

The University of Manchester Project Collaboration Tool

Project Information Coordinator (PIC) User Guide



<https://uom.myconject.com>

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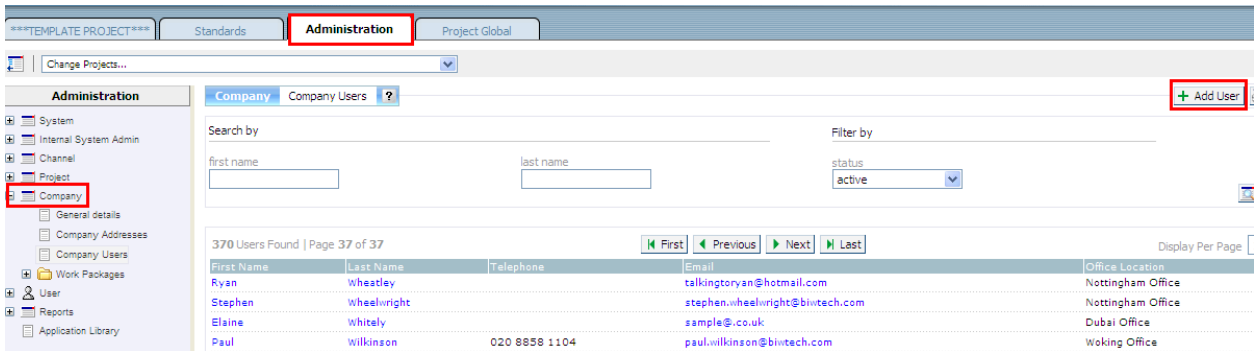
1. COMPANY ADMINISTRATION (CA) TASKS

1.1. Adding and Editing your Company Users Details

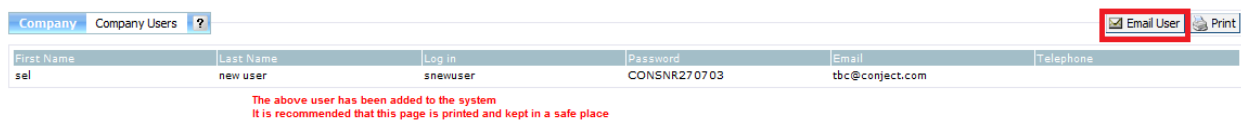
As a conject Project Control Coordinator you have also been given the Company Administrator role for your company only. This allows you to create new users for your company, edit the password and other personal details for your company users via **Administration > Company > Company Users**

This is where you can create new users and edit user details. In this section you are only setting up the user details – **you are not adding them to the project.**

Before creating a user, check to see if they have an existing user account using the Search by and Filter by boxes. Then, click on the **Add User** button to go to the add user details screen. Complete the required fields and click **Add**. This will generate a user id and password for the new user.



You can also choose to email the user their log in details using the email user option located in the top right hand corner:



To **edit** a user’s details, click on the user name link in the first or second column to go to the edit details screen.

For more information please refer to the **How Do I..** user guides of **Admin - Change my Company Details, Admin - Add a New User**

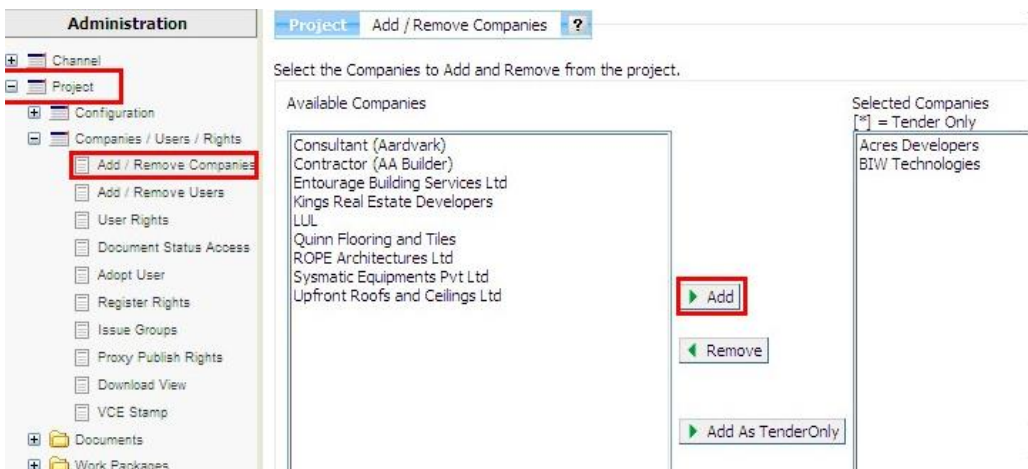
2. PROJECT INFORMATION COORDINATOR (PIC) TASKS

2.1. Adding Companies and Users to the Project – New Company

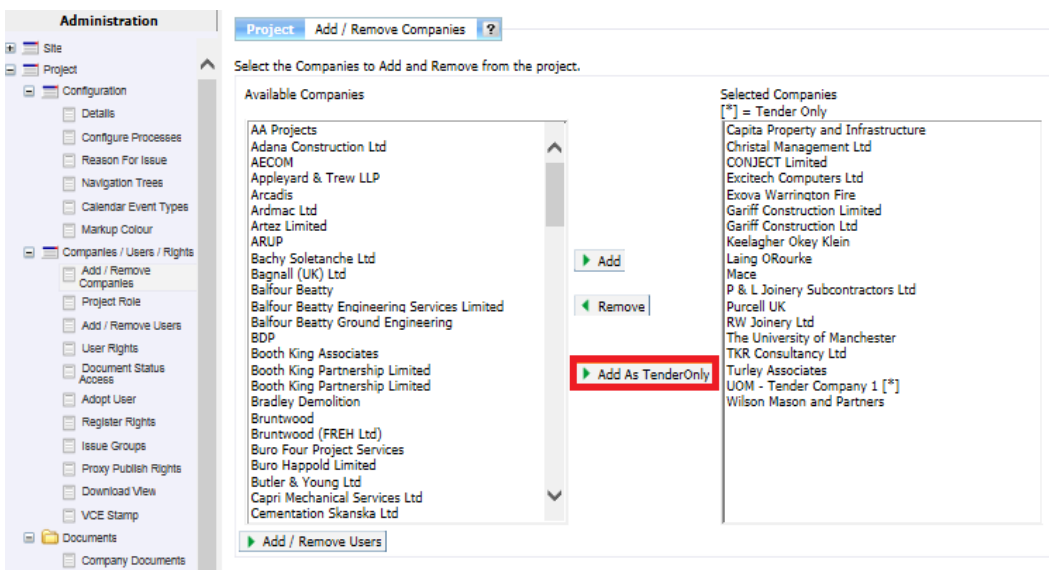
Registration Process

Adding a New Company to the Project

Click on **Admin > Project > Companies / Users / Rights > Add / Remove Companies**. Select the companies from the left column and **Add** them to the right column.



