

The University of Manchester Project Collaboration Tool

Protocol Document & Quick Start User Guide

Rev 11



<https://uom.myconject.com>

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

All Information is to be published to Conject, under the relevant project, in the relevant register and issued to the Project Information Coordinators 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 requests for new processes and Project set ups 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 Helpdesk).
- Number drawings/documents and upload to Conject according to the Project Specific Protocol.
- Issue/ respond to RFI's/ tasks where appropriate
- Comment on Contractor documents that have been issued for approval
- Manage their company user accounts.
- Review and read all comments issued which relate to their drawings/documents.

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

2. 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.

- Site level Primary contact – Benjamin Smith (Email: benjamin.smith-2@manchester.ac.uk)
- Site level Secondary contact - Ryan Lewis (Email: ryan.lewis@manchester.ac.uk)

The Project Level PIC's are:

- Project Level – Laing O'Rourke Projects, Claire Adams (Email: cadams@laingorourke.com)
- Project Level – Sir Robert McAlpine Projects, Peter Clapham (Email: p.clapham@srm.com)
- Project Level – Balfour Beatty Projects, Caroline Shaw (Email: Caroline.Shaw@balfourbeatty.com)

The PIC document controller is expected to:

- QA checks all incoming documentation.
- Assign work packages to drawings and documents.
- Manage and control distribution lists.
- Add new users to the project and assign project/process user rights.
- Manage drawing status.
- Conduct Conject training requirements to project team members
- Deal with day to day document/drawing numbering queries and resolving issues
- Liaise with the site level PIC's on issues that affect the running of the site
- Manage training of Project users

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) or requested from one of the above PICs.
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 (uk.helpdesk@aconex.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. Once on the system the nominated Company Administrators are responsible for managing the user accounts of its staff. Each company will nominate a company administrator (CA) who will be given the rights to create new user accounts for their staff and to change the passwords of the user accounts. The administrator will not be able to view the passwords of other users within their company.
7. If a user forgets their user ID or password then they can request a password reset from the Conject login screen. If this is not successful the user should contact their administrator who can give the user a new password.

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 specific related queries please contact the **Conject Helpdesk** :-

Email: uk.helpdesk@aconex.com.

Help Line: 0345 1300 999 (+44(0)1159 248 171 from outside UK).

Once raising a query with Helpdesk, please always provide the site address <https://uom.myconject.com/> and optional Project name.

3. 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.

Please note that the maximum timeout for a session is set to 80mins of inactivity.

Login: <https://uom.myconject.com>

https://uom.myconject.com/login.aspx

Project Control by Conject

MANCHESTER 1824 The University of Manchester

The University of Manchester

User ID:

Password:

Language:
 UK English

Log in

[End User Licence Agreement](#) | [Forgotten User Id/Password?](#)

Once logged in the initial page (**Dashboard**) will look like the below.

MANCHESTER 1824 University of Manchester

Lewis, Ryan Please Select Help Logout

MECD Main Project Your Current Project Financial Control Money Matters Administration Site Settings Project Global Global Actions

Home Dashboard Find & View File Publisher Publish Reports Comments Process Boiler... Change Projects...

01 General Dashboard 02 NEC (ECC) Dashboard 03 Tender Dashboard

Set Home: Page as Default Project Screen Add Gadget Add Dashboard

Task Overview

You've got 0 documents for action
 You've got 0 processes for action
 Action

113 documents have been issued for your information
 3 processes have been issued for your information
 Review

Team Member directory

Last Name: Search Clear Search

Project Details

Project Address

Description
 Manchester Engineering Campus Development

Tel

Fax

Status
 Design

Category
 Capital Projects

Contractor specific Registers/ Folders

Register Name	For Action	For Information	All
Quick Share (Zip Files)			2
3D Models			26
Drawings and RDS		43	547
Environmental Sustainability and BREEAM		3	6
Health Safety and CDM			7
Meetings and Presentations		64	147
Procurement and Legal			9
Project Admin & Protocols			19
Reports and Brief			92
Site Information & Surveys		2	32
The University of Manchester		1	14

Useful UoM Links

- 01 - Project Protocol & User Guide
- 02 - Conject NEC ECC User Guide for Contractors
- 02b - Conject NEC ECC User Guide for PMs
- 03 - Archibus Estates Space Management
- 03 - Estates and Facilities Policies and Procedures
- 04 - Estates and Facilities Homepage
- 05 - Health and Safety Policies and Procedures
- 06 - Find a University contact
- 07 - Conference call or screen sharing facility

Tasks

Process	For Action	For Information	All
Request For Information			
Task			

Document comments

Process	For Action	For Information	All
Comment		3	15

Approvals

Process	For Action	For Information	All

Notices

Site Notices

Create Notice

Title: Used some help!
 Submitted By: Ryan, Lewis: The University of Manchester
 Message Text: Have you noticed the links section on your dashboard? Here you can find the Conject Project User Gui
 Expires On: 31/12/2015

Project Notices

Create Notice

No active notices could be found.

There are 3 Dashboard's to select from:

1. General – main dashboard used
2. NEC ECC – Administration of an NEC construction contract
3. Tender – For tendering of works

3.1. Changing Projects

You may have access to more than one 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 University Site Admin who will be able to help with this. Everyone should have access to the **Training Project**. Here you can familiarize yourself with the system, upload documents and test processes in an informal area. If you can't find the training project please request access from the PIC.

conject Helpdesk +44 115 951 7711 Email helpdesk@biwtech.com Richard Moyle Please Select...

Project Test Your Current Project Administration Site Settings Project Global Global Actions Contract Admin Contract Management Audits and Inspecti Questionnaire Area Dubai KPIs Questionnaire Area Framework KPIs Questionnaire Area

Home Dashboard Find & View Project Calendar Batch Publisher Publish Reports Comments Process Basket...

Change Projects ?

