The University of Manchester Project Collaboration Tool.

Protocol Document & Quick Start User Guide

Rev 4

https://uom.myconject.com

Contents

PROJECT USE – CONJECT COMMUNICATION

Conject is to be used to provide all users and project teams with continual access to the latest project information for the life cycle of Estates Capital Projects. For this reason it is mandatory for all users to use Conject as the primary communication tool. No documents should be accepted via email.

The system is currently in implementation phase and all comments to improve the usability of the system are welcome. Please notify the PICs below.

The system is currently set up as a document management, communication and process control tool. Further modules are likely to include, Construction contract management and administration, Building Information Modelling (as required for specific projects, the current system has capabilities for reviewing Navis works files), Defects/snagging management tool.

All Information is to be published to Conject, under the relevant project, in the relevant register and issued to the specific users for each recipient company. Each individual Capital Project and Consultant Project Manager should develop its set of processes for managing the project workflow around what the system can offer defining the rules for use of Consultants, Contractors, UoM Users and Project Managers. All request for new processes and Project set up to enable these will go through the PICs.

General responsibilities of all users -
- To follow all protocols contained in the user guides.
- To nominate a Company Administrator responsible for the maintenance of the company data on Conject.
- To maintain their company information on Conject including contact details.
- To ensure that all the required documents are loaded onto the system in the stated formats.
- To regularly monitor their project dashboard to make sure that they stay on top of all documents and comments issued to them.
- To regularly monitor all the information on the project and to stay on top of all documents and comments applicable to your works.
- To report problems and provide feedback through the correct channels (Project Administrator (PIC) or Conject Help-desk).

All users (subject to access rights) of the system can:
- Change their password
- View and print drawings/documents
- Publish new drawings/documents
- Access the receipt logs of drawings/documents their company issues

ADMINISTRATIVE PROCEDURES, ROLES & RESPONSIBILITIES

The **Project Information Coordinators (PICs)** are responsible for granting access to new users to the project. They are also responsible for maintaining the rights of project users and any general queries and feedback to improve the way the University are using the system. They can change a multitude of settings on the system to help make it work better for your Project. Currently, the Project the PIC's are:-

- **Primary contact - Natalie Sullivan (Email: natalie.sullivan@manchester.ac.uk)**
- **Secondary contact - Ryan Lewis (Email: ryan.lewis@manchester.ac.uk)**

Requesting Access to conject for new users and companies

1. Initially, any new companies / users must complete a 'new company / user request form' (found in Administration > Application Area).
2. These forms should be issued to the Project Information Coordinators (PIC's)-
3. The PIC's should then issue these forms to the conject Helpdesk (help.desk@conject.com).
4. Conject will create user accounts and email them direct to the users.
5. Conject will send confirmation once the accounts have been created to the PIC's.
6. Going forward, Basic User Training attendees will be able to create and manage the accounts of any additional project users for their respective companies.

Requesting training for new users and companies

The University will provide training for up to 3 Company Administrators/ super users across all University Projects. Please request this training through the PIC. The Company Administrators will then be expected to train the rest of their company on how to use the system. Main Contractors will be expected to train their own subcontractors on the use of the system.

Additional conject assistance

For any system related queries please contact the **Conject Helpdesk**:-

Email: help.desk@conject.com
**Tel:** 0845 1300 999 (+44(0)1159 248 171 from outside UK)

Getting Started

Passwords – all users will be supplied with a user name and password from conject which will gain them access to the Site as indicated below. The user name will remain constant, but the password is temporary and upon first use of the Site you will be asked to change it. You will be prompted to change your password by the system every 90 days. This is a simple task and serves to secure the domain for its users. Please note that the maximum timeout for a session is set to 80mins of inactivity.

