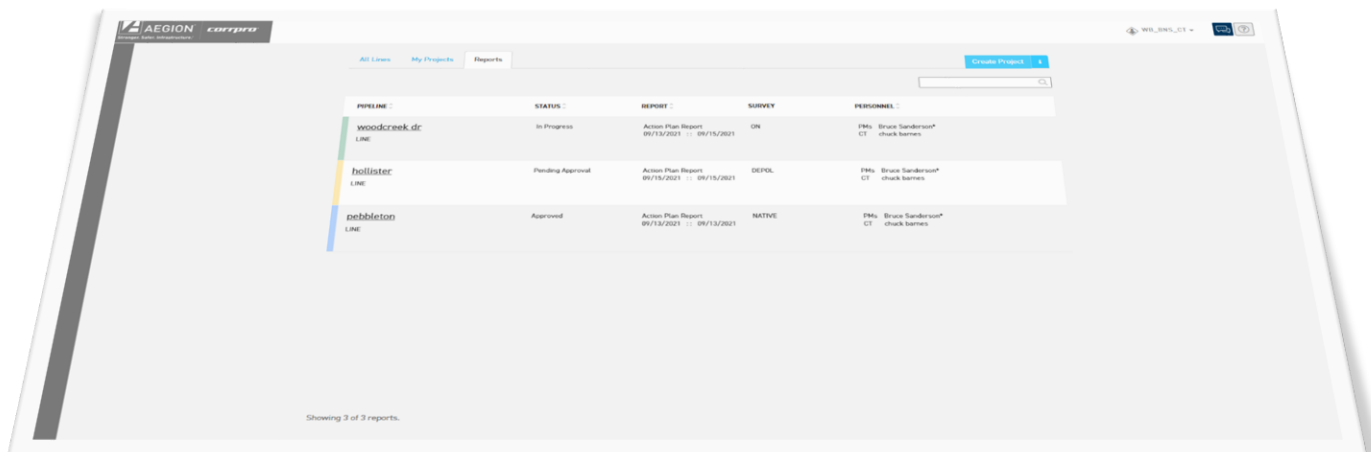


Action Plan Manager

a brand-new SCANLINE® feature



The screenshot displays the AEGION corepro Action Plan Manager interface. It features a navigation bar with 'All Lines', 'My Projects', and 'Reports' tabs. A 'Create Project' button is visible in the top right. The main content area shows a table of reports for three pipelines: woodcreek, hollister, and pebbleton. The table columns are PIPELINE, STATUS, REPORT, SURVEY, and PERSONNEL. The status of the reports is 'In Progress', 'Pending Approval', and 'Approved' respectively. The personnel listed are 'PM: Bruce Sanderson' and 'CT: chuck barnes'.

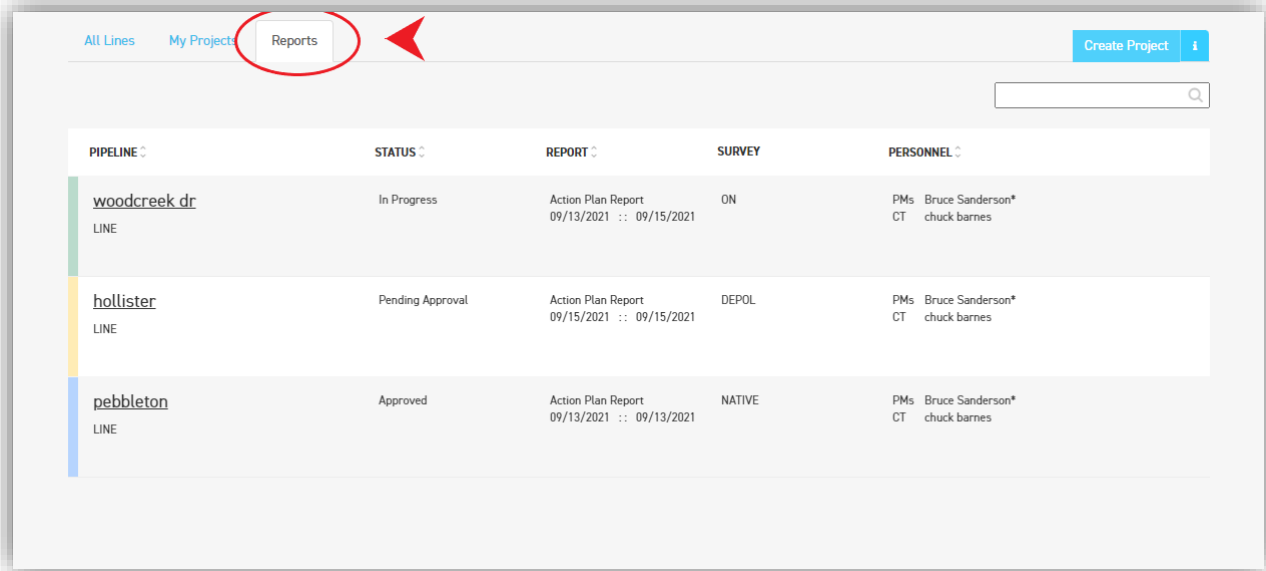
PIPELINE	STATUS	REPORT	SURVEY	PERSONNEL
woodcreek LINE	In Progress	Action Plan Report 09/13/2021 - 09/15/2021	ON	PM: Bruce Sanderson* CT: chuck barnes
hollister LINE	Pending Approval	Action Plan Report 09/15/2021 - 09/15/2021	DEPOL	PM: Bruce Sanderson* CT: chuck barnes
pebbleton LINE	Approved	Action Plan Report 09/13/2021 - 09/13/2021	NATIVE	PM: Bruce Sanderson* CT: chuck barnes