Search by project

name test attribute All Attributes description value project code

Filter by project

status All Status Feasibility Construction Completed Design Standard category All Categories Commercial BSF

4 Results Found | Page 1 of 1

Project Name	Project Code	Status	Category	Description	Start Date	Completion Date	Business	Client	Division
Hala Test Project	P01	Feasibility	Commercial	Hala Test Project	10/07/2010				
Project Test	HC002	Feasibility	Commercial	St Georges	10/07/2010				
TEST Project	asdada21	Feasibility	Commercial	Test Project	10/07/2010	10/05/2011			
ZZ - Do not use - Test Project	P01	Feasibility	Commercial	St James School	10/07/2010	10/05/2011			

4 Results Found | Page 1 of 1

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

conject Helpdesk +44 115 951 7711 Email helpdesk@biwtech.com Richard Moyle Please Select...

Project Test Your Current Project Administration Site Settings Project Global Global Actions Contract Admin Contract Management Audits and Inspecti Questionnaire Area Dubai KPIs Questionnaire Area Framework KPIs Questionnaire Area

Home Dashboard Find & View Project Calendar Batch Publisher Publish Reports Comments Process Basket...

Change Projects ?

Search by project

name test attribute All Attributes description value project code

Filter by project


status All Status Feasibility Construction Completed Design Standard category All Categories Commercial BSF


4 Results Found | Page 1 of 1

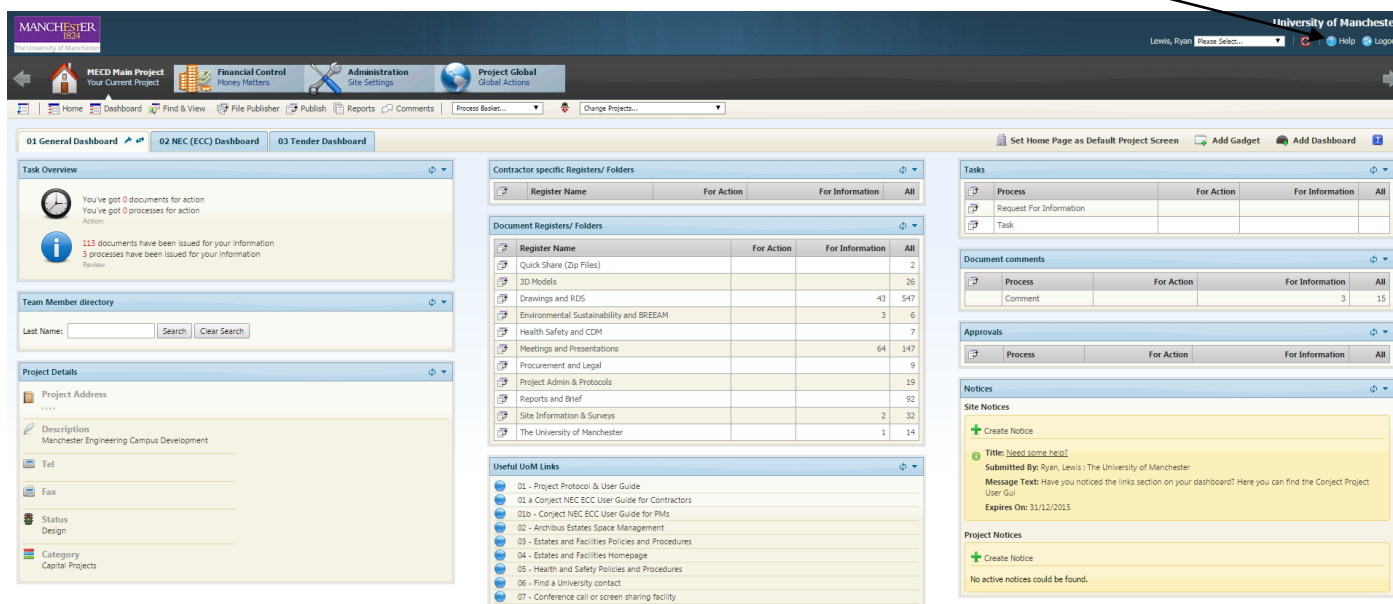
Project Name	Project Code	Status	Category	Description	Start Date	Completion Date	Business	Client
Hala Test Project	P01	Feasibility	Commercial	Hala Test Project	10/07/2010	10/05/2011		
Project Test	HC002	Feasibility	Commercial	St Georges	10/07/2010	10/05/2011	HC1002	
TEST Project	asdada21	Feasibility	Commercial	Test Project	10/07/2010	10/05/2011		
ZZ - Do not use - Test Project	P01	Feasibility	Commercial	St James School	10/07/2010	10/05/2011		

4 Results Found | Page 1 of 1

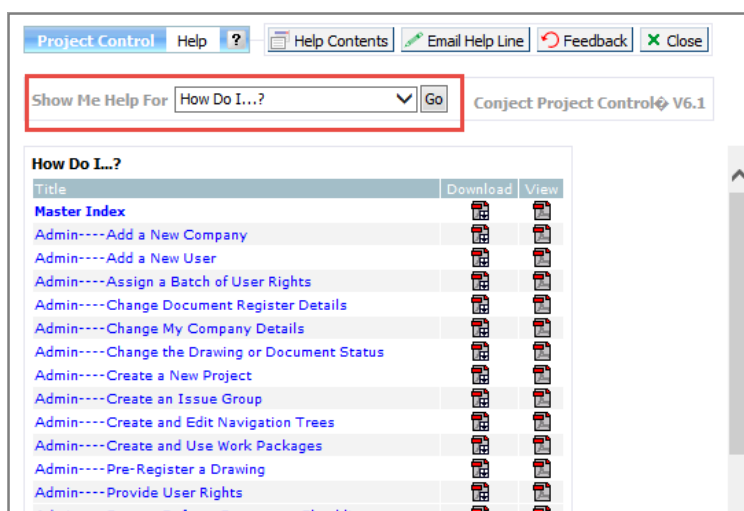
3.2. Help Guides

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.