Login: https://uom.myconject.com
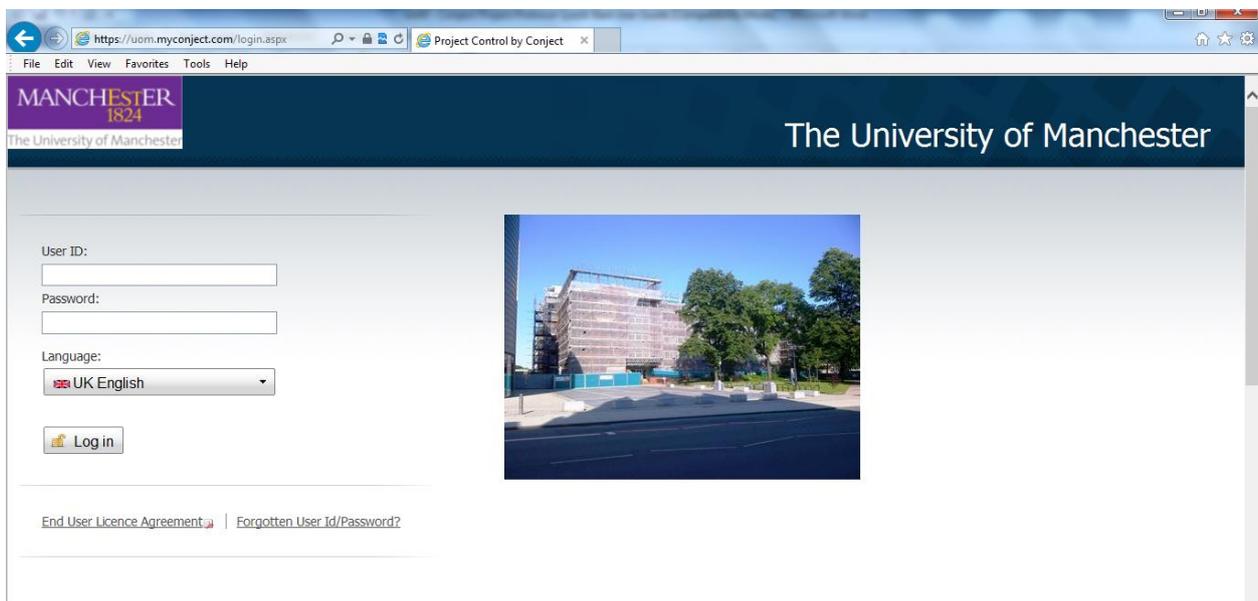
Once logged in the initial page (dashboard) will look like the below.
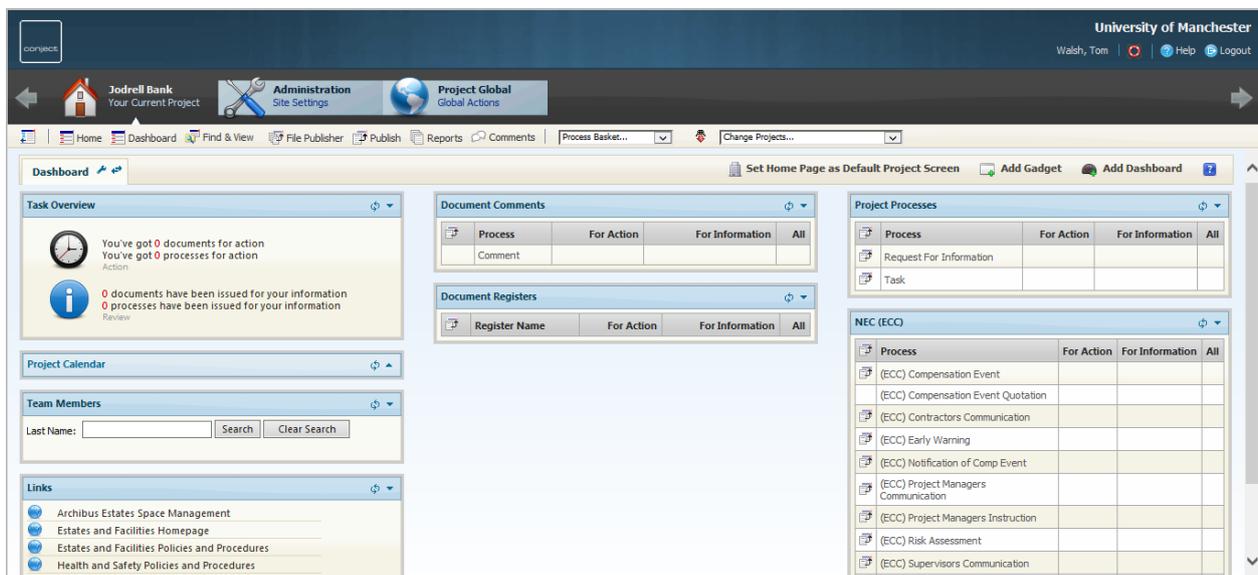
Changing Projects

You may have access to more than 1 project within the conject system; you can change between the different projects using the change projects menu. Select 'All Projects' and you will see a list of all the available projects you have access to.

