ITWOCX CORRESPONDENCE USER GUIDE

Correspondence Module

- Creating Correspondence
- Responding to Correspondence
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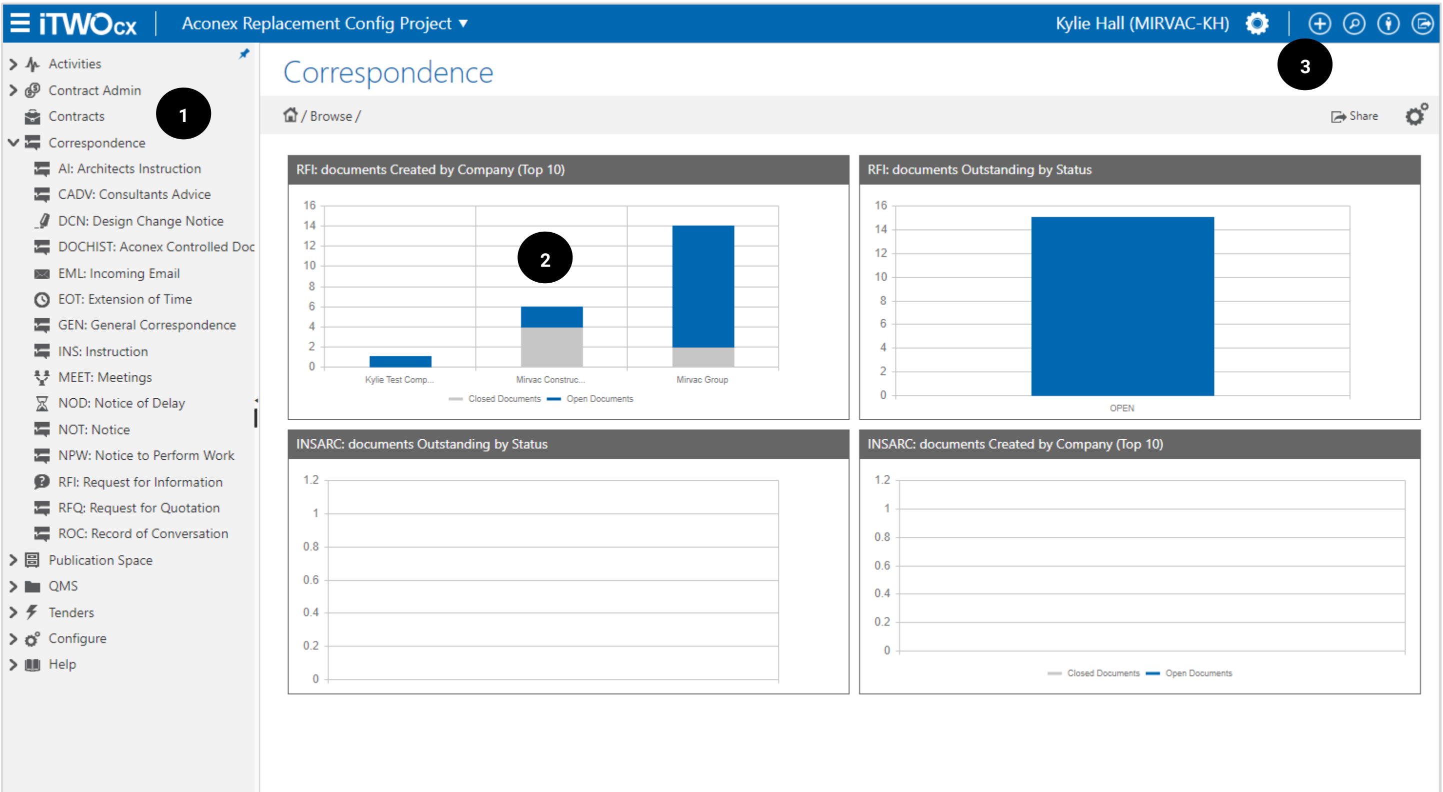
1 Correspondence

Communication in iTWOcx is achieved by using forms such as the General Correspondence (GEN) form or the Request For Information (RFI) form. The forms are created, and responses are made within the same form to create a forum thread style conversation. The types of forms available within the project are managed by the System/Project Administrator.

The **Correspondence** module holds project communication. Personal notifications are available in the **Activities** module.

1.1 Landing Page

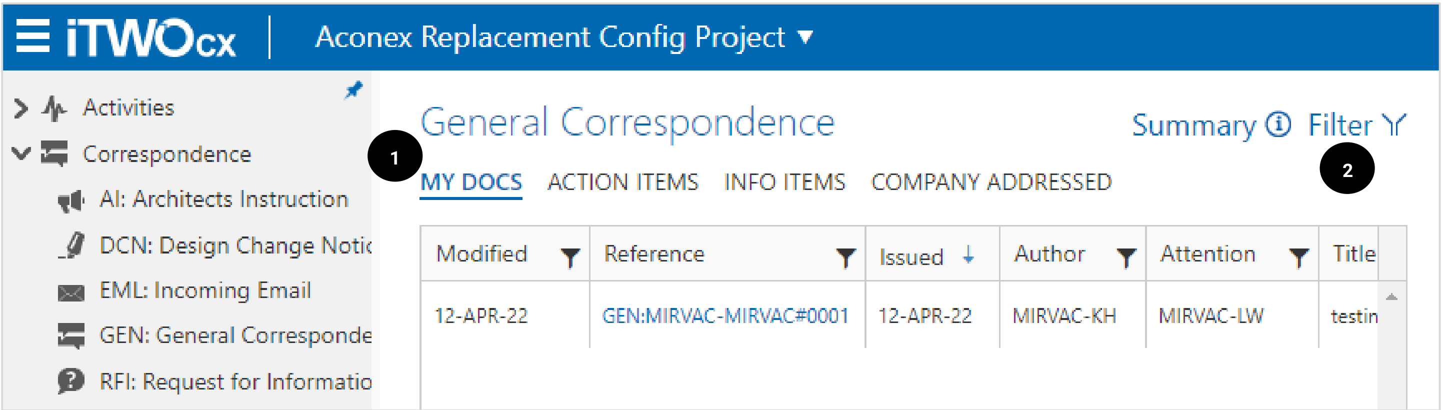
The Correspondence landing page displays the correspondence available within the project. As each form is created, they are stored automatically by type in the Correspondence Menu.



Screen Element	Description
1. Menu Frame	The Correspondence menu frame shows the configured mail types the user has access to. Clicking on a correspondence type opens the correspondence type menu.
2. Correspondence Dashboard	A correspondence dashboard can be configured for the project.
3. New Item	The plus icon opens the new correspondence screen.

Correspondence Type List

After clicking the correspondence type, all correspondence of this type is displayed on the screen.



The **tabs** across the top **(1)** allow sorting of the correspondence sent / received by you or your company.

Tab	Description
My Docs	Correspondence created by you that are waiting for action by others.
Action Items	Correspondence / forms that have a due date and are waiting for your action.
Info Items	Items where you have been added for info on the correspondence, including items you have sent.
Company Addressed	Correspondence where someone from your company has been added as an info or action.

Further filtering of the correspondence is achieved by clicking **Filter (2)**. There are many options to filter and search correspondence. Further information can be found in the the Searching for Correspondence section.

2 Creating Correspondence

Correspondence in iTWOcx is driven by forms. Instead of separate messages being sent to users with separate responses like email, the correspondence is stored centrally and everyone comments on the form. This keeps an auditable trail of conversations in one location.

The types of forms available are shown in the table below. Not all correspondence forms are available for all users. Access to the forms is set per project by the System / Project Administrator.

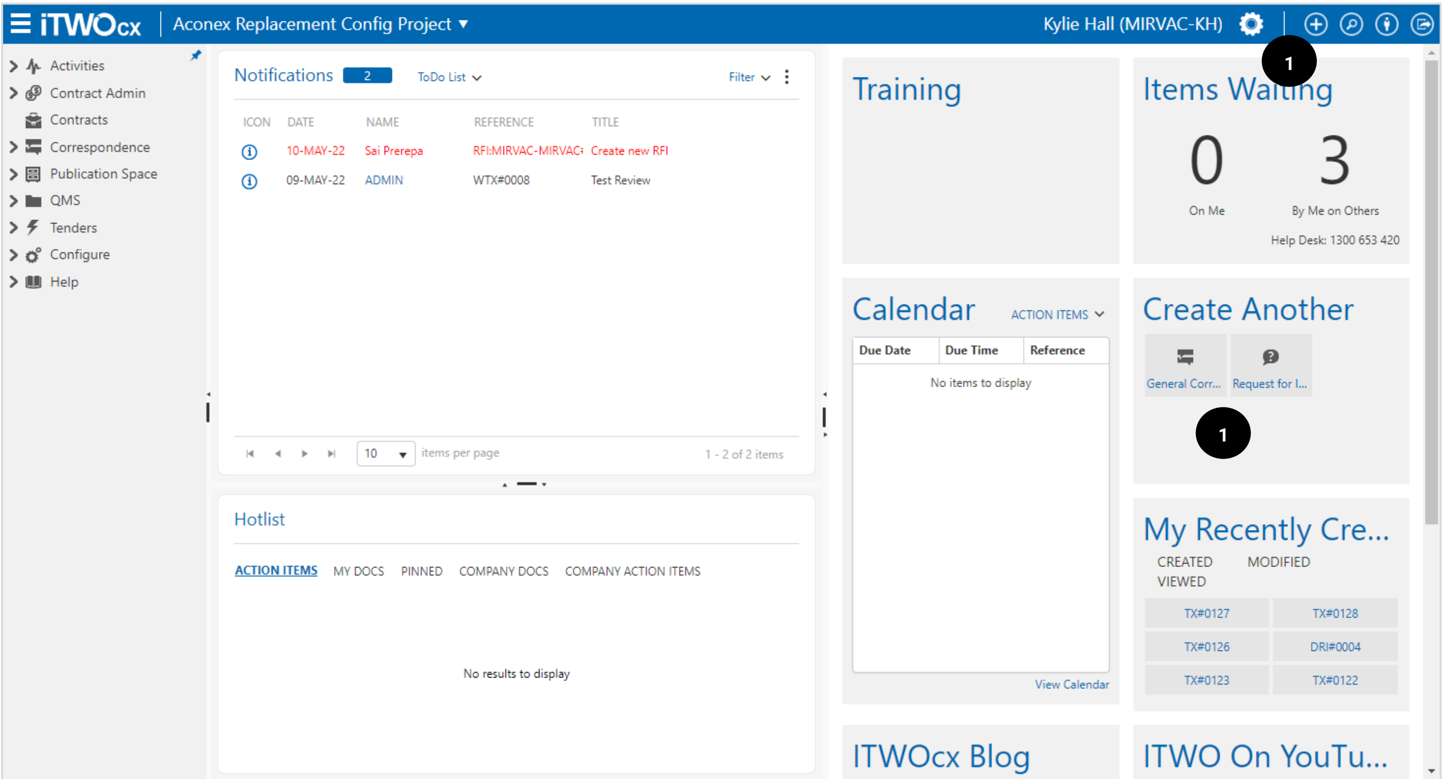
Mail Type	When to Use
Architect Instruction (AI)	For **Mirvac Design** or **External Architects** to issue instructions relating to design when there is a formal contractual request.
Consultant Advice (CADV)	For **External Consultants** to provide information.
Design Change Notice (DCN)	For **Mirvac Development/Project Design Management (PDM)** to formally raise and issue change requests to Consultants.
Developers Instruction (DINST)	For **Mirvac Development** to issue instructions.
Extension of Time Claim (EOT)	For **Mirvac Construction** to raise EOTs to Mirvac Construction. Mirvac Construction to raise EOTs upstream as required.
General Correspondence (GEN)	For informal or general communications between **Project Members**. Used as an information only type mail. **Note:** This mail type should not be used as part of the formal mail processes such as the RFI, Variation or contract notice process.
Incoming Email (EML)	Can be used by Project Members to send a message to the entire project (not to a specific person). **Note:** Notifications will not be received by users.
Instruction (INS)	For **Mirvac Sales & Marketing** to issue instructions to external or Mirvac internal organisations.
Meeting (MEET)	For **Project Members** to use to summarise actions or share minutes from a meeting.
Notice (NOT)	For the **Subcontractor** to issue all contract notices including but not limited to progress claims and invoices.
Notice to Perform Work (NPW)	For **Mirvac Construction** to issue notices to Subcontractors.
Record of Conversation (ROC)	Used by **Project Members** to record a formal decision made verbally. For example, a decision made on site for a subcontractor to take action.
Request for Information (RFI)	For **Project Members** to ask for information from the recipient.
Request for Quote (RFQ)	For **Project Members** to obtain pricing.
Site Instruction (SI)	For **Mirvac Construction** to provide site instruction as required.
Superintendents Instruction (SUI)	For the **Superintendent** to issue instruction.

