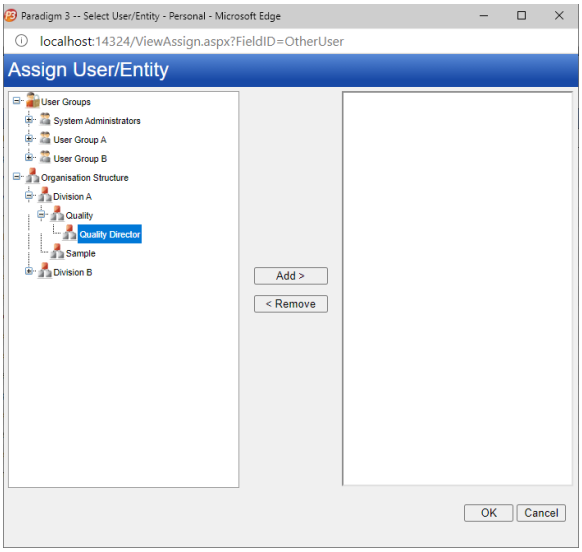


Figure 14 - Select User/Entity Dialog

Once you have selected a user/entity, click the “Add >” button to add them to the selected panel. Then click “OK” to view the user/entity Action Items.

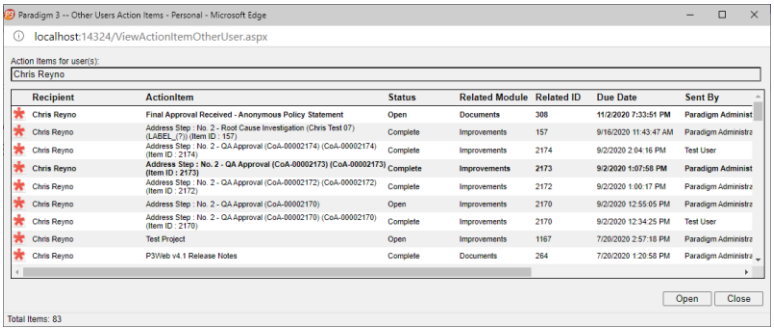


Figure 15 - Other Users' Action Items

To view any Action Item details, simply double-click the item to open it or click the “Open” button at the bottom of the dialog.

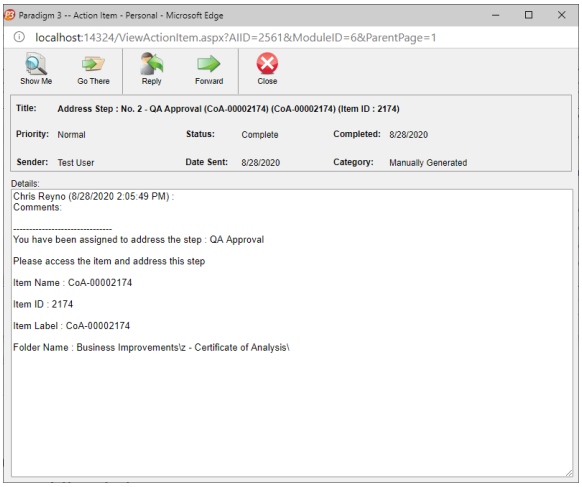


Figure 16 - Other User's Action Item Details

P3Web Documents

The P3Web Documents module presents users with full read and limited edit capabilities. Permitted users can add new files from templates, edit existing files, change document statuses, and release new CURRENT versions.

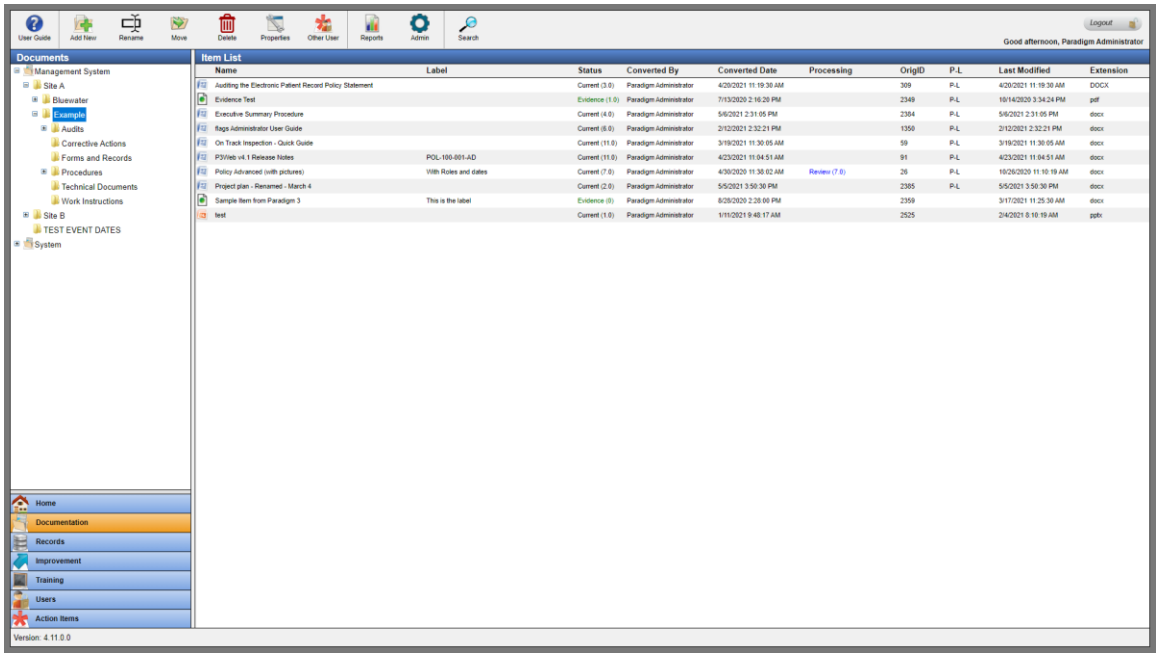


Figure 17 - Documents Module View

Functions for users are made available if the user is permitted whenever they interact with a module, folder, or item in the system. At that time, security is calculated and the applicable toolbar buttons are displayed to the user. Otherwise, the buttons are hidden from view to simplify the interface.

Viewing Documents

To view a document, simply browse to the document location and either double-click the file in the list view or highlight the item and click the “View” button on the toolbar. The document will open in the “Document Viewer” window.

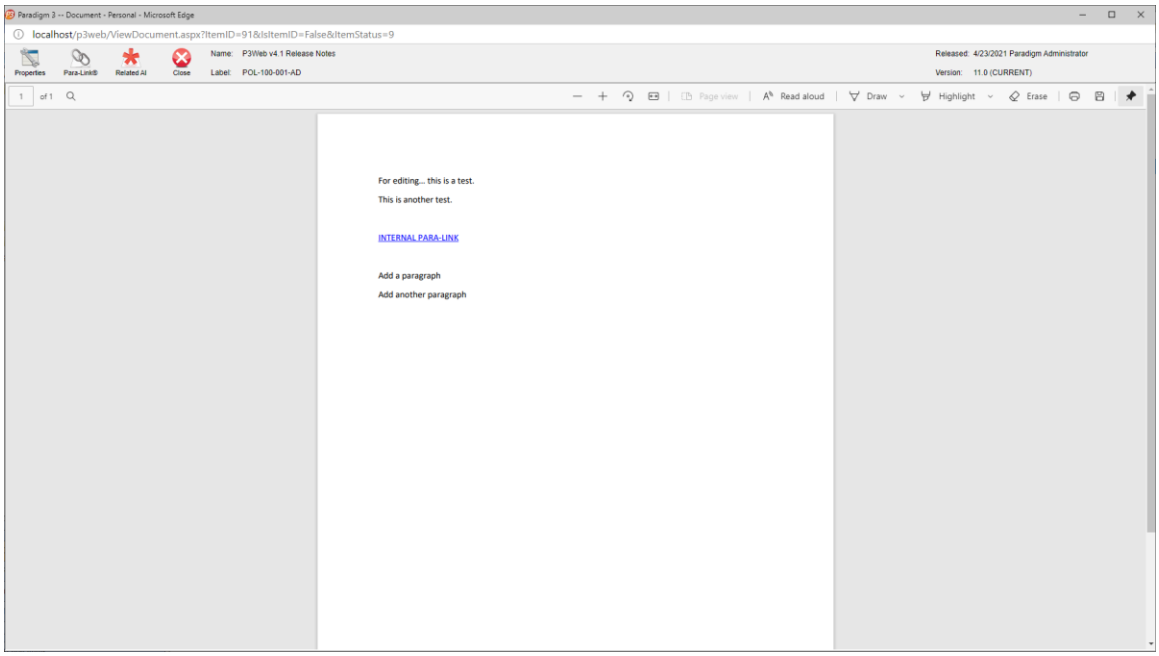


Figure 18 - Viewing a Document

From this window, users can read the document, examine its properties, view/access the list of Para-Links, save local (uncontrolled), print (uncontrolled), or see the related Action Items listing. It is strongly recommended that all documents in the system be published in PDF format to maintain maximum security and compliance. Once published in PDF, the PDF plugin in most standard browsers allows for document printing. Files published to Native formats will automatically download from the “Document Viewer” window for viewing outside of P3Web.

Document Related Action Items

Users can view a list of related Action Items for any document that can be filtered by version.

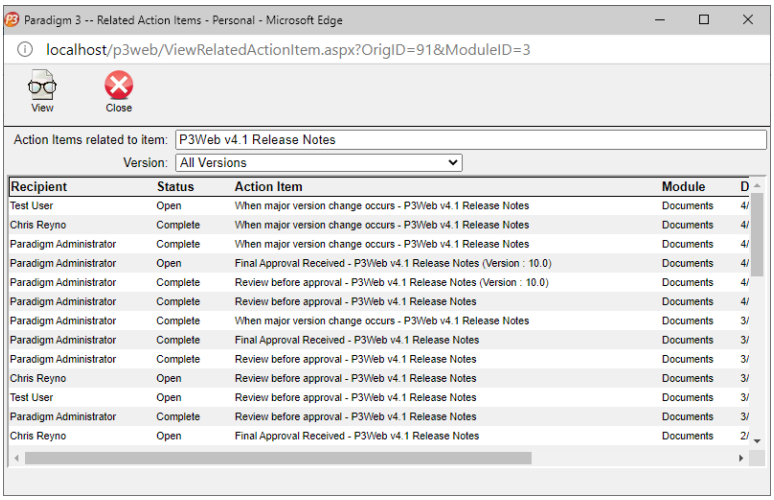


Figure 19 - Related Action Items

Create Related Action Item

User can also create a new action item for a document and send it to other users or groups. They can right click on the selected document and choose the option Create Related Action Item.

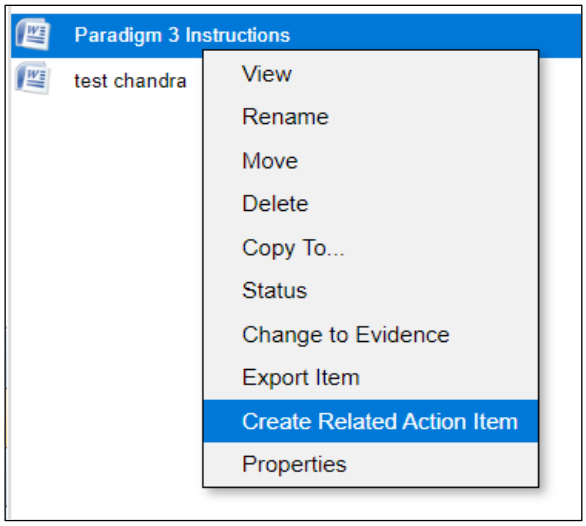


Figure 20 – Create Related Action Items

Status Control

Limited status control options are available to permitted users within P3Web. If a user is permitted to edit a document, the “Status” and “Edit” buttons are available in the P3Web toolbar. This feature is “context sensitive”. This means that depending on the version selected, the “Status” button provides different options.

For example, clicking “Status” on a CURRENT document will display a different listing of options than that of a document that is UNDER REVIEW or DRAFT. When converting to CURRENT, an additional “Status Control” page is included that allows the user to update version information and enter any details for the History.

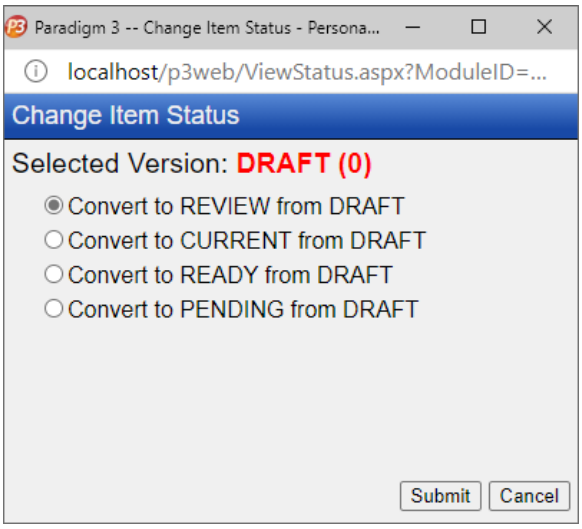


Figure 21 – Item Status Control View

Re- Training Required Option

The Re-training Required option is available while converting to CURRENT. If an authorizer decides that a user needs to re-train to the new version of the document P3Web then he/she will Check the option. This will re-open the associated training records and link the new open record to the Current version.

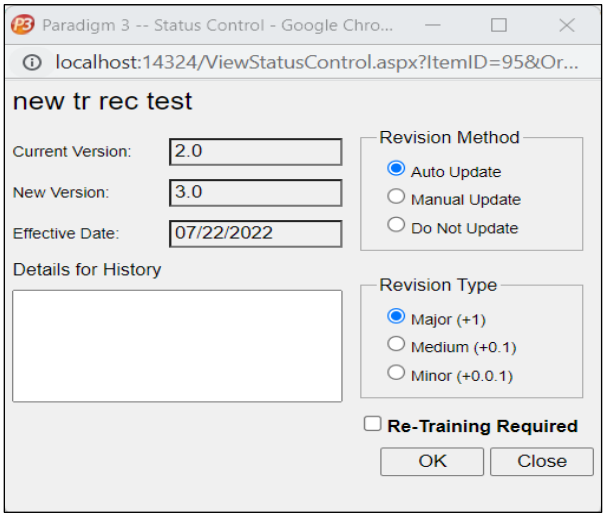


Figure 22 – Item Status Control View with Re-Training Option

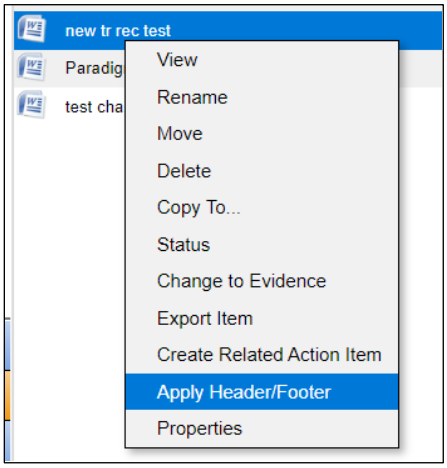
Apply Header Footer Templates

P3Web offers a System Header and Footer sub-folder where the standard header and footers are set up. The user can set up header and footer styles to suit the different types of documentation they require. Policies, procedures, or forms may need slightly different header and footer information and layout.

Once designed, convert the style to Current and then these header footer templates can be added to the preferred document, folder, sub-folder by using right click option then select Apply Header/Footer.

NOTE: Only DOCX extension documents are supported for Header Footer templates.

This feature does not support for excel and doc type of documents.



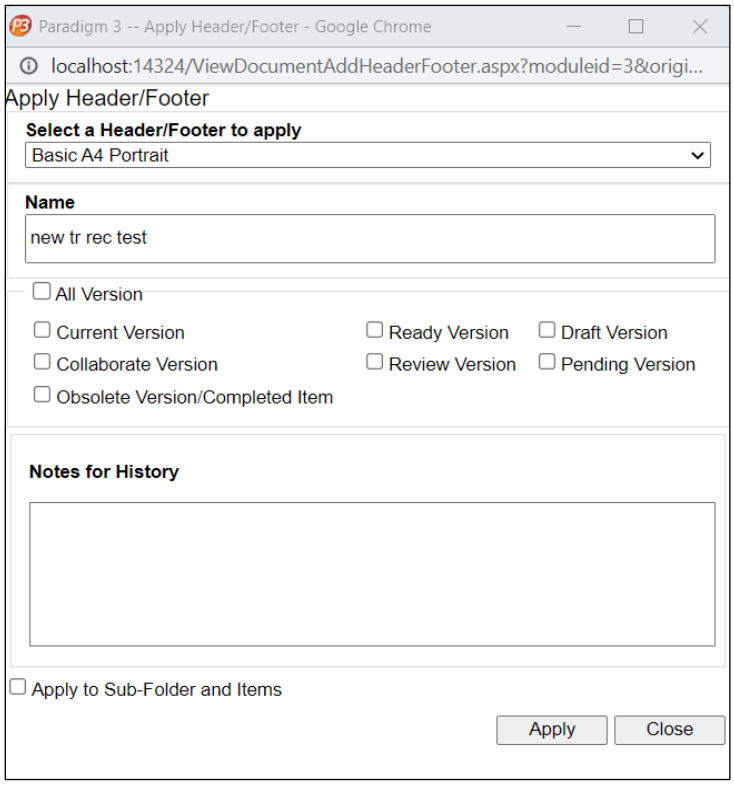


Figure 23 – Apply Header Footer Option

Export Item

Users can export document in its native format (.doc or .docx). Document will be exported to the default download location.