If you require access to projects not shown or a new project creating please contact Natalie Sullivan who will be able to help.

Select the name of the project and you will be logged into that project...

Help Guides

System Help Guides –Help guides are available throughout the various screens in the channel. Clicking on a question mark [?] in any screen will take you to the relevant help guides for that particular section.

Throughout this document there will be references to **"How Do I Guides" (HDI Guide).** These can be accessed by clicking the [?] icon that appears next to your name in the top right corner.
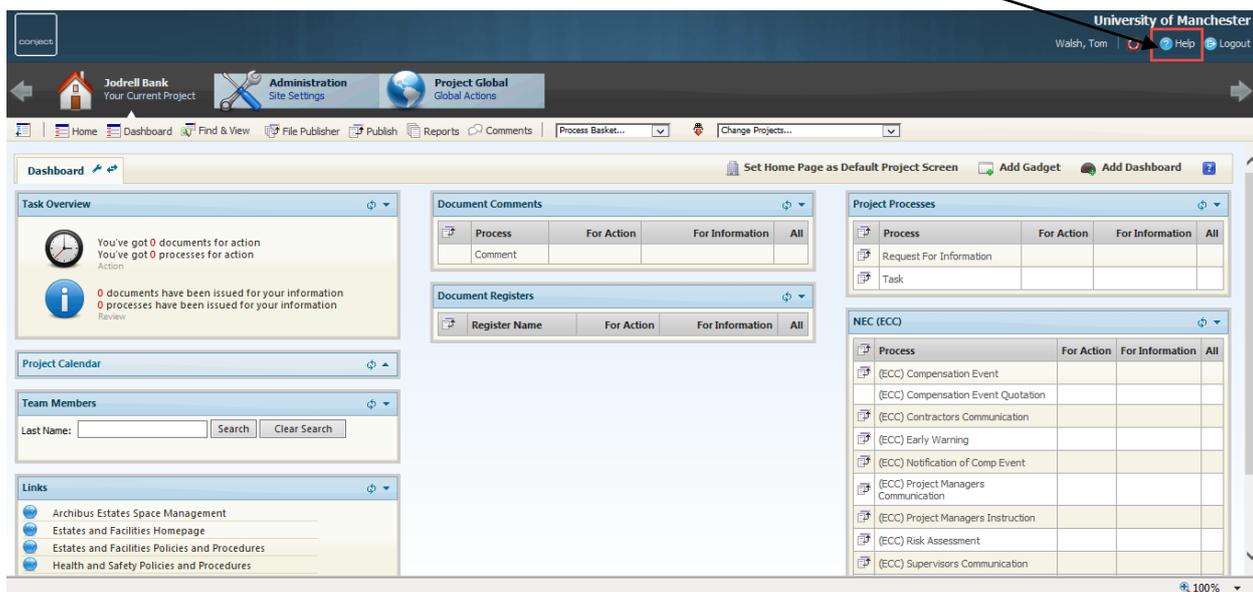
The new window that opens will look like the below. This is the **"How Do I…?"** section as noted in the **"Show Me Help For"** drop down menu, highlighted below.
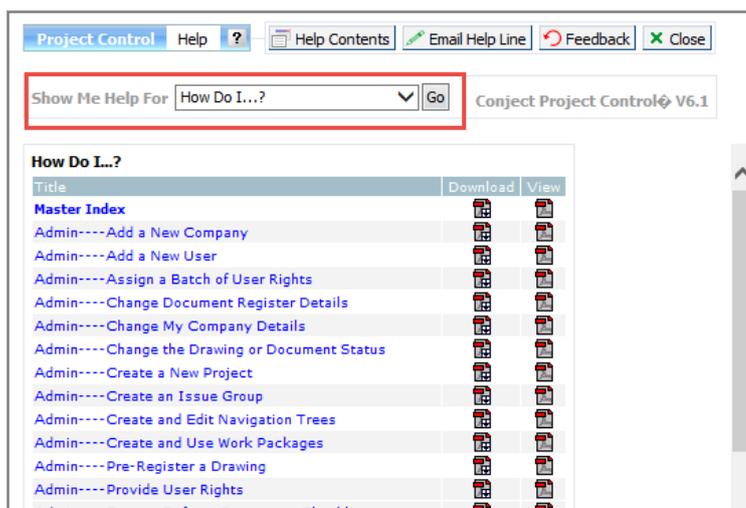
Selecting the **"Show Me Help For"** drop down menu will allow you to select other Help sections such as **NEC Guidance Notes**.