To add a **Tender Only** company click on **Admin > Project > Companies / Users / Rights > Add / Remove Companies**. Select the companies from the left column and **Add As TenderOnly** them to the right column.



What if the company isn't in the available list?

The company may not have been given access to the site or they may not even exist on the conject system. Before contacting the helpdesk, UoM Conject Admin can check to see if the company has a Conject account and add them to the University site, **not individual projects**. If the company does not have a Conject account the helpdesk can resolve this for you using the following procedure:-

- Download the 'New Company Registration form.doc' from the Application library or in **Appendix A** of this guide.
- Fill in the new company's details and send to the conject Helpdesk – **uk.helpdesk@aconex.com**
- The helpdesk create or add the company / new users to the site within 24 hrs of being logged. They will issue out login details to the PIC via email. You will be required to issue out the login details.
- It is then your responsibility to add them to ensure they have access to the project, correct project rights etc.

Please note that the process to add a Tender Only company varies slightly and is shown in section 5 below.

2.2. Add / Remove Users

Once the company has been added to the project, you must add the relevant users from that company to the project. This is done by selecting **Admin > Project > Companies / Users / Rights > Add / Remove users**. Select the company from the drop menu, and then select the users and **Add**.

The screenshot shows the 'Add / Remove Users' interface. At the top, there is a breadcrumb trail: 'Project > Add / Remove Users'. Below this, a 'companies' dropdown menu is set to 'BIW Technologies'. The interface is divided into two main sections: 'Available Users' and 'Existing Users'. The 'Available Users' list contains 25 names, including Mallela, Sreeni, Manager, CP Project, Manager, Project, Manager, Responsible, Manager, Site, Marriott, David, McEachran, Ewan, Mohanan, Mahesh, Mohanty, Madhumita, monitor, test, Mutombo, Fadumo, Nawaz, Shahzad, Neogi, Nupur, notification, ABW, Originator, CP, Originator, Process, pagal, pagal, Paladugu, Harish, Panchal, Hardik, Panchal, Komal, Pandholi, Purav, Pandya, Nidhi, parekh, Hiren, and Parikh, Ankit. The 'Existing Users' list contains 'McEvoy, Selina'. Between the two lists are 'Add' and 'Remove' buttons. The 'Add' button is highlighted with a red box. At the bottom left, there is a 'User Rights' button.

2.3. Setting User Rights

Please note Tender Only company users require different access and process rights and will be detailed further in Section

Document Rights

Click on **User Rights** which can be found via Administration > Project > companies/users/rights. Here you can set the rights for users on the project. Select the company and then the user, select **Project Rights** and then hit the **Select** button.

All users should have the following rights by default:

Review/Comment – (View and/or comment on any document or drawing to which the user has access)

Publish Documents – (Users must have this ticked in order to publish documents.)

Edit Issue Groups – (Lets you create new issue lists and add / remove names from issue lists created by your company)

Maintain Document register entries – (Each document and drawing published to this project has its own document register entry. A user with this right can change a document title, move a document from one register to another, change the public/private status, make a document inactive (so it is no longer seen on the project) or re-activate it and change the default issue list.) Additional rights that you may see assigned or assign yourself:

Work Package Administrator

If this is ticked, then the user may allocate Work Packages to any document or drawing published on this project, regardless of whether they have any rights to view or publish that document or drawing. They can also change and remove any Work Package reference.

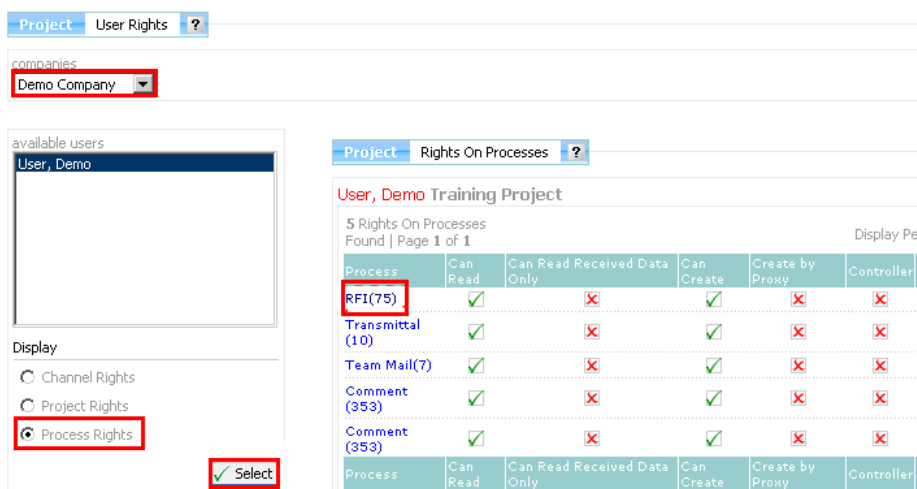
Publish Document by Proxy –This allows you to publish documents on behalf of another user. For more details click [here](#)

Maintain Document Status -

This allows the user to change the Status of documents and drawings. I.e. from 'for approval' to 'approved'. This right must only be given to those users whom are responsible for changing the status of documents.

Process Rights

Click on **User rights**. Here you can set the process rights for users on the project. Select the company and then the user, select **Process Rights** and then hit the **Select** button. You will see a list of processes available on the project. **A process matrix for NEC and Tender processes can be found in Appendix B**



The screenshot shows two panels. The left panel, 'User Rights', has a 'companies' dropdown set to 'Demo Company' and an 'available users' list with 'User, Demo'. Under the 'Display' section, 'Process Rights' is selected. A 'Select' button is visible. The right panel, 'Rights On Processes', shows 'User, Demo Training Project' with 5 rights on processes. The table below is a process matrix:

Process	Can Read	Can Read Received Data Only	Can Create	Create by Proxy	Controller
RFI(75)	✓	✗	✓	✗	✗
Transmittal (10)	✓	✗	✓	✗	✗
Team Mail(7)	✓	✗	✓	✗	✗
Comment (353)	✓	✗	✓	✗	✗
Comment (353)	✓	✗	✓	✗	✗

Click the process name and then you can set the user rights for that process:

Can Read – A user will be able to read any process that is issued.