Some mail types have an approval process built into the form.

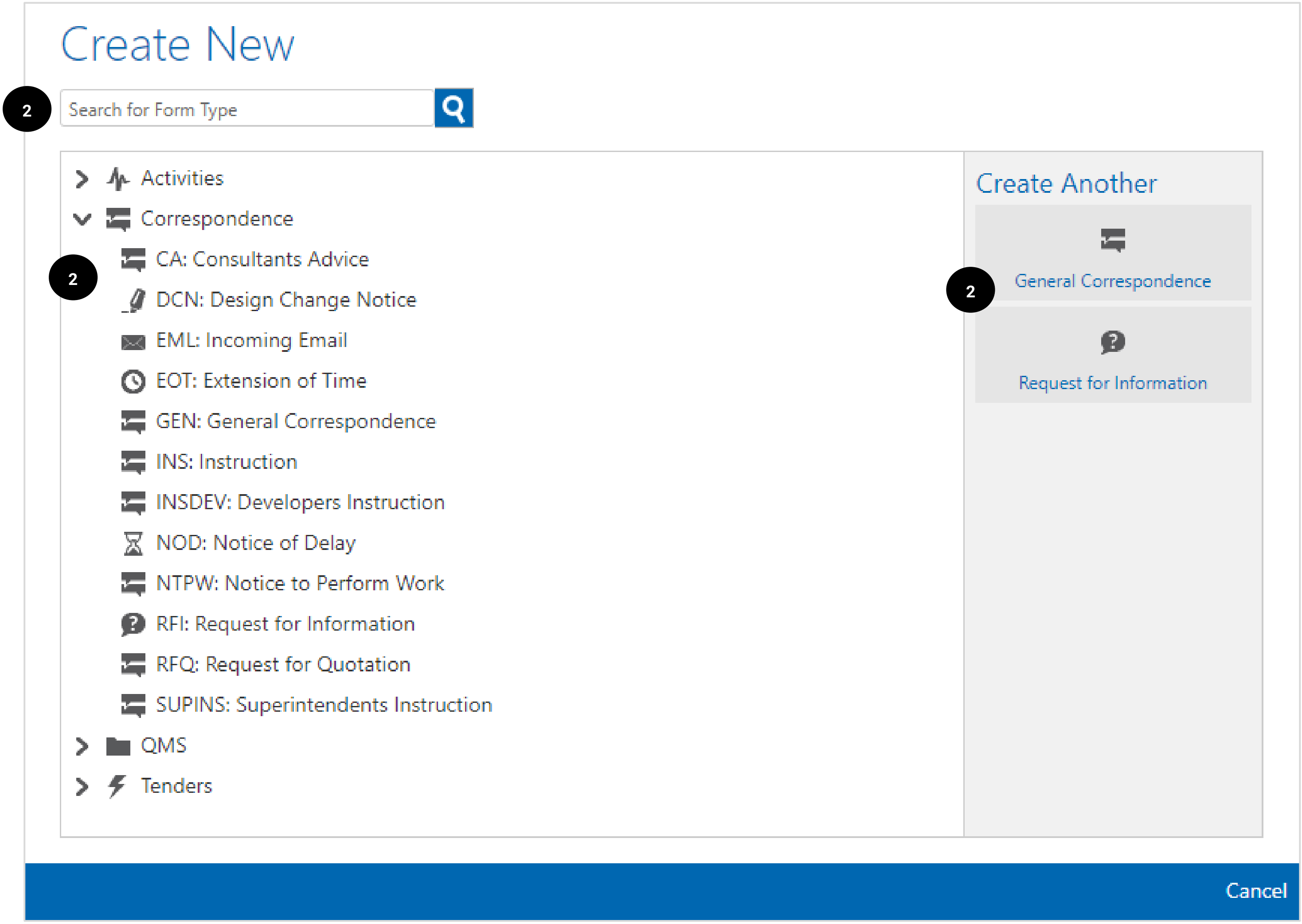
For example, Site Instructions need to be reviewed by the Contract Admin/Project Admin before they are sent to the external user.

2.1 New Correspondence

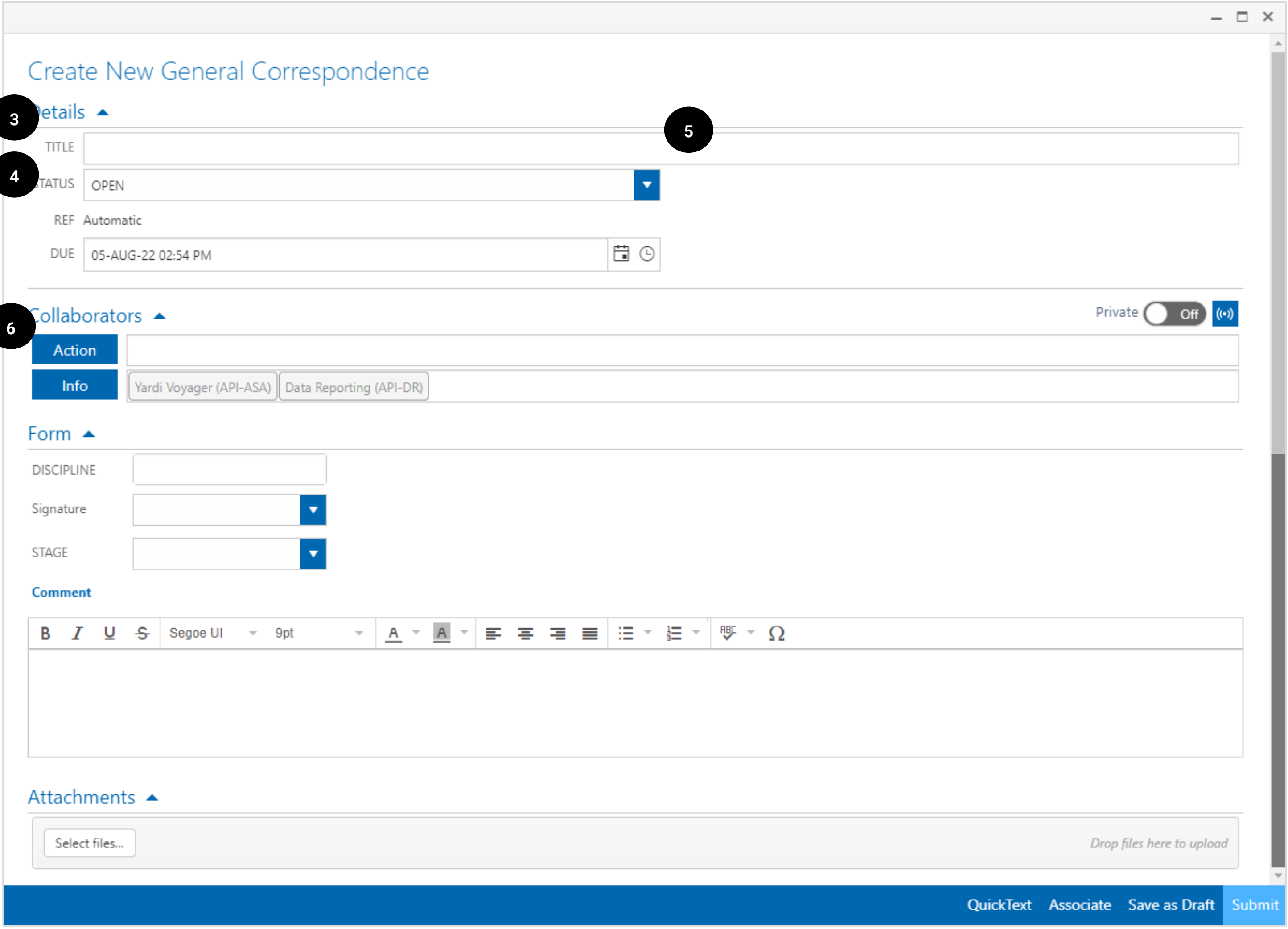
New correspondence can be created from the **toolbar** which is always available. It can also be created via the **Create Another** widget on the Activities landing page.