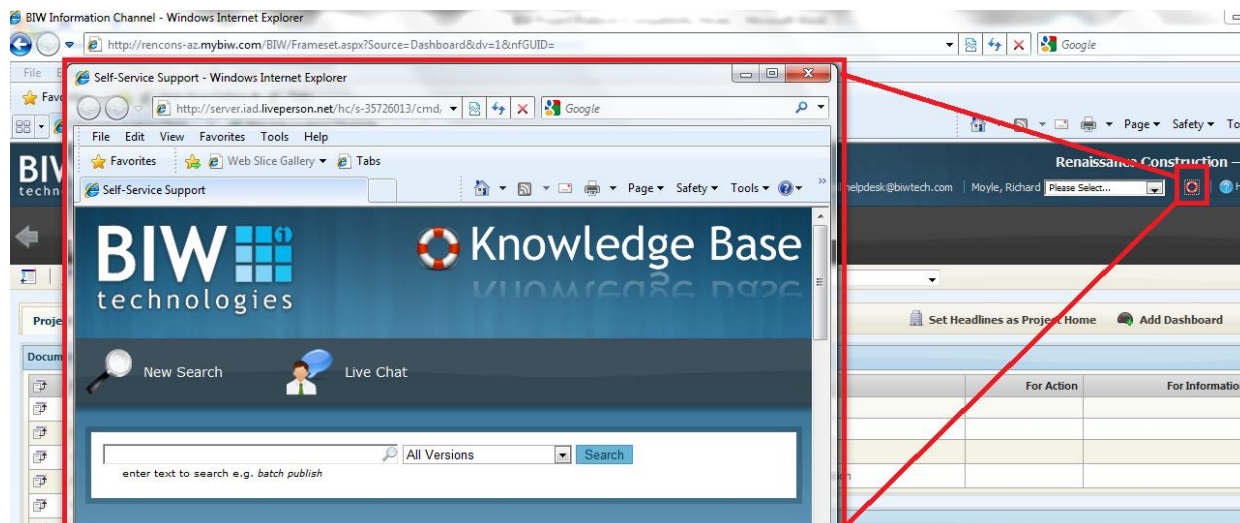


The new window that opens will look like the below. This is the **“How Do I...?”** section as noted in the **“Show Me Help For”** drop down menu, highlighted below.



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.



4. PROJECT SET UP

4.1. Information on Conject

Information is managed on Conject in two different ways:

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

4.2. Document Registers & Categories

Conject stores documents under 'registers'. It stores documents at one level and allows searching using powerful search criteria. Some folders are limited to certain file types that can be uploaded e.g. pdf. This can be changed on request if essential.

Document Registers (Primary Folder)	Document Categories (Subfolder)
Quick Share (Zip files)	<i>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.</i>
3D Models	n/a
Drawings & RDS	Architectural and Landscape, Civil and Structural, Equipment & Other, Mechanical, Electrical, Furniture & Fittings, Other, Room Data Sheet (RDS)
Specifications	Architectural and Landscape, Civil and Structural, Equipment & Other, Mechanical, Electrical, Furniture & Fittings, Other
Environmental Sustainability and BREEAM	BREEAM, Other
BBI Handover & Occupancy	n/a
Health Safety and CDM	n/a
Management	Feedback and performance, Procedures and Project Execution Plan, Change Control, Programme and plans of work, Photos, Risk, Financial, Other,
Meetings and Presentations	Client, Contractor, Design Team, Project Manager, Other
Procurement and Legal	Appointments and contract, Tenders and Quotes, Planning permission, Building Regulations, Other statutory approvals, Works Information
Project Admin & Protocols	n/a
Reports and Brief	Client, Contractor, Design Team, Project Manager, Other
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
Spare	n/a
Trade Contractor drawings and documents	Drawings, Documents

4.3. Purpose of Issue and documents status security

A 'Purpose of Issue' field should be set at the point of publishing. The field is designed to increase search ability of documents by further categorising them.

For each issue of a drawing/document a 'Document Status' is set by the publisher. The status may be also changed by authorised users to manage who can access what on the Project and by managers of the design process. The table below indicates the available Statuses on the site.

The table below indicates the different Purpose of Issue and Document Status's that are available on the site. These can be configured in different ways, please discuss with the PIC.

WS1 onwards default

Purpose of Issue Default WS1 onwards
WS 1, brief
WS 2, Concept design
WS 3, Developed design
WS 4, Technical design
Tender issue
WS 5, Construction
Work Stage 7, As built

Document Status Default WS1 onwards
For Information
For Comment
For Approval
Work in progress/ preliminary
For Coordination
For Construction
QA rejected

Framework Contractor WS4 onwards

Purpose of issue where Framework Contractor managing design WS4 onwards
For Information
For Comment
For Construction
For Tender
As built

Document Status where Framework Contractor managing design WS4 onwards
For QA Approval (Only QA and uploader companies will only see this)
Status assignment in progress (By PIC, prior to design manager)
Status A – No Comment
Status B – Progress in accordance with comments and Re-Issue For Construction Incorporating Comments
Status C – Resubmit For Approval
QA rejected
For Information

4.4. 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 PIC. Each company is assigned against a project role and each role is assigned specific access rights to each register.

Only the PIC 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.

4.5. 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 Manager 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.	<i>For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-</i> <i>Publishing----Make Comments on Documents & Drawings</i>
Request For Information (RFI)	For issuing, responding to and managing Requests for Information between design team and client including design subcontractors.	<i>For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-</i> <i>Publishing----Publish an RFI and Publishing----Respond to an RFI</i>
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.	<i>For further information on publishing please refer to the System Help Guides > HDI Guide Section for articles titled:-</i> <i>Publishing----Send and Receive Team Mail</i>
Change request	To manage change control on the Project.	<i>Will be implemented in due course or as required by each project.</i>
(ECC) Compensation Event Quotation	For use in the NEC ECC contract process	<i>For further information please refer to the System Help Guides > NEC Guidance Note section.</i>
(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 and Comp event implementation	For use in the NEC ECC contract process	
(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) Application for payment	For use in the NEC ECC contract process	
(ECC) PM assessment of amount due	For use in the NEC ECC contract process	

4.6. 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 processes.