Can Read (rec'vd data only) – Can only read what has been issued to them or someone in there company.

Can Create – A user will be able to publish/create and new process

Controller – Only the PIC or nominated individual should have this right.

Please make sure you hit the **update** button to save the rights.

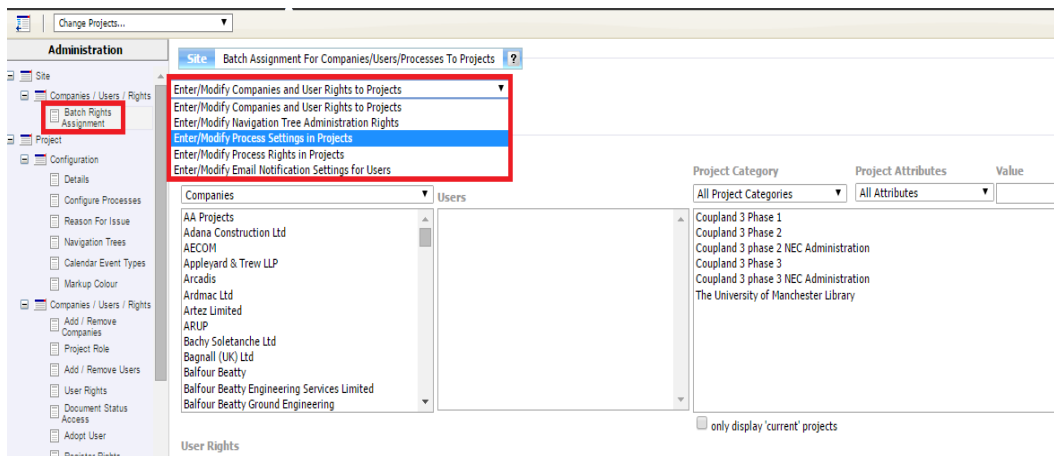
For more information please refer to the How Do I Guide... **Admin----Provide User Rights.**

HINT 1: To assign or modify user/process rights for more than one user at a time, click on **Admin > Site> companies / users/ rights >** in the side panel menu and then click on **Batch Rights Assignment.**

Batch Assigning User Rights

The batch rights assignment function is located through **Administration > Site > Companies/Users/Rights > then select Batch Rights Assignment.**

This screen helps you manage the process of assigning user rights, processes and process rights by allowing you to assign them to multiple users, across multiple projects, in one operation.



Select one of the following:

Enter/modify Companies and User Rights to Projects

Here you can select users from various companies, add them to (or remove them from) a range of projects and provide them all with the same project user rights. If you select users already on a project, you can modify and overwrite their user rights.

Enter/modify Navigation Tree Administration Rights

On projects which have Navigation Trees set up, users may assign nodes to documents or processes when they publish. Here you can assign users administration rights to selected navigation trees. This means they may access all documents (to which they have access) on the selected project(s) to assign navigation tree nodes – either singly or by using the process basket.

Enter/modify Process Settings in Projects

For your chosen projects, you can provide a set of default values to be used for selected processes, eg. Instructions, RFIs, Transmittals and so on.

Enter/modify Process Rights in Projects

This is where you can add or modify the basic process rights for your selection of projects, processes, companies and users.

Enter/modify Email notification settings

Here you may select many users from one or more projects and companies and change their email notification settings.

Please refer to the How Do I... Assign a batch of user rights help guide. (Please see section 3 for more information)

2.4. Register Rights Security

Access to document registers is managed by a Management Role. Each company needs to be setup under the correct Management Role in order to ensure they have access to the correct set of document registers. A template for projects to complete can be found in **Appendix C**. It is then the PIC's responsibility to set the management role for each new company added to the project.

This is completed by:-

Clicking on **Administration > Project > Companies / Users / Rights > Register Rights**. The Table displays which management roles have access, to which registers. These have been predefined across all projects and should not need to be amended.

Administration

- Site
- Companies / Users / Rights
 - Batch Rights Assignment
- Project
- Configuration
 - Details
 - Configure Processes
 - Reason For Issue
 - Navigation Trees
 - Calendar Event Types
 - Markup Colour
- Companies / Users / Rights
 - Add / Remove Companies
 - Project Role
 - Add / Remove Users
 - User Rights
 - Document Status Access
 - Adopt User
 - Register Rights**
 - Issue Groups
 - Proxy Publish Rights
 - Download View
 - VCE Stamp
- Documents

Register Security Administration

Note - any changes made will not affect users until they log out and then start a new session

	Client Team	Main Contractor	Design Team	PM Team	Trade Contractor	Default	
3D Models	Full	Full	Full	Full	Full	Read	Read
BBI Handover & Occupancy	Full	Full	Full	Full	Full	Read	Read
Drawings and RDS	Full	Full	Full	Full	Full	Read	Read
Environmental Sustainability and BREEAM	Full	Full	Full	Full	Full	Read	Read
Health Safety and CDM Management	Full	Full	Full	Full	Full	Read	Read
Meetings and Presentations	Full	Full	Full	Full	Full	Read	Read
Process Attachments (Hidden)	Full	Full	Full	Full	Full	Read	None
Procurement and Legal	Full	Full	Full	Full	Full	Read	None
Project Admin & Protocols	Full	Full	Full	Full	Full	Read	Read
Quick Share (Zip Files)	Full	Full	Full	Full	Full	Read	Full
Reports and Brief	Full	Full	Full	Full	Full	Read	Read
Site Information & Surveys	Full	Full	Full	Full	Full	Read	Read
Spare	Full	Full	Full	Full	Full	Read	None
Specifications	Full	Full	Full	Full	Full	Full	Full
The University of Manchester	Full	Read	Read	Read	Read	Read	Read
Trade Contractor Drawings and Documents	Full	Full	Full	Full	Full	Full	Full

To edit the register security settings, select a register or project role from the top or left side of the table above. If you are unsure which role a company has on the project, use the [Project Role Administration](#). To assign special register rights to a company irrespective of its project role, see [Company Register Exceptions](#). To assign special register rights to an individual irrespective of their company's rights, see [Individual Register Exceptions](#).