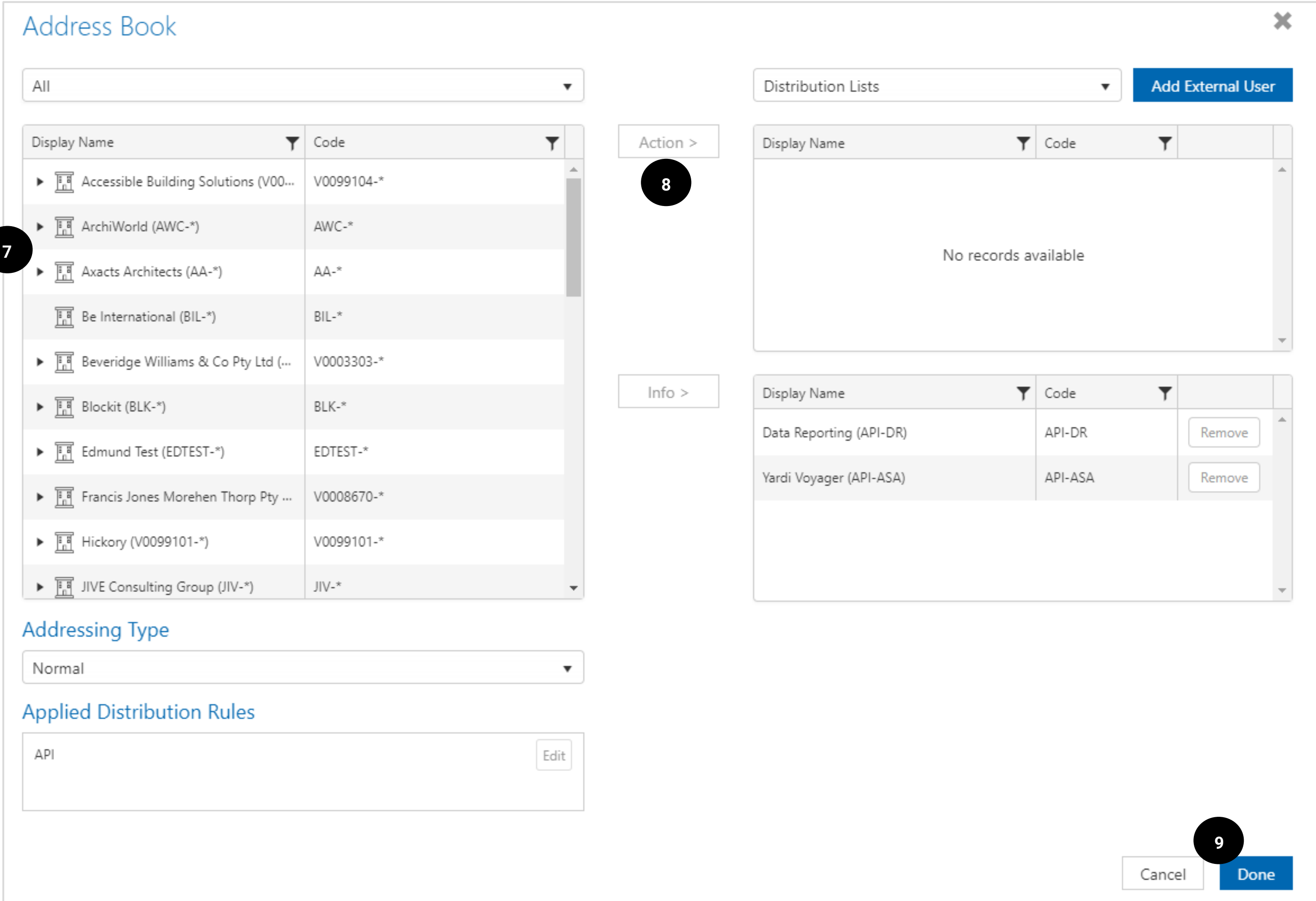
Step	Description
1. Click **+**	Click to select a new correspondence. Alternatively, click the form type in the **Create Another** widget. The **Create New** popup screen appears.



Step	Description
2. Select **Correspondence Type**	Select the correspondence type by either: • Typing in the search field • Expanding the correspondence section and select the correspondence type • Clicking the correspondence type in the Create Another tile (if type has been created previously) The required form displays. For this example, the General Correspondence form is used.

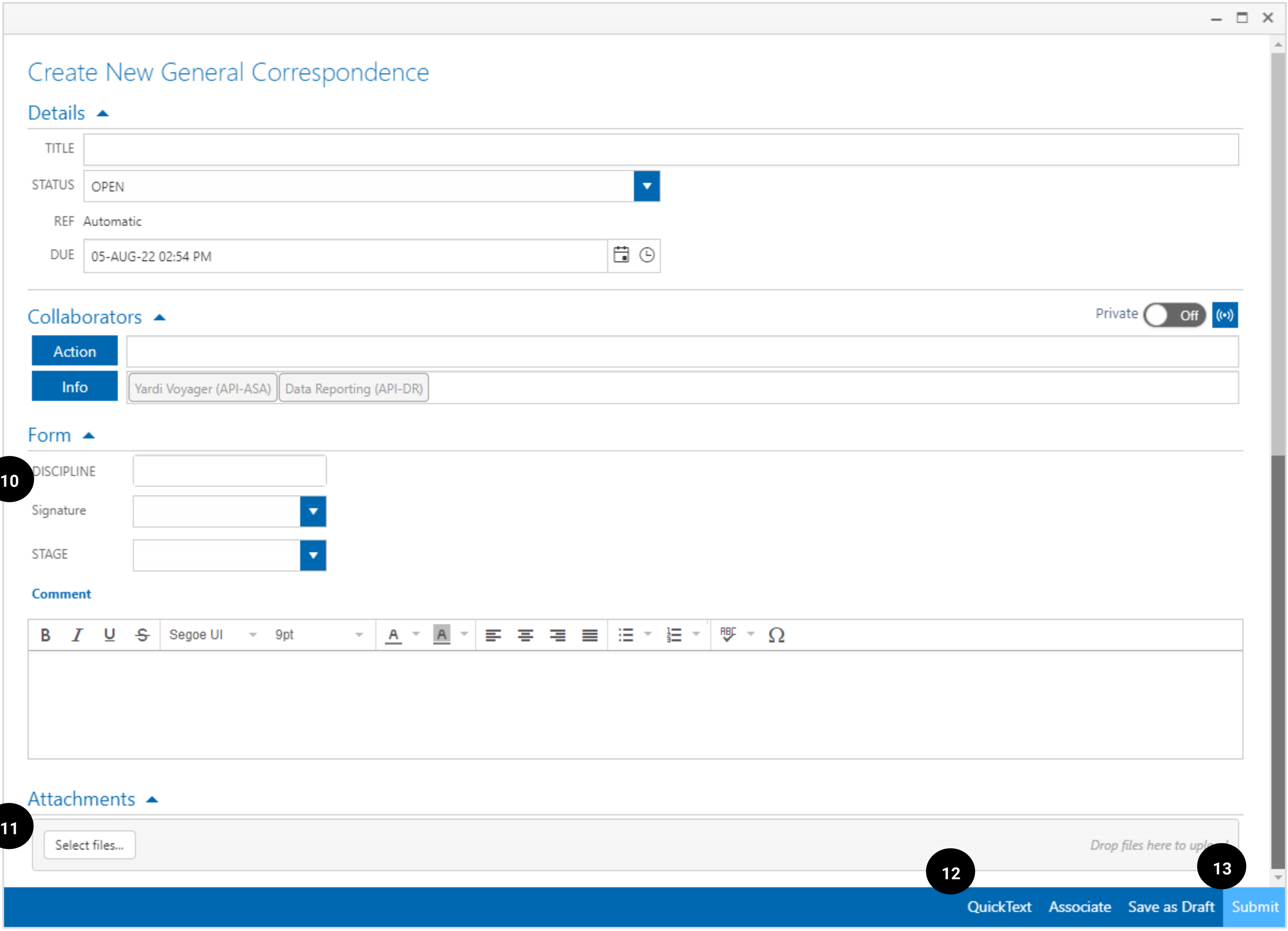


Step	Description
3. Enter **Title**	Add a meaningful title to the form. The title appears in the email notification, hotlist and the to do list and therefore should be something descriptive e.g. 'Acoustic panel drawings' instead of 'Drawings'.
4. Select **Form Status** (if required)	Select the status of the form from the dropdown where relevant. Most forms will prepopulate with the required status. **Note**: the status field is disabled in some forms, e.g. Extension of Time, or contains specific status for the form type, e.g. 'issued' for Design Change Notice.
5. Add **Due Date**	This field is pre-populated to +2 days for most forms. If required, select the due date for the expected response.
6. Add **Collaborators**	Names can be typed into the action and info fields directly. Select the user from the dropdown menu. To search for users, click the **Action** and/or **Info** buttons. The **Select Addressee** window opens



Step	Description
7. Find Users	Users are grouped based on their company. **Expand** the company and **highlight** the user in the left-hand column. **Note:** To change/filter the list, use the Project Address Book dropdown to select role, company, group, external user etc.
8. Add Users	With the user highlighted, click either **action >** or **info >** to move them to the righthand side. • **Action** – the user required to complete the task, respond to the message, etc. • **Info** – the users that need to be informed. Continue adding required users. A distribution list can be used to send forms to a pre-defined list of users for frequent interactions. **Note:** some users are already added for reporting purposes (API-XX). Do not delete them.
9. Click **Done**	Click Done to return to the message / form.

It is possible to send correspondence to someone not configured within iTWOcx. Click the **Add External User** button and complete the required fields.



Step	Description
10. Complete Form	Complete relevant **fields** and enter **comments**. **Note:** The required fields will vary for each form type.
11. Add **Attachments**	Add any **non-controlled** attachments to the form. **Drag and drop the file** into the grey box or click **Select files…** button to browse and upload.
12. Complete additional actions (if required)	Depending on the form it may be necessary to [Associate]() documents to the correspondence or add [QuickText]().
13. Click **Submit**	Click **Submit** to send the form. Depending on the recipient's notification settings, they may receive a plain text email, preview email or only receive the notification in their To Do List within iTWOcx.

When creating correspondence, remember that you can't delete items from iTWOcx. If you send the form to the wrong person, you can't recall it.

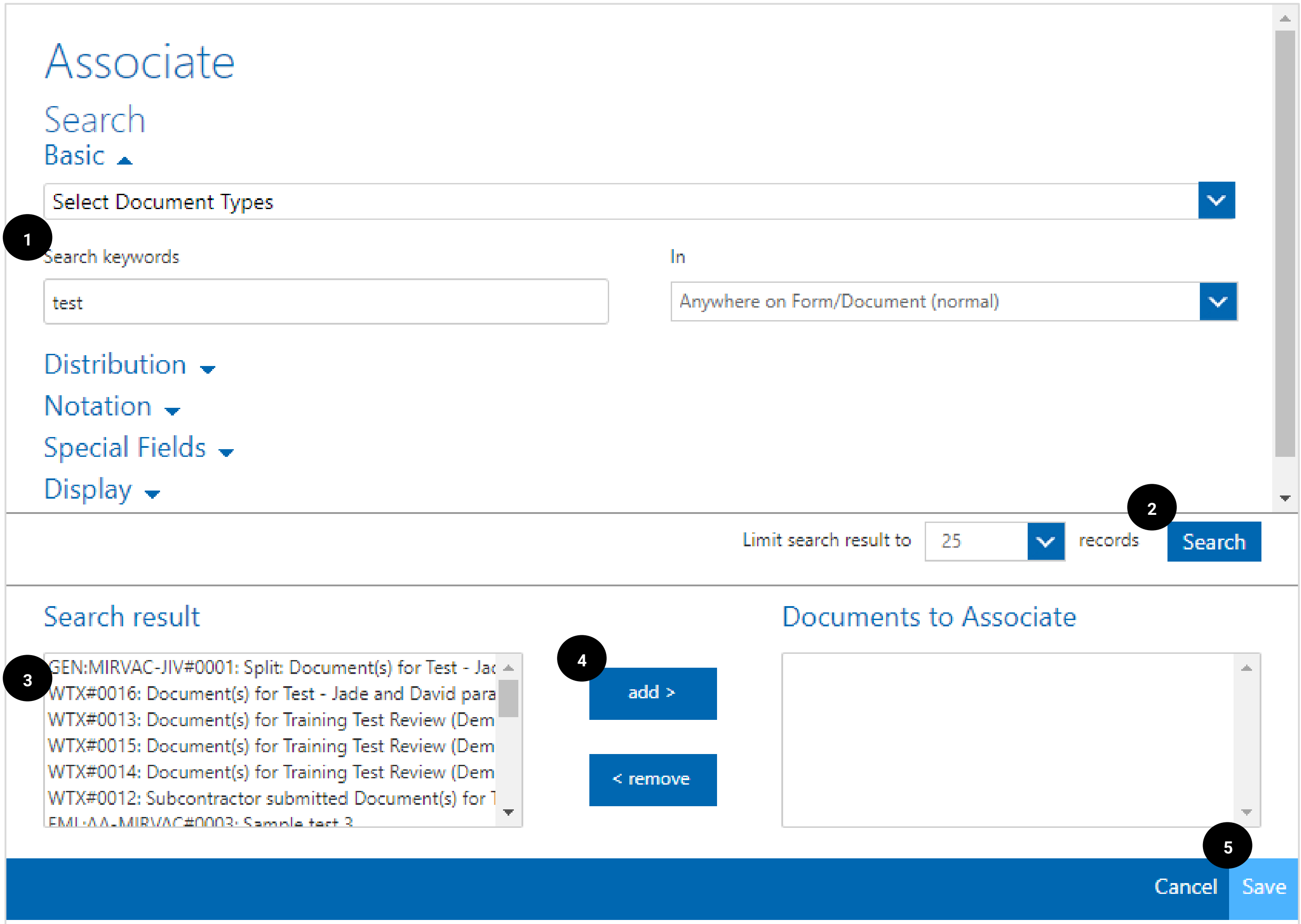
Take some time to make sure everything is right before sending.