Showing 3 of 3 reports.

Oversight * Review * Locking * Status Changes * Email Notifications * Discoverable

Where

open SCANLINE® and click reports

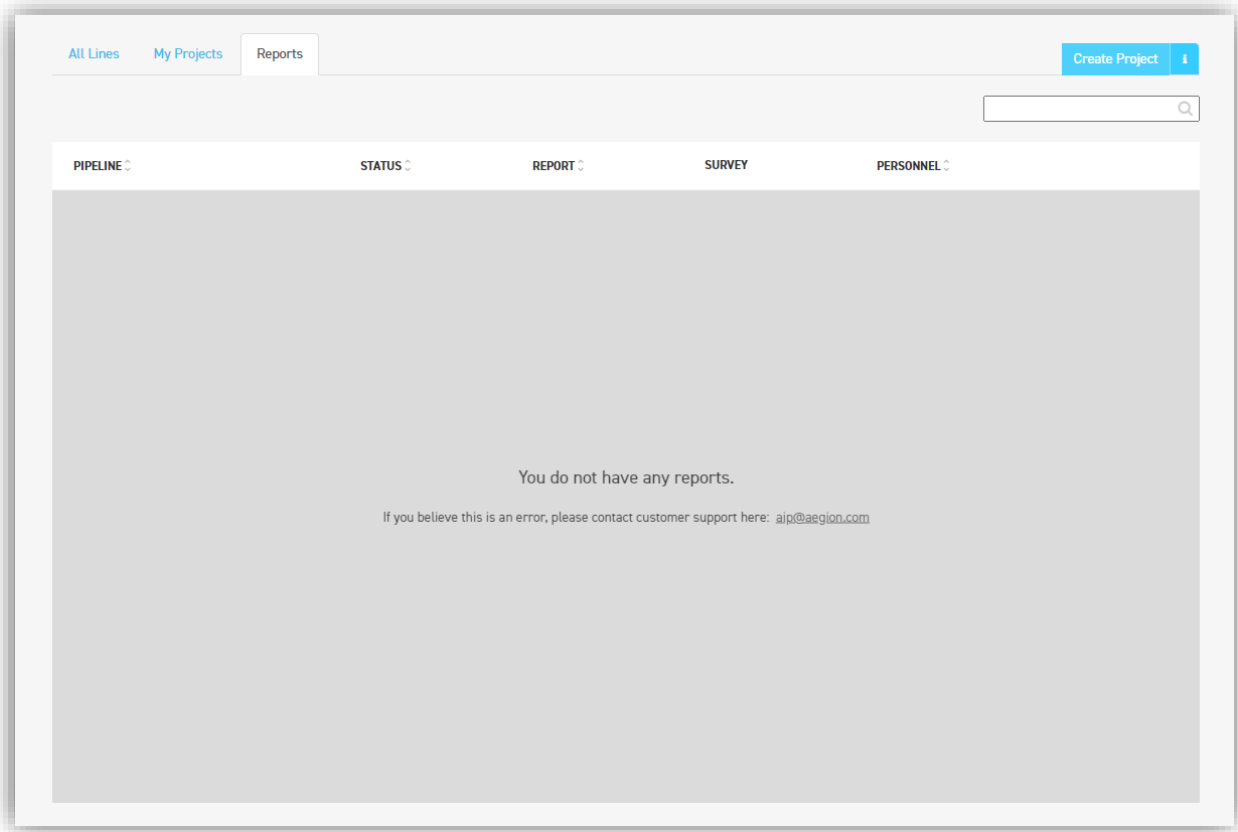


How to access the reports manager

- Open SCANLINE®
- Move mouse to top left of page
- You will see 3 tabs: All Lines, My Projects, & Reports
- Click Reports