When exporting you can then also decide on what versions of the item you require.

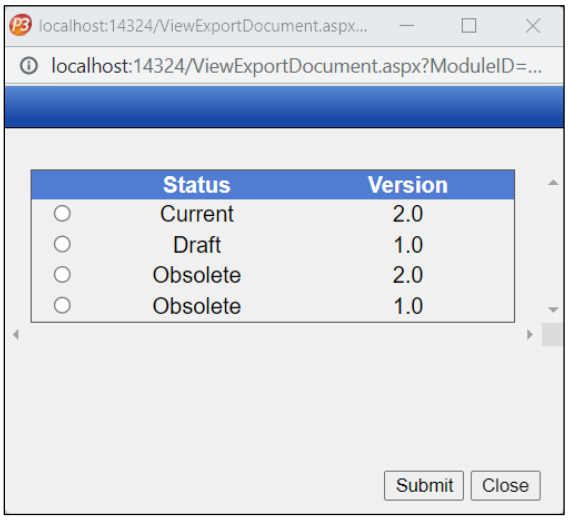


Figure 24 – Export Document

Convert Item to/from Evidence

Permitted users can now convert items to Evidence or revert Evidence to an item. Right click any item and select the appropriate option to convert. A confirmation pop-up will appear allowing the user to confirm their choice:

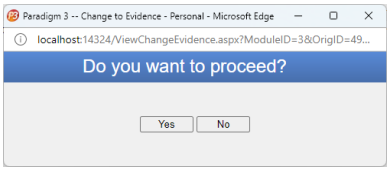


Figure 25 - Convert to/from Evidence Confirmation

Document Check-Out

DRAFT documents in P3Web can be edited offline by checking the file out to your local PC or a pre-determined “working” folder on the server so that it can be edited. To trigger this function, click the “Check-Out” button on the P3Web Toolbar. P3Web will automatically download/copy the file for editing and alert the user when successful. From there, the user can browse to and edit the file externally.

Document Check-In

If a file is already checked out, the “Check-In” button will open the “Check-In” dialog. If the current user is the one who checked out the file, they will be given the opportunity to check it back in or cancel the current check-out. If another user has the file checked out, the dialog will display the name of that user for ease of communication. Administrators can always cancel a checkout if required.

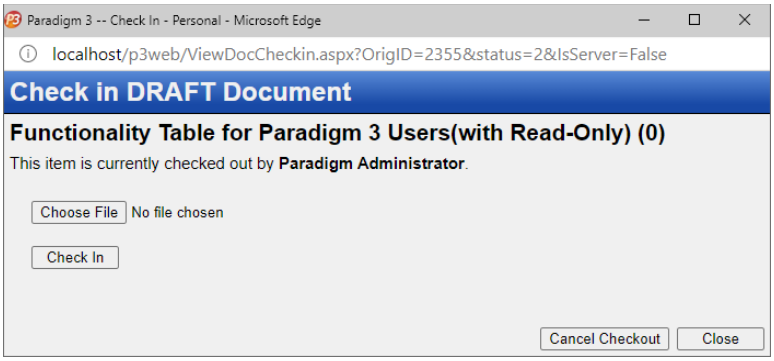


Figure 26 - Document Check-In Dialog

Clicking “Check In” will allow the user to browse for their local file (if applicable) and upload/copy the checked-out file back to the server.

Add New Items to Documents

P3Web allows permitted users to add new documents/folders to P3Web. To add a new item, select a folder and click the “Add” button on the P3Web toolbar. Only permitted options for the current user will appear in the menu:

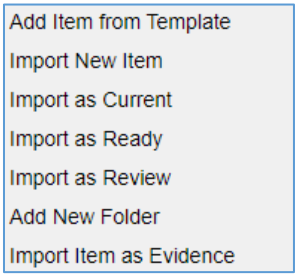


Figure 27 - Documents: Add Item Option List

Adding Item from Template:

If “Add Item from Template” is selected, P3Web will open the “Add from Template” dialog:

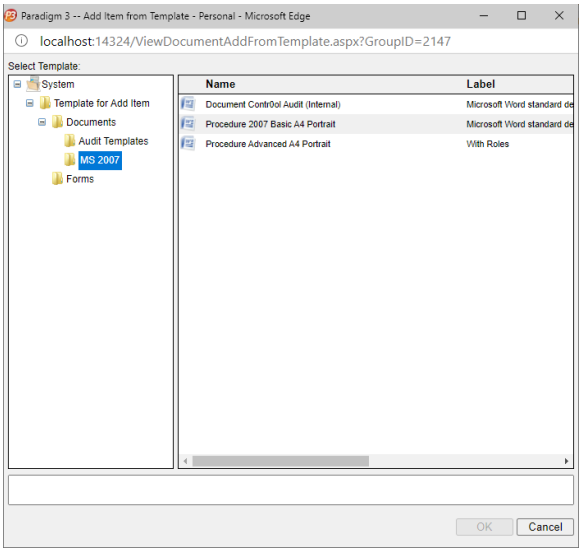


Figure 20 - Select Template for "Add"

From here, the user can browse to any CURRENT template. Once a template is selected, the template name will appear in the text field at the bottom of the dialog. Then the user can click “OK” to commit. Once committed, the user will be asked to specify a File Name and Label. If the parent folder is set to use naming or labeling formulae, the name/label will be automatically set, and the user will not be permitted to change them:

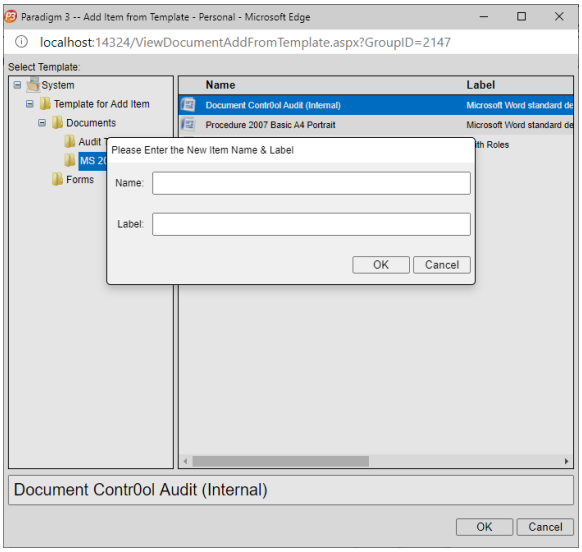


Figure 21 - Add from Template: Name and Label

Once the Name/Label are established, the file will be created as a copy from the specified template in DRAFT mode and will be available for editing.

Importing an External File:

If any of the “Import Item…” options are selected (DRAFT, CURRENT, READY, REVIEW, EVIDENCE), P3Web will open the “Import Item” window, with a reference to the selected import option:

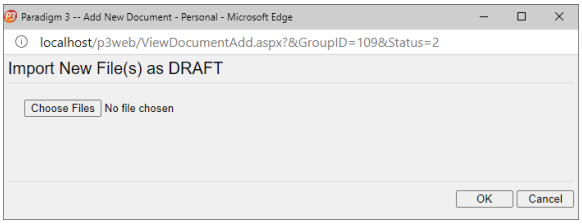


Figure 22 - Import Item Dialog

Users can import one or more items by clicking the “Select” file button to browse. Files that are valid and encounter no errors will be tallied next to the “Choose Files” button when accepted:

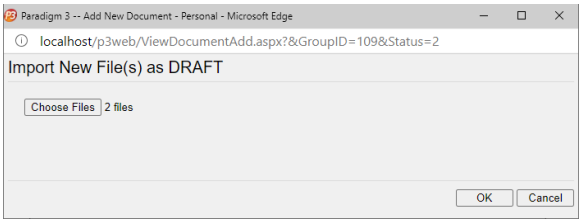


Figure 23 - Import Item: Multiple Item Counter

When the user clicks “OK”, the files are uploaded to the server and imported into Paradigm as the specified status. Imported files will automatically inherit publish, event date and role settings from the selected parent folder.

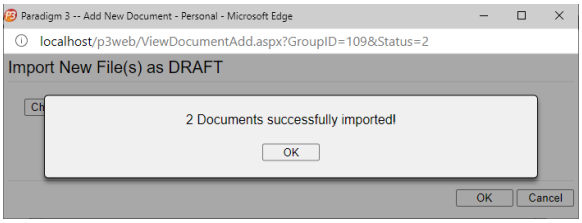


Figure 24 - Import Item: Confirmation

Adding a new Folder

If “Add New Folder” is selected, P3Web will open the “Add Folder” dialog, allowing the user to specify a folder name. The name field is mandatory and must contain a value to proceed.

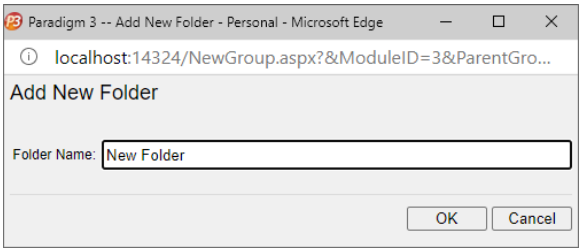


Figure 25 - Add Folder Dialog

Once the folder is added, it automatically selects that folder and inherits all folder settings from the parent folder.

P3Web Records

The P3Web Records module allows permitted users to browse, add, and edit records using the browser.

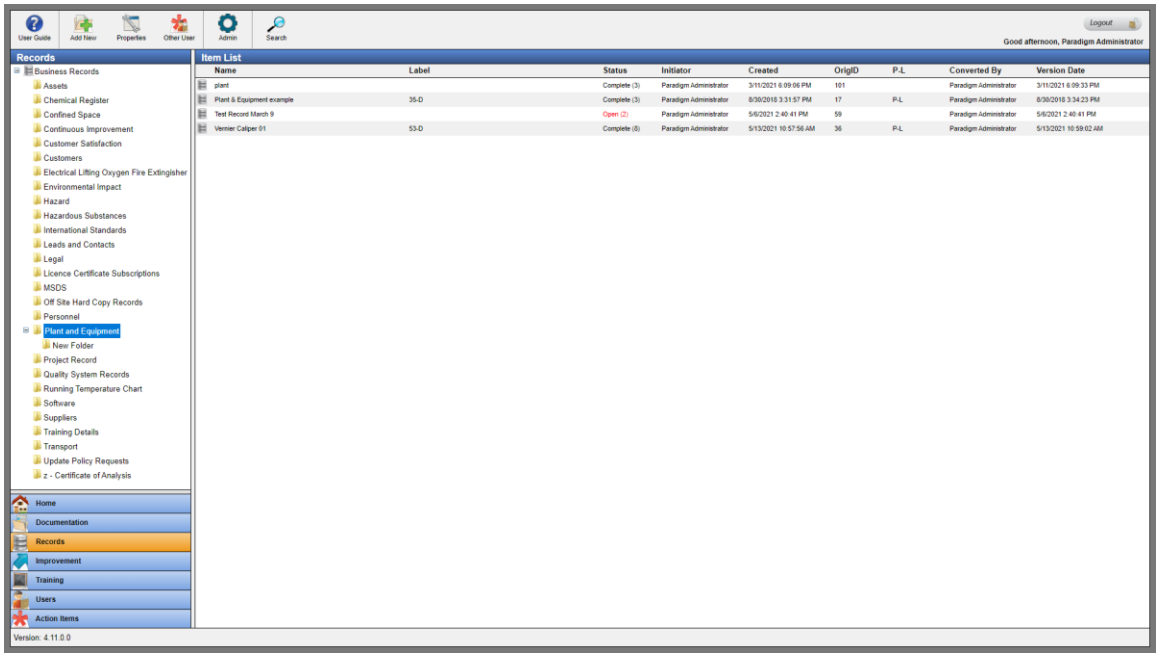


Figure 26 - Records Module View

Viewing a Record

Double-clicking, right-clicking and selecting “View”, or highlighting a record and clicking the “View” button in the toolbar will open the record in Read-Only mode:

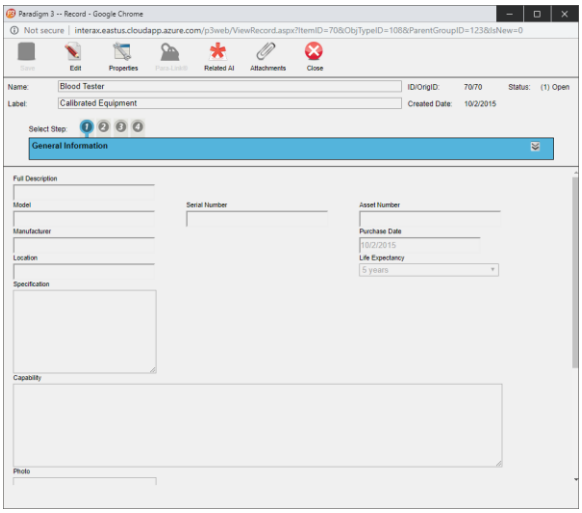


Figure 27 - Record in Read Mode

Users can select the various style pages in the same manner as in the Paradigm 3 client. Click the tab. This view also offers the ability to see record properties, Para-Links, Related Action Items, and Attachments.

Editing a Record

Permitted users can also put the record into Edit mode by clicking the “Edit” button on the record toolbar. In Edit mode, the record fields become editable.

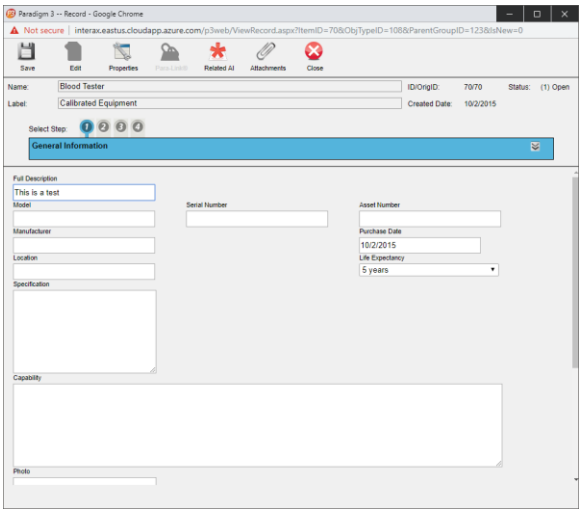


Figure 28 - Record in Edit Mode

Clicking “Save” will save your changes and switch the record back to Read Only mode.

Adding Items to Records

Permitted users can add new records to the system by clicking the “Add” button on the P3Web Toolbar and selecting the appropriate option:

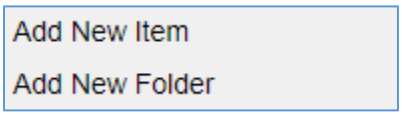


Figure 29 - Records: "Add New" List

Adding Items

If “Add New Item” is selected, P3Web will open the “Add New Item” dialog. The user can specify a name/label for the record and also any applicable sub-folder of the parent folder in which to add the record. If Name/Label formulae are enabled in the parent folder, the Name/Label fields will display their respective formula and lock the field from being edited.

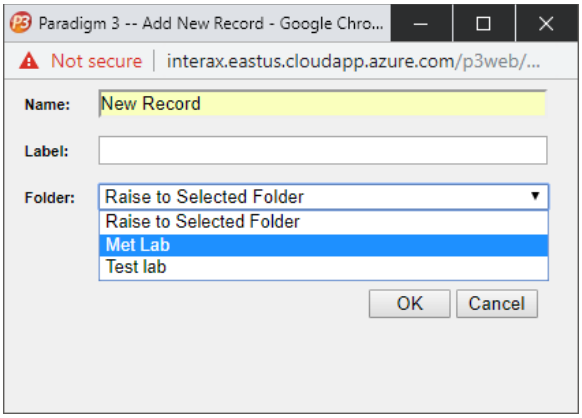


Figure 30 - Records: Add Item Dialog

The “Name” field is mandatory, but the label is optional. You can also select a sub-folder to raise the item. Once the user clicks “OK”, the record is created and automatically opened in edit mode for the user to begin entering data.

Records can also be edited and saved via the Action Item “Show Me” button.

Adding a new Folder to Records

If “Add New Folder” is selected, P3Web will open the “Add Folder” dialog, allowing the user to specify a folder name. The name field is mandatory and must contain a value to proceed.

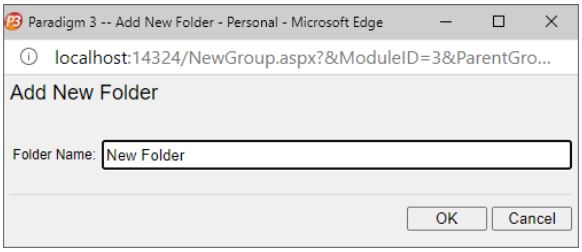


Figure 31 - Records: Add Folder Dialog

Once the folder is added, it automatically selects that folder and inherits all folder settings from the parent folder.

Attachments

Viewing Attachments

P3Web currently allows users to view existing attachments in the Records module. To view a record’s attachments, click the “Attachments” button in the toolbar of the record.

