

Guidance on Using Aconex for Key Action Tracking

User Guide



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Introduction

This guideline provides a step by step methodology that demonstrates an approach that could be adopted by a project team to utilise Aconex for the tracking of Key Actions generated throughout a project. Typical key actions tracked on a project could include HAZOP Actions, Design Review Actions or Constructability Review Actions, to name a few. The proposed methodology in Aconex utilises the Packages Module, the Document Module and Workflows functionality within Aconex. This guideline assumes that action close-out forms are documents in their own right that are uploaded to the document register. This allows the action close out forms be circulated via workflows for addition of responses to the assigned action on the form directly within Aconex and for sign-off of the action item within Aconex. All actions are registered in the Packages Module as separate "packages" which allows you to associate controlled documents, mail and other reference documents all of which provide support and back up for the action item response and also allows for the automatic generation of a tracking register for the project team to manage all the key actions.

An alternative approach of using just metadata fields within the Packages Module to replicate the fields in an Action Close-Out form was investigated. Whilst it is possible to replicate the contents of Action Close-Out forms using metadata fields, the current functionality of Aconex has limitations on the updating of metadata field to add comments and the use of digital signatures to approve the close-out of the action when using the package review workflow functionality.

In the Worley Aconex configuration template, the packages modules have a number of package templates, one of which is called Action Item. The Action Item Template can be used as a basis for creating a project specific action item template for whatever key action the project wishes to track. The following steps demonstrate the process of using Aconex to track key actions using the example of a HAZOP Action Close-Out.

Step 1 - Create a Package Type template for HAZOP Action Close-Outs in your Project

Guidance on how to create a package type can be found [here](#)

Guidance on how to customized your package type can be found [here](#)

- To create a package template on a project requires Doc Admin rights within Aconex.
- Fields required for the package are to be added from the available Project Field library.
- Additional Project Fields can be created from the Project Fields tab.
- The Project Fields added to the HAZOP Action Close-Out are to be used for status tracking.

The screenshot shows the Oracle Aconex Project Settings interface. The left sidebar contains a navigation menu with options: Project, Security, Mail/Documents Role Settings, Project Fields, Mail, Models, Documents, Reviews, Package Types (selected), and Addresses. The main content area is titled 'Package Type - HAZOP Action Close-Out (HAZOP) Active'. It is divided into three sections: Settings, Project fields, and Package fields applied to all Packages.

Settings:

- Mail: Who can create mail from packages of this type? Administrators, Editors
- Attachments: Who can add attachments? Administrators, Editors
- Auto Numbering: Not enabled

Project fields:

- Action Party: Select List (Single)
- Action Sheet Ref. No.: Select List (Single)
- Action Status: Select List (Single)
- Actionee: Text Area
- Additional Notes: Text Area
- Area 500 - ECA: Select List (Single)
- Area 500 - PN: Select List (Single)
- Area Number: Text

Package fields applied to all Packages:

Field	Mandatory
Package Type	<input checked="" type="checkbox"/>
Package Title	<input checked="" type="checkbox"/>
Package No	<input checked="" type="checkbox"/>
Revision	<input checked="" type="checkbox"/>

Project fields applied to 'HAZOP Action Close-Out' Packages:

Field	Mandatory
<input type="checkbox"/> Sub-Project Number / Name: Select List (Single)	<input type="checkbox"/>
<input type="checkbox"/> Date of Issue: Date	<input type="checkbox"/>
<input type="checkbox"/> Action Party: Select List (Single)	<input type="checkbox"/>
<input type="checkbox"/> Responsible Party: Text	<input type="checkbox"/>
<input type="checkbox"/> Due Date	<input type="checkbox"/>

A 'Save' button is located at the bottom right of the 'Project fields applied to 'HAZOP Action Close-Out' Packages' section.

Step 2 - Create HAZOP Action Close-Out Packages

- For each HAZOP Action close-out, create a HAZOP Action Close-Out package providing the required metadata for the package.
- The screen shot below shows an example of a created package.
- Note it is possible to create packages in bulk if required.

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Tasks Models Documents Mail Packages Workflows Supplier Documents Directory Insights Setup

HAZ-Rec 543 Unit 1900 - Process Hazard Analysis

Send Package Start a Review Close Package More Edit

Properties

Package Type: HAZOP Action Close-Out

Package Title: Unit 1900 - Process Hazard Analysis

Package No: HAZ-Rec 543

Revision: C

Sub-Project Number / Name: 401012-02441 Gorgon CO2 Injection - Enhanced Dehydration Project

Date of Issue: 05/07/2018

Action Party: Safety & Risk

Responsible Party: Simon Duffy

Due Date: 03/05/2019

Step 3 - Create a HAZOP Action Close-Out Saved Search

Guidance on how to create saved searches in packages can be found [here](#)

- The saved search created becomes the HAZOP Action Close-out Tracking Register.
- Select columns to show in this saved search from the Project Fields associated with the package. Adding and removing columns can be done by clicking on the Cog Icon on the RHS of the page.
- The screen shot below provides an example of a HAZOP Action Close-out Tracking Register.
- The HAZOP Action Close-Out Tracking Register can be exported to Excel for inclusion in Project Reporting as required.

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Tasks Models Documents Mail Packages Workflows Supplier Documents Directory Insights Setup

Search - Packages Open 74 Closed 3

Package No: HAZ- Package Title: Package Type: HAZOP Action Close-Out State: All Updates Available: All

More filters Apply filter Clear all (2)

New Package Tools (0 selected) Export to Excel

Package No	Package Title	Revision	Updates Available	Package Type	Administrators	Editors	State
HAZ-Rec 543	Unit 1900 - Process Hazard Analysis	C	Outdated	HAZOP Action Close-Out	Simon Duffy		Open

Step 4 - Prepare and Upload HAZOP Close-Out Form & other relevant Documents to the Document Register

- HAZOP Action Close-Out Form - Native & PDF. In this example the filename is "HAZ-Rec 543"
- The Document Numbers adopted for HAZOP Action Close-Out Forms need to be aligned with Project document numbering requirements.