For New Users

no reports no problem



You Do Not Have Any Reports

New users will often see the above message because they have not created any action plans nor closure reports.

What to do

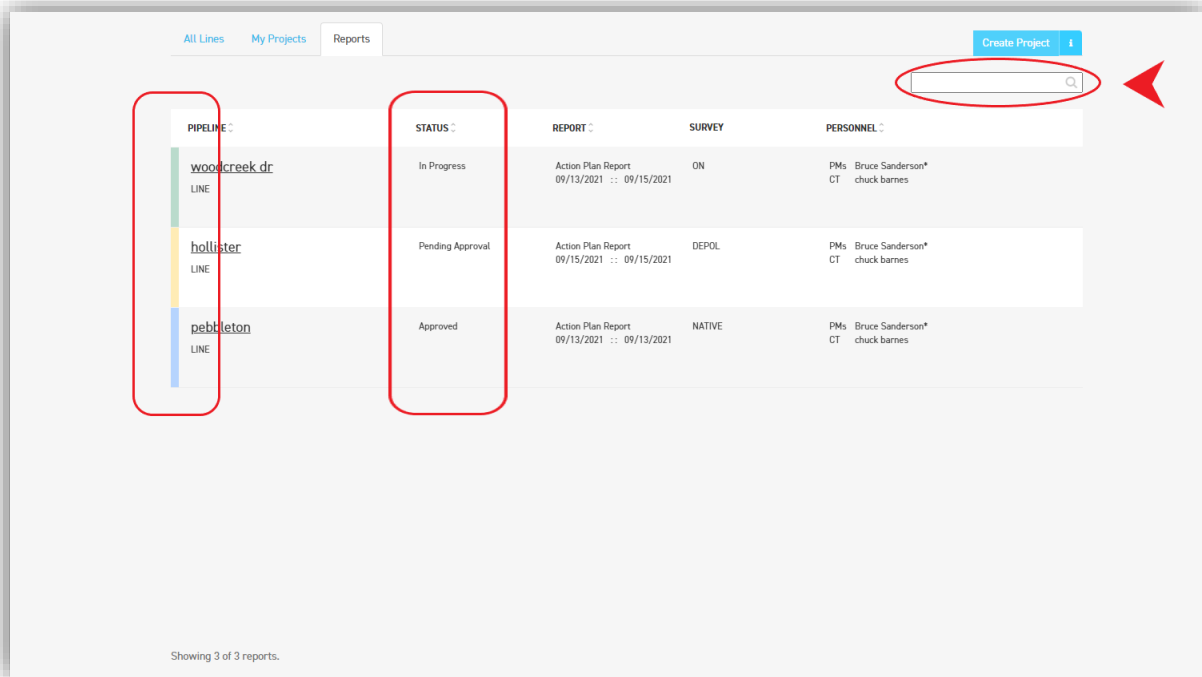
Begin creating reports by reviewing and analyzing your lines.

OR

If you believe this is an error and you should be seeing reports, contact customer support. Click the customer support email address and a preformatted email will open in your email client.

Table Features

search & status



The screenshot shows the SCANLINE interface with a table of reports. A search bar is located at the top right, and a red arrow points to it. The table has columns for PIPELINE, STATUS, REPORT, SURVEY, and PERSONNEL. The first three columns are highlighted with red boxes. The table shows three reports: 'woodcreek dr' (In Progress), 'hollister' (Pending Approval), and 'pebbleton' (Approved). The status is color-coded: green for In Progress, yellow for Pending Approval, and blue for Approved.

PIPELINE	STATUS	REPORT	SURVEY	PERSONNEL
woodcreek dr LINE	In Progress	Action Plan Report 09/13/2021 :: 09/15/2021	ON	PMs: Bruce Sanderson* CT: chuck barnes
hollister LINE	Pending Approval	Action Plan Report 09/15/2021 :: 09/15/2021	DEPOL	PMs: Bruce Sanderson* CT: chuck barnes
pebbleton LINE	Approved	Action Plan Report 09/13/2021 :: 09/13/2021	NATIVE	PMs: Bruce Sanderson* CT: chuck barnes

Showing 3 of 3 reports.