2.2 Associating / Linking Items to Correspondence

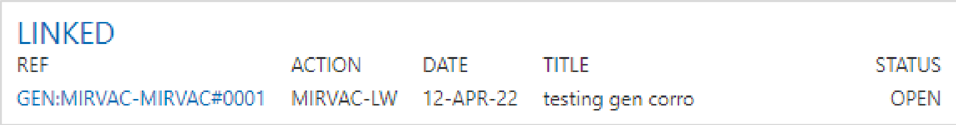
Associating items to a correspondence creates a link to a document or another correspondence form located within iTWOcx. This keeps relevant information about an issue or process together and helps with communication.

At the bottom of every form there is the Associate button.

Clicking the button opens the Associate pop up with the standard search options.



Action	Description
1. Enter **Search Criteria**	Use the search function to locate the form or document you want to link to the correspondence. Refer to the Global Search section for more details.
1. Click **Search**	Results appear in the **Search result** section.
2. Locate form or document	In the search results, select the desired correspondence form, transmittal or document.
3. Click **add >**	Move selected items to the ‘Documents to Associate’ section. To remove items, highlight and click the **< remove** button.

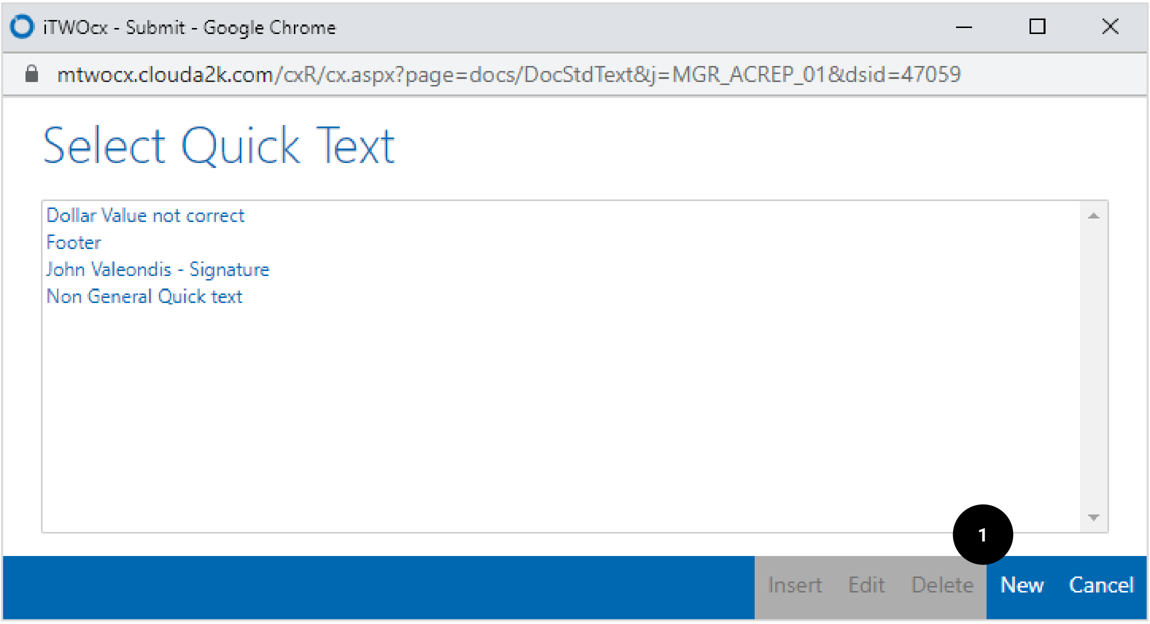
4. Action	Description
5. Click **Save**	The items are linked to the correspondence and are visible in the Linked section at the bottom of the form. 

2.3 Create QuickText

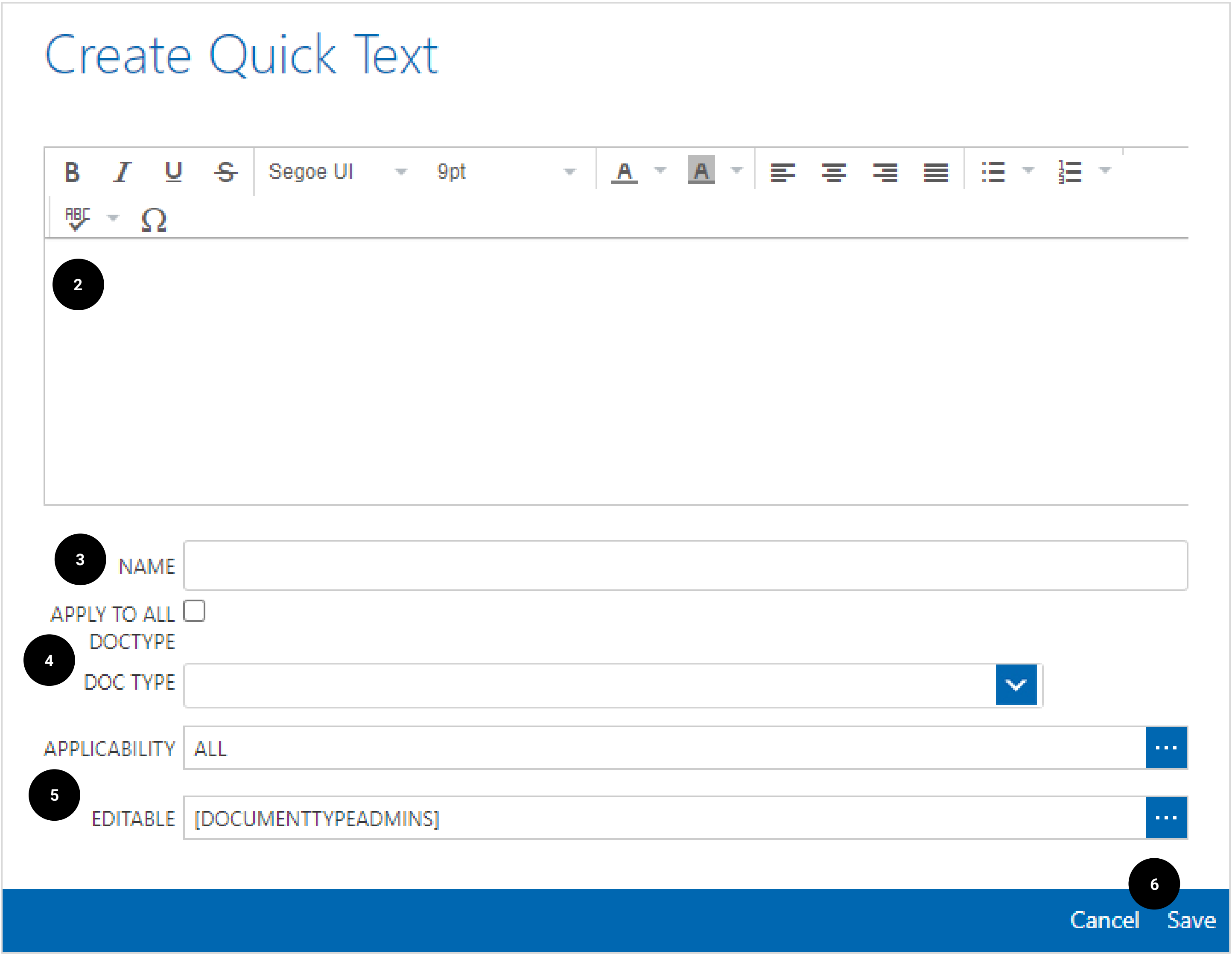
When creating or replying to a correspondence form, the option to add a QuickText message is available. These are saved messages/templates that can be used to convey either standard messages used across a project or a personal message such as a mail signature indicating office hours.

QuickText is created within the correspondence form by clicking the QuickText button.

This opens the Select Quick Text window showing a list of existing QuickText options.



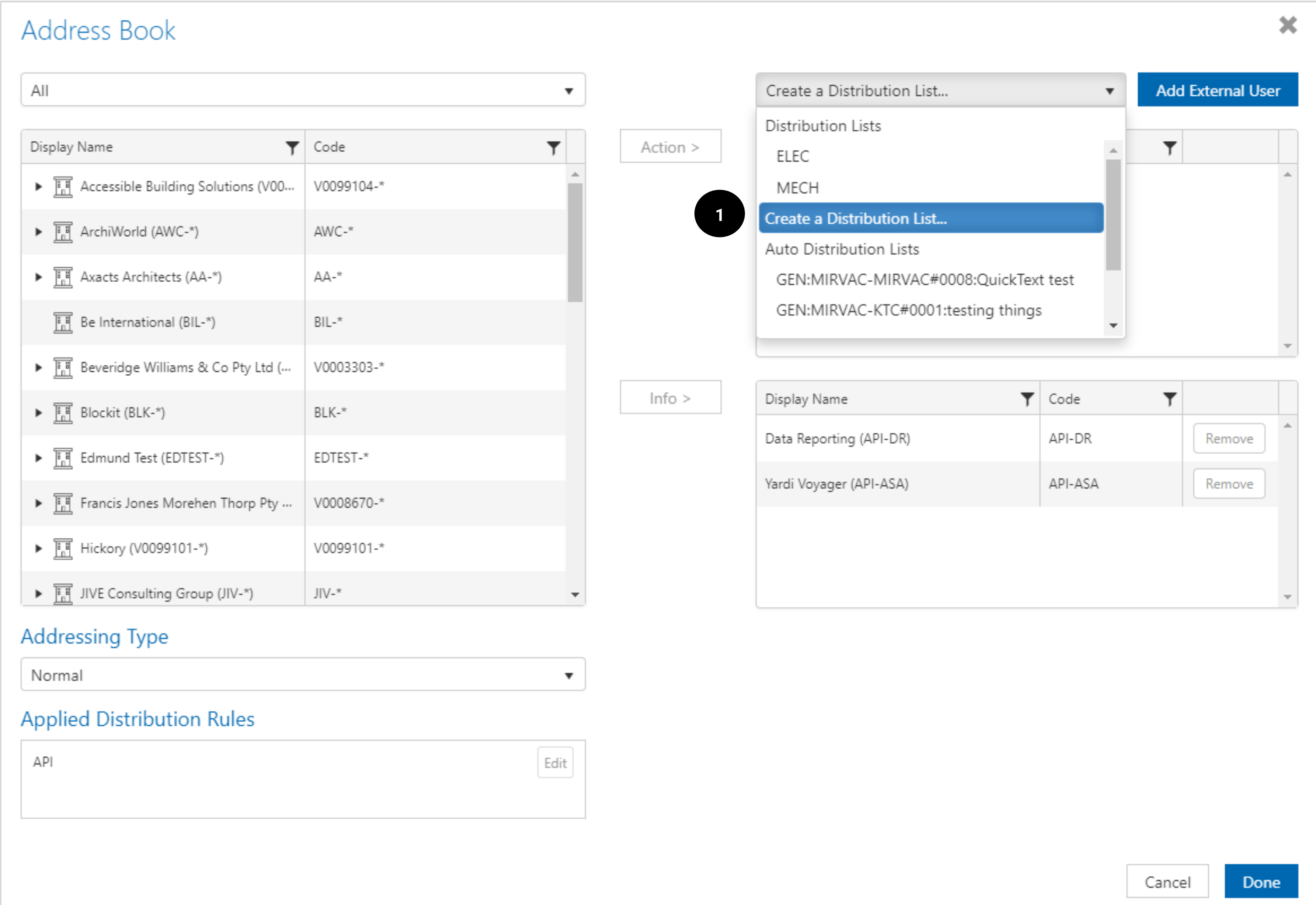
Step	Description
1. Click **New**	Click New. Opens the Create Quick Text window.