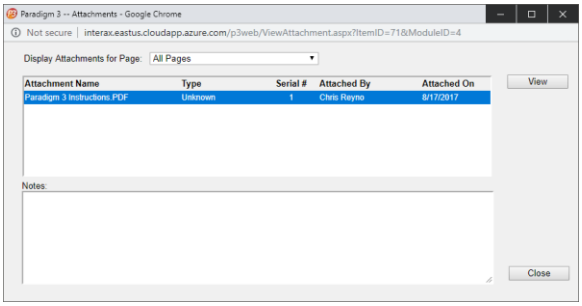


Figure 32 - Records: Attachments Dialog in Read View

Adding/Modifying Attachments

P3Web allows editor users to add new attachments or even modify existing attachments. To enable this feature, the record must be in "Edit" mode when you click the "Attachments" button in the record toolbar:

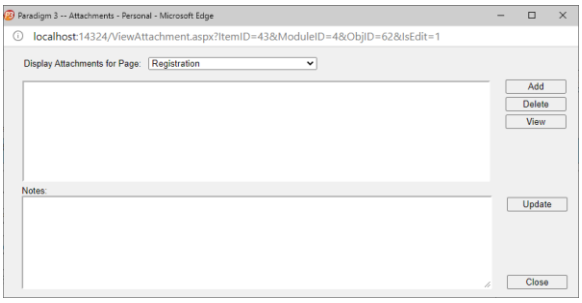


Figure 33 - Records: Attachment Dialog in Edit View

Click the "Add" button to add a new attachment. Make sure to select the desired page, to which you wish to attach the item.

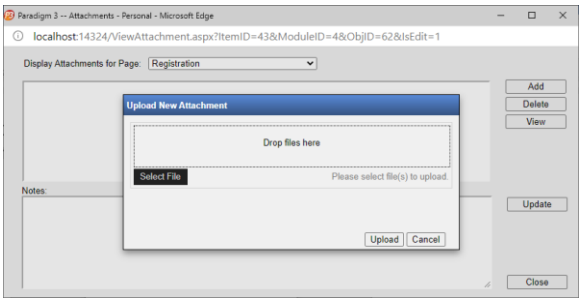


Figure 34 - Records: Adding an Attachment

A dialog will appear that allows you to either browse for a file by clicking the "Select File" button or drag a file into the dialog itself. Once the file is added to the queue, click "Upload" to send the file to the system.

You can also select any attachment that is there and update the notes for that attachment. Click the "Update" button when you have finished.

P3Web Improvements

The P3Web Improvements module offers all the same functionality as the client tool.

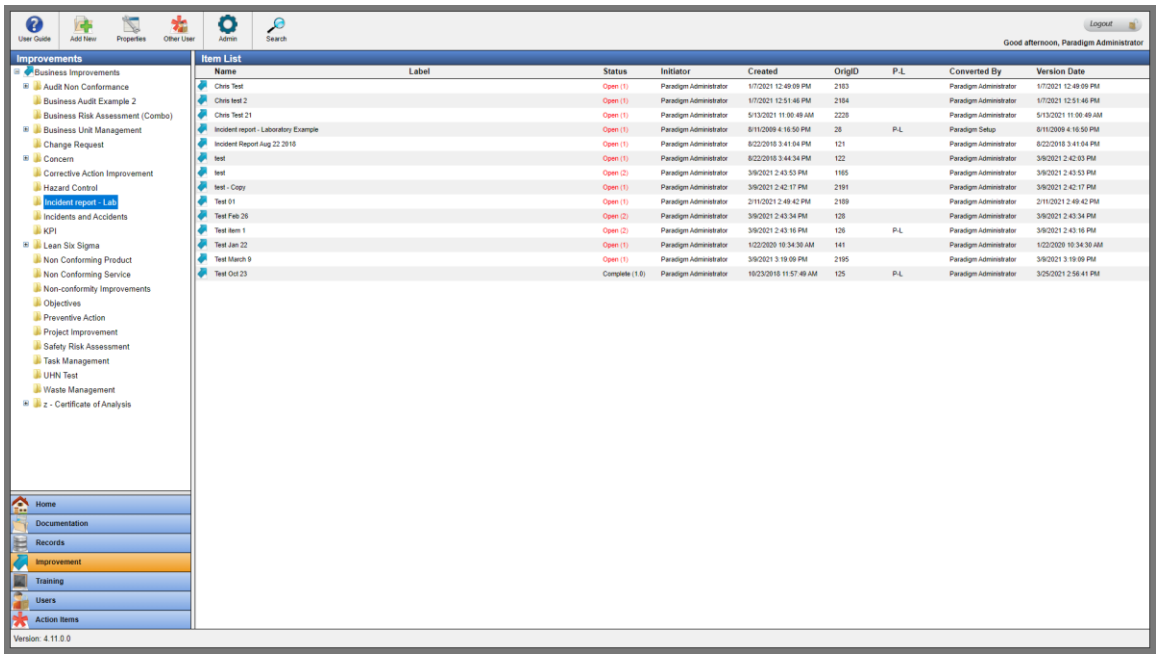


Figure 35 - Improvements View

Viewing an Improvement

Double-clicking, right-clicking and selecting “View”, or highlighting it and clicking the “View” button in the toolbar will open an Improvement record in Read-Only mode:

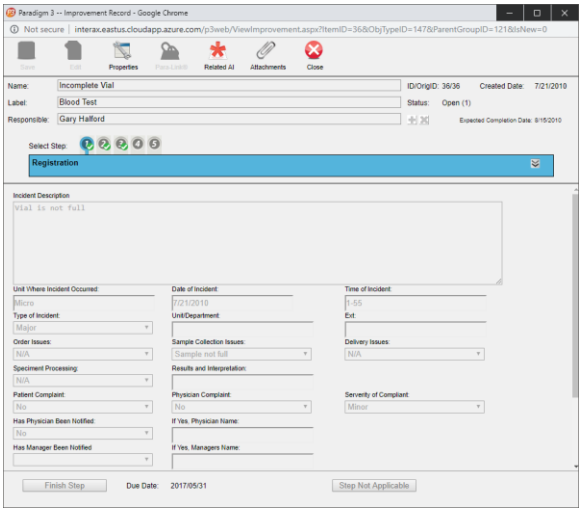


Figure 36 - Improvements: Item in Read Mode

Users can select the various style pages in the same manner as in the Paradigm 3 client. Click the tab. This view also offers the ability to see improvement properties, Para-Links, Related Action Items, and Attachments.

Improvement Properties

Improvement properties view provides access to the basic details of the record, Roles and members for the selected Improvement, the transaction history and a list of related Training records (if applicable).

Editing an Improvement

Permitted and Responsible users can also put the record into Edit mode by clicking the "Edit" button on the record toolbar. In Edit mode, the record fields become editable.

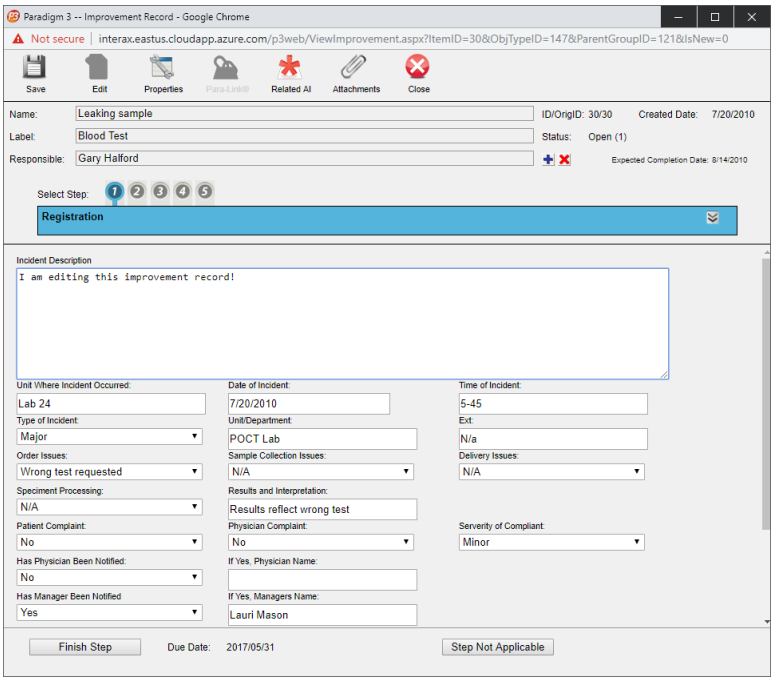


Figure 37 - Improvements: Item in Edit Mode

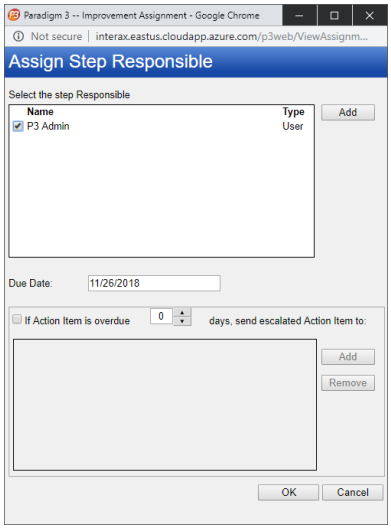


Figure 38 - Improvements: Assign Responsible

Finishing an Improvement Step

Clicking “Finish Step” will save the Improvement and forward it to the next responsible person. If a responsible person must be selected the user will be prompted to select from a list. Once all steps are completed, the Improvement record will be marked as “Complete”.

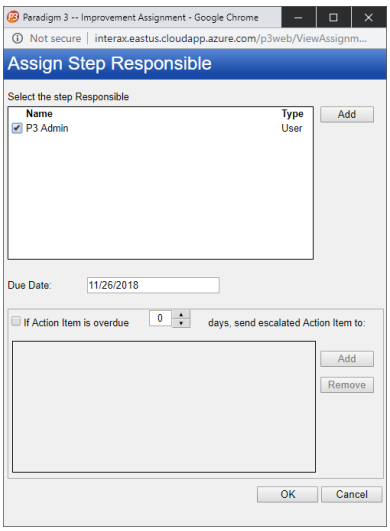


Figure 39 - Improvements: Assign Responsible on Finish

Setting a Step as “Not Applicable”

Clicking the “Set Not Applicable” button will disable the step. Notifications and responsibility are also disabled when this is done, so make sure to use this feature with care. The step is also hidden from the record view. Only a system administrator can un-mark a step from Not Applicable status.

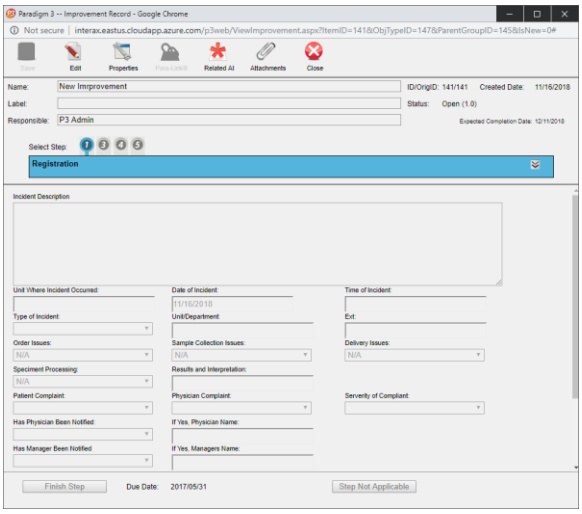


Figure 40 - Improvement Record Hiding Step 2 (Not Applicable)

Adding Items to Improvements

Permitted users can add new records to the system by clicking the “Add” button on the P3Web Toolbar and selecting the appropriate option:

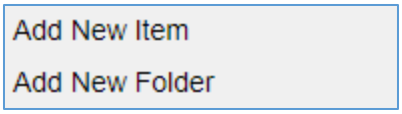


Figure 41 - Improvements: Add List

Adding Improvements

If “Add New Item” is selected, P3Web will open the “Add New Item” dialog. The user can specify a name/label for the record and also any applicable sub-folder of the parent folder in which to add the improvement. If Name/Label formulae are enabled in the parent folder, the Name/Label fields will display their respective formula and lock the field from being edited.

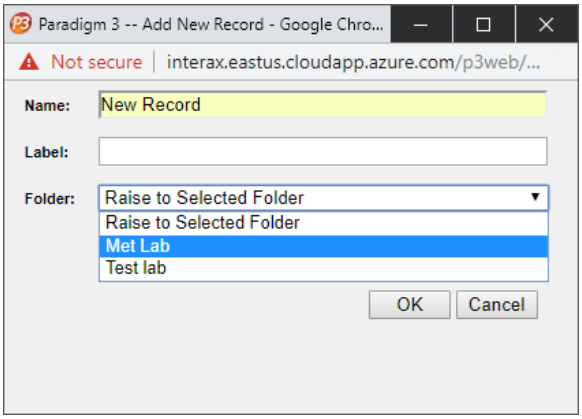


Figure 42 - Improvements: Add Item Dialog

The “Name” field is mandatory, but the label is optional. You can also select a sub-folder to raise the item. Once the user clicks “OK”, the improvement is created and automatically opened in edit mode for the user to begin entering data.

Improvements can also be edited and saved via the Action Item “Show Me” button.

Adding a new Folder to Improvements

If “Add New Folder” is selected, P3Web will open the “Add Folder” dialog, allowing the user to specify a folder name. The name field is mandatory and must contain a value to proceed.

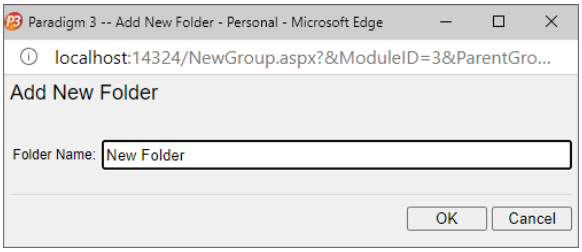


Figure 43 - Improvements: Add Group Dialog

Once the folder is added, it automatically selects that folder and inherits all folder settings from the parent folder.

Attachments

Viewing Attachments

P3Web currently allows users to view existing attachments in the Improvements module. To view an Improvement record's attachments, click the "Attachments" button in the toolbar of the Improvement record.

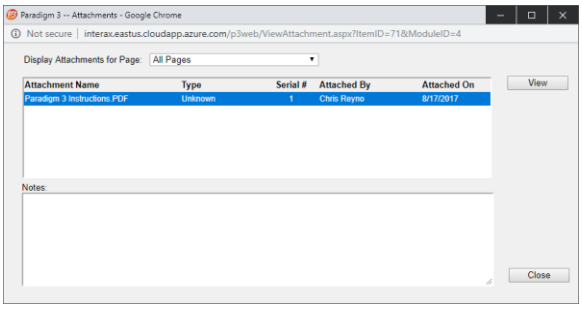


Figure 44 - Attachments in Read View

Adding/Modifying Attachments

P3Web allows editor users to add new attachments or even modify existing attachments. To enable this feature, the record must be in "Edit" mode when you click the "Attachments" button in the Improvement record toolbar:

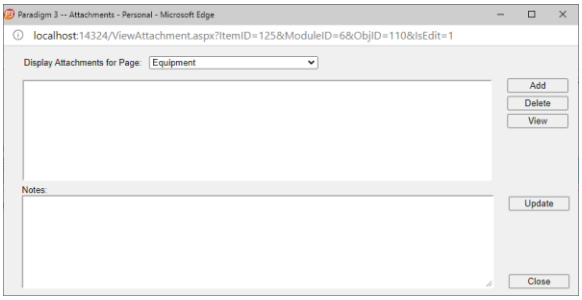


Figure 45 - Attachments in Edit View

Click the "Add" button to add a new attachment. Make sure to select the desired page, to which you wish to attach the item.

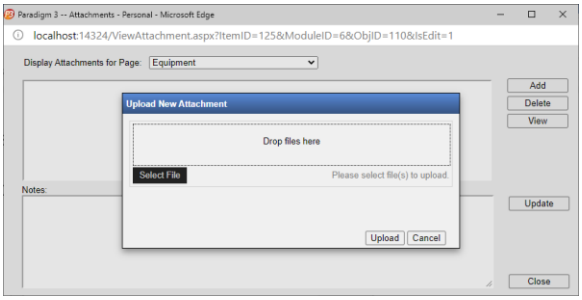


Figure 46 - Improvements: Adding an Attachment

A dialog will appear that allows you to either browse for a file by clicking the "Select File" button or drag a file into the dialog itself. Once the file is added to the queue, click "Upload" to send the file to the system.

You can also select any attachment that is there and update the notes for that attachment. Click the “Update” button when you have finished.

P3Web Training

P3Web currently offers access to the Paradigm 3 Training module. Permitted users can add/edit Training records and Trainees can complete competency assessments.