4.7. Commenting

Any user can comment on any drawing or document. Comments will then be emailed automatically by the Conject system to the users on the distribution for the drawing/document being commented on. Recipient will receive comments on the overnight summary email. A Snap shot tool on the mark up screen can be used if instant notification is required, this can then be emailed.

Comments should be made using one of the following 3 methods:

- Redline mark-up features of the Conject viewer. This effectively adds a comment layer over the top of the drawing or document.
- Complete the 'comment form' from within a document and add a text comment.
- Complete the 'comment form' from within a document and attach a PDF file containing scanned hand written comments.

Comment files should never be uploaded into any of the folders as separate files. They must always be attached to comments linked to the original document.

Online mark-up tool colour allocation

Architect	Red
M&E Engineer	Green
Structural Engineer	Blue
Project Manager	Orange
Contractor	Purple
Others to Choose Any Other Colour	

Requests for Information (RFI)

(Generally always used during construction phase)

The RFI process provides a means by which a user can raise technical queries. The process is described below:

- The originator completes the online form.
- The status of the query is automatically set as 'Awaiting Answer'
- The recipient reviews the query and responds if an answer is known. If an answer cannot be provided then the form is forwarded to the appropriate designers for response.
- The recipient is expected to respond within 3 working days
- Finally, the originator will then change the status of the RFI to 'Answered' or 'Part Answered' as appropriate.

4.8. File naming

There will be no strict file naming convention/protocol for **general documents** on projects, see below for drawing file naming. Users are advised to follow their own file naming convention for general documents, **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 **not** form any part of the filename.
- When revising files ensure that it has **exactly** 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

Design Team Drawing References & Filenames

This section of the document describes the rules for naming drawings, documents etc. Information published to the system which does not conform to the protocols could be rejected. Any rejected documents should then be re submitted.

FOR PROJECTS WITH THE FRAMEWORK CONTRACTOR ACTING AS LEAD INFORMATION/DESIGN MANAGER ALL DESIGN TEAM DRAWINGS AND DOCUMENTS ARE TO BE ISSUED TO THE CONTRACTORS PIC ONLY (see page 4 for contact information).

File name format: P-W-V-F-T-D-(F)Z

(P) Project Name (See Appendix 1)	(W) Company Originator Acronym Code (See Appendix 1)	(V) Volume (See Appendix 1)	(F) Floor/Level (See Appendix 1)	(T) Document Type (See Appendix 1)	(D) CI/Sfb Code (See Appendix 1)	(F)Z 5 Digit Sequential No Originator to Keep Record of No's Used
-----------------------------------	--	-----------------------------	----------------------------------	------------------------------------	----------------------------------	---

P Project Code for Building (See Appendix 1)

W Company Originator acronym Code (See Appendix 1)

V Volume (Project Specific - examples in Appendix 1)

F Floor (See Appendix 1)

T Document Type (See Appendix 1)

(D) CI/Sfb Code (See Appendix 1)

(FZ) A5-digit Sequential Number. The number can be any combination of letters and numbers but not contain any dashes. The first two digits of the 5 digit number can be used to designate the floor level

Example An architect's suspended ceiling drawing for first floor for Library

Sample Drawing Number: **6072-RYD-03-01-DR-47-01001**

Corresponding to Drawing *File-name* **6072-RYD-03-01-DR-47-01001.pdf**

Notes:

1. All publishers should check the document registers for previously used filenames to ensure they do not assign the same filename to different documents; this will also become obvious when uploading if the system advises that you are publishing a new version of the same file-name. If the document you are uploading is completely different to what was published previously, then abort the upload and amend the filename and ensure this is amended within the document as well.
2. Document filenames must not have revision references.

File Naming Exceptions to the Above File Naming Rules:

For non-design documents the following should be used:

P-W-T-YYMMDD-NNNN where:

P-W-T is as described above;

YYMMDD = 6 digit date in reverse order representing the date the meeting was held or that the photo was taken

NNNN = sequential number from 0001 to 9999

E.g., a photograph would become: **9559-UOM-PH-091106-0001.jpg**

File Attachments

File attachments are used when you want to upload a secondary file (E.g. a native CAD file). Normally, native CAD files should be DWG format and contained within a ZIP file.

Revision Letters/ Numbers

Formats as described. Every drawing and document must clearly display a revision and also include a revision history table.