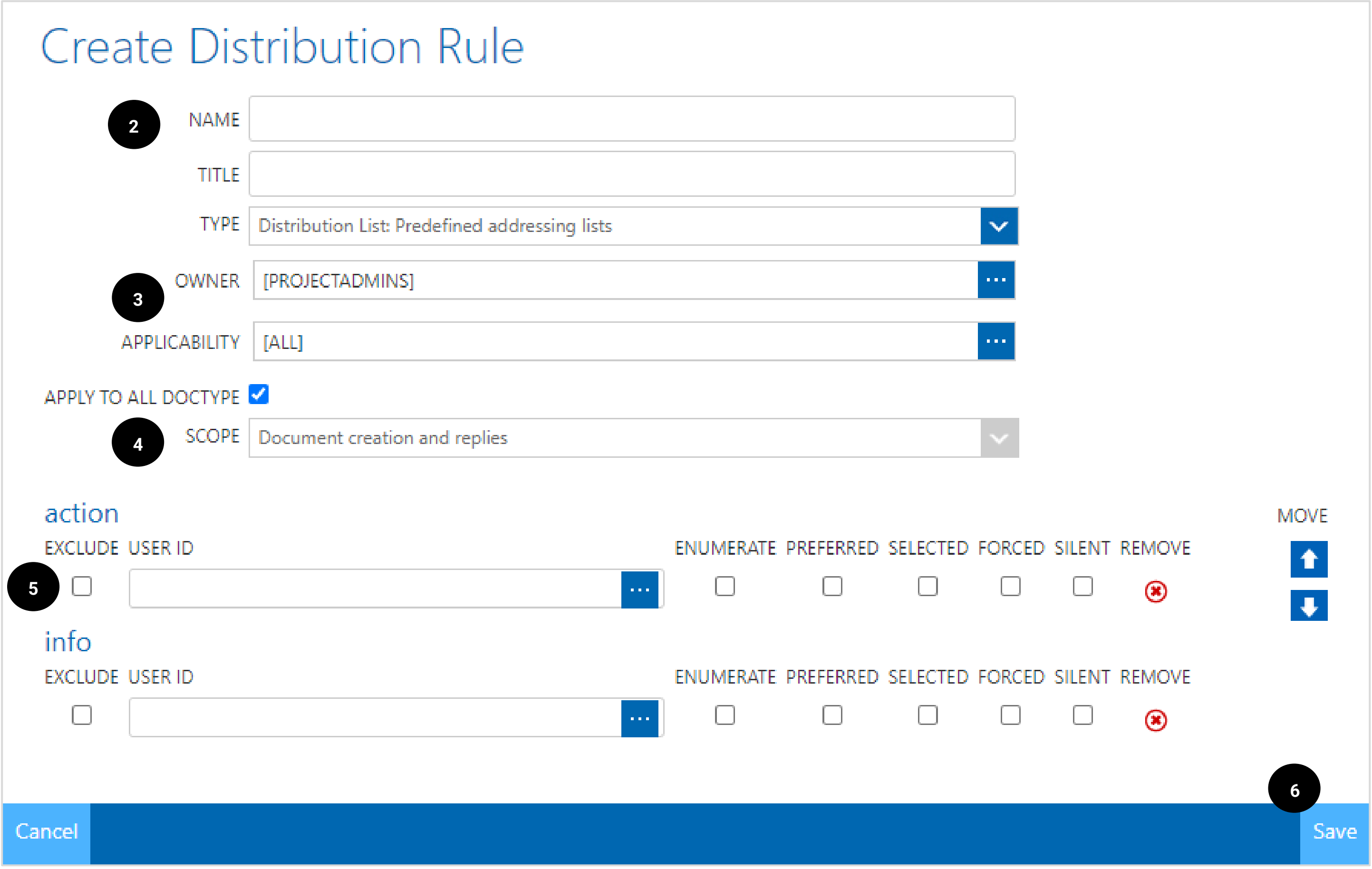
Step	Description
2. Enter **Message**	Enter the message into the comments box.
3. Add **name**	Add a title of the QuickText. This is what appears in the list so be descriptive.
4. Select **Doc Type**	Select the document types that the QuickText option will be available to select and apply: • To be available for all documents and correspondence forms, select the **Apply to all doctype** checkbox • To be available for only specific documents or correspondence forms, use the **dropdown menu** and select the options. Note multiple options can be selected.
5. Select **Applicability** and **Editable**	Choose who can use the QuickText. The default setting is that it is available to all. For a personal message, ensure that this is changed. Choose who can edit the message apart from any document admins (they should be added as a default option).
6. Click **Save**	Saves the QuickText message.

2.4 Create Distribution List

Distribution lists are created to make it easy to correspond to a set of users, rather than manually adding users each time. Distribution lists can be created by anyone and shared with the project or only a few selected users.



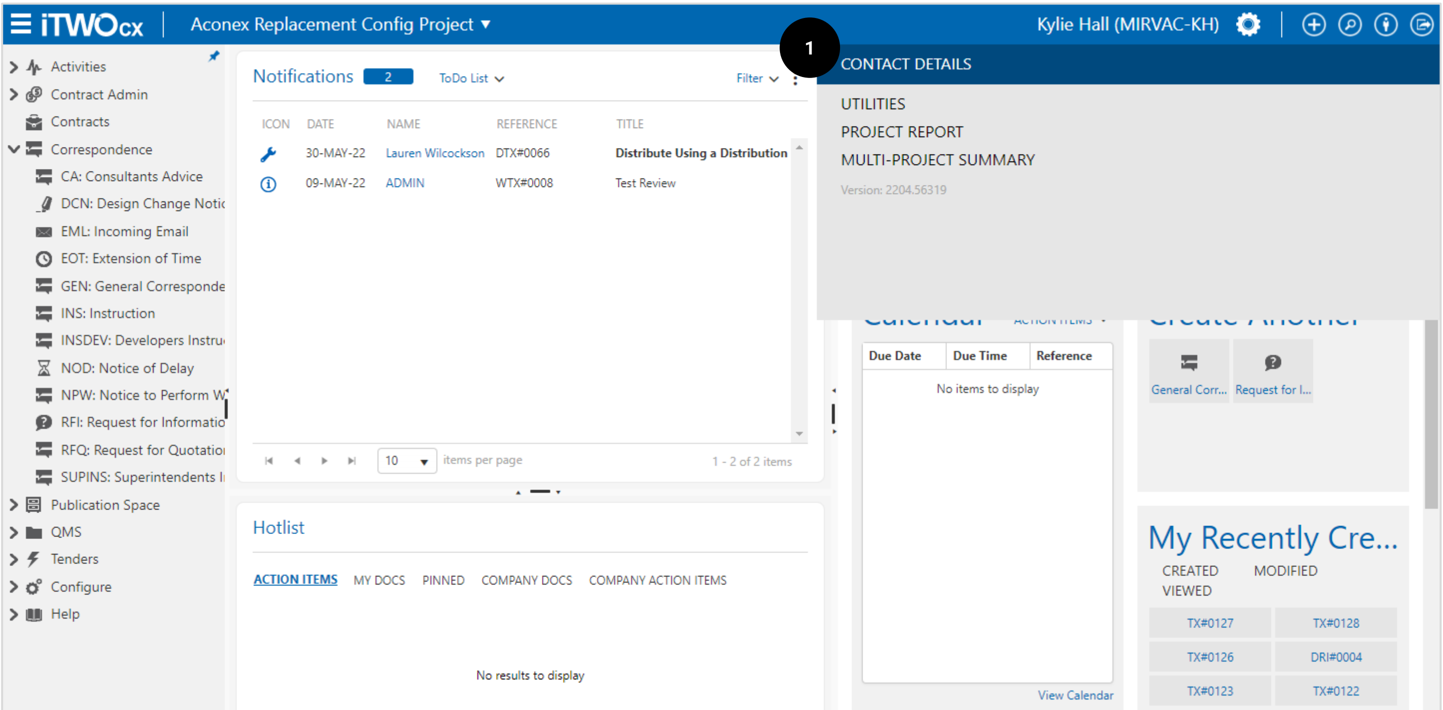
Step	Description
1. Click **Create a Distribution List…**	After clicking the Action button on a new correspondence form, the Select Addressee screen displays. Click **Distribution List** dropdown and select **Create a Distribution List…** The Create Distribution Rule window opens.