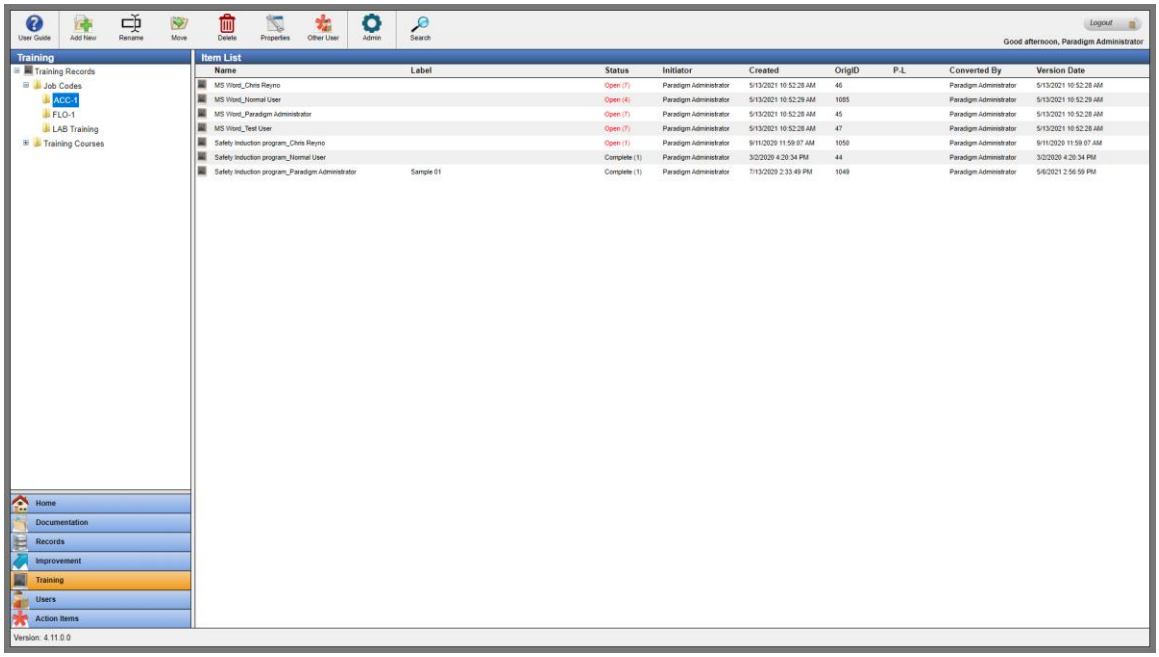


Figure 47 - Training View

Viewing a Training Record

Double-clicking, right-clicking and selecting “View”, or highlighting it and clicking the “View” button in the toolbar will open the Training record in Read-Only mode.

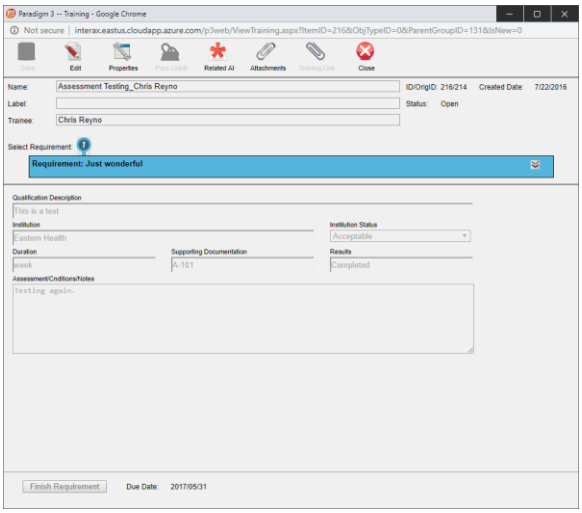


Figure 48 - Training Record in Read View

Training Properties

Training properties view provides access to the basic details of the record, Roles and members for the selected Training record, the transaction history and a list of related Training records (if applicable).

Editing a Training Record

Permitted and Responsible users can also put the Training record into Edit mode by clicking the “Edit” button on the record toolbar. In Edit mode, the record fields become editable.

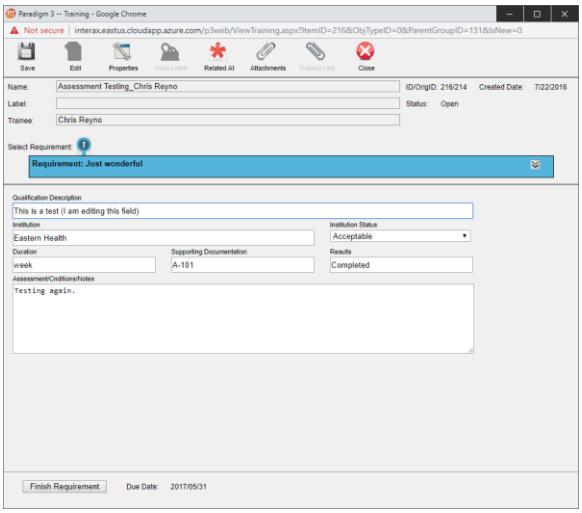


Figure 49 - Training Record in Edit View

Finishing a Requirement

Clicking “Finish Step” will save the Training record. Once all requirements are completed, the Training record will be marked as “Complete”.

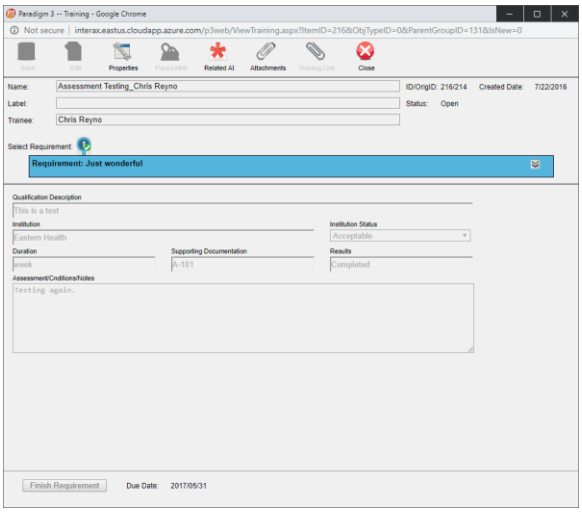


Figure 50 - Training Record with Finished Requirement(s)

Adding Items to Training

Permitted users can add new Training records to the system by clicking the “Add” button on the P3Web Toolbar and selecting the appropriate option:

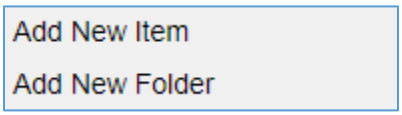


Figure 51 - Training: Add List

Adding Training Records

If “Add New Item” is selected, P3Web will open the “Add New Item” dialog. The user can specify a name/label for the Training record and also any applicable sub-folder of the parent folder in which to add the improvement. If Name/Label formulae are enabled in the parent folder, the Name/Label fields will display their respective formula and lock the field from being edited. Users must select one or more “trainees” for the record from the “Users” field.

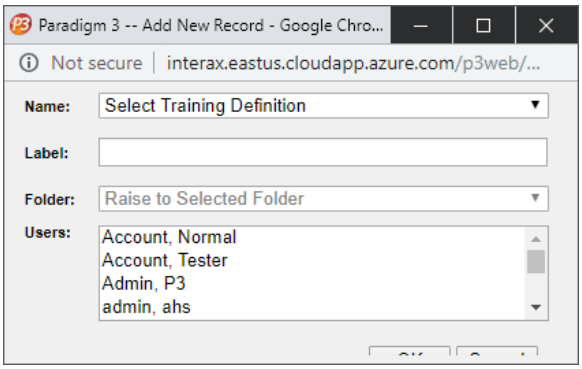


Figure 52 - Training Add Item Dialog

The “Name” field is mandatory, but the label is optional. You can also select a sub-folder to raise the item. Once the user clicks “OK”, the Training record(s) is/are created and automatically opened in edit mode for the user to begin entering data.

Training records can also be edited and saved via the Action Item “Show Me” button.

Adding a new Folder to Training

If “Add New Folder” is selected, P3Web will open the “Add Folder” dialog, allowing the user to specify a folder name. The name field is mandatory and must contain a value to proceed.

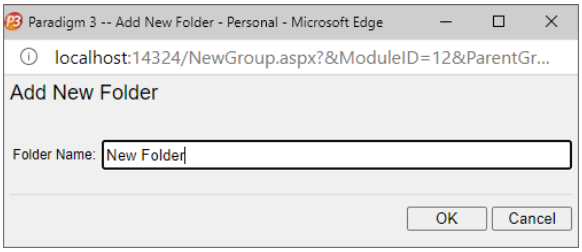


Figure 53 - Training: Add Group Dialog

Once the folder is added, it automatically selects that folder and inherits all folder settings from the parent folder.

Viewing Attachments

P3Web currently allows users to view existing attachments in the Training module. To view a Training record's attachments, click the "Attachments" button in the toolbar of the Training record.

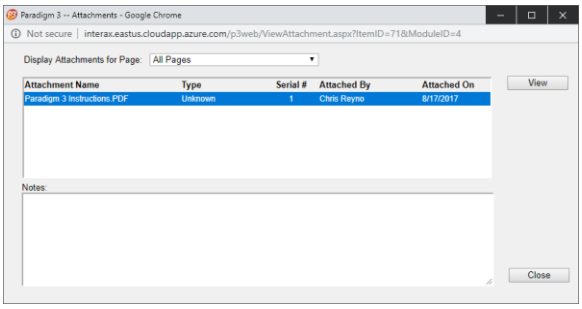


Figure 54 - Training: Attachments in Read View

Adding/Modifying Attachments

P3Web allows editor users to add new attachments or even modify existing attachments. To enable this feature, the record must be in "Edit" mode when you click the "Attachments" button in the Training record toolbar:

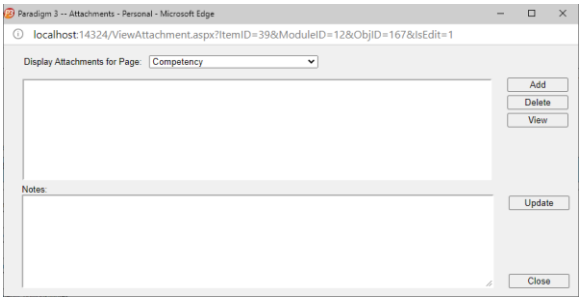


Figure 55 - Training: Attachments in Edit View

Click the "Add" button to add a new attachment. Make sure to select the desired page, to which you wish to attach the item.

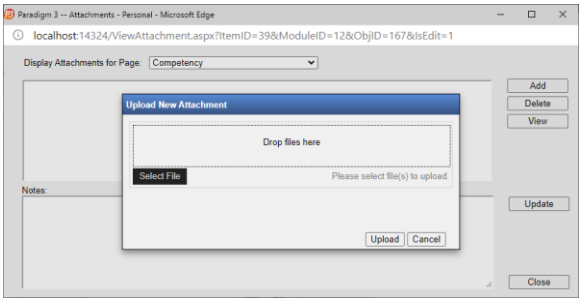


Figure 56 - Training: Add Attachment

A dialog will appear that allows you to either browse for a file by clicking the "Select File" button or drag a file into the dialog itself. Once the file is added to the queue, click "Upload" to send the file to the system.

You can also select any attachment that is there, and update the notes for that attachment. Click the “Update” button when you have finished.

P3Web Users Module

P3Web offers Administrators access to the Paradigm 3 Users module. Administrators can add/edit users and folders within the Users module structure.

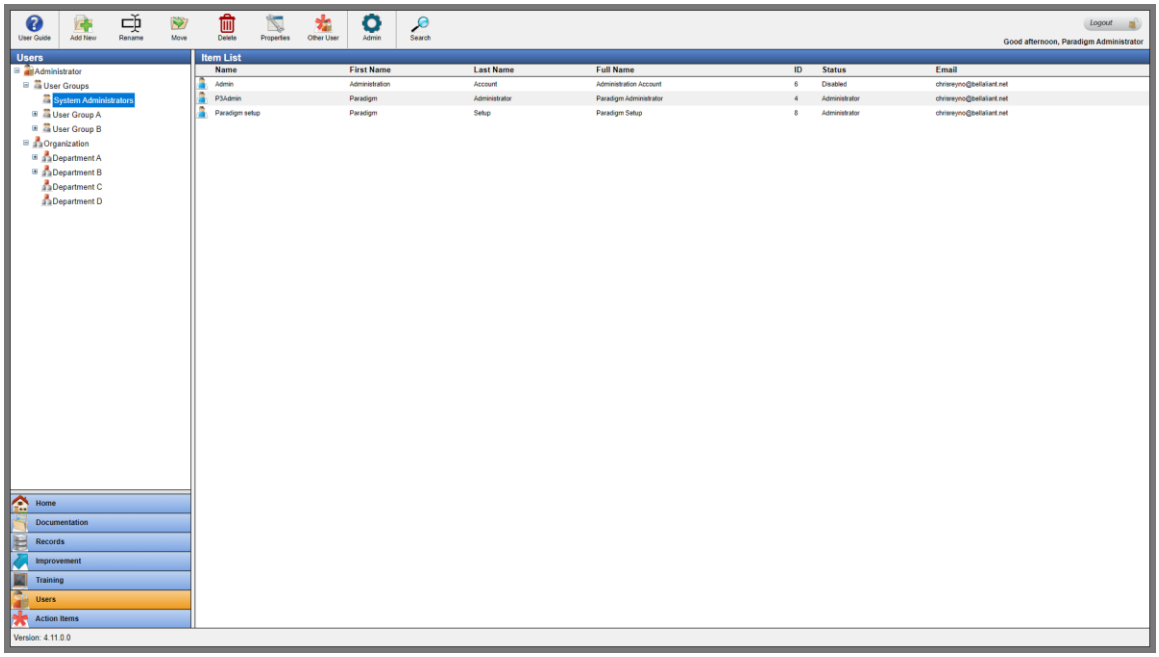


Figure 57 - P3Web Users Module

Viewing/Editing a User Record

Administrators can view a user record by double-clicking, highlighting and selecting “View” from the toolbar, or right-clicking and selecting “View” or “Properties”. The properties of the user can be changed and updated by clicking the “OK” button to commit. Membership, license, module permissions, user and email options, and Other User lists for Action Items can all be accessed and modified. Training records for a user can also be accessed.

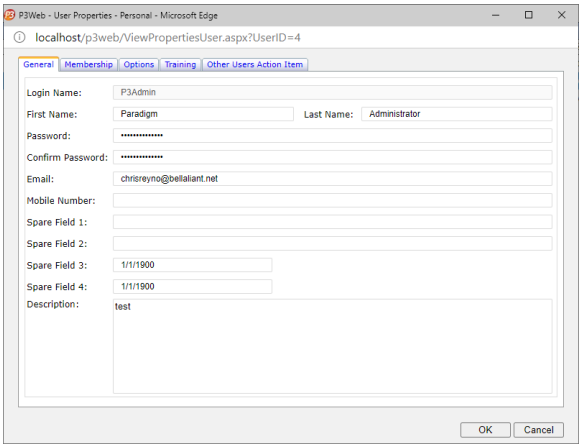


Figure 58 - P3Web User Record

Adding a New User

To add a new user, click on the Appropriate User Group folder, click the “Add New” button on the toolbar and select the “Add New User” option from the context menu. “Login Name”, “First Name”, “Last Name” and the “Password” fields are mandatory. Passwords must meet minimum password requirements. Membership, license, module permissions, user and email options, and Other User lists for Action Items can all be accessed and modified.

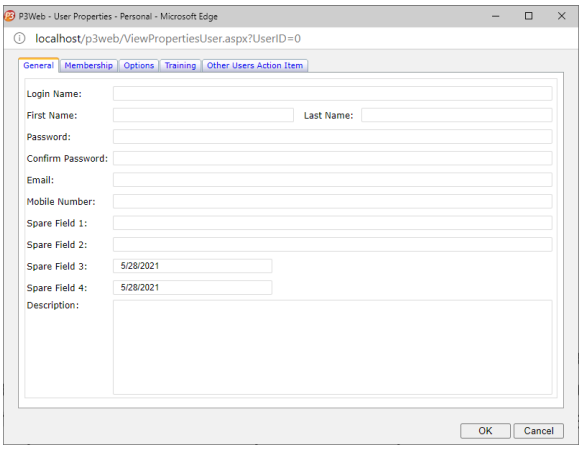


Figure 59 - P3Web New User

Adding User Groups/Organization Entities

To add a User Group or Organization Entity to the module, select an appropriate parent folder, click the “Add New” button on the toolbar, and select “Add New Entity/Folder” from the context menu.

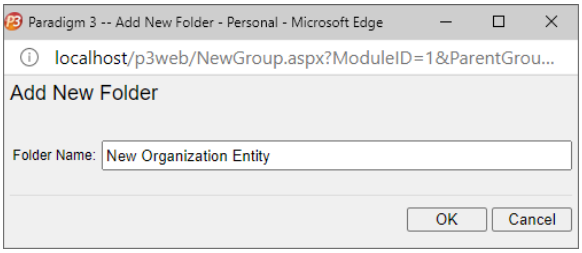


Figure 60 - P3Web Add New Entity/Folder

Rename/Move/Delete Users, Folders or Entities

To rename, move or delete a User record, User Group folder, or Organization Entity select the desired item and right-click it and select an applicable function from the context menu or click an applicable toolbar button.

This will open an appropriate dialog to perform the desired action.

P3Web Administration

Administrators now have limited access to an Administration page that will allow for configuration of P3Web and also to add/modify Direct Links. When logged on as an Administrative user, click the “Cog” button on the toolbar.

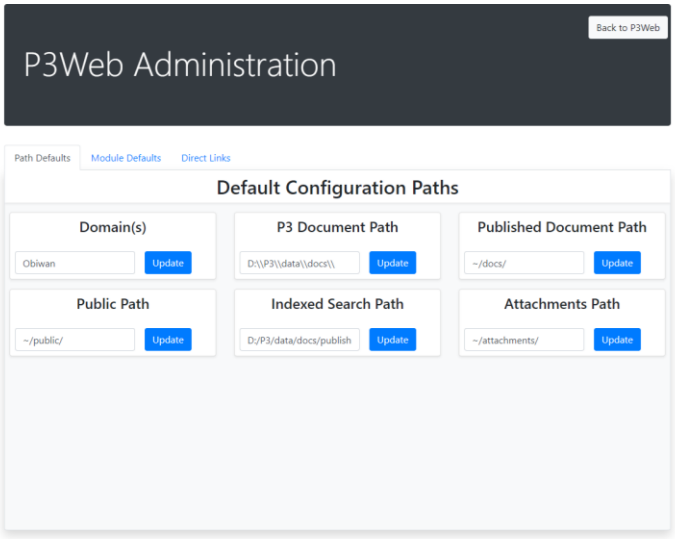


Figure 61 - P3Web Administration

Modifying P3Web Paths

To modify default paths for P3Web (i.e. – Document Path, Published Document Path, etc.) select the “Path Defaults” tab. To update the displayed value, simply overwrite it in the text field and click the “Update” button for that field.