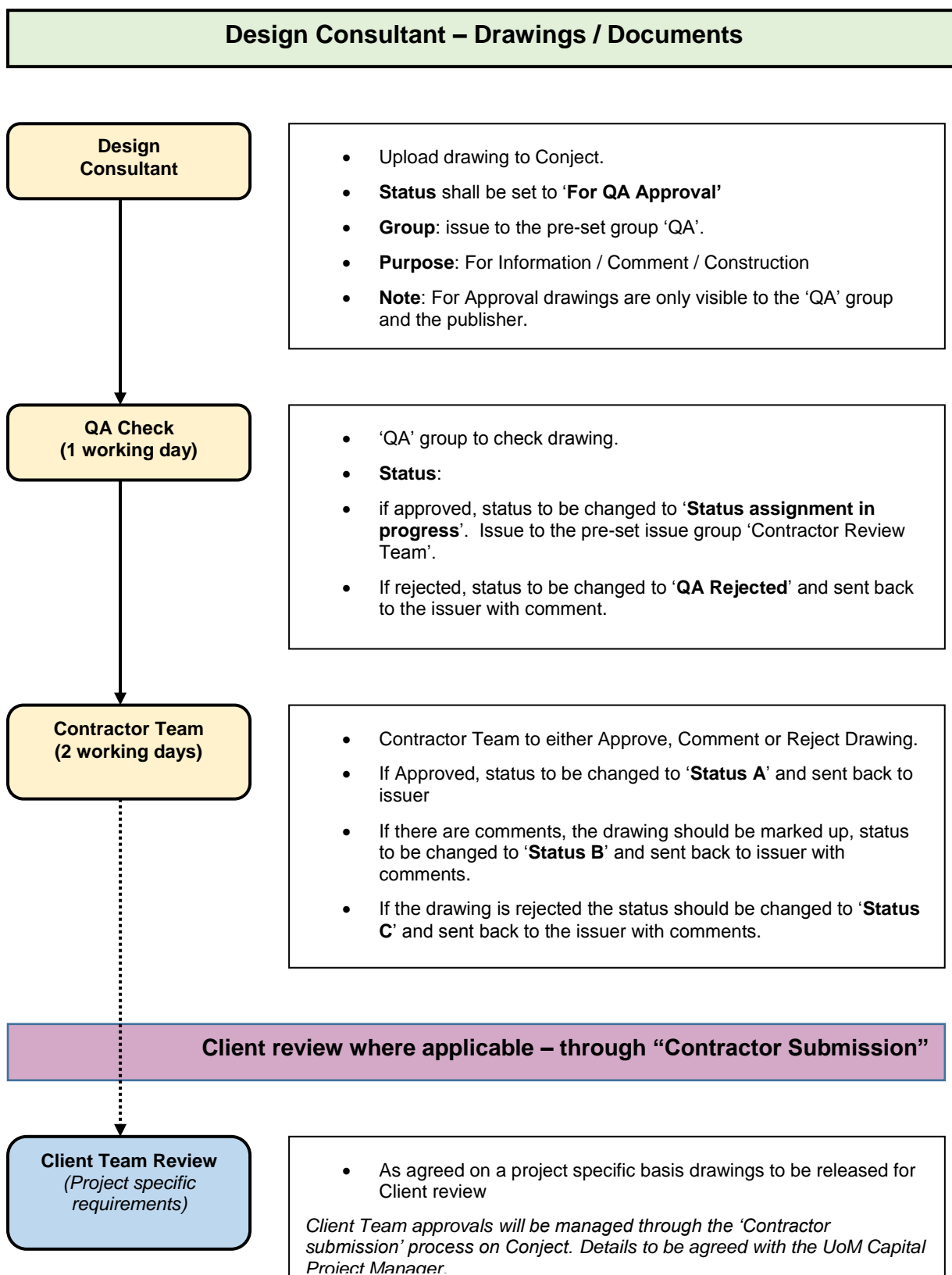
Title

The drawing or document title must match that on the actual document. Do not enter all of the title in upper case letters as it is much more difficult to read.

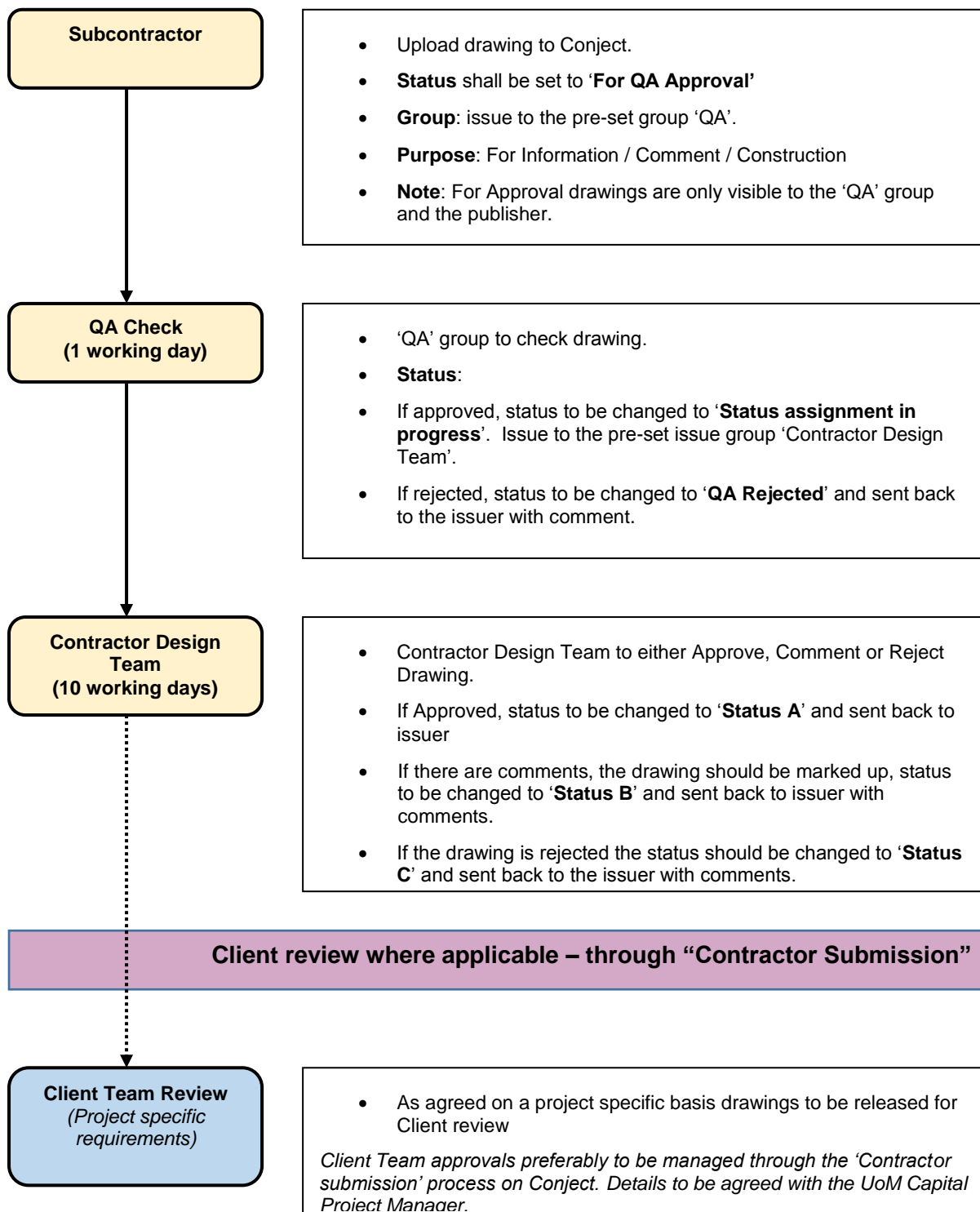
Issue Notes

When issuing a drawing or document you can optionally add some issue notes. E.g. describing what changes have been made.