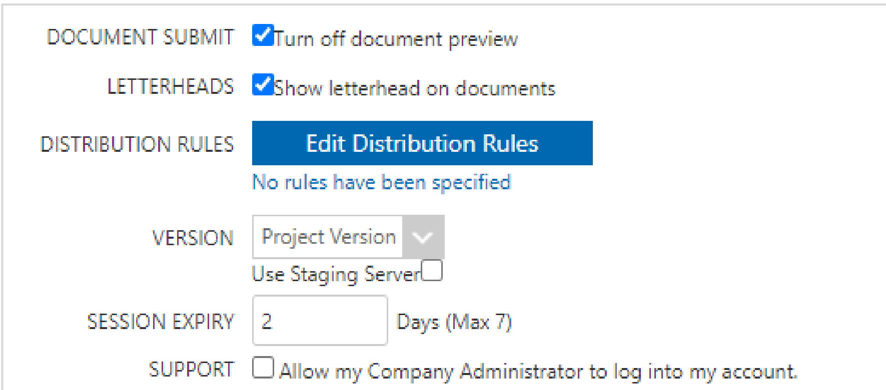


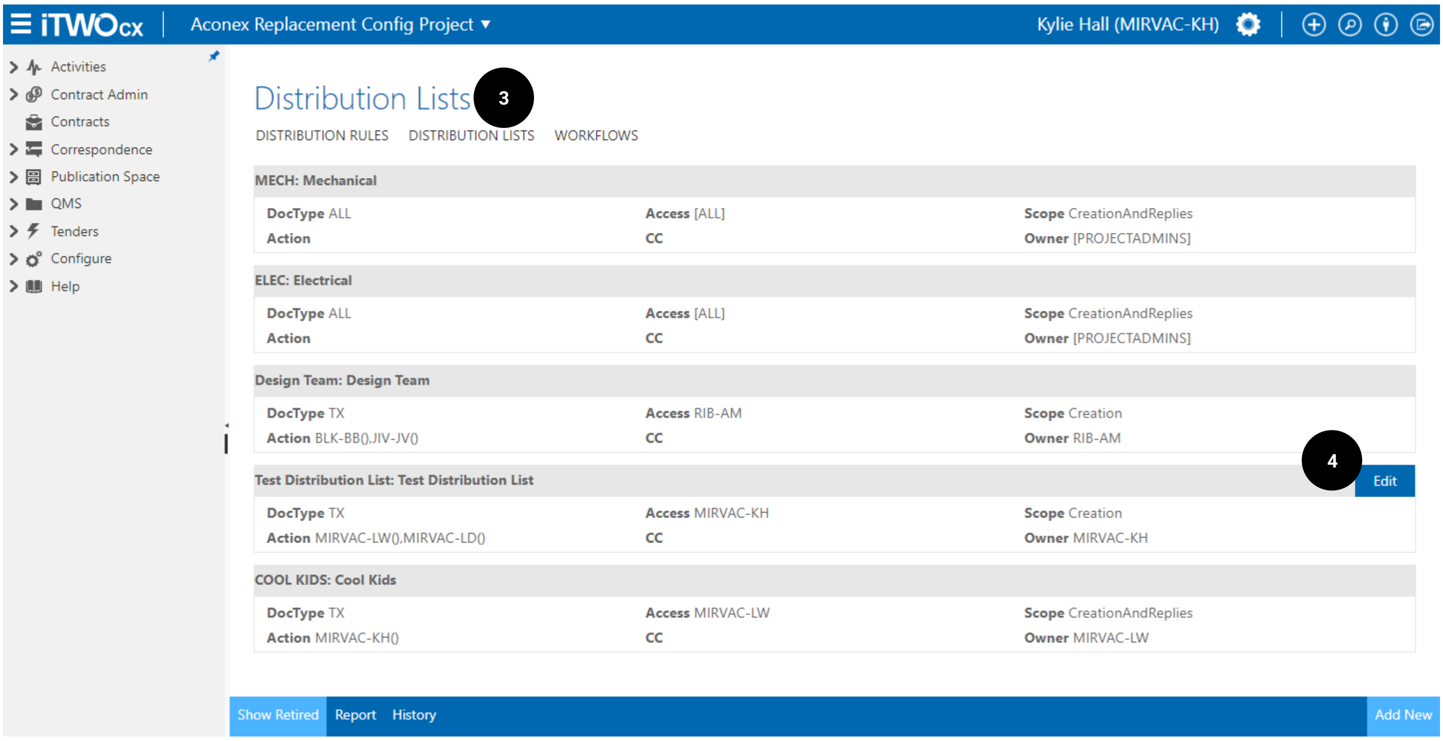
Step	Description
2. Add **Name** & **Title**	Enter Name and Title for the distribution List. Ensure this is meaningful for people to understand.
3. Update **Owner** and **Applicability**	The default owner is 'yourself'. If other users or groups are to be given access to control the users within the distribution list, add them as owner. Applicability relates to who can use the distribution list. The default owner is 'all'.
4. Check **Scope**	The default setting is 'apply to all doc types'. To restrict the use of the distribution list to one correspondence type, uncheck the box and select the correspondence type from the list.
5. Add **Users**	Add relevant users to the Action and Info fields and check any boxes if required. • To add a user, click ··· next to the blank action or info fields.
6. Click **Save**	Saves the distribution list.

2.5 Edit / Delete Distribution List

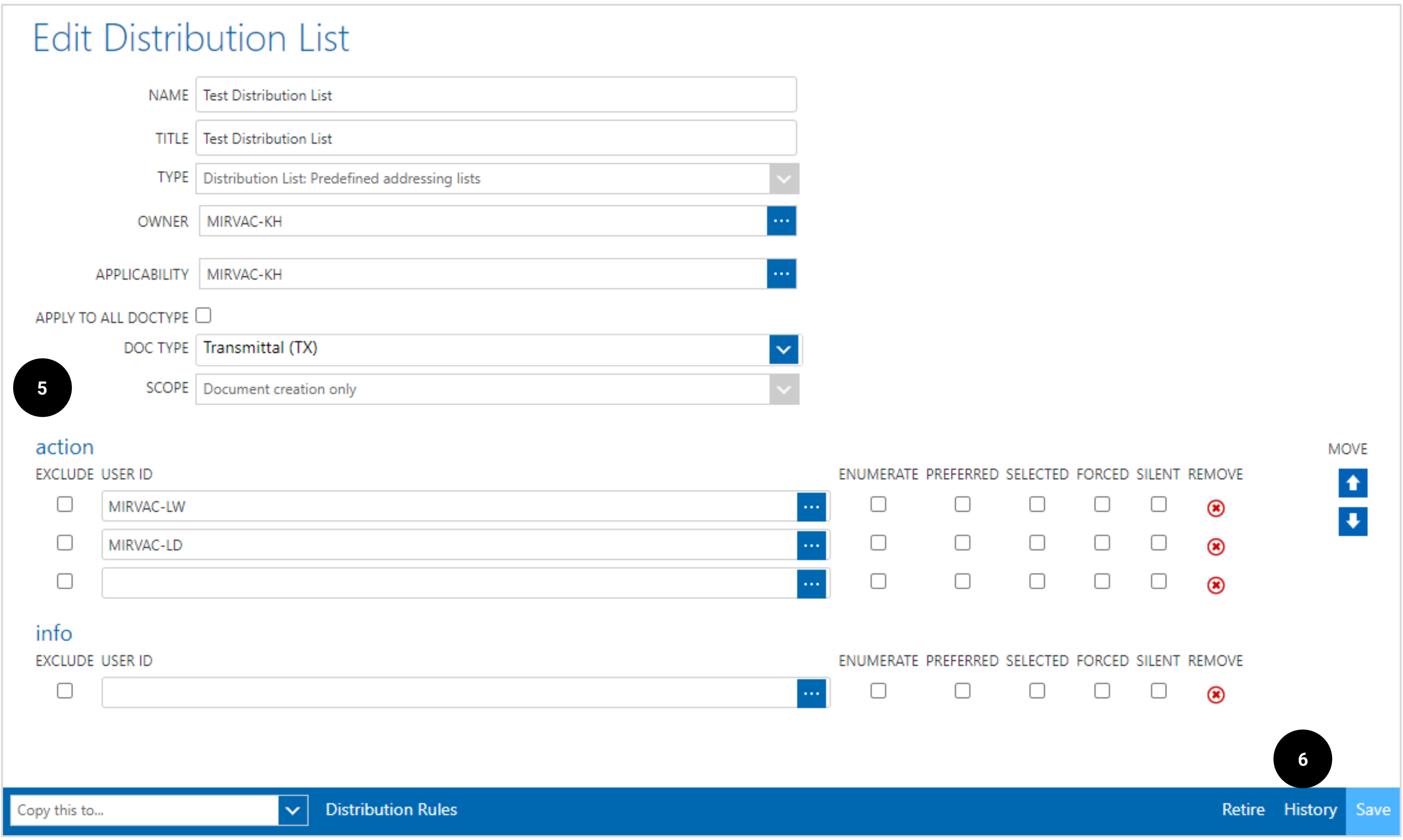
Once a distribution list has been created, the list can be edited or retired.



Step	Description
7. Open **Contact Details**	Click **Cog** > **Contact Details**. Contact Detail screen appears.
8. Click **Edit Distribution Rules**	Scroll down the page to Distribution Rules section 



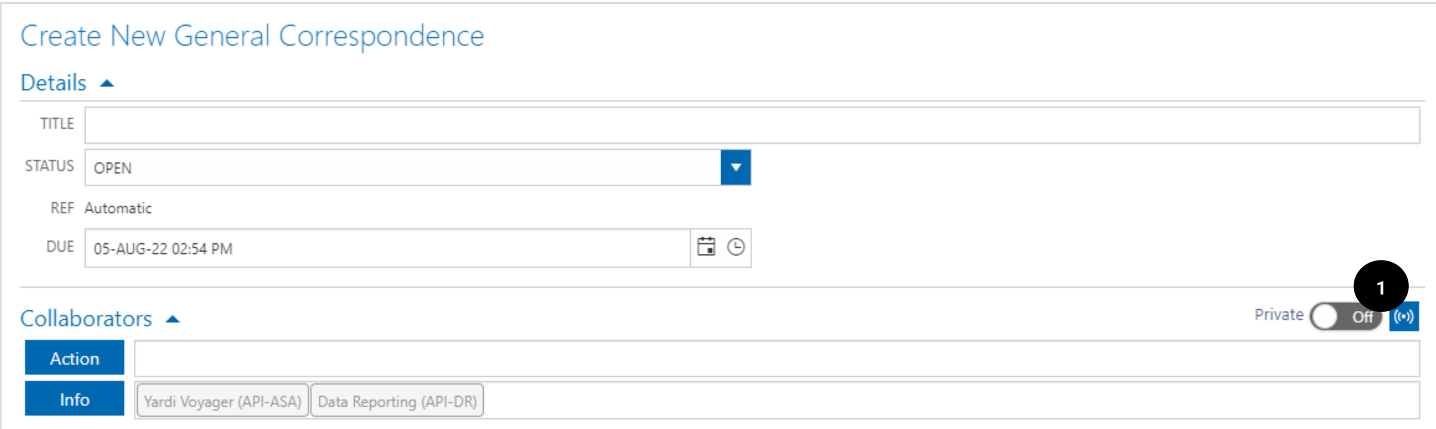
Step	Description
9. Click **Distribution List**	Click the distribution list tab
10. Click **Edit**	Click Edit next to the distribution list to edit / retire. Opens the edit distribution list (separate tab).



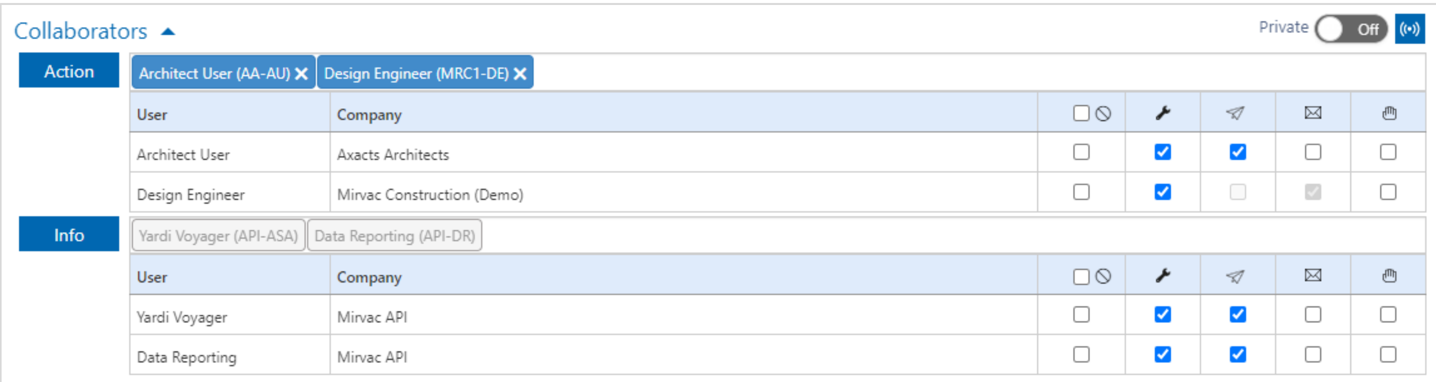
Step	Description
11. Make required changes	Update the required fields depending on the action required: • Update who can use the distribution list by clicking ··· near **applicability** and selecting the users, roles, groups etc. • To **remove a user**, click the ✖ next to their name. • To **add a user**, click ··· next to the blank action or info fields.
12. Click **Save** or **Retire**	Click **Save** to save changes. Click **Retire** to delete the distribution list.

