**#Placeholders and Documents Creation in Aconex: Engineering**

1 How to create a document in Aconex?

2.Download templates and create a placeholder: (Originator)
3.Login to the required project in Aconex Select “Documents / Document Register”, click on “All filters” type in the filters and choose « template » as type and then click on “Search”
4.Choose the appropriate template and download it into your laptop
5.Click on “Add placeholders” and fill in manually the information related to the card (Document type, discipline, phase, …) or you can use the metadata file to upload more documents (more than one document).
6.Once the card is created, fill in the downloaded template in your laptop with all information, rename the file as per the document number generated in Aconex, Drag, and drop the native file, and then click on “update documents”
NB: if a document needs to be under an approval workflow, it’s recommended to add the approval names in the native file, convert it to PDF, then update the card again. If it needs to be on squad check, convert the document again to PDF without putting the approval names (not required).

**# What is squad check process?**

It is a collaborative document review involving multiple disciplines before final approval or submission.

**# Document upload and transmission**

1 Upload Document:
Go to the "Documents" module
Click "Upload Documents."
Select files from your computer.
Fill in metadata (document type, discipline, title, revision, etc.).
Click "Upload."
2 Register Document:
Once uploaded, documents must be registered with all required metadata to be searchable and version-controlled
3 Transmit Document:
Go to "Transmittals" or from the document list, select documents.
Click "Transmit."
Choose recipients, add subject/message.

Set document purpose and response required (if any).
Click "Send Transmittal."

**# Placeholders creation**
*Go to the Document Register.
*Click on "Create →Placeholders
*Indicate the number of placeholders you want to create
*Choose the Document Type and fill in required metadata fields (Title, Number, Discipline, etc.).
*Save the placeholders.

**#Starting an approval workflow**
The Originator shall login to the required project in Aconex then from the document register he should search for the document, select it and Click on “start a Workflow”, He then need to click on Click on next, choose the workflow template related to the discipline, click on next, He need to Choose the “reason for issue” and then click on “Submit”. A notification will be sent to the approvers for their review with all details.

Before Putting the pdf in the approving workflow, the originator must fill in the approval names in the cover page of the native file, convert it to PDF, update the document in document register, then he can initiate the approval workflow.

**#Engineering Approval Workflow: Native & PDF files**
The approver can be able to check the pdf file during the approval workflow and approve it following the steps below:
Login to the required project in Aconex.
Click the Tasks button and under View, choose My Tasks.
Under Documents heading click on the Awaiting Your Review title to expand your list.
Click on the workflow number you would like to review/approve.
You’ll see the List Mode page
To submit your review for the document: a. Select the checkbox for the document. b. Select a value from the Review Outcome list.
c. If required, type any additional comments regarding your approval in the Comments field;

and the review has been submitted. An automatic notification will be sent to the workflow administrator and the next reviewer.
Note: If you have multiple documents for review, you can choose Bulk Review option to bulk assign the Review outcome and comments and follow the previous steps for review.

# how to review documents in WFs ?

you can use Workflows Module after that use assigned to me

# how to stamp several documents in one click ?

you can give a review status to several documents using bulk review but for stamping it should be done for each document separately

# how to stamp multiple documents in one click ?

*Select one or more markups you want to copy across to other pages or documents in the review
*Click Bulk Annotate from the toolbar.
*Complete the details in the Bulk Annotation screen:
>Enter a name for this bulk run. This is only visible to you as a handy reference if you need to undo the action.
>Enter the start and end page to apply the selected markups
>Select documents in this review to apply the selected markups.
*Click Apply Annotations.

# how to know if this document is pending review or pending submission from suppliers?

If the submission status of a document is " Submission Required" then it is pending with supplier but if the Submission Status is "Submitted" then it pending for our review

Go to Supplier Documents → Active Packages.
Find the document or package you are checking.
Look at the Status column:
Pending Submission → means the supplier has not submitted yet.
Pending Review → means the supplier has submitted, and it’s waiting for your review.