Knowledge Base – The conject **knowledge base** is available to all users by clicking on the **lifebelt icon** at the top right of the screen, this contains various common questions that have been asked to the conject helpdesk along with Video guides. It will also allow access to **live chat** providing an MSN, Lync, Skype style **text based chat** window with the conject helpdesk.
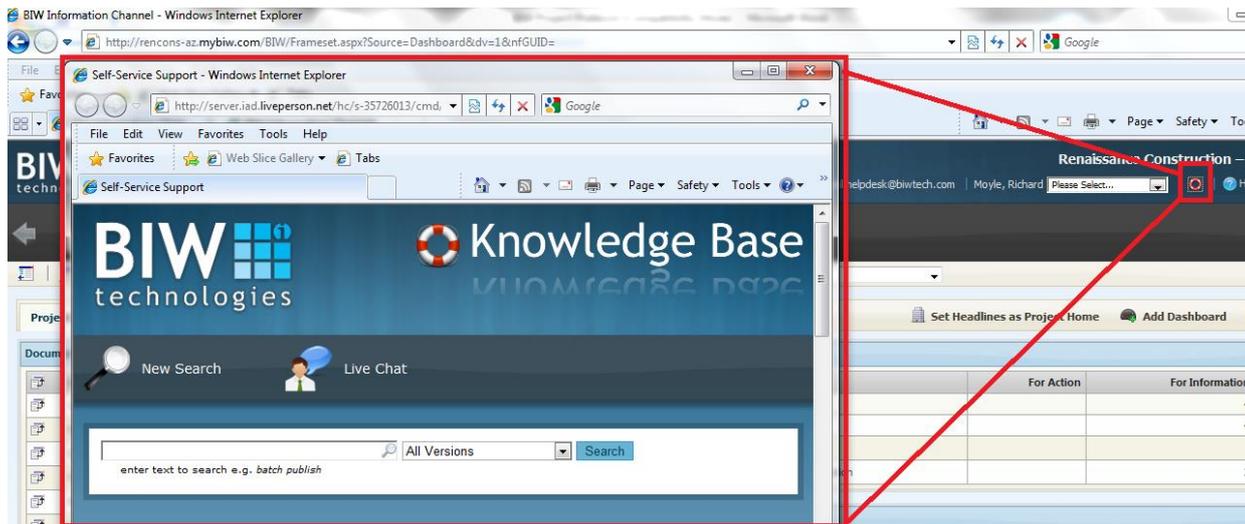
PROJECT SET UP

Information on Conject

Information is managed on Conject in two different ways:

- Drawings/ Documents – files published to the system e.g. drawings, specifications
- Forms & Processes – input forms to allow the creation and management of construction project processes e.g. Requests for Information, Instructions.

Document Registers & Categories

Conject stores documents under 'registers'. It stores documents at one level and allows searching using powerful search criteria. Documents are not stored under multi-level folders. The registers and typical contents are detailed on the next page.

Document Registers	Document Categories (Subfolder)
Drawings, BIM Models, Specifications & RDS	Architectural and Landscape, Civil and Structural, Equipment & Other, Mechanical, Electrical, Furniture & Fittings, Other
Environmental Sustainability and BREEAM	n/a
Financial	n/a
Handover & Occupancy	n/a
Health Safety and CDM	n/a
Management	Other, Feedback and performance, Procedures and Project Execution Plan, Change Control, Programme and plans of work, Photos, Risk
Meetings and Presentations	Other, Client, Contractor, Design Team, Project Manager
Procurement and Legal	Appointments and contract, Tenders and Quotes, Planning and statutory approvals
Project Admin & Protocols	n/a
Reports and Brief	Other, Client, Contractor, Design Team, Project Manager
Site Information & Surveys	Site Information, Surveys, O&M Manuals
The University of Manchester	Capital Project Managers, Estates and facilities policies and procedures, University policies and procedures, Estates and Facilities Sign off, User / client sign off, Other
Quick Share (Zip files)	*This is used purely for sharing of documents at speed. It should be used in an informal way to share large files between individuals or small groups.*

Document Status Security

For each issue of a drawing/document a Document Status is set by the publisher. The status may be also changed by authorised users. The table below indicates the available Statuses on the site.