Company and individual exceptions can be made by following the highlighted links

Assignment

- Project
- Configuration
 - Details
 - Configure Processes
 - Reason For Issue
 - Navigation Trees
 - Calendar Event Types
 - Markup Colour
- Companies / Users / Rights
 - Add / Remove Companies
 - Project Role
 - Add / Remove Users
 - User Rights
 - Document Status Access
 - Adopt User
 - Register Rights**
 - Issue Groups
 - Proxy Publish Rights
 - Download View
 - VCE Stamp
- Documents

	Client Team	Main Contractor	Design Team	PM Team	Trade Contractor	Default	
3D Models	Full	Full	Full	Full	Full	Read	Read
BBI Handover & Occupancy	Full	Full	Full	Full	Full	Read	Read
Drawings and RDS	Full	Full	Full	Full	Full	Read	Read
Environmental Sustainability and BREEAM	Full	Full	Full	Full	Full	Read	Read
Health Safety and CDM Management	Full	Full	Full	Full	Full	Read	Read
Meetings and Presentations	Full	Full	Full	Full	Full	Read	Read
Process Attachments (Hidden)	Full	Full	Full	Full	Full	Read	None
Procurement and Legal	Full	Full	Full	Full	Full	Read	None
Project Admin & Protocols	Full	Full	Full	Full	Full	Read	Read
Quick Share (Zip Files)	Full	Full	Full	Full	Full	Read	Full
Reports and Brief	Full	Full	Full	Full	Full	Read	Read
Site Information & Surveys	Full	Full	Full	Full	Full	Read	Read
Spare	Full	Full	Full	Full	Full	Read	None
Specifications	Full	Full	Full	Full	Full	Full	Full
The University of Manchester	Full	Read	Read	Read	Read	Read	Read
Trade Contractor Drawings and Documents	Full	Full	Full	Full	Full	Full	Full

To edit the register security settings, select a register or project role from the top or left side of the table above. If you are unsure which role a company has on the project, use the [Project Role Administration](#). To assign special register rights to a company irrespective of its project role, see [Company Register Exceptions](#). To assign special register rights to an individual irrespective of their company's rights, see [Individual Register Exceptions](#).

Company Exceptions

If a company's project role is, for example, Trade Contractor but you wish to give them access to additional register that they would not otherwise see you can do this by clicking the links which will take you to the screen shown below

Register Security Administration

Company register exceptions

Company (click to edit exception)	Status (company level)	Status (individual level)
Capita Property and Infrastructure		
Christal Management Ltd		
CONJECT Limited		
Excitech Computers Ltd		
Exova Warrington Fire		
Gariff Construction Limited		
Gariff Construction Ltd		
Keelagher Okey Klein		
Laing O'Rourke		
Mace		
P & L Joinery Subcontractors Ltd		
Purcell UK		
RW Joinery Ltd		
The University of Manchester		
TKR Consultancy Ltd		
Turley Associates		
UOM - Tender Company 1		
Wilson Mason and Partners		

Click on the company you wish to apply the exception to and select what type of access you would like to provide them with.

Register Security Administration

Company register exceptions

	No Access	Read Only	Full Access
_3D Models	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
BBI Handover & Occupancy	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Drawings and RDS	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Environmental Sustainability and BREEAM	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Health Safety and CDM	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Meetings and Presentations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Process Attachments (Hidden)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Procurement and Legal	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Project Admin & Protocols	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Quick Share (Zip Files)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Reports and Brief	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Site Information & Surveys	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Spare	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Specifications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
The University of Manchester	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Trade Contractor Drawings and Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Individual Exceptions

In addition to Company exceptions you can also provide access to registers on an individual basis if required.

Change Projects... ▼

Administration

Register Security Administration

Individual register exceptions

Company (click to list all users)	Status (company level)	Status (individual level)
Capita Property and Infrastructure		
Christal Management Ltd		
CONJECT Limited		
Excitech Computers Ltd		
Exova Warrington Fire		
Gariff Construction Limited		
Gariff Construction Ltd		
Keelagher Okey Klein		
Laing O'Rourke		
Mace		
P & L Joinery Subcontractors Ltd		
Purcell UK		
RW Joinery Ltd		
The University of Manchester		
TKR Consultancy Ltd		
Turley Associates		
UOM - Tender Company 1		
Wilson Mason and Partners		

Click on the users company and you will be presented with all the users belonging to that company on your project.

Change Projects... ▼

Administration

Register Security Administration

Individual register exceptions

Individual (click to edit exception)	Status (on individual level)
Bannister, Matt	
Baynton, Andy	
Brown, Jacqueline	
Evans, Derek	
Fennon, Samantha	
Hedges, David	
Higginson, Rob	
Hodgkinson, Elliott	
Hodson, Neville	
Johnson, Lee	
Kinwan, Michael	
Lane, Simon	
Law, Colette	
Lee, Matthew	
Rapinett, David	
Riches, Ryan	
Riding, Andrew	
Taylor, Dave	
Warren-Barratt, Eleanor	

Go Back

Once you have selected the user you wish to grant the exception to you can select the registers and access you wish to modify.

Register Security Administration

Individual register exceptions

	No Access	Read Only	Full Access
3D Models	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
BBI Handover & Occupancy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Drawings and RDS	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Environmental Sustainability and BREEAM	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Health Safety and CDM	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Meetings and Presentations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Process Attachments (Hidden)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Procurement and Legal	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Project Admin & Protocols	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Quick Share (Zip Files)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Reports and Brief	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Site Information & Surveys	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Spare	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Specifications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
The University of Manchester	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Trade Contractor Drawings and Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Cancel Submit

To set the management role for each company click on the **Project Role** link also available from the left hand side administration menu. Set each companies role using the drop menu and hit the change button. A template for projects to complete can be found in **Appendix D**.

Administration

- Site
- Companies / Users / Rights
 - Batch Rights Assignment
- Project
 - Configuration
 - Details
 - Configure Processes
 - Reason For Issue
 - Navigation Trees
 - Calendar Event Types
 - Markup Colour
 - Companies / Users / Rights
 - Add / Remove Companies
 - Project Role**
 - Add / Remove Users
 - User Rights
 - Document Status Access
 - Adopt User

Project Role Administration

Current Project Roles by company ...