# How to put my comments on a document?

*Go toWorkflow→assigned to me.
*select the needed document to be reviewed.
*Review documents and select Review Code.
*Add your comment.

*Click Submit Review.
**# Why don't my comments appear in the documents (before submit review)?**
A publish markup is needed before submit review

**# Can we comment in parallel in the same document?**
Yes, In order for several users to add comments on the same document independently without interfering with each other, the document must be assigned to a Parallel Workflow Template. This workflow allows multiple users to review and comment on the document simultaneously.

**# What are the workflows to be used in engineering to approve documents?**
In engineering document we have check print workflow to do the checking of your document, we have squad check workflow for the interdiscipline squad check and we have the engineering approval workflow for approving or rejecting a document
**# Can I change the workflow duration after launching it?**
No we can't change the workflow duration after starting the workflow
**# How do I reassign a workflow?**
you can reasign a workflow from the workflow module >> Initiator tools >> Reasign
**# How do I create or modify workflow template**
You can ask the document control in your project to add a template or modify infomation there
**# What are the steps for adding or deleting names, and how do I do it?**
after choosing the workflow template and opening it , you will find the step box at the end of the template , there you can open the box and remove a name or add it by typing the name and clicking enter
**# Can I integrate workflow templates with other systems or tools?**
Workflow templates can be used only inside Aconex
**#How do I set up and activate a workflow template?**
setting or activating workflow template is the DC responsibility , please send your request to the DC of your project
**# How do I initiate a workflow ?**
you can initiate a workflow from the documents register >> Transmit >> Start a workflow
**# How to download documents from Aconex**
Go to Document Register.
Use filters/search to find the documents.
Select the checkboxes next to the documents.

Click "Download" from the action menu., or simply click on the document format icone

**#Squad check for Engineering documents: PDF files**

Using theOnline Viewer and mark-up tool is where reviewers can view and review PDF documents online within the workflow module in Aconex. Reviewing PDF files in workflows can occur by marking up the document online. It requires the reviewer to follow the workflow in Aconex, mark it up, publish the comments, and then submit the review in the system.

This section provides step by step guidance on how reviewers can perform this task to complete their review.

Once the steps indicated in the user guide n°JESA-ACX-PIM-UG-00001 are completed and ready to put the documents on squad check, the below steps need to be followed: 2.2 Notify project Document controller to start a Squad check workflow: (Originator) user should Login to the required project in Aconex and Go to email module and select “Squad check Instruction “mail type, then he should Fill in the email with all required information and attach the documents from “Document register”, click on “search”, select the documents and click on “attach”, Select the Document Controller contact and then send the email .

NB: SQ workflow shall be done as per the distribution matrix related to each project.

2.3 Open PDF files in a workflow to review (Reviewer) Login to the required project in Aconex Click the Tasks button and under View, choose My Tasks

Under Documents heading click on the Awaiting your Review title to expand your list

Click on the workflow number you would like to review/approve.

You’ll see the List Mode page

to add your mark-ups, the online markup can be used by clicking on the pencil below:
Once the review is done, you can add any additional comments in “comments area”, Publish the mark up so other reviewers in the step can see your markups and comments too, but do not click on “Submit Review”.
Note: If you have multiple documents for review, you can choose Bulk Review option to bulk assign the Review outcome and comments and follow the previous steps for review.
Tip! While reviewing documents in the viewer your markups are automatically saved as you work. If you leave the screen for any reason, your markups, comments, and review outcome are right there in your draft when you come back, ready for you to continue.
2.4 Closing SQ workflow in Aconex The project Document controller will be responsible to submit the review after being completed by the involved disciplines, so the workflow will be closed. The DC shall inform back the originator about the closure, so he can go to document register and check the commented documents with the markup’s summary sheet