Document Status
For comment
For approval
For information
For coordination
Work In progress
QA Rejected

Purpose of Issue

In addition to Document Status the site has a 'Purpose of Issue' field, which should be set at the point of publishing. The field is designed to increase search ability of documents by further categorising them. The table below indicates the different Purpose of Issue options that are available on the site.

Purpose of Issue
Work Stage 1, Preparation and brief
Work Stage 2, Concept design
Work Stage 3, Developed design
Work Stage 4, Technical design
Tender issue
Work Stage 5, Construction issue
Work Stage 7, As built

Project Roles, Document Register and Document Status Security

Access to Document Registers is controlled via the Register Rights Matrix. This Matrix is defined by the project team and administered by the Project Administrator. Each company is assigned against a project role and each role is assigned specific access rights to each register.

 Only the Project Administrator has rights to make changes to the access rights. The registers for this project are shown down the left and with the roles along the top.

Forms & Processes

Conject allows the management of construction forms or processes. The Forms and Processes in use on this site are shown below, any number of other forms and processes are available and should be defined by the individual Capital Project and consultant Project Manager in the Project Execution plan. It is recognised that one size does not fit all and changes will need to be made via the PICs.

Form	Used For	Notes
Comment	For making comments and mark-ups on drawing using the Conject Viewer.	*For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-* *Publishing----Make Comments on Documents & Drawings*
Request For Information (RFI)	For issuing, responding to and managing Requests for Information between design team and client including design subcontractors.	*For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-* *Publishing----Publish an RFI and Publishing----Respond to an RFI*
Task	A basic form designed to replace the need for external email, meaning simple questions and/or tasks can be sent through the system and an audit history will exist for easy access at a later date.	*For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-* *Publishing----Send and Receive Team Mail*
Change request	To manage change control on the Project.	*Will be implemented in due course or as required by each project.*
(ECC) Compensation Event Quotation	For use in the NEC ECC contract process	
(ECC) Compensation Event	For use in the NEC ECC contract process	
(ECC) Contractors Communication	For use in the NEC ECC contract process	
(ECC) Early Warning	For use in the NEC ECC contract process	
(ECC) Notification of Comp Event	For use in the NEC ECC contract process	*For further information please refer to the System Help Guides > NEC Guidance Note section.*
(ECC) Project Managers Communication	For use in the NEC ECC contract process	
(ECC) Project Managers Instruction	For use in the NEC ECC contract process	
(ECC) Risk Assessment	For use in the NEC ECC contract process	
(ECC) Supervisors Communication	For use in the NEC ECC contract process	
(ECC) Supervisors Instruction	For use in the NEC ECC contract process	

Process Rights

The **Project Information Co-Ordinators (PIC**) have the ability to **remove and apply rights to all forms**, so if you require rights to a form please contact the Projects relevant **PIC**.

As standard you should expect rights to be able to create and read the 'Comments', 'Request For Information' and 'Task' process forms. Rights to the NEC ECC contract forms will be given, as per your role on the Project, to be in-line with the NEC process.

Publishing Protocol

There will be no strict file naming convention/protocol for Documents on any of the projects. Users are advised to follow their own file naming convention, **taking extra care to make the filename and document title clear as to the documents content** such that it is easily searchable and easy to find for all users. Documents that do not adhere to this code will be QA rejected by the PICs.

Please consider these key notes when generating and Publishing Drawings & Documents

- The revision letter should **<u>not</u>** form any part of the filename.
- When revising files ensure that it has **<u>exactly</u>** the same file name as the original file already in conject. This will ensure that the file is taken into conject as a revision to an existing file rather than a new file.
- Ensure that the 'Title/Description' on document is descriptive of what the document relates to.
- For drawings you should upload a **PDF** as the main file type. and a **DWG** as an attachment.