Document Register

Document No: HAZ-Rec*

Type: -- Select --

Status: -- Select --

Access Control List: %

Contract Number: %

Originating Organisation: %

Customer Document: %

Supplier Document: %

Document Identifier: -- Select --

File Classification: -- Select --

Sub-Project Number / Name: -- Select --

Control Account: -- Select --

Purchase Order Number: -- Select --

Date Range: -- Select --

Title: %

Area or Asset Number: -- Select --

Revision: %

Tag: %

SDR Codes: %

Customer Document No: %

Supplier Document No: %

Discipline: -- Select --

Sheet Number: -- Select --

Originator: -- Select --

Phase: -- Select --

Manufacturer: -- Select --

Review Status: %

Search: [Search] Clear all filters

1 - 2 of 2 documents (0 selected)

File	Document No	Title	Revision	Revision Date	Status	Discipline	Document Identifier	Date Modified	Originating Organisation	Lock
	HAZ-Rec 543	Unit 1900 - Process Hazard Analysis - HAZ-Rec 543 - HAZOP Action Close Out	C	05/07/2018	IFA - Issued for Approval	SR - Safety & Risk	FRM - Form	17/04/2019	WorleyParsons	
	HAZ-Rec 543_Native	Unit 1900 - Process Hazard Analysis - HAZ-Rec 543 - HAZOP Action Close Out	C	05/07/2018	IFA - Issued for Approval	SR - Safety & Risk	FRM - Form	17/04/2019	WorleyParsons	

Step 5 - Add Documents to the Package

- This is done by clicking the blue icon "Edit".

HAZ-Rec 543 Unit 1900 - Process Hazard Analysis

Send Package Start a Review Close Package More Edit

Properties

Package Type: HAZOP Action Close-Out

Package Title: Unit 1900 - Process Hazard Analysis

Package No: HAZ-Rec 543

Revision: C

Sub-Project Number / Name: 401012-02441 Gorgon CO2 Injection - Enhanced Dehydration Project

Date of Issue: 05/07/2018

Action Party: Safety & Risk

Responsible Party: Simon Duffy

Due Date: 03/05/2019

- The documents attached can be seen by clicking on Documents in the LHS menu.

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Tasks Models Documents Mail Packages Workflows Supplier Documents Directory Insights Setup

HAZ-Rec 543 Unit 1900 - Process Hazard Analysis Send Package Start a Review Close Package More Edit

Date: 17/04/2019 Revision: C Ver: 7

Documents (0 selected) Show in Document Register Add/Remove Columns Filter Documents

File	Document No	Title	Revision	Updates Available	Status	Area or Asset Number	Originating Organisation	Date Modified	Type	File Size	Version
<input type="checkbox"/>	G1-TD-P-1900-PID2002	P&ID	C	View updates	IFD - Issued for Design		WorleyParsons	15/04/2019	Drawing		1
<input type="checkbox"/>	G1-TD-P-1900-PID2003	P&ID	C	View updates	IFD - Issued for Design		WorleyParsons	15/04/2019	Drawing		1
<input type="checkbox"/>	HAZ-Rec 543	Unit 1900 - Process Hazard Analysis - HAZ-Rec 543 - HAZOP Action Close Out	C	Up to date	IFA - Issued for Approval		WorleyParsons	17/04/2019	Engineering and Design	300.8 KB	1
<input type="checkbox"/>	HAZ-Rec 543_Native	Unit 1900 - Process Hazard Analysis - HAZ-Rec 543 - HAZOP Action Close Out	C	Up to date	IFA - Issued for Approval		WorleyParsons	17/04/2019	Engineering and Design	593.4 KB	1

Step 6 - Link Mail, Send Mail from the Package and Adding to the Package

- Mail can be linked to a package by going to the Mail Module, selecting the mail to link to the package, going to Tool and selecting Link to package. Step by step guidance can be found [here](#).
- Mail can be sent from the package by clicking on Mail on the LHS menu From here you can create a Mail. Step by step guidance can be found [here](#).
- Uncontrolled documents such as MOM can be attached to the package by clicking on Attachments on the LHS menu and clicking on Attach files. Step by step guidance can be found [here](#).
- Completing this step progressively through the development of the HAZOP Close Out response, links all relevant information to the response recorded on the HAZOP Action Close-Out form should it be required to go back and re-validate generated outcomes.

Step 7 - Use the Window Module to Sign-Off HAZ-Rec 543 Form

- Create a workflow to circulate the HAZOP Action Close-out form "HAZ-Rec 543" to the Customer for approval.

Step 8 - Close the Package

- Once the HAZOP Action Close-out is approved by the customer, the HAZOP Action Close-Out package can be transmitted to the customer for their record if required and the package closed out, which updates the register. Step by step guidance on transmitting the package can be found [here](#).

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Cross Project Search

Mr Hemant Adauli Worley

Help

Tasks Models Documents Mail Packages Workflows Supplier Documents Directory Insights Setup

Search - Packages Open 73 Closed 4

Package No Package Title Package Type State Updates Available

HAZOP Action Close-Out All All More Filters Apply Filter Clear all (1)

New Package Tools (0 selected) Export to Excel

Package No	Package Title	Revision	Updates Available	Package Type	Administrators	Editors	State
HAZ-Rec 543	Unit 1900 - Process Hazard Analysis	C	Up to date	HAZOP Action Close-Out	Simon Duffy		Closed