When the Project is controlled by a Framework Contractor PIC, then the following approval processes of documents/drawings will be used:



Subcontractor – Drawings / Documents



4.9. Status Stamps

Status stamps are used by the design manager or representative for assigning the status of drawings. These are to be Project specific but in general follow the theme of:

Status A – No comments (Proceed in accordance with the contract)

Status B – With comments (Proceed in accordance in with comments and resubmit incorporating comments)

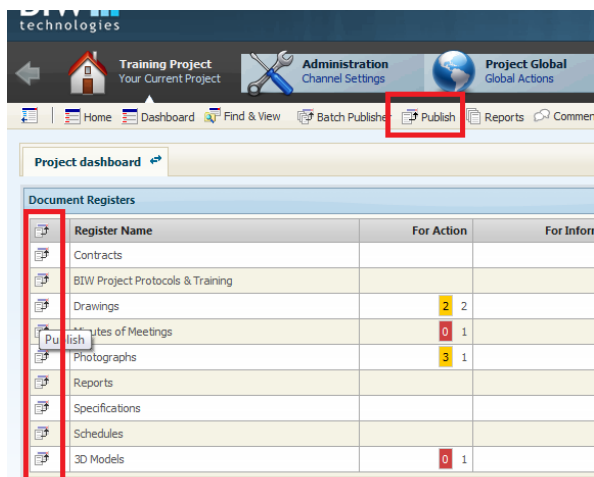
Status C – Rejected, (Resubmit for approval)

Example of stamp

Status C Company: Laing O'Rourke Person: Goodier, Ryan Date: 20/02/2012
Status C ***TO BE REVISED***

5. 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.

6. SEARCHING FOR AND VIEWING DOCUMENTS

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

The screenshot shows the Aconex Conject dashboard for a project named '(Test) T2 Retail'. The top navigation bar includes links for Home, Dashboard, Find & View, Batch Publisher, Publish, Reports, and Comments. Below this, the 'Sample User Dashboard' is displayed. It features a table with document status indicators for 'For Action' and 'For Information'. A red box highlights the 'For Information' column, and an arrow points to the 'For Information' tab in the 'General Information' section on the right.

Register Name	For Action	For Information	All
Car Park (MSCP_RU001)			1
WHS - Unit 1		1	5
WHS - Unit 10 (exmple data)		16	16
WHS - Unit 100		1	2

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

The screenshot shows the Aconex Conject search screen. The top navigation bar includes links for Home, Dashboard, Find & View, Batch Publisher, Publish, Reports, and Comments. Below this, the 'Search' section is displayed. It features a search bar and various filters. The search results are shown in a table with columns for File name, Reference number, Iss., Rev., Status, Category, Title, Company, Issued, and Iss. reason. The results are filtered to show documents for 'Information'.

File name	Reference number	Iss.	Rev.	Status	Category	Title	Company	Issued	Iss. reason
myfileRM1	HC002-DR-0039	1	a	A4	For Approval (QA)	Test File	conject	26/01/2012	Comment
DR-BM-71-0125	HC002-DR-AR-00000-0002	1	-		For Approval	Test document	conject	28/06/2012	Approval
DR-BM-71-0125	HC002-DR-AR-00000-0002	2	A		Approved	Test document	conject	28/06/2012	Approval

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'.

The screenshot shows the Aconex Conject 'Find & View' screen. The top navigation bar includes links for Home, Dashboard, Find & View, Batch Publisher, Publish, Reports, and Comments. Below this, the 'Find & View' section is displayed. It features a search bar and a list of registers. A red box highlights the 'Find & View' link in the top navigation bar and the list of registers below.

- Search All Documents
- 3D Models
- Contracts
- BIW Project Protocols & Training
- Drawings
- Minutes of Meetings
- Photographs
- Reports
- Specifications
- Schedules

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.

Search Project Documents ? Publish

Try our [new search](#) screen with enhanced search capabilities.

file name status **For Approval** category **not selected** ☐ issued to me ☒ latest issue issued date **all dates**
☐ un-seen documents
☐ un-actioned documents
☐ accessible by me
☐ checked out to me

title company **BIW Technologies** reason for issue **any reason**

search options [Reset Filters](#) results

19 Documents Found | Page 1 of 1 Display Per Page 10

Register	File name	Iss.	Rev.	Status	Category	Title	Company	Issued	iss. reason
Drawings	Consultant Appointment 6232	2	-	For Approval	Architectural	ground floor layout 5	BIW Technologies	05/10/2011	-
Drawings	Consultant Appointment 532	2	-	For Approval	Architectural	ground floor layout 4	BIW Technologies	05/10/2011	-
Drawings	Consultant Appointment 432	2	-	For Approval	Architectural	ground floor layout 3	BIW Technologies	05/10/2011	-
Drawings	Consultant Appointment 3232	2	-	For Approval	Architectural	ground floor layout 2	BIW Technologies	05/10/2011	-
Drawings	Consultant Appointment 22	2	-	For Approval	Architectural	ground floor layout 1	BIW Technologies	05/10/2011	-
Drawings	Afternoon test	1	a	For Approval	Mechanical	ground floor layout	BIW Technologies	05/10/2011	Comment

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).

Search Project Documents / Drawings ?