Capita Property and Infrastructure	PM Team ▼	Change
Christal Management Ltd	Default ▼	Change
CONJECT Limited	Default ▼	Change
Excitech Computers Ltd	Default ▼	Change
Exova Warrington Fire	Default ▼	Change
Gariff Construction Limited	Default ▼	Change
Gariff Construction Ltd	Default ▼	Change
Keelagher Okey Klein	Default ▼	Change
Laing O'Rourke	Main Contractor ▼	Change
Mace	Default ▼	Change
P & L Joinery Subcontractors Ltd	Default ▼	Change

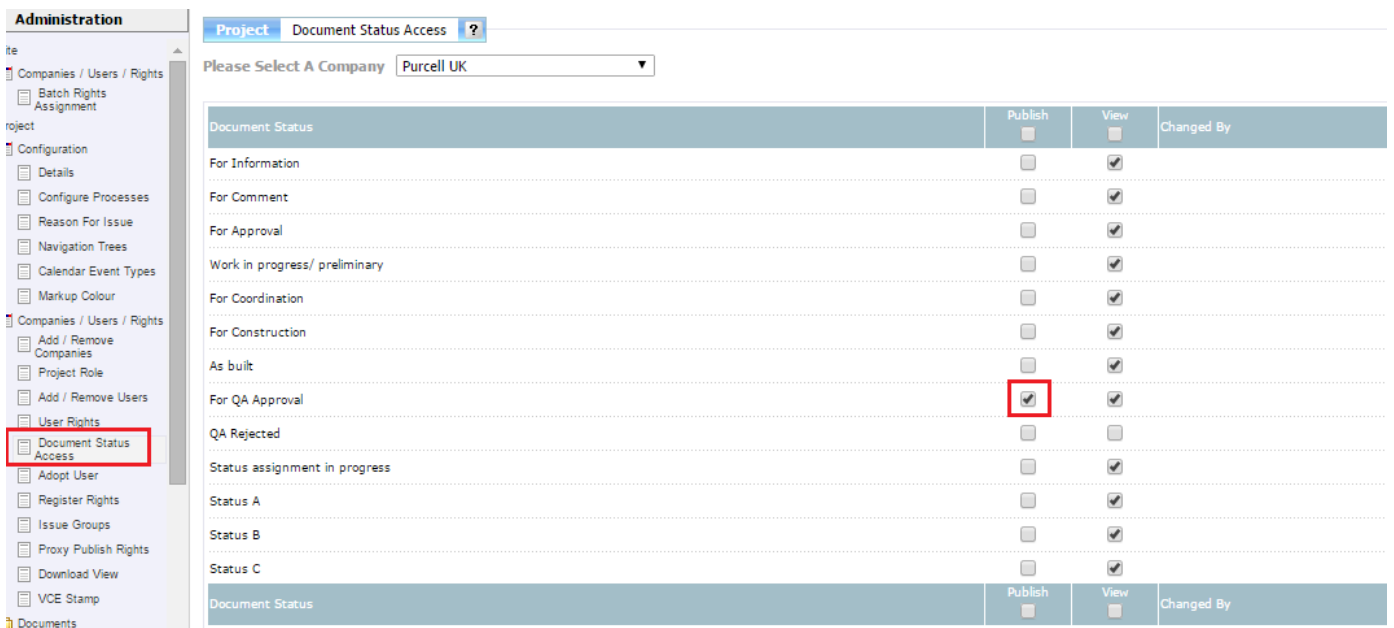
3. Document Status Security

As well as restricting access to document registers, we can restrict a company's ability to view and even publish documents at a specific status.

It is the PIC's responsibility to set the document status access for each new company added. This is done in the following way: -

Administration > Project > Companies / Users / Rights > Document Status Access – Select the company name from the drop menu and then tick whether the company can publish and/or view documents at each status. Hit **Update** once complete.

A template can be found in **Appendix E** for projects to complete and define access company by company, however all companies other than the main contractor should only be able to publish using the QA Approval status.



Document Status	Publish	View	Changed By
For Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
For Comment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
For Approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Work in progress/ preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
For Coordination	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
For Construction	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
As built	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
For QA Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
QA Rejected	<input type="checkbox"/>	<input type="checkbox"/>	
Status assignment in progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Status A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Status B	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Status C	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

For more information please refer to the How Do I Guide... **Using Status Driven Security.**

3.1. Creating Predefined Issue Groups

To set up an issue group - Click on **Administration > Project > Companies / Users / Rights > Issue groups**, select to add a new issue group. Give it a name and then add the relevant users to the people in group box. If you make it 'Cross Company' then all companies on the project will be able to use it.

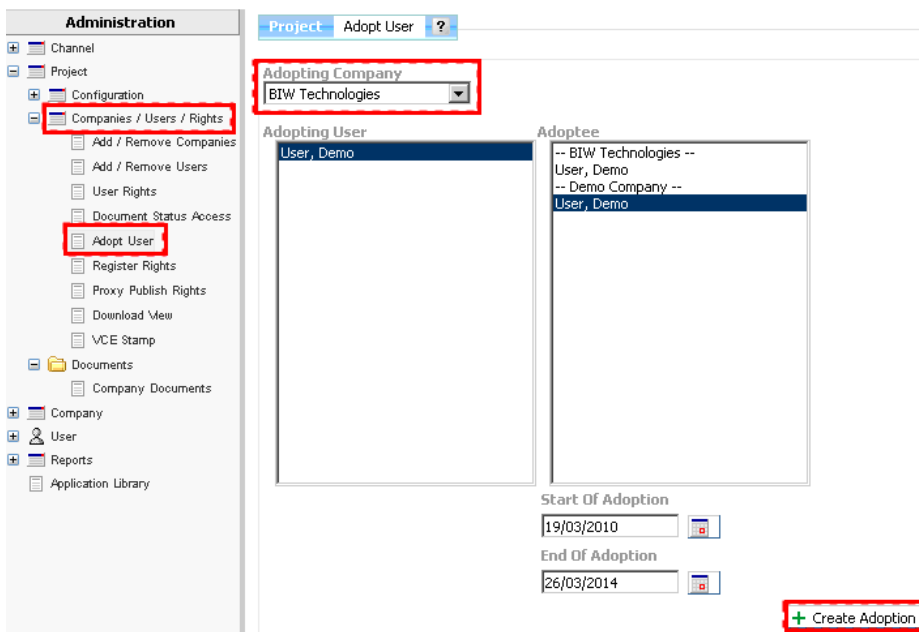
The screenshot shows the 'New Issue Group' configuration page. The 'Name' field is set to 'test'. The 'Active' checkbox is checked. The 'Visible' checkbox is checked. The 'Cross-Company' checkbox is unchecked. The 'Force Distribution' checkbox is unchecked. The 'Assigned To' dropdown is set to 'Unassigned'. The 'Company Name' dropdown is set to 'Display all Members'. The 'Available People' list contains: Brand-Williamson, Alistair; Dewsbury, Kate; Group, CP; Jones, Hannah; Khanna, Aneel; McEvoy, Selina; Moyle, Richard; Originator, CP. The 'People in Group' list contains: Bilkhu, Charandeep. There are 'Add' and 'Remove' buttons between the lists. A red box highlights the 'Add' button at the bottom right of the form.