Publishing a Document

If you have rights to publish documents into a register then you will see a publish icon to the left of the register name or you can select the publish button on the tool bar and select the register you want to publish to. You will find full instructions on publishing individual documents and 'batches' of documents in the help guides and knowledge base.
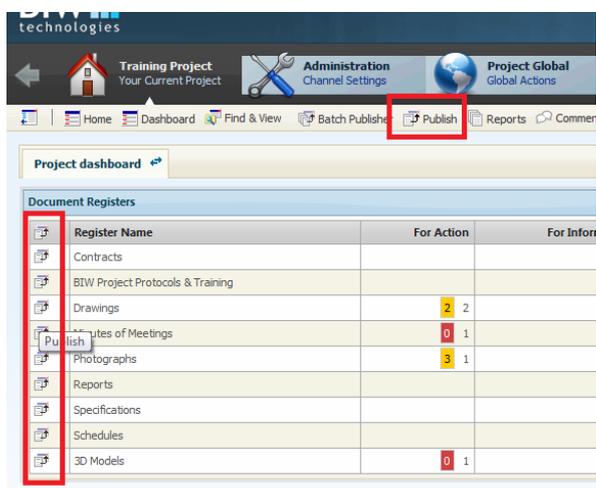
For further information on publishing please refer to the System Help Guides; Publishing----Publish Documents and Drawings and Publishing----Publish a Batch of Documents & Drawings.

Searching For and Viewing Documents

From you dashboard you will see indicators as to where you have been issued documents for Action / Information.

If you select the documents for Information you will be taken to a search screen showing those outstanding documents.


You can also search the system for any document you have access to by selecting 'Find and View', picking a Register or searching 'All Documents'.
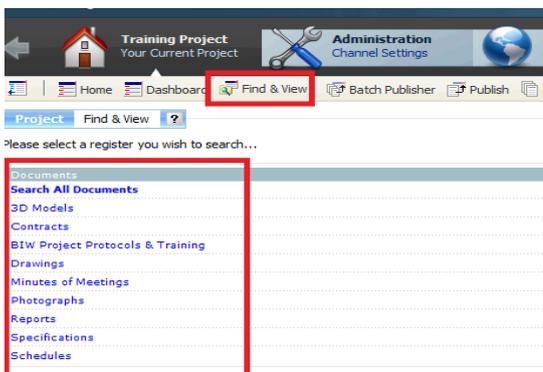
You will be presented with a blank search screen where you can use a combination of filters to find documents issued by a company, at a particular status etc.
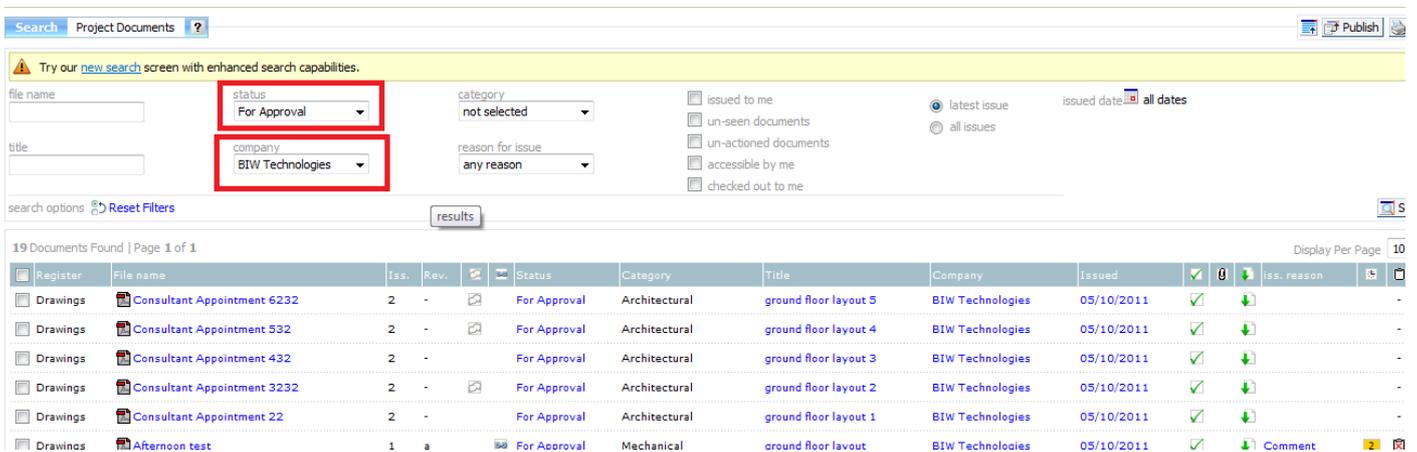
By default you will be shown just the latest issue of each file. You can now click on the file name of the document to open and view the document in the conject viewer (only PDF or DWF file types only).
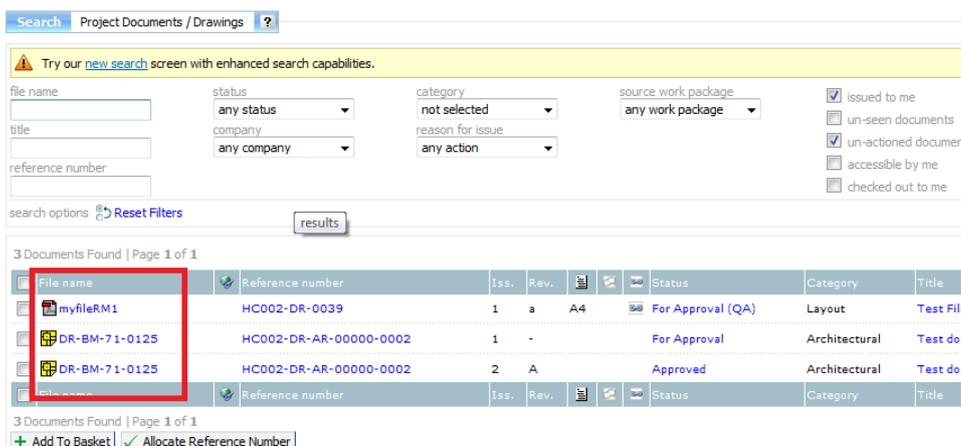
Other Actions with Documents