Modifying P3Web Module Defaults

To modify default module settings for P3Web (Default folders, Default Start Module, etc.) select the “Module Defaults” tab. To update the displayed value for Module, simply open the dropdown menu and select a module. For default folders, click the “Update” button and browse an appropriate folder. Then click “Submit”.

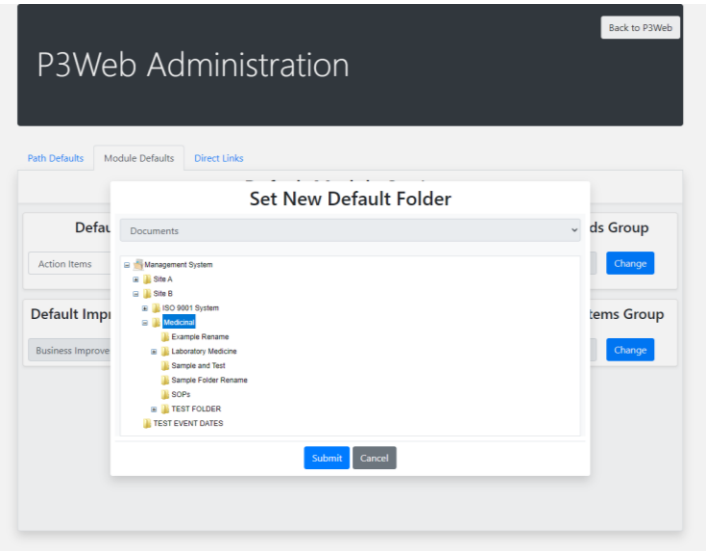


Figure 62 - P3Web Administration: Update Default Documents Folder

Adding/Modifying P3Web Direct Links

P3Web Direct Links can now be directly added or modified from within P3Web Administration.

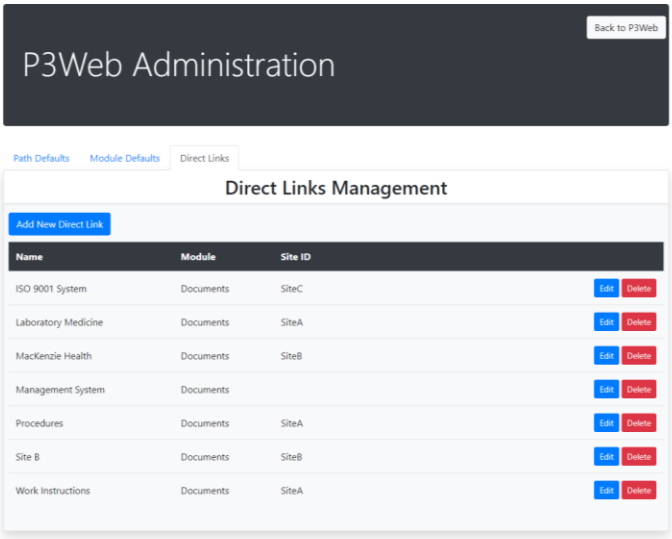


Figure 63 - P3Web Administration: Direct Links

Add Direct Link

To add a Direct Link, click the “Add New Direct Link” button. Browse to the desired folder in any of the main modules (Documents, Records, Improvements, or Training), set an applicable SiteID and click “Submit”.

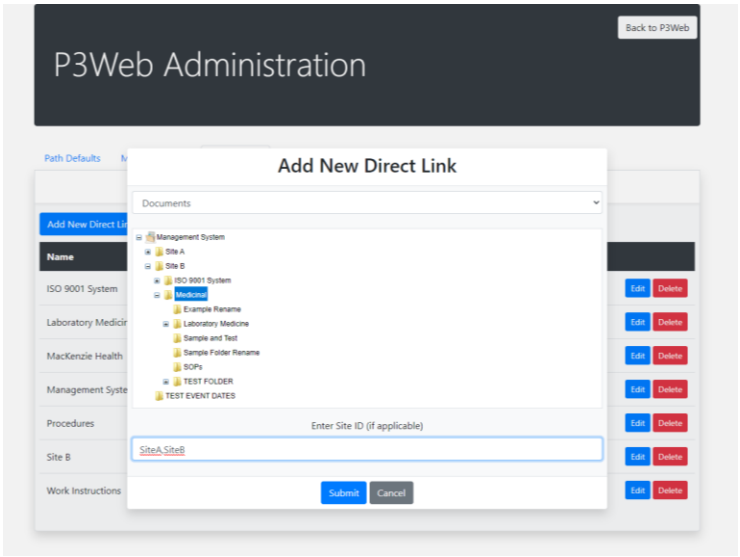


Figure 64 - P3Web Add Direct Link

Edit Direct Link

To Edit a link (Site ID), click the “Edit” button to the right of the desired link and change an available field.

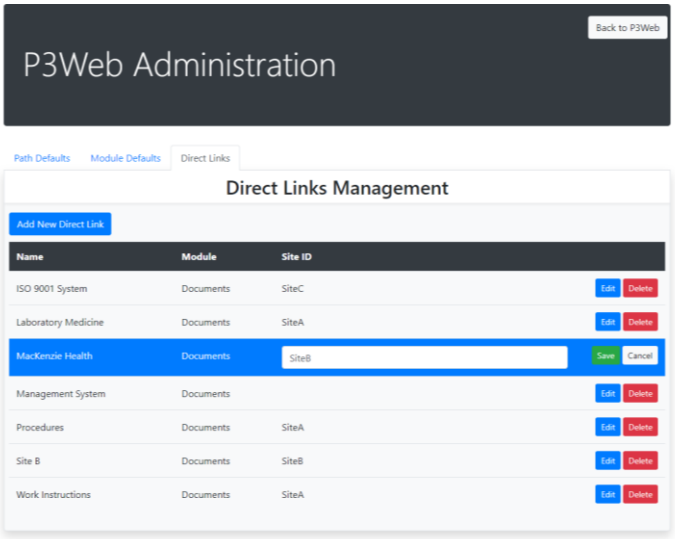


Figure 65 - P3Web: Edit Direct Link

Delete Direct Link

To delete a link, click the “Delete” button to the right of the desired link. The link will be permanently deleted.

P3Web Item/Folder Management

Rename/Move/Delete

Rename Item

Permitted users can rename items by selecting the item and clicking the “Rename” button on the P3Web toolbar or right-clicking and selecting the “Rename Item” option. The user will be prompted to rename either the Name or the Label of the item, or both if they choose.

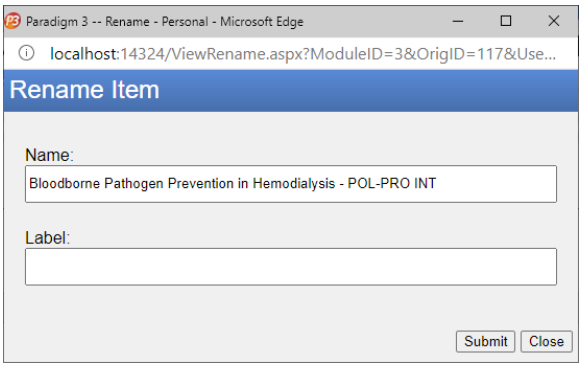


Figure 66 - Rename Item Dialog

To rename the item, update the old information in the applicable field with the desired new information and click “Submit”. P3Web will ask you to confirm your selection.

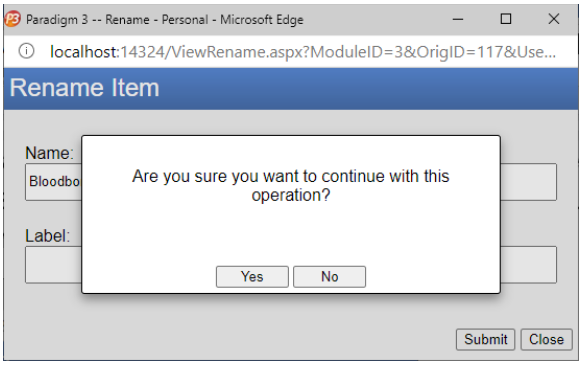


Figure 67 - Rename Item Confirmation

Click “Yes” to confirm. The item will be renamed and the display will refresh to show the updated information in the item List View.

Rename Folder

Renaming folders is similar to renaming items, without the option to rename the label.

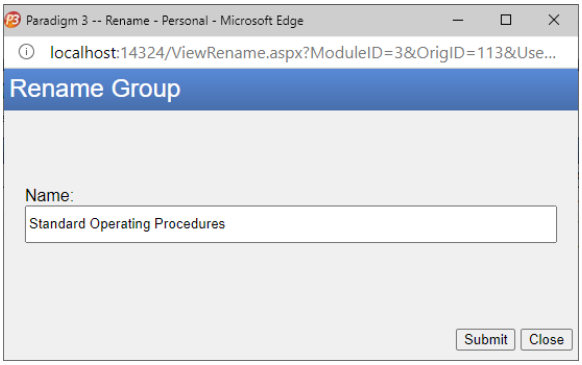


Figure 68 - Rename Folder Dialog

Update the “Name” field with the desired new value and click “Submit”. P3Web will ask you to confirm your selection.

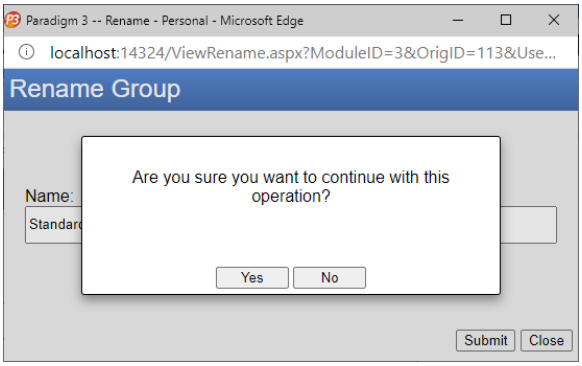


Figure 69 - Rename Folder Confirmation

Click “Yes” to accept the change. P3Web will refresh the Tree View to include the newly renamed folder.

Move Item

Permitted users can move items by selecting the item and clicking the “Move” button on the P3Web toolbar or right-clicking and selecting the “Move Item” option. The “Move Item” dialog will open, allowing the user to select a new destination for the item.

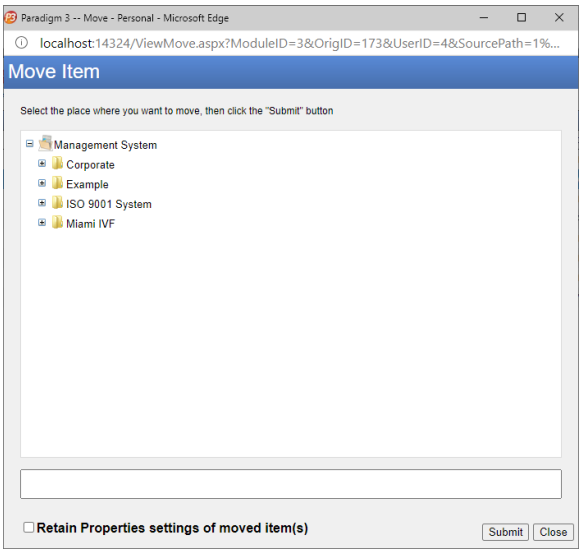


Figure 70 - Move Item Dialog

Users can choose to retain the existing properties (Event Dates, Publishing, Categories) or to have them be inherited from the destination. Make your selection using the checkbox at the bottom left and click “Submit”. P3Web will confirm your action.

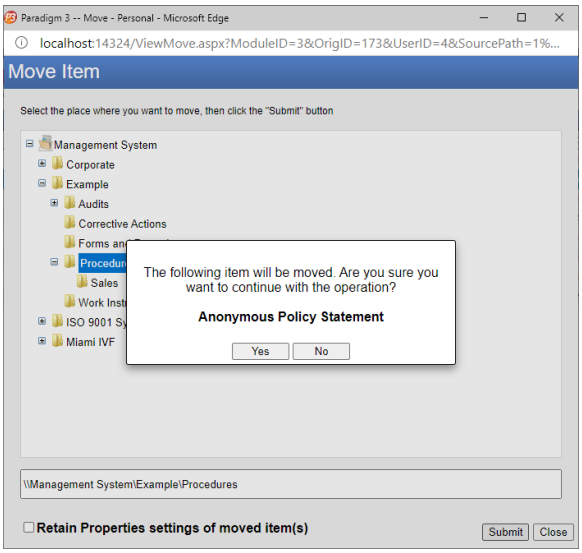


Figure 71 - Move Item Confirmation

Click “Yes” to confirm the choice. Once the item is moved, the List View will be updated to display with the item removed from the list. Browse to the new location to view the moved item.

Move Folder

Permitted users can move folders to other sections of the Tree View. Highlight the desired Tree View folder and click the “Move” button on the P3Web toolbar or right-click

the folder. Then select the option to “Move Folder”. P3Web will present the “Move Item/Group” dialog

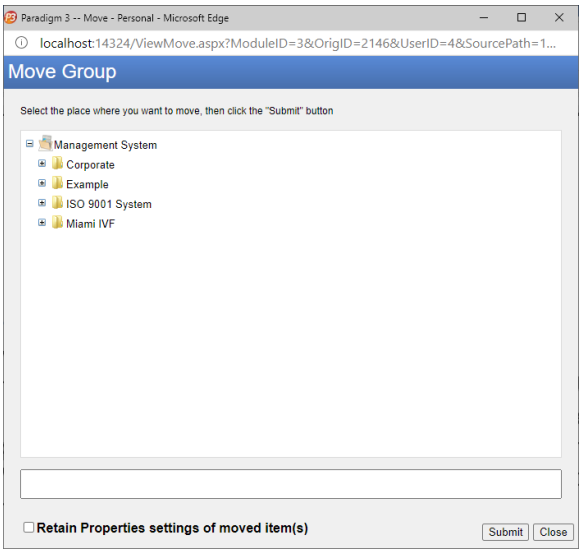


Figure 72 - Move Folder Dialog

Browse the associated tree to select the new location for the folder. Users can choose to retain the existing properties (Event Dates, Publishing, Categories) or to have them be inherited from the destination. Make your selection using the checkbox at the bottom left and click “Submit”. P3Web will confirm your action.

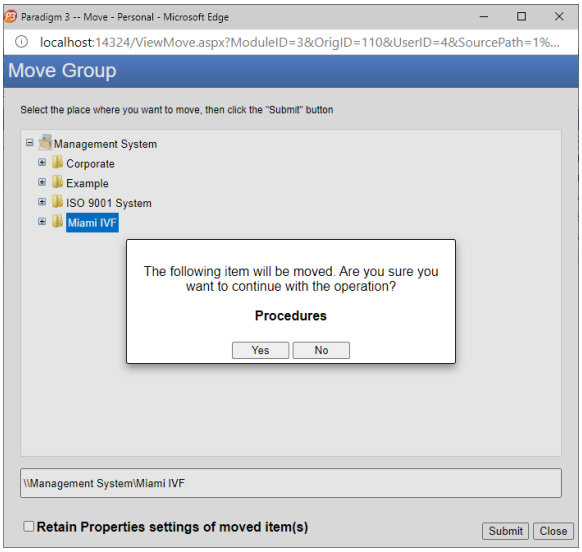


Figure 73 - Move Folder Confirmation

Click “Yes” to confirm. The Tree View will refresh to the parent folder of the selected/moved folder.

Delete Item

Permitted users can delete items in P3Web. Select the desired item and click “Delete” from the P3Web toolbar or right-clicking. Then select “Delete Item” from the list. The “Delete Item” dialog will open, showing all available versions of the selected item.

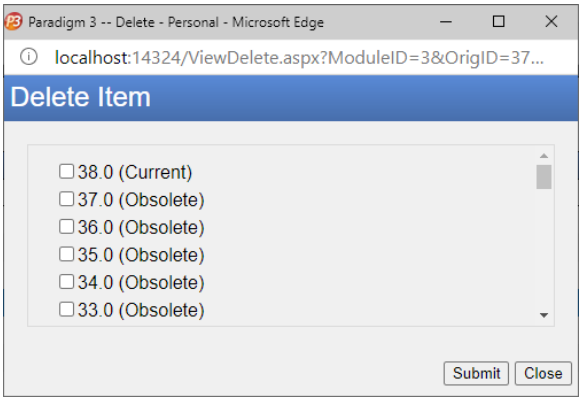


Figure 74 - Delete Item Dialog

Check the box for any version you wish to delete, then click “Submit”. P3Web will confirm the action.