For more information please refer to the How Do I ... **Admin----Create an Issue Group** user guide.

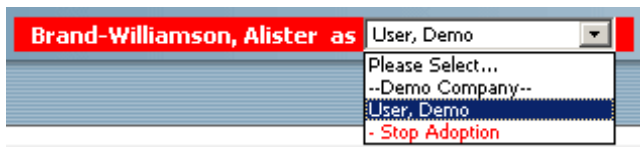
3.2. Creating User Adoptions

As a PIC you have the ability to create user adoptions for both yourself and any other users on the project. This can be used to allow users to be logged in as another user while retaining the correct audit trail in the system.

Click **Administration > Project > Companies / Users / Rights > Adopt User**. First select the adopting user (the person who you wish to be able to adopt other users), then select the Adoptee (the user being adopted). Finally set the adoption period (start and end dates) and then hit **Create Adoption**.



The adopting user will now see a drop menu containing a list of other users they can adopt, next to their name at the top right of the screen. If one of the names is selected, the screen will refresh and effectively log the adopting user in as the selected adoptee user. To stop the adoption, use the Stop Adoption option at the bottom of the adoption drop menu.



For more information please refer to the How Do I ... **Admin----Setup User Adoptions** user guide.

3.3. Creating / Editing a Navigation Tree

A Navigation Tree is a hierarchical list of subject headings or “branches” to which you may associate documents and/or processes. You can associate your documents and processes to these “branches” when you publish or you can assign them as a batch using the Process Basket on the Project screen. Examples include BREEAM, Health & Safety and O&M Manuals

To create a new navigation tree Choose to Add New via **Administration > Project > Configuration > Navigation Trees**

To add a new node right mouse click on the node and select:

- Add a new root node to add a node at the top level
- Add a node to create a new node below the current node

Type the name of the new node where it says type and press enter - and then press ENTER to save it. You can move nodes up and down the hierarchy – highlight the node and click on the Move Up or Move Down buttons until the node is in the correct position. Remember to hit the ENTER key each time you add or edit a node.

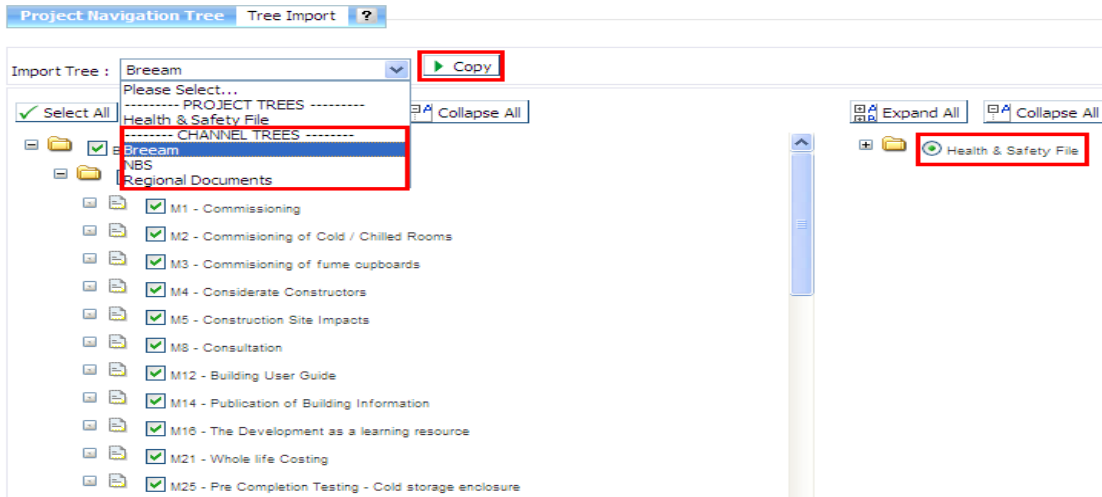
Please refer to the document How Do I... **Admin----Create and Edit Navigation Trees** for a full description.

Importing existing Navigation Trees

To import a template navigation tree you must first create the navigation tree at project level via: **Administration > Project > Configuration > Navigation Tree**. Hit **Add New**. Add a name for tree i.e. Health & Safety, select the relevant settings and hit **Add**.

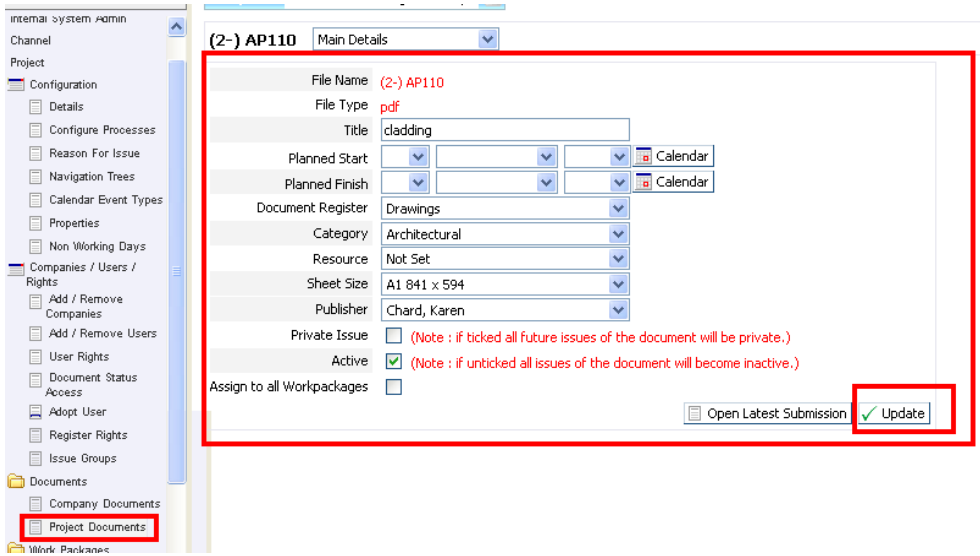
You are now ready to import the navigation tree branches from the template at site level. After selecting your new navigation tree, hit **Tree Import**.

Select the tree template from site level that is required to be imported. Select the branches required and hit **Copy**.



4. Project Document Administration

As PIC you have the ability to amend the details of any project document via **Administration > Project > Documents > Project Documents**. Features include editing the title, rev letter, privacy, category and register.



For more information please refer to the How Do I ... **Project---View and Change Document Details** and **Admin---Change Document Register Details** user guides.