**#how to submit supplier documents ?**

You can submit it using supplier transmittal from "supplier documents" >> active packages >> Submitted/ Submission Required

**# how to check previous revisions of documents ?**

You can click on the title of the document and at the left side you will find all the history of the previous revision and version of the document

**# How can I review a supplier document?**

Go to the Document Register.
Use filters to select documents submitted by suppliers (e.g., by Organization, Status, or Date).
Click Export
Choose format (Excel, CSV, PDF).
Save the report

**# how to review documents in Workflow**

*Go to Workflow→assigned to me.
*Select the needed document to be reviewed.
*Review documents and select Review Code.
*Add comments if needed.
*Click Submit Review.

**# Where can I find my workflows?**

Go to the Workflows tab in the main menu.

Choose "My Workflows" to see workflows you're involved in.
Filter by status (e.g., Pending, Completed) or use search options.
Workflows: Check status and steps in the Workflows > My Workflows tab.

# Where can I check the progress of a package?

You can check the progress of a package from Supplier Documents >>Active Packages >> then click on the package number , the progress will be mentioned beside it

# When can we create a supplier package?

We can create supplier package once the contract is signed between Jesa or client and the supplier,

# Who can create supplier Aconex account?

Supplier Aconex Account should be created by the supplier administrator

# Using Aconex for RFI and where to find RFI log

RFI is Aconex are handled using Mail Module, there you can send, receive and reply to RFIs , You can find the RFI Log in Insights then reports >> standards

# how to submit supplier documents in Aconex

once the review is finished, the document can be shared back with the supplier as follow:
*Go to Supplier Documents → Active Packages.
*Click on the relevant package by selecting the corresponding PO number.
*Navigate to the Submitted tab.
*Click on the icon ![icon] to open the document selection.
*Select the document, assign the appropriate review code, and click Submit Review.
*The email module will appear. Fill in the email subject and click Send.

# how to check previous revision of documents

*Navigate to the main menu and select Documents → Document Register.
*Use the search filters to find the desired document.
*Click on the document title to open it.
*On the left side of the screen, you will see a list of all revisions.
*Click the arrow next to the revision you want to view to access its version.

# How to download Suppliers Report ?

*Go to Supplier Documents.
*Apply filters if needed (by supplier, PO, status, etc.).
*Click the Export button.
*Choose to export as Excel or CSV.
*Download and open your report.

# Aconex Lobby account issues

if you're experiencing Aconex Lobby account issues, it could be related to login problems, access permissions, or system-related errors

# Aconex reports generation for specific data (Document status, send and received letter...)

Go to Insight → Reports.

Select the Report Type:
*In the Standard section, you'll find various types of reports.
*Click on the title of the report you want to generate.
Aconex will generate the report based on your selected criteria.
Export the Report:
*Once the report is ready, look for the Export options at the top of the page.
*Select the format you need (e.g., Excel, pdf).
*Click the arrow at the top of the page to go back to the report list.
*Next to the report type you selected, click the 3 dots (ellipsis).
A menu will appear; click on View History.
*On the right side, you'll see the Report Run History.
*Click the Action button next to the report entry to download the report.

**# is check print mandatory ?**
YES, check prints are mandatory in Aconex for all documents except annexure and procedures

**# Is it ok reviewing documents by email ?**
reviewing documents by email is not recommended for formal processes.

**# How can I check the status of my submitted documents in aconex?**
to check the status of your submitted documents in Aconex:
Go to the Document Register.
Use the search filters (e.g., Document Number, Status, Workflow) to locate your document.
Check the document's status column (e.g., "Under Review," "Approved," "Rejected," etc.).
You can also click on the document to view more details, including the current workflow stage and any comments or actions.

**# Can engineering documents be issued directly to suppliers or contractors?**
yes, engineering documents can be issued directly to suppliers or contractors in Aconex. This is typically done through:
Transmittals: You can create and send transmittals to suppliers or contractors, which include documents for review, approval, or information.
Document Workflows: You can assign documents to specific workflows, which automatically notify and route them to the appropriate contractors or suppliers for action.