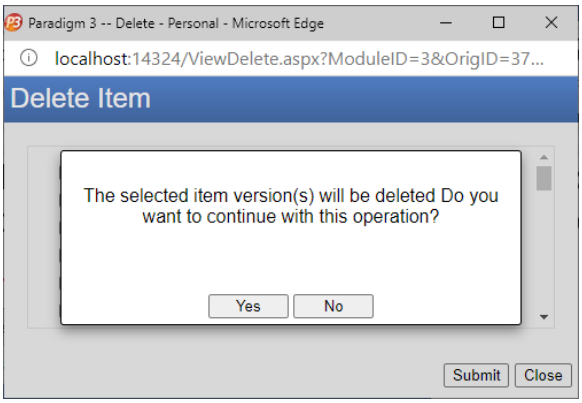


Figure 75 - Delete Item Confirmation

Click “Yes” to confirm the choice and commit the deletion operation.

Delete Folder

Permitted users can delete folders from the Tree View. Note that all sub-folders and items will also be marked as deleted. Select the desired folder and click the “Delete” button on the P3Web toolbar or right-clicking, then select “Delete Folder” from the list. P3Web will confirm the folder for deletion by name in the “Delete Folder” dialog.

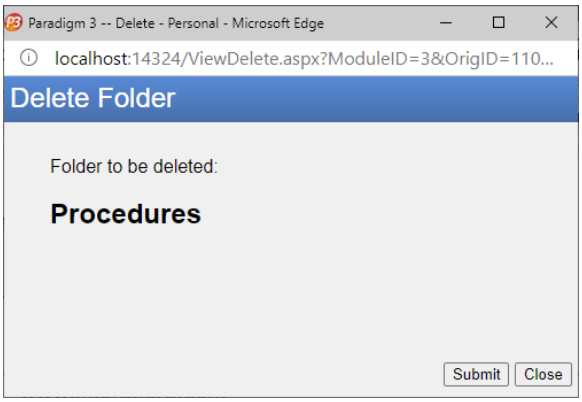


Figure 76 - Delete Folder Dialog

Click “Submit” to proceed. P3Web will confirm the operation.

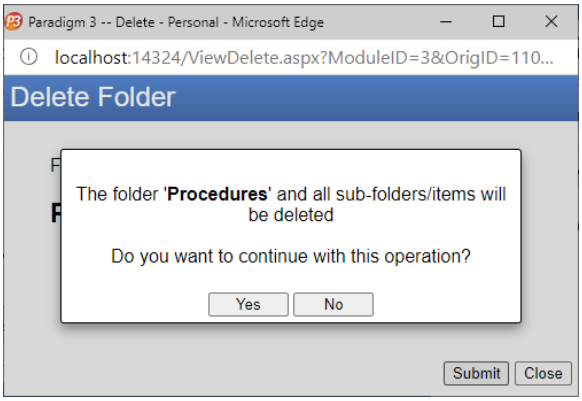


Figure 77 - Delete Folder Confirmation

Click “Yes” to commit. The Folder will be deleted and the Tree View will select the parent folder.

Copying Folder Structures or Items

Authenticated and permitted users can copy a folder structure or item in any module. This is achieved by right clicking any folder/item and selecting “Copy to…”

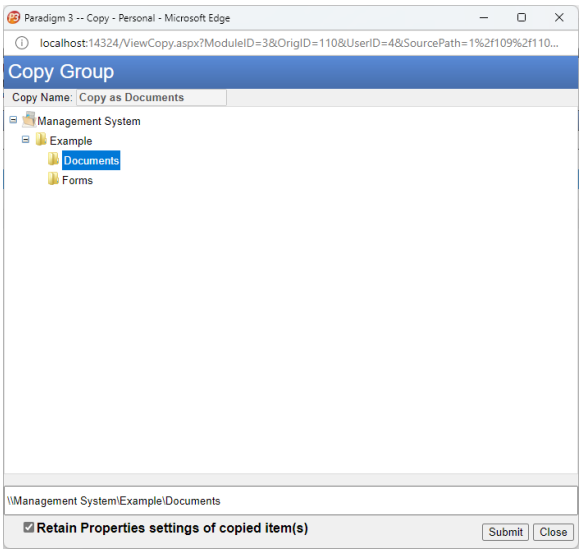


Figure 78 - Copy a Folder

Viewing and Modifying Item/Group Role Members

Authenticated users can view a list of available roles and their members for every document. Open the Properties dialog and click the “Roles” tab to view the list. Users can browse the list of roles on the right by selecting them. This will display the role’s current members on the left panel. Administrators can manage the list of role members for any item in the system. When you select a role, control buttons will appear in the lower right, allowing the user to add/remove role members.

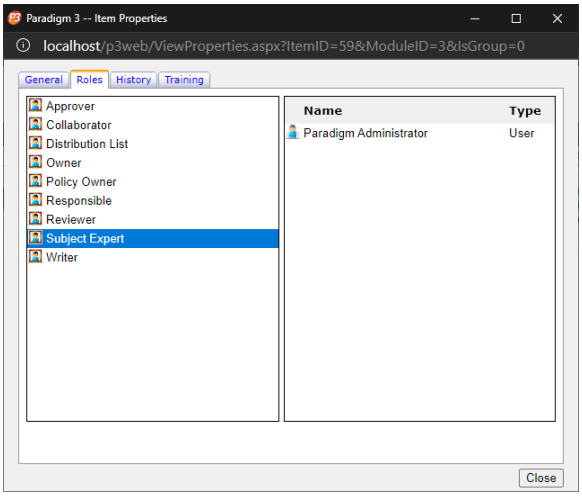


Figure 79 - Item Roles: Read View

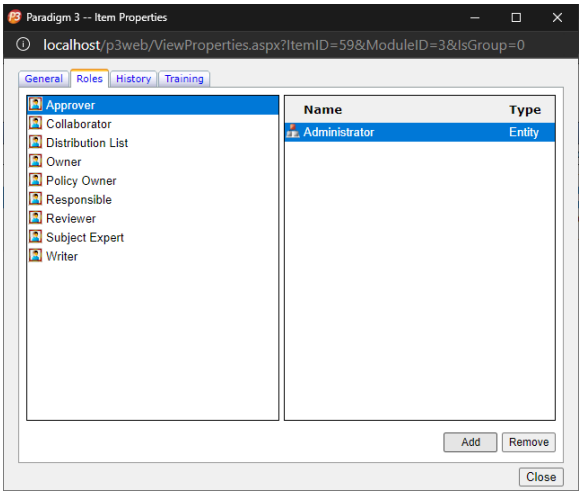


Figure 80 - Item Roles: Edit View

Add Members to Item Roles

To add members to a role, select the desired role and click the “Add” button. The “Assign User/Entity” dialog will open, allowing you to browse the Users module for specific users, entities or position titles. Highlight the desired user/entity and click the “Add >” button to move that user/entity over to the “selected” window. Click “OK” to commit and save the changes.

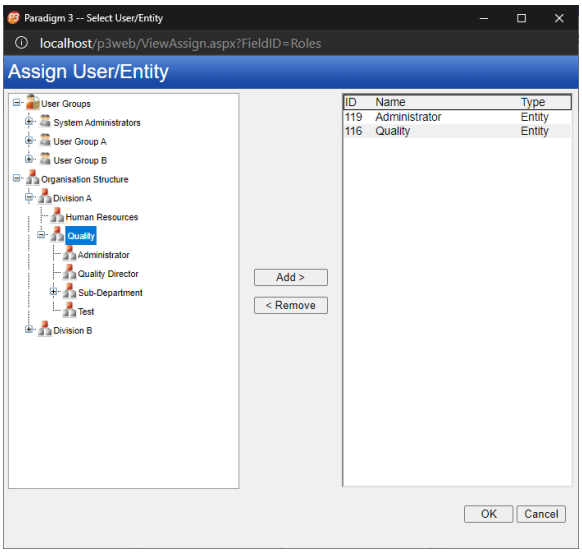


Figure 81 - Select User/Entity for Role

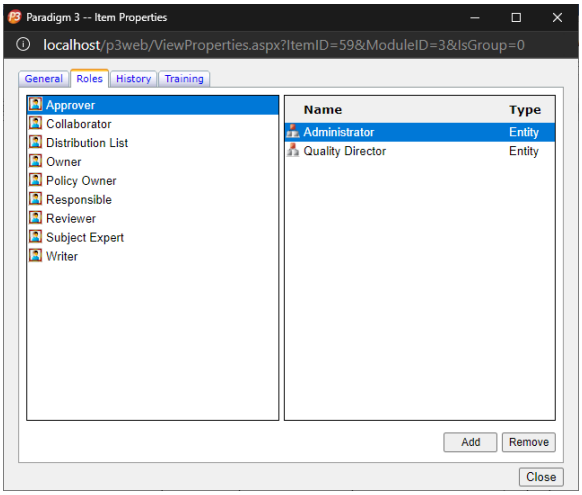


Figure 82 - Added User/Entity

Remove Members from Item Roles

To remove a member from a role, select the desired role, then select the desired member. Then click “Remove” to remove the member from the role. The change will be instantly committed and saved.

Modifying Roles for Folders

Administrators can modify the list of role members for any folder, and also apply a specific role and its members to sub-files or all sub-folders.

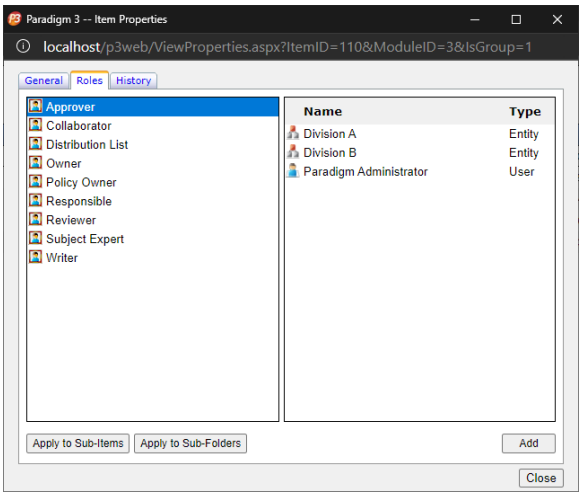


Figure 83 - Group Roles: Edit View

To add members to a role, select the desired role and click the “Add” button. This will open the “Assign User/Entity” dialog

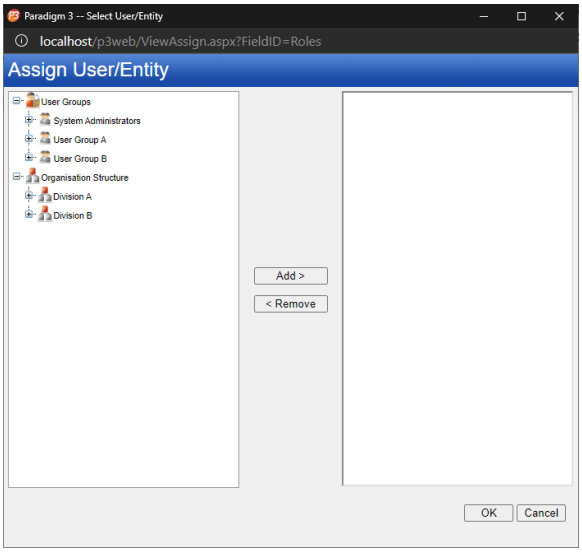


Figure 84 - Select User/Entity for Group Roles

Select a User/Entity from the left panel and click “Add >” to add them to the right panel. Once all members have been assigned, click “OK” to commit the changes.

To remove members from a role, select the desired role, select the desired member and click the “Remove” button. The member will immediately be removed from the role for the selected folder/item.

Applying Roles to Folder Items and Sub-Folders

Administrators can apply a role and its members to sub items and also to all sub-folders and items. To apply only to the immediate items contained in that folder, click the “Apply to Sub-Items” button. To apply the role to all sub folders and items, click the “Apply to Sub-Folders” button.

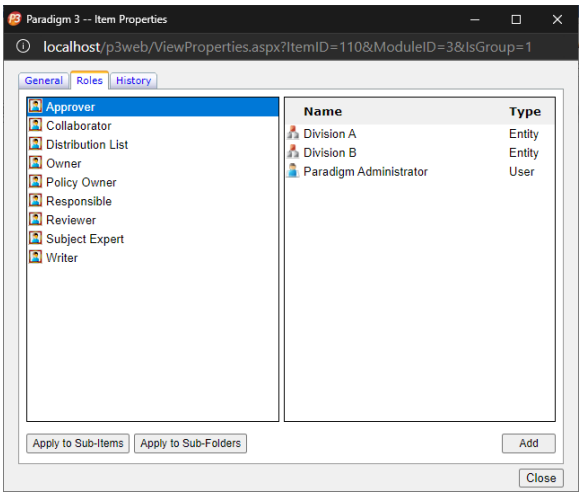


Figure 85 - Added Group Role User/Entity

Searching in P3Web

P3Web offers a fully featured search engine that integrates with all modules. Users can search for Documents, Records, Improvements, Training or Action Items.

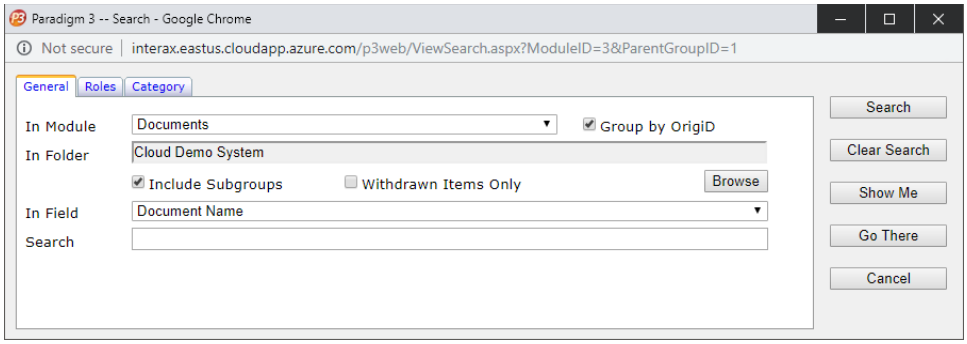


Figure 86 - Search Dialog

Searching in a Specific Module

Documents

P3Web Search allows users to search permitted folders in the Documents module by the following criteria:

- Document Name
- Document Label
- Item ID
- Original ID
- Last Modified Date
- Converted Date
- Status
- Document Notes
- Document History
- Document Containing Text

Records/Improvements/Training

P3Web Search allows user to search permitted folder in the Records, Improvements, and Training modules by the following criteria:

- Document Name
- Document Label
- Item ID
- Original ID
- Last Modified Date
- Converted Date
- Status
- Item Notes
- Item History
- Attachment Name
- Event Dates

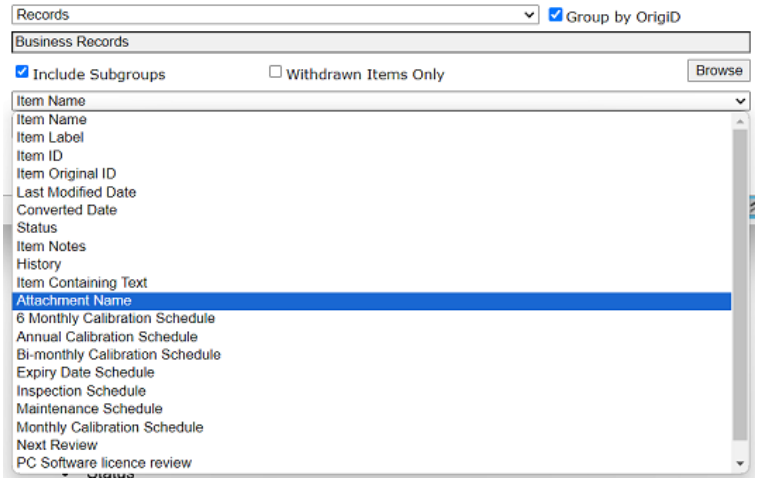


Figure 87- Records Module Options

Action Items

P3Web Search allows user to search permitted folder in the Action Items module by the following criteria:

- Title
- Status
- Due Date
- Details
- Sent Date
- Recipient

Browsing Folders to Search

It may be necessary to refine the search location to improve response time and produce a quicker result. Clicking the “Browse” button in the Search dialog will open a model pop-up that allows the user to select a subfolder from which the search can begin.

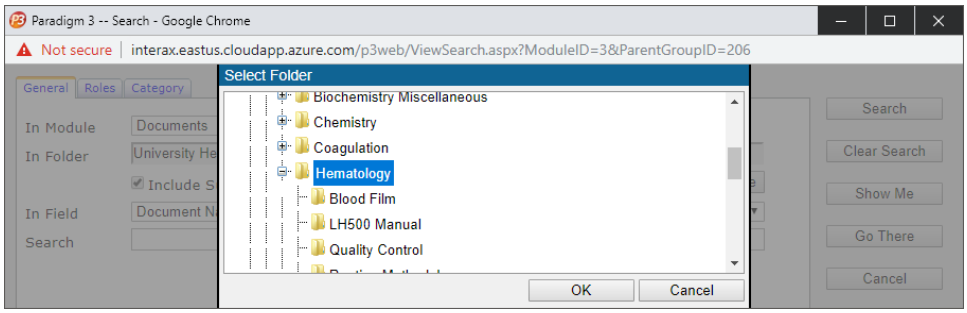


Figure 88- Search: Select Folder

Clicking “OK” will set the selected folder as the search root.

Working with Search Results

Results for any search expands the search dialog and displays a result count.