2.6 Forcing a Notification

Each user can decide on how and when they receive an email notification. When sending correspondence, it is possible to view the notification settings for a user and if required, force a notification for the form.



Step	Description
1. Click **Broadcast icon**	Follow the steps to create a correspondence and add the users in the Action and Info fields. Click the broadcast icon ((•)) The collaborators section expands.

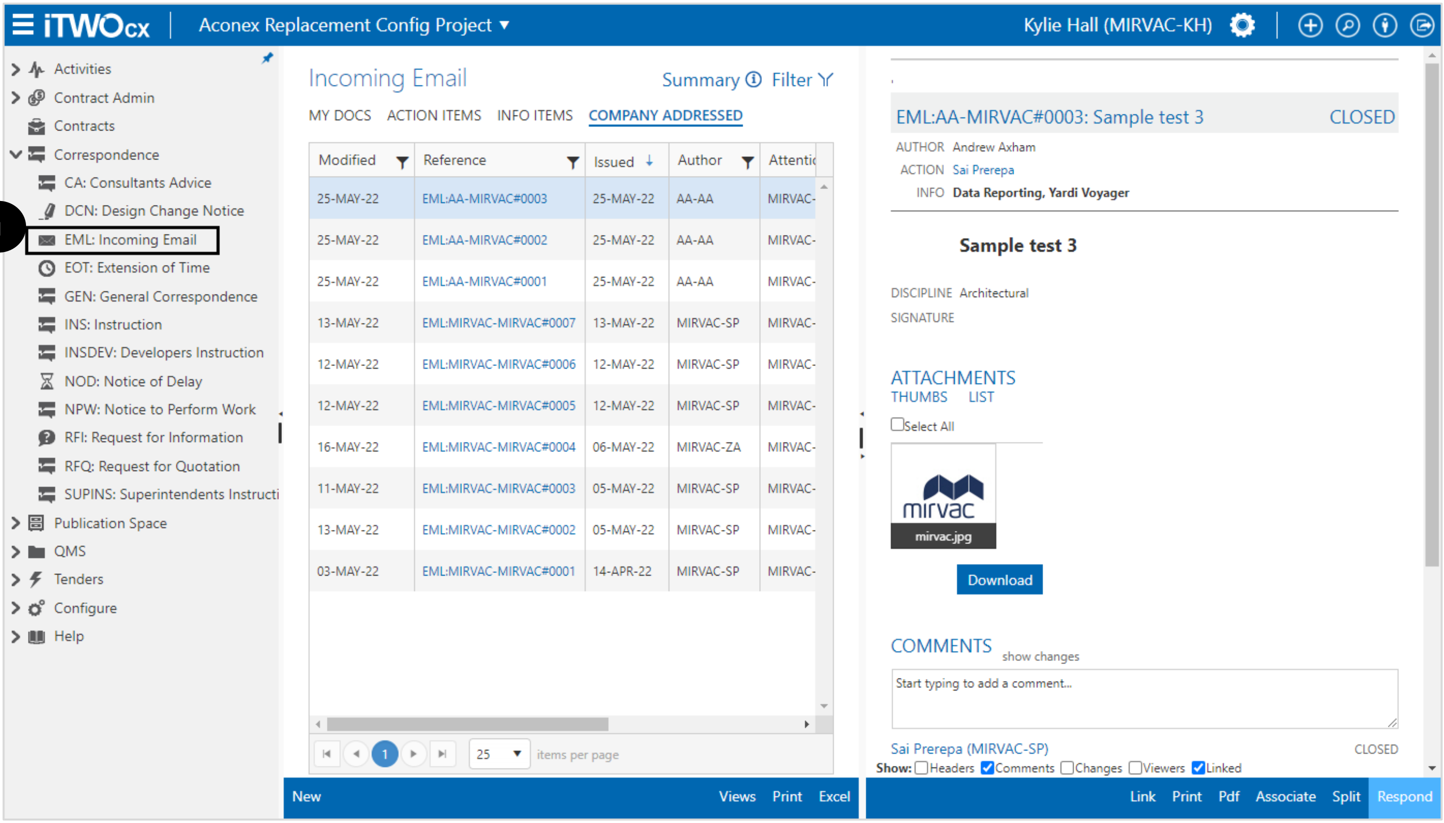


Step	Description
2. Review user preferences	Next to each user the preferred settings are shown. In the example above, the settings are: • Architect User – receives a notification in the to do list (wrench) and an email (plane) • Design Engineer – only receives the to do list notification (t) If changes need to be made, tick the relevant checkbox

2.7 Sending an email to a Project

Every project instance within iTWOcx has a unique project name / ID. It is possible for users to send an email to the project using the unique email address ProjectID@MIRVAC.itwocx.com.

As the email is not addressed to an individual user, the email is visible in the **Incoming Email** section.



Action	Description
1. Click **EML: Incoming Email**	Expand the **Correspondence** section of the menu frame. Click **Incoming Email**. A list of incoming emails is visible. Click a link to display the message on the right hand side of the screen

Emails sent to the project using this method should only be used when a message is a blanket broadcast to all users, not for an individual user or for a task that needs action. There are no controls on who will see the message.

3 Responding to Correspondence

Correspondence in iTWOcx works like a discussion forum. All comments and attachments are linked to the original correspondence creating a thread of responses. Every response is a 'reply all' and all users on the form are notified. There are no separate correspondence types for responses.

When sent a correspondence, users can:

- Respond within the system (by clicking the link in the email)
- Reply via email (using outlook reply button)
- Respond via email (using respond button on the preview email)

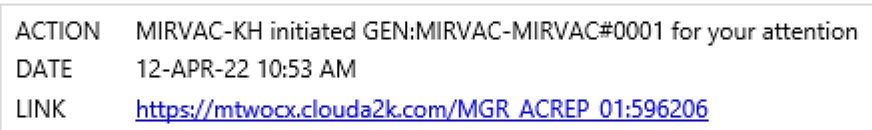
The method to respond depends on the type of notification received. Refer to the **Notifications** topic in this guide for more information about each notification type and steps on how to change preferences.

3.1 Respond in System

Both types of notifications (plain or preview) have a link to view the notification within the system. The message can also be opened via the notifications / hotlist within iTWOcx by clicking on the item.

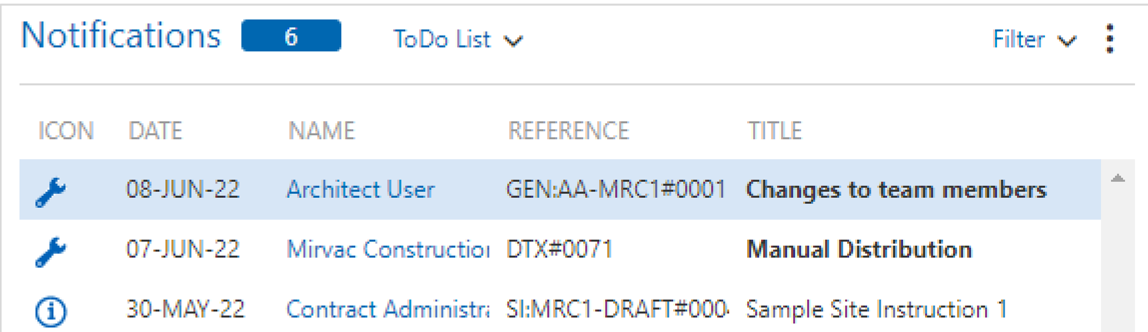
Preview email:

Plain text email:



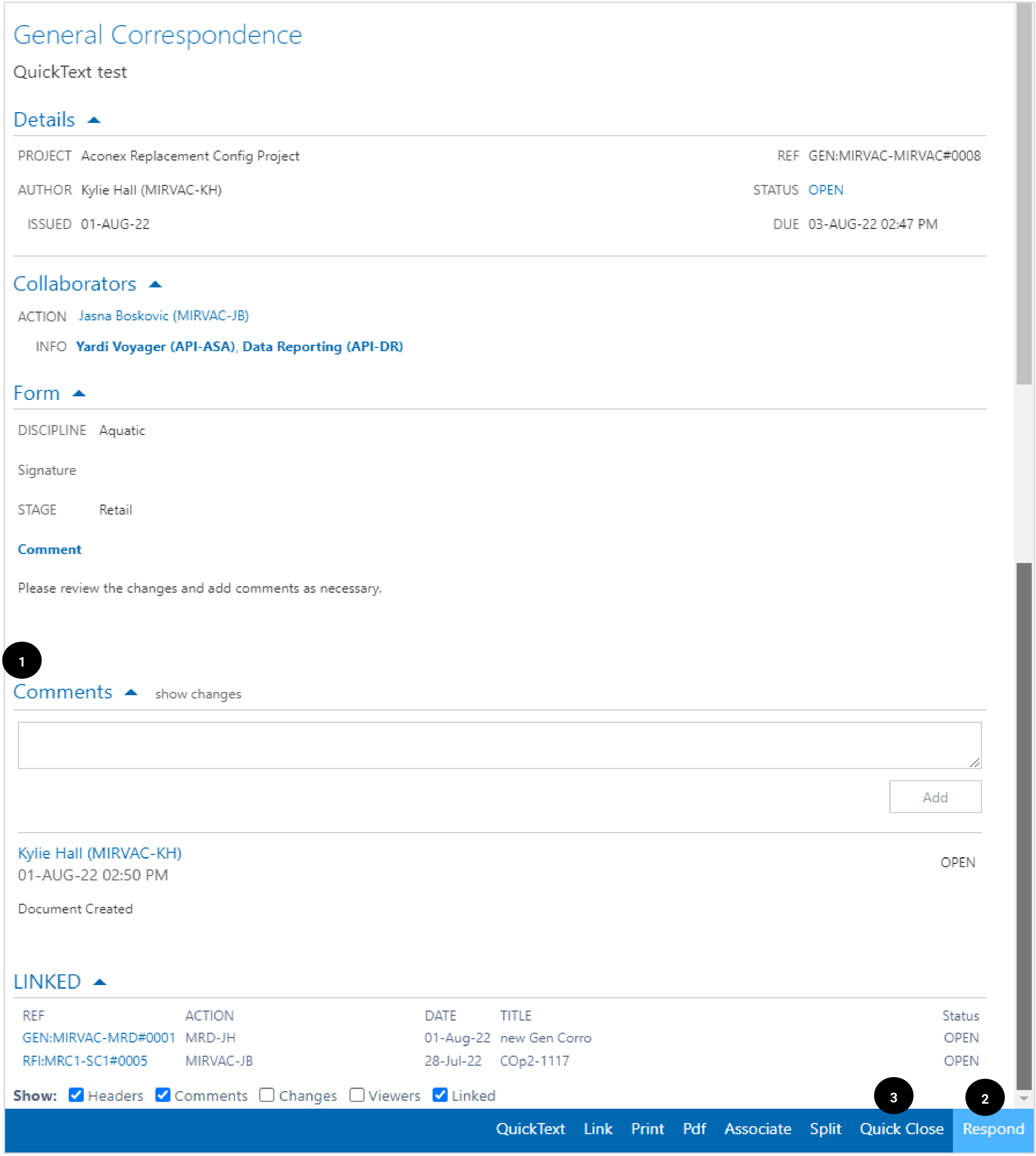
ACTION	MIRVAC-KH initiated GEN:MIRVAC-MIRVAC#0001 for your attention
DATE	12-APR-22 10:53 AM
LINK	https://mtwocx.clouda2k.com/MGR_ACREP_01:596206

Notification within iTWOcx:



ICON	DATE	NAME	REFERENCE	TITLE
	08-JUN-22	Architect User	GEN:AA-MRC1#0001	**Changes to team members**
	07-JUN-22	Mirvac Constructio	DTX#0071	**Manual Distribution**
	30-MAY-22	Contract Administr	SI:MRC1-DRAFT#000	Sample Site Instruction 1

Click the item to open the message in the system. Example below is of a General Correspondence form.