Try our [new search](#) screen with enhanced search capabilities.

file name status **any status** category **not selected** source work package **any work package** ☒ issued to me
☐ un-seen documents
☒ un-actioned document
☐ accessible by me
☐ checked out to me

title company **any company** reason for issue **any action**

reference number

search options [Reset Filters](#) results

3 Documents Found | Page 1 of 1

File name	Reference number	Iss.	Rev.	Status	Category	Title
myfileRM1	HC002-DR-0039	1	a	For Approval (QA)	Layout	Test File
DR-BM-71-0125	HC002-DR-AR-00000-0002	1	-	For Approval	Architectural	Test do
DR-BM-71-0125	HC002-DR-AR-00000-0002	2	A	Approved	Architectural	Test do

3 Documents Found | Page 1 of 1
[Add To Basket](#) | [Allocate Reference Number](#)

7. 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.

Search Project Documents / Drawings ?

Try our new search screen with enhanced search capabilities.

file name: status: any status category: not selected source work package: any work package

title: company: any company reason for issue: any action

reference number:

search options: [Reset Filters](#) results

3 Documents Found | Page 1 of 1

File name	Reference number	Iss.	Rev.	Status	Category	Title	Company	Issued	Iss. reason
myfileRM1	HC002-DR-0039	1	a	A4	For Approval (QA)	Layout	conject	26/01/2012	Comment
DR-BM-71-0125	HC002-DR-AR-00000-0002	1	-		For Approval	Architectural	conject	28/06/2012	Approval
DR-BM-71-0125	HC002-DR-AR-00000-0002	2	A		Approved	Architectural	conject	28/06/2012	Approval

3 Documents Found | Page 1 of 1

[Add To Basket](#) [Allocate Reference Number](#) [Export All 3 Results](#)

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.

Search Project Documents / MSCP2 - RU0001 ?

Try our new search screen with enhanced search capabilities.

file name: status: any status category: not selected

title: company: any company reason for issue: any reason

search options: [Reset Filters](#) results

3 Documents Found | Page 1 of 1

File name	Iss.	Rev.	Status	Category	Title	Company	Issued	Iss. reason
Test Shell	2	02		Shell and Core	New title 3	BAA Company	12/04/2012	
PAW_12142-20-DR-200-000003	1	1		Contract	Contents Page for RU1003	BAA Company	11/04/2012	
car park doc	1	a		Concept Design	test	Test Contractor	03/04/2012	

3 Documents Found | Page 1 of 1

Details Test Shell/ Iss: 2 Rev: 02 ?

Open Document Document Issue Print Close

Document Issue Report ?

Forward/Amend Issue Submission Access Document Access

Consultant Document Submittal Report no: 66
Project (Test) T2 Retail
Company BAA Company
Telt: BAA Company
Issued By: Helena Barrett

Description T2 Retail
Address BAA Company, BAA Company , , ,
Fax

issued: 12/04/2012 11:18:51

File Name: Test Shell
Issue: [2]
Title: New title 3
Document Status: Shell and Core
Attachment(s): [0]

Register MSCP2 - RU0001
Revision Letter 02

Document Category: General
Sheet Size: A4

Issuer	Issued	Name	Company	Reason For Issue	Respond By	Actioned Date
Helena Barrett	12 April 2012	Sarah Wood	BAA Company	For Information		12 April 2012
Claire Goode	13 April 2012	Simon Sorin	Bryden Wood Limited	For Information		
Helena Barrett	12 April 2012	WHS User 1 cannot access this register	WH Smith	For Information		

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.

Search options: [Reset Filters](#)

any status | not selected | latest issue | all issues

title | company | any company | reason for issue | any reason

un-seen documents | un-actioned documents | accessible by me | checked out to me

3 Documents Found | Page 1 of 1

File name	Iss.	Rev.	Status	Category	Title	Company	Issued
<input checked="" type="checkbox"/> Test Shell	2	02	Shell and Core	General	New title 3	BAA Company	12/04/2012
<input checked="" type="checkbox"/> PAW_12142-20-DR-200-000003	1	1	Contract	Specifications	Contents Page for RU1003	BAA Company	11/04/2012
<input checked="" type="checkbox"/> car park doc	1	a	Concept Design	Specifications	test	Test Contractor	03/04/2012

3 Documents Found | Page 1 of 1

[+ Add To Basket](#)

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

(Test) T2 Retail | Administration | Project Global

Home | Dashboard | Find & View | Batch Publisher | Publish | Reports | Comments

Process Basket... | Process Basket... | Documents

Document Basket ?

Search by: file name | title

Filter by: register | all registers | document status | any status | company | any company

all dates | latest issue | all issues

Process (limit: 100) | View All Items | allowed | disallowed

3 Items In Basket Found | Page 1 of 1

Register	File Name	Iss.	Rev.	Doc. Stat.	Title	Company	Issued
MSCP2 - RU0001	Test Shell	2	02	A4	Shell and Core	BAA Company	12/04/2012
MSCP2 - RU0001	PAW_12142-20-DR-200-000003	1	1	A3	Contract	BAA Company	11/04/2012
MSCP2 - RU0001	car park doc	1	a		Concept Design	Test Contractor	03/04/2012

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).

8. ADVICE ON THE OPTIMUM MACHINE AND NETWORK SETTINGS

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 uk.helpdesk@aconex.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 uk.helpdesk@aconex.com

File Publisher – Internet Explorer settings

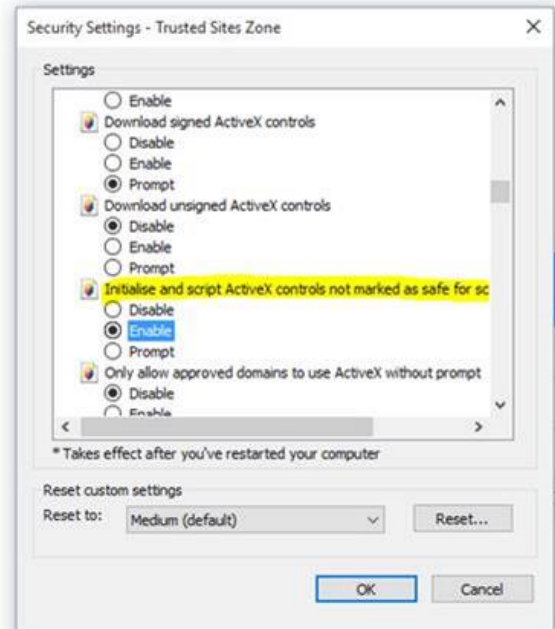
Internet Explorer needs to be set up in a certain way in order to use a data file within the File Publisher. Please see settings that need to be applied/amended below.