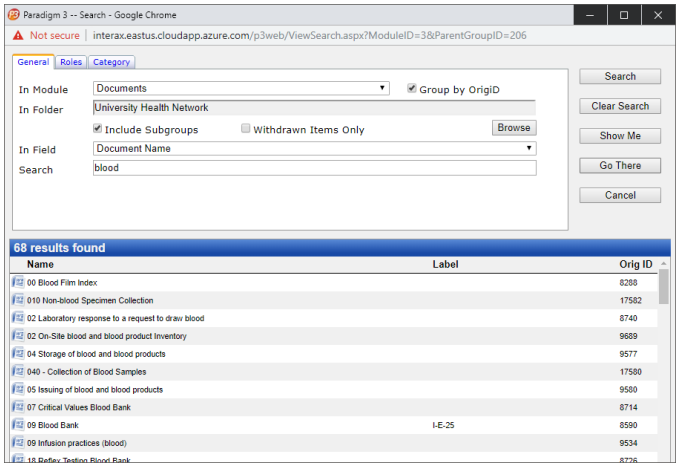


Figure 89- Search Results

Users can select any result item in the list and click “Show Me” to view the item or “Go There” to be brought directly to the folder location of the item.

Advanced Search in P3Web

P3Web now offers a new feature of Advanced Search option that integrates with all modules. Users can now add multiple conditions/criteria to search for Documents, Records, Improvements, Training or Action Items. This will reduce the search time for users as they can add more than one filter for search.

To access this feature, User needs to click on the down arrow button on bottom right of the search screen. See below:

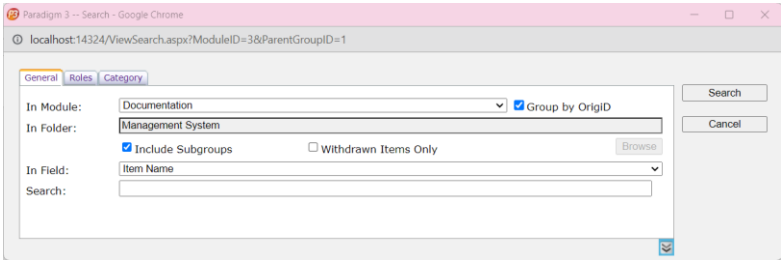


Figure 90- Advanced Search Option at Bottom

After clicking the button, a new section appears below with additional options to search Documents, Records, Improvement, Training or Action Items.

See below figure:

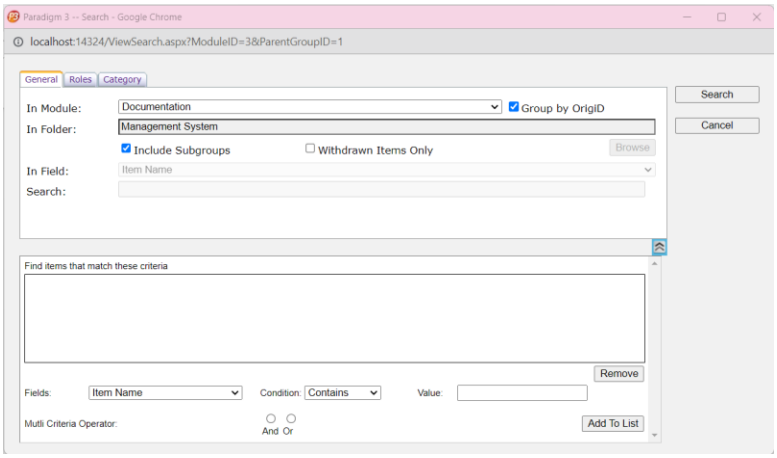


Figure 91- Advanced Search Section

Multiple Search Criteria

User can specify more than one condition to search an item, which will give more precise result and reduce the search time of application. Users use AND OR search operator to create their own filters.

To add different conditions and filters use available dropdown options as below:

Example:

Document Name – Test
Status – Current
LastModified Date – January 1st, 2023, till Current date.

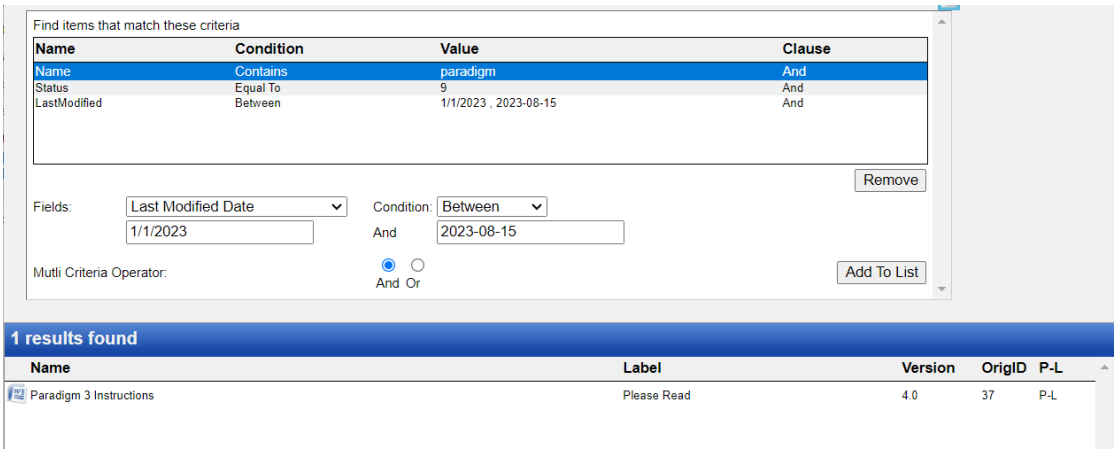


Figure 92- Advanced Search Result

Similarly, users can search for any module by using multiple search conditions.

Item/Group Properties

All items and groups in P3Web have an associated Properties dialog that provides crucial information that relates to them. To open the Properties dialog, select a group from the Tree View or an item from the Item List View and click the “Properties” button on the P3Web toolbar.

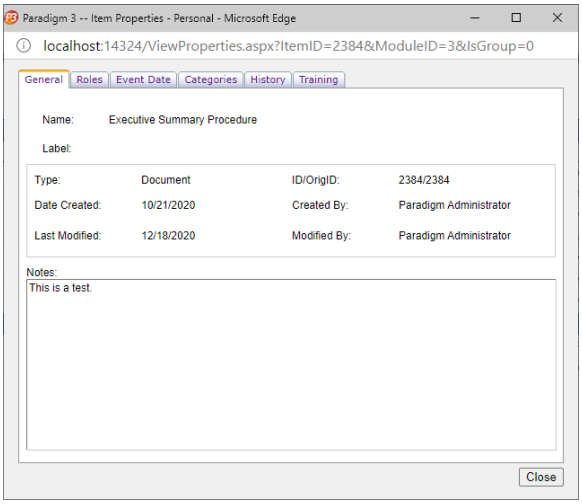


Figure 93 - P3Web Properties Dialog

General Tab

The General Tab of the Properties dialog (figure 81) displays all general properties related to the selected item or group.

Roles Tab

The Roles Tab of the Properties dialog displays all available roles and its associated members, if applicable. Permitted users can edit the role members of any role and apply those changes to sub-folders or items.

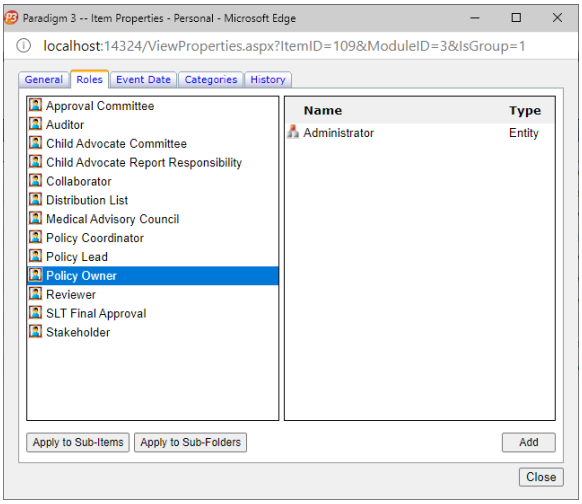


Figure 94 – Properties: Roles Tab

Event Date Tab

The Event Date tab of the Properties dialog displays any applied Event Dates to the item or folder. Permitted users can edit these Event Dates and apply any changes to sub-folders or items.

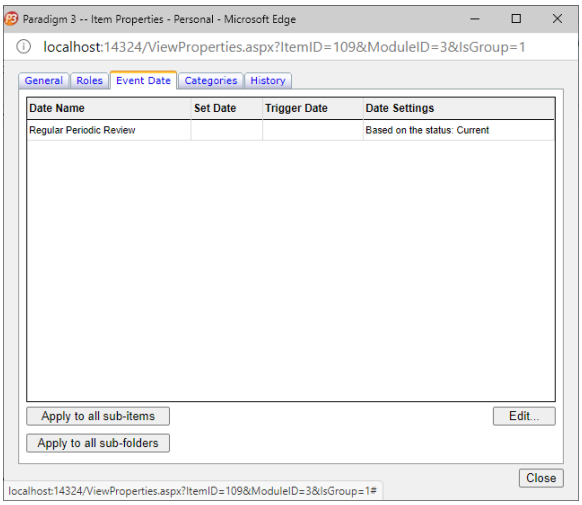


Figure 95 - Properties: Event Date Tab

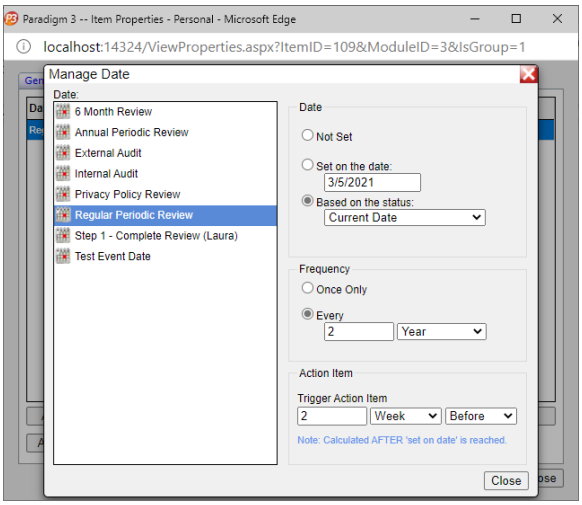


Figure 96 - Properties: Event Tab, Edit Selected Event Date

Categories Tab

The Categories Tab of the Properties dialog displays a list of available and chosen categories for the selected item or group. Permitted users can check additional categories or remove Category selections and apply them to sub-items or folders.

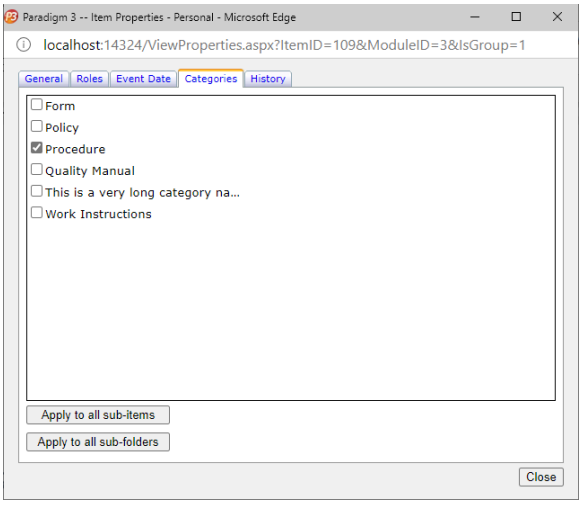


Figure 97 - Properties: Categories Tab

History Tab

The History tab of the Properties dialog displays a detailed transaction history against the selected item or group.

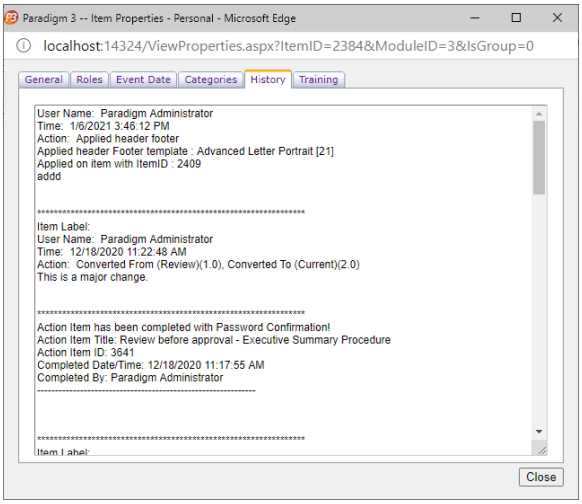


Figure 98 - Properties: History Tab

Training Tab

The Training tab of the Properties dialog is only available when viewing item properties. This tab displays any Training records associated to the selected document by a requirement and will show the status of the associated training. Clicking SHOW ME or GO THERE will take the user to the selected Training record or to the record's parent folder in the Training module.

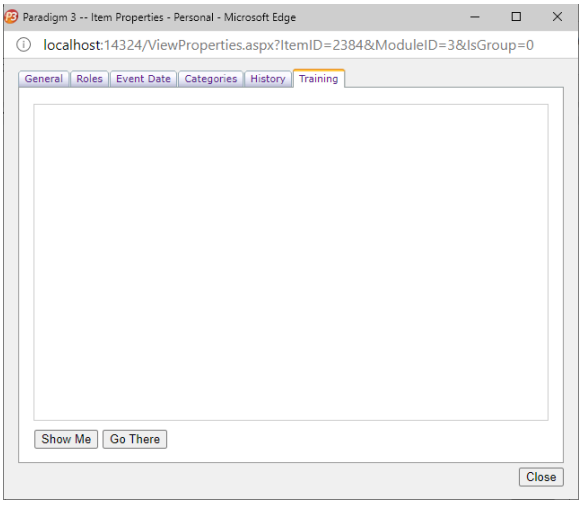


Figure 99 - Properties: Training Tab

Para-Links

Viewing a Para-Link

To view an item's Para-Links in any module, a user can either select the item from the Item List View and click the "Para-Link" button on the P3Web toolbar, or open any item and click the "Para-Link" button on the Item Toolbar. The Para-Link pop-up window will display all available links for that item:

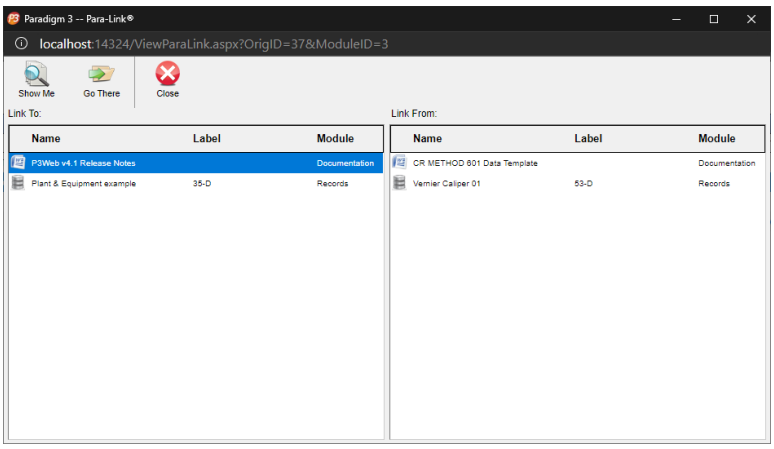


Figure 100 - Para-Links Dialog in Read View

Highlighting a link item will display the "Show Me" and "Go There" buttons, which behave in the exact same way as for Action Items.