Search

Located top right of table

- Click in the search box
- Enter text you would like to match on
- We will check your reports':

Name, status, technician,
project manager, survey type,
& report type

Status

3 statuses - color coordinated

- **In Progress** – green
- **Pending Approval** – yellow
- **Approved** - blue

Changing Action Plan Status

located bottom left in the Action Plan footer

The screenshot displays the 'INTEGRITY ACTION PLAN™' interface. On the left, a sidebar contains navigation links: 'Action Plan Report' (highlighted in blue), 'Survey Validation', 'Exceptions', and 'Segment Reports'. The main content area is titled 'Action Plan Report' and includes a form for 'Compliance Date (NTE)' and 'Action Plan Date', both set to '09/13/2021'. Below this is the 'Survey Validation' section, which contains three questions with radio button options for 'Yes' and 'No'. The first question is 'Is the survey data valid for the entire extent of the survey?' with 'No' selected. The second question is 'If not, is resurvey required on invalid data segments?' with 'No' selected. The third question is 'Are there any skips that require survey?' with 'No' selected. To the right of these questions are lists of 'Typical conditions that may invalidate a survey' and 'Typical conditions that may require surveys of skips'. At the bottom left of the main content area, a red circle highlights a button labeled 'Request Approval', with a red arrow pointing to it.

How To Change Your Action Plan Status

You will find buttons in the bottom left of your action plan allowing you to change the status.

- These buttons will differ depending upon who is reviewing the action plan and the current status.
- We will address the details of the various use cases later in this document.

Status Change Workflows

what changes are available to who and when

Corrosion Technicians

Request Approval

In Progress

When a CT is working on their own [In Progress](#) Action Plan, they can request approval which will change the AP status to [Pending Approval](#)

Cancel Approval Request

Pending Approval

When a CT is reviewing their own [Pending Approval](#) Action Plan, they can cancel approval request which will change the AP status to [In Progress](#).

Project Managers

Request Approval

In Progress

When a PM is reviewing their own or another's [In Progress](#) Action Plan, they can request approval which will change the AP status to [Pending Approval](#).

Cancel Approval Request

Pending Approval

When a PM is reviewing their own [Pending Approval](#) Action Plan, they can cancel approval request which will change the AP status to [In Progress](#).

Approve

Reject Approval Request

Pending Approval

When a PM is reviewing someone else's [Pending Approval](#) Action Plan, they can either approve or reject approval request which will change the AP status to either [Approved](#) or [In Progress](#) respectively.

Unlock Action Plan

Approved

[Approved](#) Action Plans are locked and un-editable. PMs can unlock action plan, which will change the status to [In Progress](#), allowing for edits once again.

Requesting Approval

how to and what is needed

Request Approval

Add custom contact

Entering a custom contact will add them to the below Project Managers list.

Name Email

NAME EMAIL +

Project Managers

Below is a list of project managers you can select to request report approval from.

	NAME	EMAIL
<input type="checkbox"/>	Charles L. Jones	Missing email
<input type="checkbox"/>	Charles L. Jones	charles.l.jones@aeion.com
<input type="checkbox"/>	Charles L. Jones	charles.l.jones@aeion.com

Send Approval Request Cancel

How To Request Approval

- Click the “Request Approval” button in the bottom left corner of your Action Plan.
- Select the PMs you would like to review your Action Plan.
- Use the “Add custom contact” form to add a reviewer you do not see in your PM list.
- Click “Send Approval Request”

Help, My Project Manager Cannot See My Action Plan

If someone invited to approve your Action Plan is unable to do so, please contact customer support at aip@aeion.com. The AIM team needs to grant PM accounts permissions to approve Action Plans.

Email Notifications

for those that created or have been invited to review

Action Plan has been submitted for Line PEBBLETON on 9/13/2021 and is ready for review
[Review Action Plan](#)

[AIP SCANLINE™](#)

When

Any time the action plan status changes, email notifications are sent. They will be formatted like the above screen shot.

Who

The below users will receive email notifications when the AP status is changed:

- The user who created the Action Plan.
- The Project Manager assigned to the Job which the Action Plan is created for.
- The users who have been invited to Review the Action Plan.