**# Are superseded documents automatically removed from the system?**

superseded documents are not automatically removed from Aconex. They remain in the system for record-keeping and auditing purposes, but their status is updated to "Superseded" or "Obsolete." This ensures that only the latest version is actively used, while older versions are still accessible for reference.

**# Who should I contact if I have an issue with an engineering document submission?**

1 Document Controller: They manage the document flow, approvals, and ensure proper submission protocols.
2 Project Administrator: For issues related to permissions, access, or system settings.
1 Aconex Support: For technical issues or troubleshooting with the Aconex platform itself.

# What is the document review and approval process? how long does it take?
the document review and approval process in Aconex follows these steps:
Upload the document to Aconex with all required metadata.
Start a Workflow and select the reviewers/approvers.
Reviewers receive tasks and provide comments, markups, or decisions (e.g. Approved, Rejected, Revise and Resubmit).
Each step is tracked, and Aconex sends automatic notifications.
Once all steps are complete, the document is formally approved or rejected, and a full audit trail is maintained.

# What happens if an engineering document is rejected?
if an engineering document is rejected in Aconex:
The rejection status is recorded in the workflow.
The document owner is notified with comments or reasons for rejection.
The document must be revised based on feedback.
A new revision is uploaded and re-submitted through the workflow for review again.

# what is the numbering system followed in the project?
the numbering system in Aconex follows a Document Numbering Convention defined by the project, typically including:Project Code/Discipline Code/Document Type/Sequential Number/Revision Number

# what is squad check process?
the Squad Check process in Aconex is a multi-disciplinary review of documents involving various stakeholders (engineering, procurement, construction teams) to ensure all inputs are addressed before approval. It’s managed through workflows in Aconex for tracking and accountability.

# how check prints are handled?

Check prints are uploaded as PDFs with markups and shared via workflows or mail for review and comment. Once reviewed, they are revised and resubmitted until approval.

# how to cancel / remove a used placeholders?

Go to Document Register.
Search for the placeholder document using filters (e.g., status = "Placeholder").
Select the placeholder you want to cancel/remove.
Click "More Actions" > "Cancel Document" (if you have the right permissions).
Add a reason/comment and confirm.
PS: Once a placeholder is used (i.e., a file is uploaded), it becomes an active document and cannot be "deleted", only canceled

# How many documents have been submitted by the Supplier
Go to the Document Register.
Use the filter panel:
Set "Created by" to the Supplier's organization.
Optionally set "Status" or Date range for more specific results.

Click "Search".
The total number of documents will be shown at the top of the list.
PS: This gives you the count of documents submitted by that Supplier

**# can we upgrade the document revision if the document was canceled?**
we cannot directly upgrade the revision of a document that has been marked as "Canceled",
It becomes non-current and is usually locked from further use in workflows

**# Who's in charge of putting supplier documents in Aconex ?**
the person in charge of putting supplier documents in Aconex is typically the Supplier’s Document Controller.
They are responsible for uploading, registering, and submitting documents to the project team via Aconex, following the project's document control procedures.

**# how to arrange the revision sequence after the use of "as current"**
to arrange the revision sequence after using "As Current" in Aconex:
Go to the Document Register.
Locate the document marked "As Current".
Upload the new revision with the correct next revision number or letter (e.g., from A to B, or 01 to 02).
Aconex will automatically place it in sequence, making it the new current version.

**# what are the steps for placeholder creation ?**
Go to Documents > Add Placeholders.
Choose Manual entry or Import from Excel.
Enter metadata (e.g. Document Number, Title, Discipline).
Complete all mandatory fields.
Use Bulk Edit if needed to update multiple placeholders.
Once all are marked Ready to Register, click Register.sq