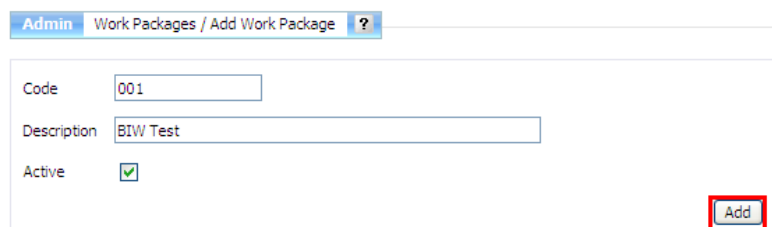
4.1. Adding Work Packages

Work Packages can be predefined in the system and then have documents assigned to them, giving greater search capability.

When working across multiple project, the best way to setup Work Packages is to do it company level, create a template to store all the packages against and then simply add the template the relevant projects. This allows the same packages to be used across multiple projects and reduces the admin burden.

There will be a standard set of work packages already added to the project. Should you wish to add any additional work packages select

Administration > Project > Work packages > Work packages and select **New**



From this screen enter the code and description and then hit **Add**. The additional work package has now been added to the project.

4.2. Additional Reporting

The following reports are available from within the Administration section of conject Project Control:

Access Report

This report shows you which users from your company have been accessing the project you are currently logged into. If you have PIC access rights, you will be able to select other companies to view their project access.

User / Process Rights Report

Here you can create a report showing the project rights or process for all users of the projects to which you have access.

4.3. Publishing a Project Notice

Project notices can be used issue generic notifications to project team members. They can be issued as an intercept page so that it is the first thing that every user sees as soon as they login to conject Project Control.

5. Tender – set up

5.1. Tendering set up at Project Level

When configuring **Tendering**, there are process settings at both Site & Project level which need to be configured to ensure that the **Tendering Module** runs smoothly. The Project Level settings in question are those settings which are configured within **Configure Processes**. For more information about **Configure Processes** and the settings as they apply to all processes, click [here](#). This article deals only with those settings with particular relevance to **Tendering**.

Issue Screen - where the **Tender Manager** is sending information to **Tender Users**, he needs to be able to select an **Issue List**. When a **Tender User** is sending information back to the **Tender Manager**, he should not be given the responsibility of selecting an Issue List. The **Issue Screen** settings for the **Tender** processes can be set as follows;

- **Tender - Skip When Responding**
- **Tender Acknowledgement - Skip When Issuing**
- **Tender Query - Skip When Issuing**
- **Tender Addendum - Skip When Responding**

If you select to use a **Controller** to manage the flow of **Tender** information, you may wish to set this up differently - if so, please discuss with your conject Consultant.

Tick Response Distribution - this should be disabled for all **Tender** processes (**Responses** to **Tender** processes are usually only sent to the originator of the process - other recipients of the original process should not be included on the issue list for the response).

For more information on...

- how **Tendering** works on conject Project Control, click [here](#)
- setting up **Tendering** at **Site Level**, click [here](#)

Rights: Only [PICs](#) can edit Project level process configurations.

Tender Users are those who are invited to bid on issued **Tenders**, and so are often referred to as **Bidders**.

Their site access should be restricted and their account set up so that they are automatically taken to the **Tendering Tab** when they login to the site.

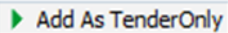
5.2. Tender Companies – set up process

Tender Companies should be added to the project as **Tender Only**. This ensures that they do not appear on the **Team Member** report or on the **Issue List** screen when publishing documents and non-Tender processes.

To add a company as **Tender Only**:

1. Click **Administration** -> **Project** -> **Companies / Users / Rights** -> **Add / Remove Companies**

2. Select the company required from the **Available Companies** list
3. Click

 Add As TenderOnly

to move them to the **Selected Companies** list (added **Tender Only** companies are indicated by [*] after the company name)

4. Tender users from these **Tender Companies** then need to be added to the project and given rights using the normal method

[Click here for more information about Tender Companies.](#)

Project Rights

Tender users do not need any **Project Level** rights and should not be given any. They should be given **Restricted Access - Tender View** at project level. This ensures that they can only view **Tenders** and related information which has been sent to them. This also ensures that they can view **Tenders** and associated information through the **Tendering Tab** as well as through the project screen.

Process Rights

Tendering uses **Processes** to manage the flow of information between **Tender Managers** and **Tender Users**. It's important that all users involved in **Tendering** have the correct access rights to these processes. **Tender** users need the following rights on the four commonly used **Tender Processes**:

Tender - Read rights only

Tender Acknowledgement - Read and **Create** rights

Tender Query - Read and **Create** rights

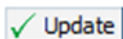
Tender Addendum - Read rights only

[For more information on adding users to Projects and assigning rights, click here.](#)

Default View

This setting controls the tab the user is taken to when they login to the Site. It does not restrict their access to other tabs. **Tender Users** (especially if they are not to be trained on conject Project Control) should have their **Default View** set to take them straight to the **Tendering** tab (and any **Tenders** which have been sent to them). To do so...

1. Click **Administration** -> **Site** -> **Companies / Users / Rights** -> **User Rights**
2. Select the company from the dropdown
3. Highlight the required user in the **Available Users** box
4. At the bottom of the **General** section, select the required **Default View**, in this case, **Tendering**
5. Click

 Update

[For more information about Default View, click here](#)

Rights: Project and **Process** Rights should be assigned by a PIC. **Default View** needs to be set by a Site Administrator.

5.3. Tender Managers – set up process

Tender Managers are those users who issue **Tenders** and associated information to **Tender Users**. They also respond to any **Tender Queries** as necessary and deal with returned bids.

Project Rights

Tender Managers do not require any specific project rights, but will always have at least the four basic user rights (**Review / Comment**, **Publish Documents**, **Add/Edit Issue Groups** and **Maintain Document Register Entries**). They will often have additional project rights and sometimes be PICs or CICs.