Download the document –

From within the document search screen you can click on the file name of the document to open it or you can click on the download icon to save the document to your machine.

View the submittal / access area for a document –

You can check the submittal report of any document by clicking the 'issued' date of the document.

Add documents to your process basket for Batch Printing, forwarding and downloading –

You can select to carry out actions (batch forward, print, download, status change) on multiple documents at the same time by adding them to your process basket. From the document search screen select the documents using the left hand tick box and select 'add to basket' at the bottom of the search screen.

Then select 'documents' from your process basket. You will then be able to choose the batch action to carry out...


Change Status of Documents -

Users with relevant rights can change the status of documents by clicking on the document status. Select a new status and reason for the change. You can then issue a comment to notify existing document recipients of the status change.

Edit document details (title, rev letter) -

Users with a project user right of 'maintain document register entries' are able to edit the Meta data of documents issued by users from their respective company. You can do this in **Administration > Project > Documents > Project Documents**...find the relevant document and change any required data (title, rev letter, etc).

Advice on the optimum Machine and Network settings

Prior to using conject it is worth reviewing the following 2 user guides to check that your machine and company network settings are set to allow conject to function optimally. Click on the ⑦ icon at the top right of the screen and then select to open / download the 'General ----Check my internet and Network settings' and 'General----Know if my PC setup is supported' articles.
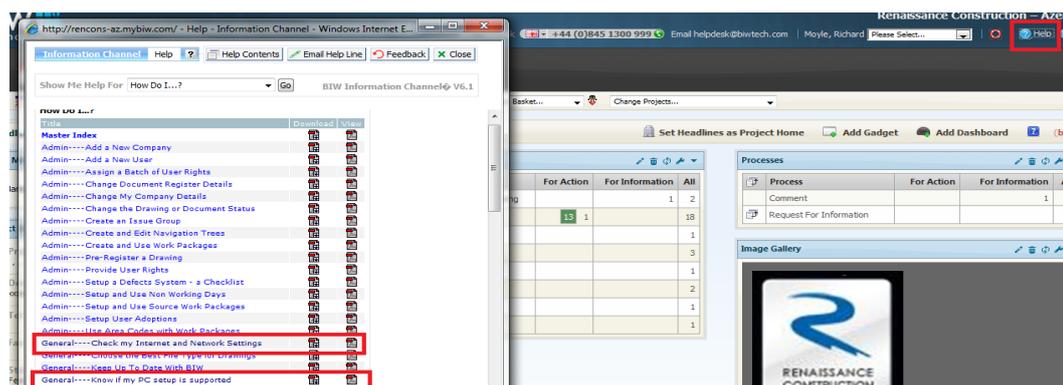
Basic principles –

- For PC users, conject works best with Internet Explorer 8, 9 or 10.
- We offer limited support for Mac users so would advise them to contact help.desk@conject.com to discuss the optimum settings for conject use.
- All users will need Java installed on their machines in order to use the batch publisher and batch download facilities (this can be downloaded from www.java.com)
- Any issues, please contact the conject Helpdesk at help.desk@conject.com