“If you want to use a Data File to import document details you must have MS Excel installed, your Project Control site must be added to your Trusted Sites list and the Initialize and script ActiveX controls not marked as safe for scripting setting must be set to either enable or prompt for this zone.”

To make this a bit clearer, the CONJECT website needs to be added into the trusted sites zone of Internet Explorer. You can add the website into this zone by navigating to internet options, and selecting the areas highlighted in the screenshot below.



In addition to this, the Initialize and script ActiveX controls not marked as safe for scripting setting must be set to enable or prompt for the trusted sites zone. I've highlighted how to do this below.



- Appendix 1

P	Project Code typical examples
5376	Chemistry Building LTM
5920	Quad conservation Project
5955	Coupland 3
5983	Manchester Engineering Campus Development
5985	Manchester Business School
6072	The University of Manchester Library
6029	Fallowfield Campus Development
6381	Schuster Annexe
6241	GEIC
6480	SKA II

W Originator Company Acronym or Works Package Code examples

UOM University of Manchester
 BAB Balfour Beatty
 LOR Laing O'Rourke
 SRM Sir Robert McAlpine
 BDP Building Design Partnership
 RYD Ryder Architecture
 CAP Capita
 MAC Mace

V Volume

(EXAMPLE ONLY – PROJECT SPECIFIC)

01 Phase 1
 02 Phase 2
 03 Phase 3

(2ND EXAMPLE)

01 Blue Area
 02 Orange Area
 03 Purple Area
 04 Red Area
 05 Green Area
 ZZ Across Multiple Areas

F Floor

(Must be used UoM's standard See EPM GM11 for room numbering procedure)

B = Basement
 MB = Mezzanine between Basement and the floor above
 LG = Lower Ground
 MLG = Mezzanine between LG and the floor above
 GF = Ground Floor

MG = Mezzanine between Ground and the floor above
 01 = First
 M1 = Mezzanine between First and the floor above
 02 = Second and so on
 R = Roof
 ZZ = Across multiple
 XX – No levels – typical detail
 EXG - external works

T Document Type Codes

BRF	Brief
BM	Benchmark
CA	Calculations
DA	Data Sheets
DR	Drawing
EM	Email
FX	Fax
HS	Health & Safety Plan
LT	Letter
MD	3D Drawing model file
MN	Meeting Minutes and Notes
MS	Method Statement (to include Risk assessment)
OM	O&M Manuals
AFP	Application for payment
TS	Technical submission
WPR	Work Package recommendation to procure
PC	Procedure
PH	Photographs
PR	Programmes
QM	Quality Manual
QP	Quality Procedures
RA	Risk Assessments
RP	Report
SA	Sample
SH	Schedule
SK	Sketch
SM	Schematic
SP	Specifications
TC	Test Certificate
TR	Test Results
TS	Technical Submittals

D CI/SfB Codes

00	Site Plan
01	Presentation
02	GA – Master Plan
03	Demolition

04	Fire Strategy / Access
05	GA – Plans
06	GA – Sections
07	GA – External Elevations
08	GA – Reflected Ceiling Plans
09	Not Used
10	Substructure
11	Ground Excavations
12	Not Used
13	Ground Bearing Slabs
14	Not Used
15	Not Used
16	Retaining wall foundations
17	Pile Foundations
18	Other substructure elements
19	Not Used
20	Primary Structure – General
21	External Walls
22	Internal Walls
23	Floors
24	Stairs & Ramps
25	Auditorium
26	Sanitary layouts
27	Roofs
28	Structural Frames
29	Not used
30	Secondary Structure
31	External Elements – Cladding
32	Internal Elements – Joinery
33	Raised Floors
34	Balustrades & Metalwork
35	Suspended Ceilings
36	Not used
37	Roof lights
38	not used
39	not used
40	Details – General
41	External Wall Details
42	Internal Wall Details
43	Floor finishes Details
44	Stair and Metalwork details
45	Ceiling Details
46	Sanitary Details
47	Roof Details
48	not used
49	not used
50	Mechanical Services
51	Combined M&E
52	Drainage
53	Hot & Cold Water
54	Gas & Compressed Air

55	Refrigeration
56	Space Heating
57	Ventilation & Air Conditioning
58	Other piped, ducted services
59	not used
60	Electrical Services
61	Electrical Supply
62	Power
63	Lighting
64	Communications
65	not used
66	Transportation
67	Fire Systems
68	Security and Control Systems
69	Lightening Protection/Earthing
70	Fixed Furniture – General
71	Signage Details
72	Fixed Furniture Details
73	Kitchen Fitting Details
74	Not used
75	Cleaning Fittings Details
76	Storage & Shelving Details
77	Bar Fixture Details
78	Not used
79	Not used
80	Loose Equipment – General
81	Circulation Loose Equipment
82	General Loose Equipment
83	Kitchen Loose Equipment
84	Sanitary Loose Equipment
85	Cleaning Loose Equipment
86	Storage Loose Equipment
87	Bar Loose Equipment
88	Not used
89	Not used
90	External Works – General
91	Ground Preparation
92	Hard Landscaping
93	Soft Landscaping
94	Services
95	Furniture & Fittings
96	External Works – Service/Utilities General
97	Schedules
98	Specifications
99	Scope Drawings