Process Rights

Tendering uses **Processes** to manage the flow of information between **Tender Managers** and **Tender Users**. It's important that all users involved in **Tendering** have the correct access rights to these processes. **Tender Managers** need the following rights on the four commonly used **Tender Processes**:

Tender - Read and **Create** rights

Tender Acknowledgement - Read rights

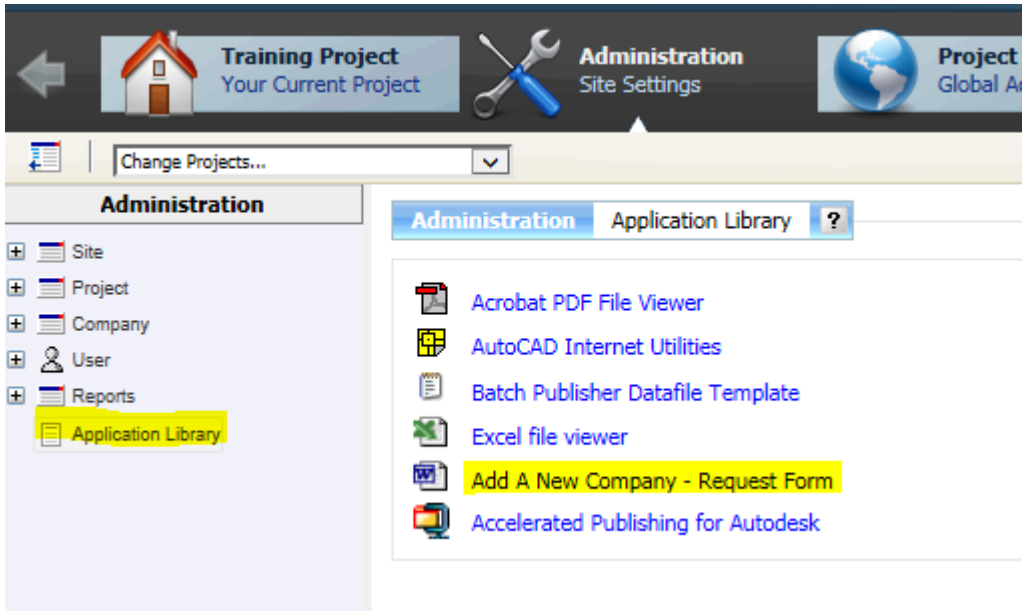
Tender Query - Read rights

Tender Addendum - Read and **Create** rights

Rights: Project and process rights can be assigned by PICs and CICs only. For more information on how this is done, click [here](#).

Appendix A - New Company – Request

A New Company – Request form can be found within Application Library – please see below:



Appendix B - NEC ECC Process User Rights Matrix

		ECC Processes													
Conject Dashboard		Early warnings				Defects		Compensation events				Communications		Payment	
Conject process		Early Warning		Extension of Time request		Notification of a defect		Notification of Compensation Event		Compensation Event Quote		Contractors Communication		Application for Payment	
Role		Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create
Main Contractor		X	X	X	X	X	X	X	X	X	X	X	X	X	X
Project Manager		X	X	X	X	X		X		X		X		X	
Supervisor		X		X		X	X	X		X		X		X	
All members on the Issue group		X		X		X		X		X		X		X	

		ECC Processes													
Conject Dashboard		Submission				Risk assess		Compensation Event				Communications			
Conject process		Design Submission		Programme Submission		Risk assessment		Compensation Event		Compensation Event Implementation		Project Manager Instruction		Project Managers Communication	
Role		Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create
Main Contractor		X	X	X	X	X		X		X		X		X	
Project Manager		X		X		X	X	X	X	X	X	X	X	X	X
Supervisor		X		X		X		X		X		X		X	
All members on the Issue group		X		X		X		X		X		X		X	

		ECC Processes							
Conject Dashboard		Payment				Communications			
Conject process		PM Assessment of Amount Due		Notice of Intention To Withhold		Supervisors Communication		Supervisors Instruction	
Role		Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create
Main Contractor		X		X		X		X	
Project Manager		X	X	X	X	X		X	
Supervisor		X		X		X	X	X	X
All members on the Issue group		X		X		X		X	

		Tender Processes							
		Tender Invitation		Tender Acknowledgement		Tender Query		Tender Addendum	
Role		Can Read	Can Create	Can Read	Can Create	Can Read	Can Create	Can Read	Can Create
Tender Manager - Main Contractor		X	X	X		X		X	X
Tenderer		X		X	X	X	X	X	

Appendix C – Document Register Rights

	Client Team	Main Contractor	Design Team	PM Team	Trade Contractor	Default
_3D Models	Full	Full	Full	Full	Read	None
BBI Handover & Occupancy	Full	Full	Full	Full	Read	None
Drawings and RDS	Full	Full	Full	Full	Read	None
Environmental Sustainability and BREEAM	Full	Full	Full	Full	Read	None
Health Safety and CDM	Full	Full	Full	Full	Read	None
Management	Full	Full	Full	Full	Read	None
Meetings and Presentations	Full	Full	Full	Full	Read	None
Process Attachments (Hidden)	Full	Full	Full	Full	Read	None
Procurement and Legal	Full	Full	Full	Full	Read	None
Project Admin & Protocols	Full	Full	Full	Full	Read	None
Quick Share (Zip Files)	Full	Full	Full	Full	Read	None
Reports and Brief	Full	Full	Full	Full	Read	None
Site Information & Surveys	Full	Full	Full	Full	Read	None
Spare	Full	Full	Full	Full	Read	None
Specifications	Full	Full	Full	Full	Read	None
The University of Manchester	Full	Read	Read	Read	Read	None
Trade Contractor Drawings and Documents	Full	Full	Full	Full	Read	Read

Full
Read
None

Appendix D - Project Role Assignment

	Client Team	Main Contractor	Design Team	PM Team	Trade Contractor	Default
Client	Yes					
Contractor		Yes				
Designer			Yes			
Consultant				Yes		
Subcontractor 1					Yes	
Subcontractor 2						
Subcontractor 3						
Subcontractor 4						
Subcontractor 5						
Subcontractor 6						
Subcontractor 7						
Subcontractor 8						
Subcontractor 9						
Subcontractor 10						
Subcontractor 11						
Subcontractor 12						
Subcontractor 13						
Subcontractor 14						

Client Team

Main Contractor

Design Team

PM Team

Trade Contractor

Default

Appendix E - Document Status Access

EXAMPLE

	Client	Consultant	Contractor	Subcontractor 1	Subcontractor 2	Subcontractor 3	Subcontractor 4
For Information	V	V	V	V	V	V	V
For Comment	V						
For Approval	V						
Work in progress/ preliminary	V						
For Coordination	V						
For Construction	V	V	V	V	V	V	V
As built	V	V	V	V	V	V	V
For QA Approval	P	P	P	P	P	P	P
QA Rejected	V						
Status assignment in progress	V						
Status A	V	V	V	V	V	V	V
Status B	V						
Status C	V						
V = View							
P = Publish							
B = Both							