



# **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.

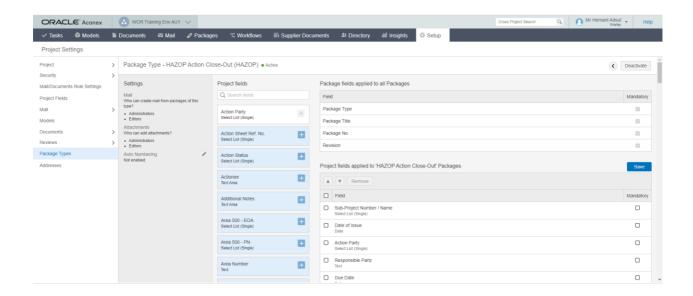




# **Step 1 - Create a Package Type template for HAZOP Action Close-Outs in your Project**

Guidance on how to create a package type can be found <a href="here">here</a>
Guidance on how to customized your package type can be found <a href="here">here</a>

- 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.

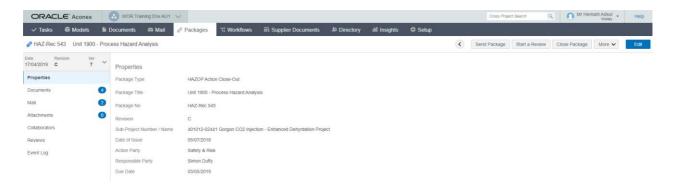






#### **Step 2 - Create HAZOP Action Close-Out Packages**

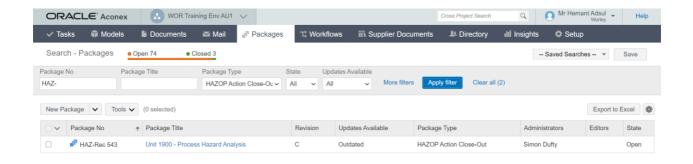
- For each HAZOP Action close-out, create a HAZOP Action Close-Out package providing the required metadata for the package.
- The screen shot below shows an example of a created package.
- Note it is possible to create packages in bulk if required.



#### 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.

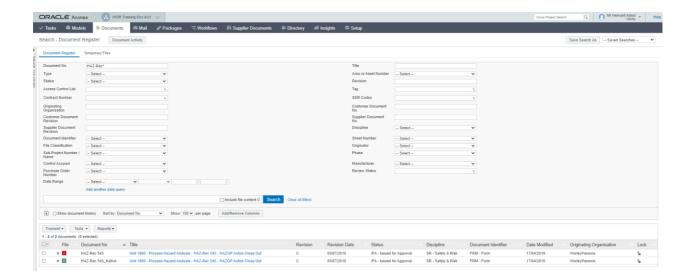






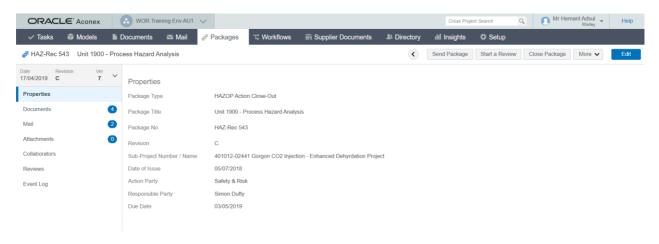
# **Step 4 - Prepare and Upload HAZOP Close-Out Form & other relevant Documents to the Document Register**

- 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.



### **Step 5 - Add Documents to the Package**

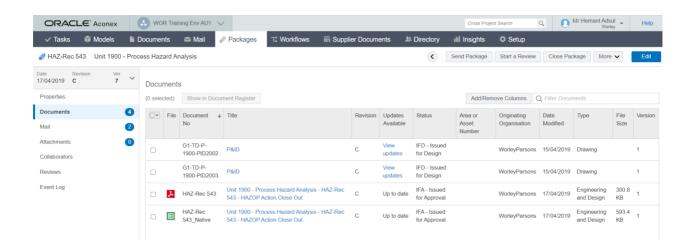
• This is done by clicking the blue icon "Edit".







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



# 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 <a href="here">here</a>.
- 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 <a href="here">here</a>.
- 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 <a href="https://example.com/here">here</a>.
- 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.

