

Aconex Training Syllabus

User Guide for Trainers



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PROJECT - Management of Portfolio Projects in Aconex - User Guide

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1. Overview

This user guide provides guidance to trainer to cover subjects during Aconex training sessions. This guide shall be considered as base line to trainer to keep a track what is covered each day.

2. Aconex Training Syllabus

1. Aconex Training Session - Day 1

- 1-1 Safety Moment
- 1-2 Log in to Aconex
 - 1-2.1 Aconex URL
 - 1-2.2 Reset password
- 1-3 Task page
 - 1-3.1 Choose Desire Project
 - 1-3.2 User Log id and Org
 - 1-3.3 Log out
 - 1-3.4 ?Help and Need Help
 - 1-3.5 Visit Support Central
 - 1-3.6 Latest Release Notes – Subscribe to alerts
 - 1-3.7 Project Details
 - 1-3.8 Shortcuts
- 1-4 Document Module
 - 1-4.1 Searching of Documents
 - 1-4.2 Add / Remove Column
 - 1-4.3 Saving Search Results
 - 1-4.4 Download search Result in Ms Excel from Aconex Temp
 - 1-4.5 Searching of Document – all Revisions
 - 1-4.6 Download search Result in Ms Excel from Aconex Temp
 - 1-4.7 My Searches, Project Searches and Stand Searches
 - 1-4.8 How to open document
 - 1-4.9 Download documents
 - 1-4.10 View Documents in Viewer
 - 1-4.11 Check Document History
 - 1-4.12 Check Related items
 - 1-4.13 View Event Log
 - 1-4.14 Mail Module
 - 1-4.14.1 How to write - by choosing correspondence type
 - 1-4.14.2 Search Mail – Inbox, sent, transmittals
 - 1-4.14.3 Search Mail: To, only me
 - 1-4.14.4 Searches – Save Searches
 - 1-4.14.5 Download search results
 - 1-4.14.6 Project Directory

Please note:- If any topic(s) are left to cover then carry forward in Day 2 session.

2. Aconex Training Session - Day 2

- 2.1 Workflow Module
- 2.2 Search Assigned to me
- 2.3 How to participate in Workflow Commenting and Redlining
- 2.4 Submit Review with comments
- 2.5 Consolidate comments
- 2.6 Close Workflow
- 2.7 View Workflow Report

3. Packages

- 3.1 View Package
- 3.2 Search Package reviews
- 3.3 Review Packages

4. Aconex Training Session - Day 3

4.1 Upload Documents

- 4.1.1 Create Place Holder
- 4.1.2 Fill up Document Properties
- 4.1.3 Add pick list values
- 4.1.4 Save document
- 4.1.5 Create a transmittal
- 4.1.6 Send Transmittal
- 4.1.7 Edit/Update Documents (Supersede)
- 4.1.8 Create a transmittal
- 4.1.9 Multi File upload
- 4.1.10 Fill up Document Properties
- 4.1.11 Confidential documents

4.2 Workflow Configuration

- 4.2.1 Workflow Transmittal creation
- 4.2.2 Workflow closing
- 4.2.3 Upload mark-up documents
- 4.2.4 Workflow Report

4.3 Packages

- 4.3.1 Package Review Templates
- 4.3.2 Configure package reviews
- 4.3.3 start a review and work with templates
- 4.3.4 end of the review process
- 4.3.5 Delete unwanted packages
- 4.3.6 Download reviewed documents from package

5. Aconex Training Session - Day 4

5.1 Supplier Documents package

- 5.1.1 Create place holders
- 5.1.2 create a supplier document package.
- 5.1.3 Create transmittal
- 5.1.4 Start review
- 5.1.5 Process documents received from Supplier
- 5.1.6 Return reviewed documents to Supplier

5.2 Project Directory

- 5.2.1 Invite user
- 5.2.2 Create Distribution Groups

Only for Project Admins

6. Set up module - Day 5

- 6.1 User creation – Create Full user
- 6.2 Create Guest user
- 6.3 Reset user password and user details
- 6.4 Lock / Unlock users
- 6.5 Disable and enable users
- 6.6 Show and hide in global directory
- 6.7 Project directory visibility
- 6.8 Invite users to project
- 6.9 Remove users from the project

7. Working with Fields / Doc Properties

- 7.1 Pick list value update
- 7.2 Field enable and disable
- 7.3 Manage mail types
- 7.4 Manage doc types
- 7.5 Manage Doc Status codes
- 7.6 Manage Review statuses
- 7.7 Working weeks for projects
- 7.8 Auto numbering

8. Configure access control

9. Reports

10. Project setup form



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Project Creation Form