Adding Item Para-Links

To add an Item Link, select/open the item from which you want to create the link and click the "Para-Link" button, if you are permitted to add/remove para-links, the "Add" and "Remove" buttons will be available to you:

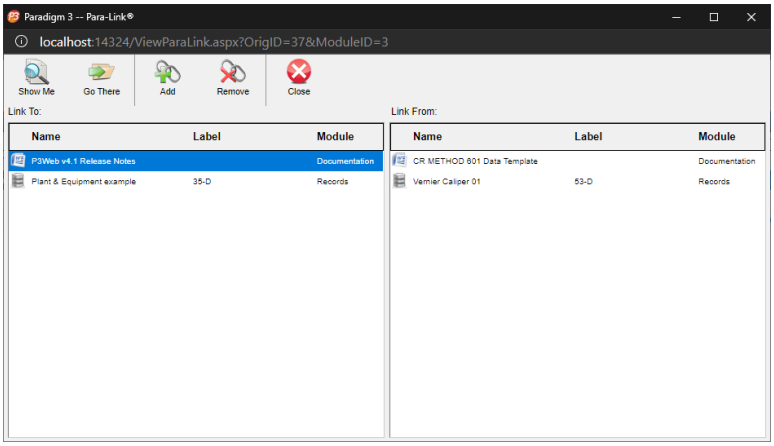


Figure 101 - Para-Links Dialog in Edit View

Click the “Add” button, select “Add Item Para-link” from the pop-up dialog and click “OK” to open the “Add Para-Link” window:

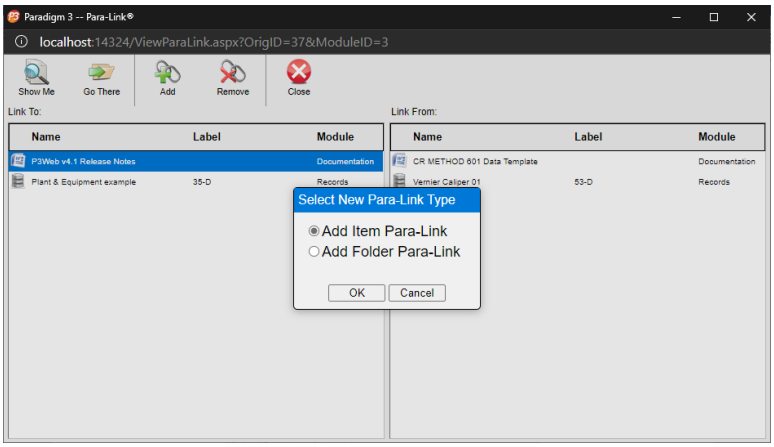


Figure 102 - Adding an Item Link

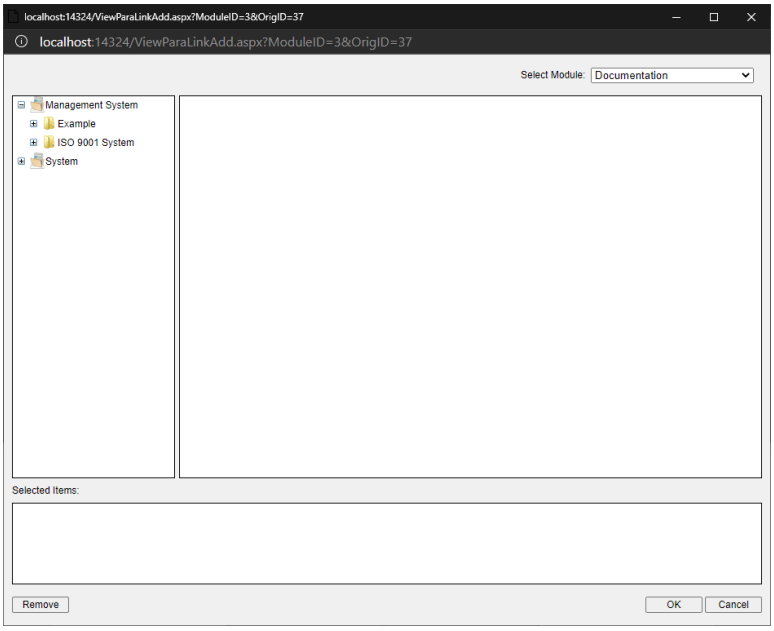


Figure 103 - Select Link Destination

From here, the user can select any available module then browse the available Tree View to seek the desired linked item. Multiple items can be selected simply by clicking on them and browsing for more:

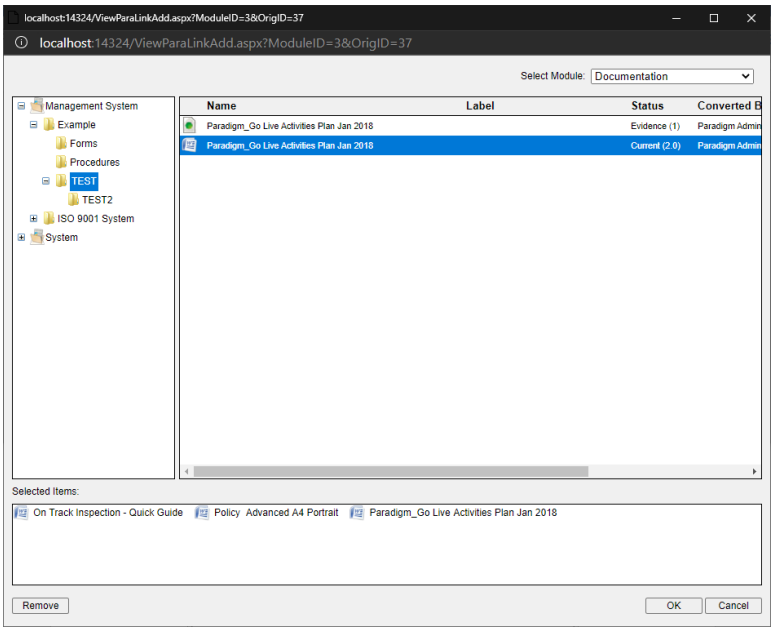


Figure 104 - Multiple Selected Links

Items accidentally added to the list can be removed by selecting them from the "Selected Items" list and clicking "Remove".

To add the selected item(s), click "OK". After a confirmation message, the window will close and you will see your new Para-Links added to the item:

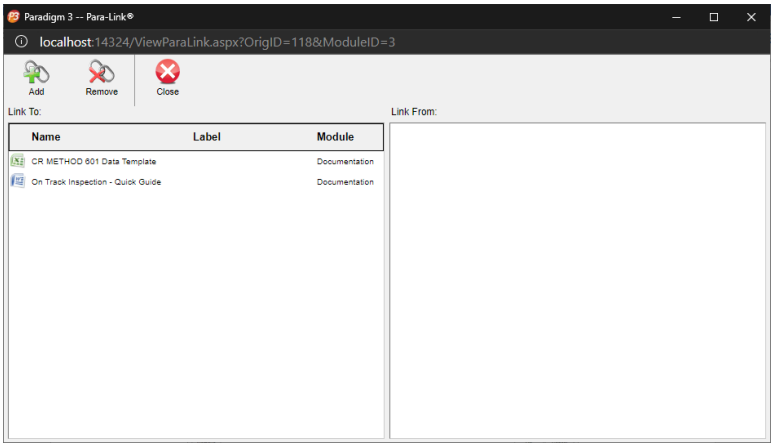


Figure 105 - Added Para-Links

Adding Folder Para-Links

To add a folder Link, select/open the item from which you want to create the link and click the "Para-Link" button, if you are permitted to add/remove para-links, the "Add" and "Remove" buttons will be available to you. Click the "Add" button, select "Add Folder Para-Link" from the pop-up dialog and click "OK" to open the "Add Para-Link" window:

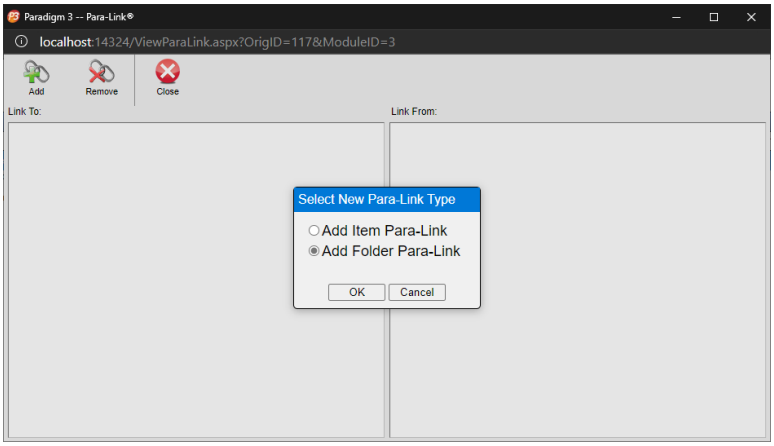


Figure 106 - Add Folder Link

The “Add Folder Para-Link window will open. From here, select the desired module and browse through the folder Tree View. Clicking on a folder name will add it to the “Selected Folder” field. Only one folder can be linked at a time.

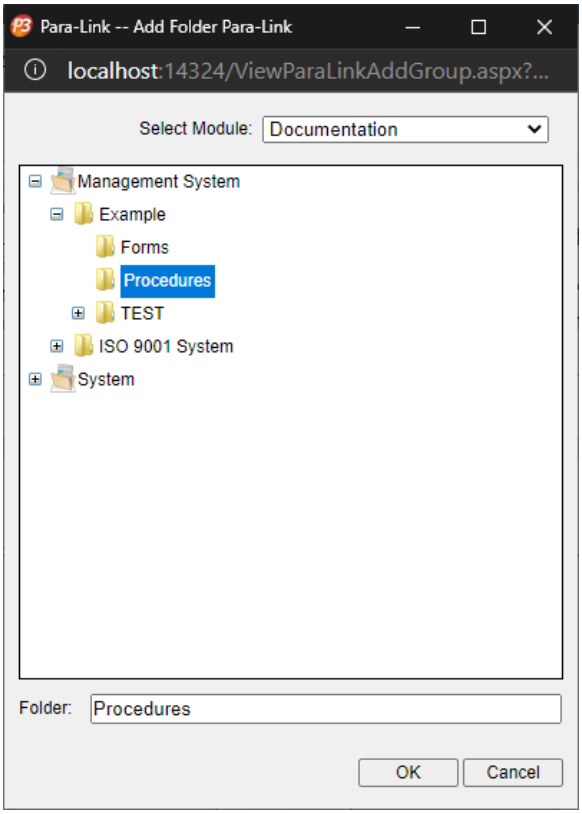


Figure 107 - Para-Link: Select Destination Folder

Click “OK” to add the link and the window will close, allowing you to see your newly added folder link:

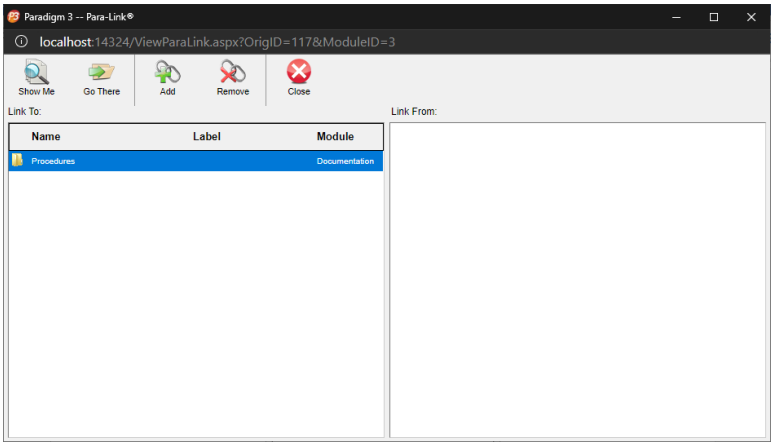


Figure 108 - Added Folder Link

Saved Searches and Reports

P3 Web allows users quick access to saved report templates from Paradigm 3. To access this feature, log into P3Web, select any module and click the “Reports” button on the toolbar to open a list of available reports. The reports are based upon the saved report criteria and will display the included fields and search results specified in the report template:

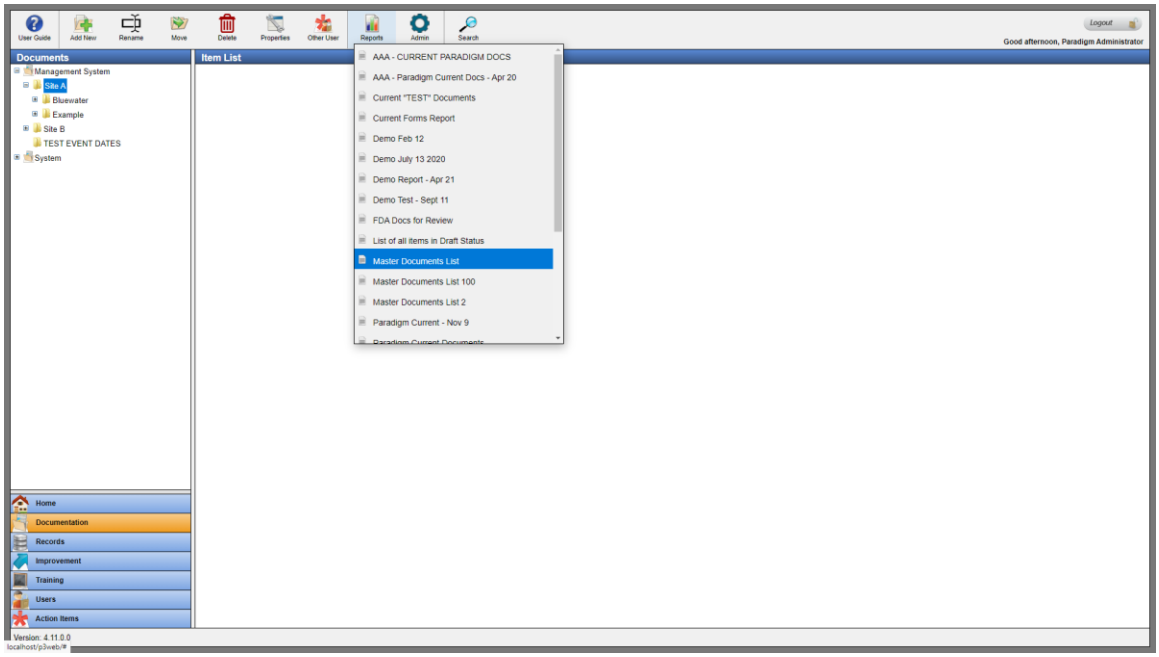


Figure 109 - Saved Searches List

Clicking on one of the available listed reports will open a new window, displaying the report data, with links to print, export to Word, and export to Excel. Double-clicking on any result item will open that item for viewing, provided it is current and publishing to the P3Web application.

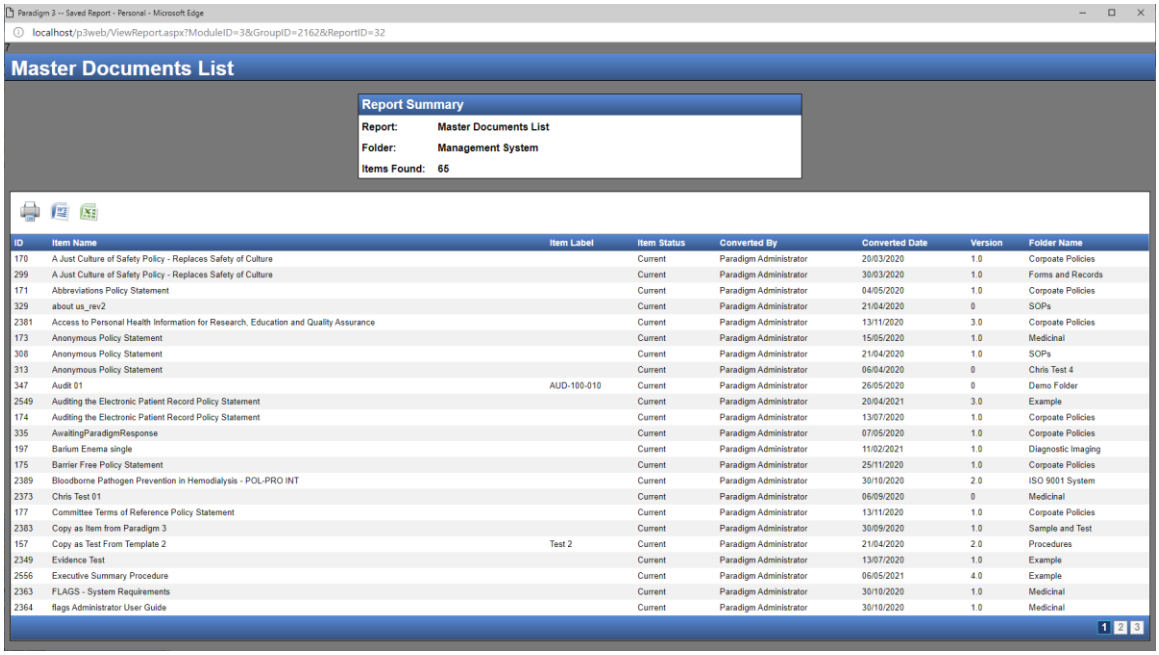


Figure 110 - Saved Search Result List

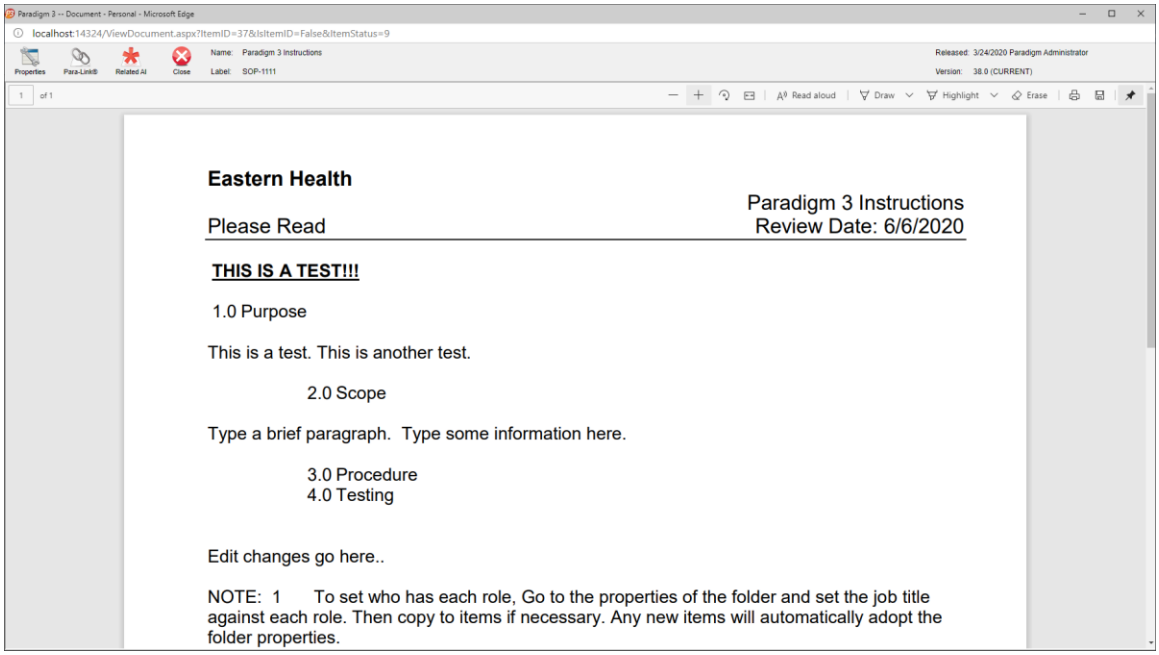


Figure 111 - Saved Search Result Item View