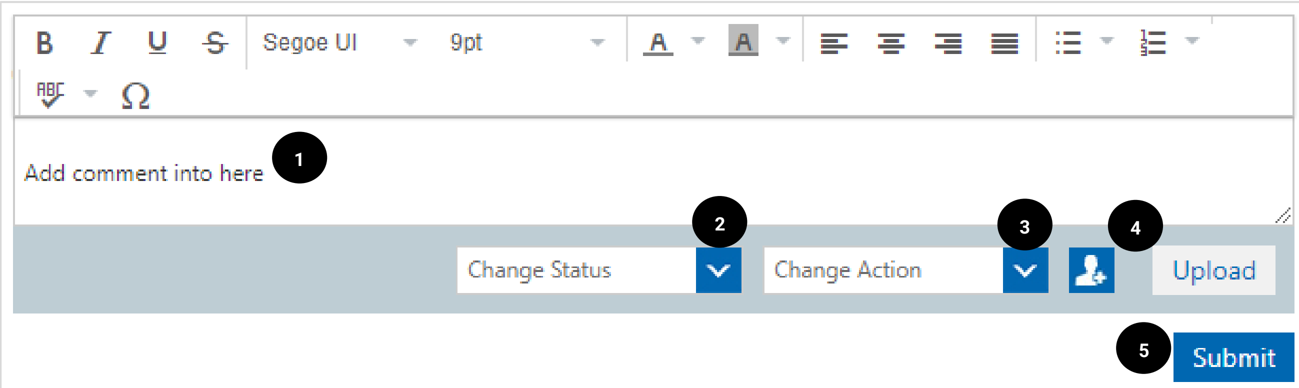
Screen Element	Description
1. Comment box	The comment section is a quick way to respond directly within the form. Upon clicking into the comment field the screen changes to allow for comments, status changes, action on user etc.
2. Respond button	Clicking Respond opens the form within the window, the respond button becomes a submit button. The form allows for comments, status changes, action on user etc.
3. Quick Close	The quick close button completes the actions to move the form to a closed status.

There are two ways to respond to the message:

1. Add a comment
2. Click Respond

3.1.1 Add a Comment

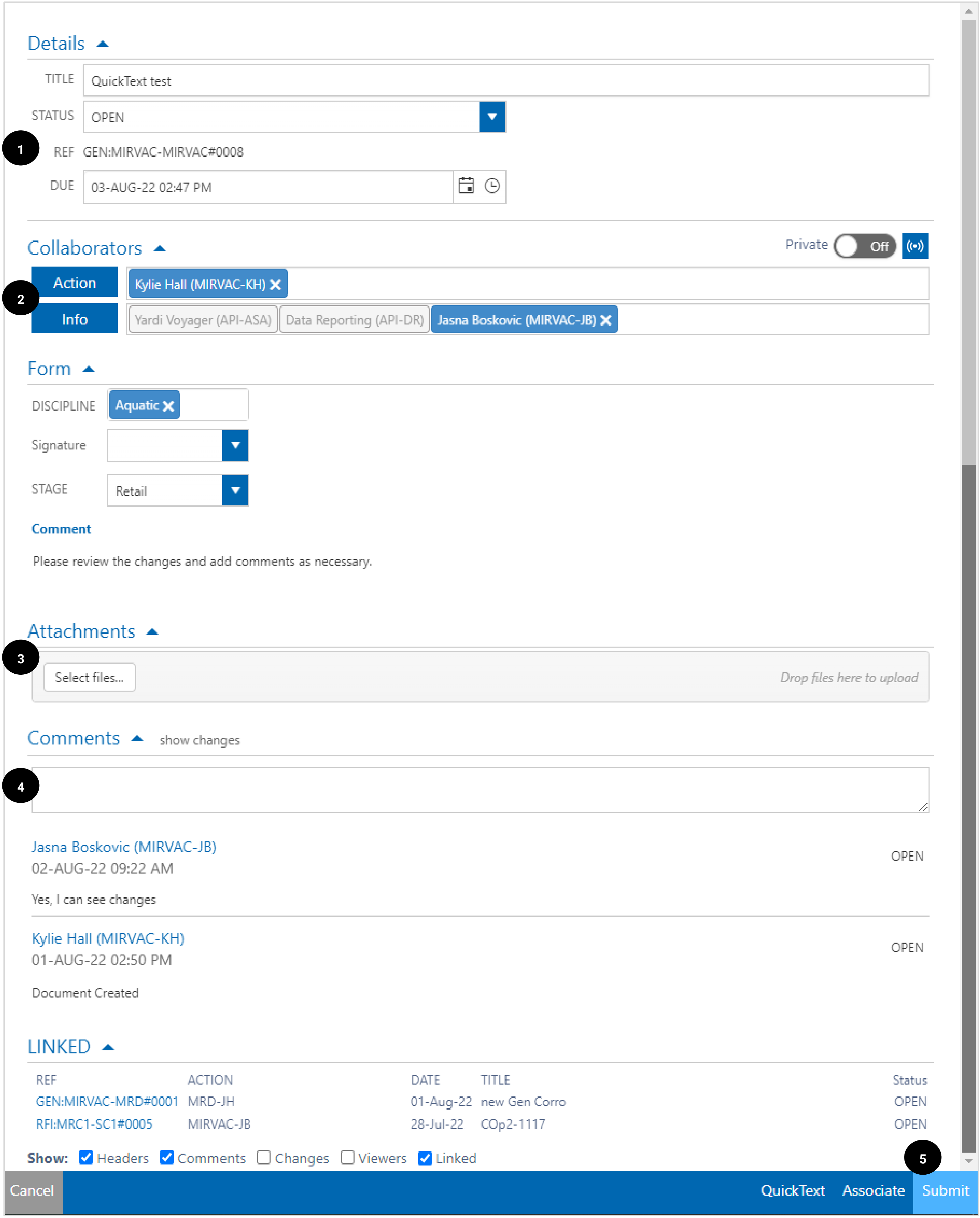
A quick way to respond is to simply start typing into the comments field. This opens the comment section to allow for the comment, the ability to change the status of the form, change the action on user and add attachments.



Action	Description
1. Add **Comment**	Enter comments into the field.
2. Change **Status**	Change the status of the form (if required). The options in the Change Status dropdown is defined on a per form basis and is dependent on the user's access level within the system.
3. Change **Action** user	Change the action user (if required). The options in the Change Action dropdown shows the existing users on the form. Selecting a user will make them the action on user of the form.
4. Add **User** or **Attachment**	Additional users can be added to the form by clicking Uncontrolled documents can be added as an attachment (e.g. a screenshot) by clicking the Upload button.
5. Click **Submit**	Once complete, clicking submit sends the comment to the users on the form.

3.1.2 Click Respond

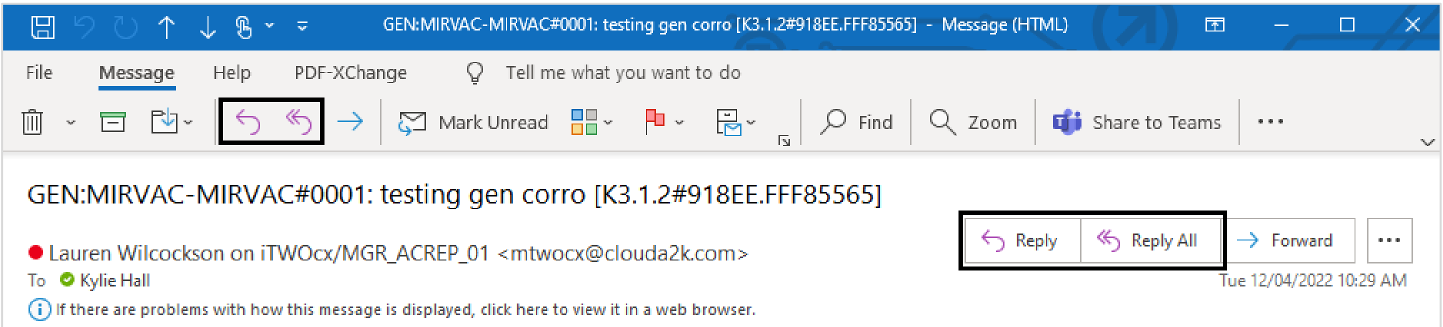
When clicking the Respond button on the correspondence form within iTWOcx it opens within the same window. The Respond button becomes a Submit button.


Details
TITLE
QuickText test
STATUS
OPEN
1
REF
GEN:MIRVAC-MIRVAC#0008
DUE
03-AUG-22 02:47 PM
Collaborators
Private
Off
2
Action
Kylie Hall (MIRVAC-KH)
Info
Yardi Voyager (API-ASA)
Data Reporting (API-DR)
Jasna Boskovic (MIRVAC-JB)
Form
DISCIPLINE
Aquatic
Signature
STAGE
Retail
Comment
Please review the changes and add comments as necessary.
Attachments
3
Select files...
Drop files here to upload
Comments
show changes
4
Jasna Boskovic (MIRVAC-JB)
02-AUG-22 09:22 AM
OPEN
Yes, I can see changes
Kylie Hall (MIRVAC-KH)
01-AUG-22 02:50 PM
OPEN
Document Created
LINKED
REF
ACTION
DATE
TITLE
Status
GEN:MIRVAC-MRD#0001
MRD-JH
01-Aug-22
new Gen Corro
OPEN
RFI:MRC1-SC1#0005
MIRVAC-JB
28-Jul-22
COp2-1117
OPEN
Show:
Headers
Comments
Changes
Viewers
Linked
5
Cancel
QuickText
Associate
Submit

Action	Description
1. Change **Status**	Change the status of the form (if required). The options in the Status dropdown is defined on a per form basis and is dependent on the user's access level within the system.
2. Change **Action** or **Info** users	To change the Action / Info users, click and drag the name to the other fields. Additional users can be added by clicking the Action or Info buttons.
3. Add **Attachment**	Uncontrolled documents can be added as an attachment (e.g. a screenshot) by opening the attachment section and searching for the file or using drag and drop.
4. Add **Comment**	Enter comments into the field.
5. Click **Submit**	Clicking submit sends the form.

3.2 Reply to Email via Outlook

Both types of notifications (plain or preview) can be replied to from Outlook using the **Outlook reply buttons**.



A reply (or reply all) from outlook notifies all users on the correspondence (within the info and action fields) of the message and adds a comment to the correspondence form within iTWOcx (as per below).

Replying to a notification from outlook does not change the **action on** user or the **status**, it just adds a comment to the form. To change the action on user or the status of the form, click the **link** to open the form in iTWOcx and complete the actions.

3.3 Respond to Preview Email

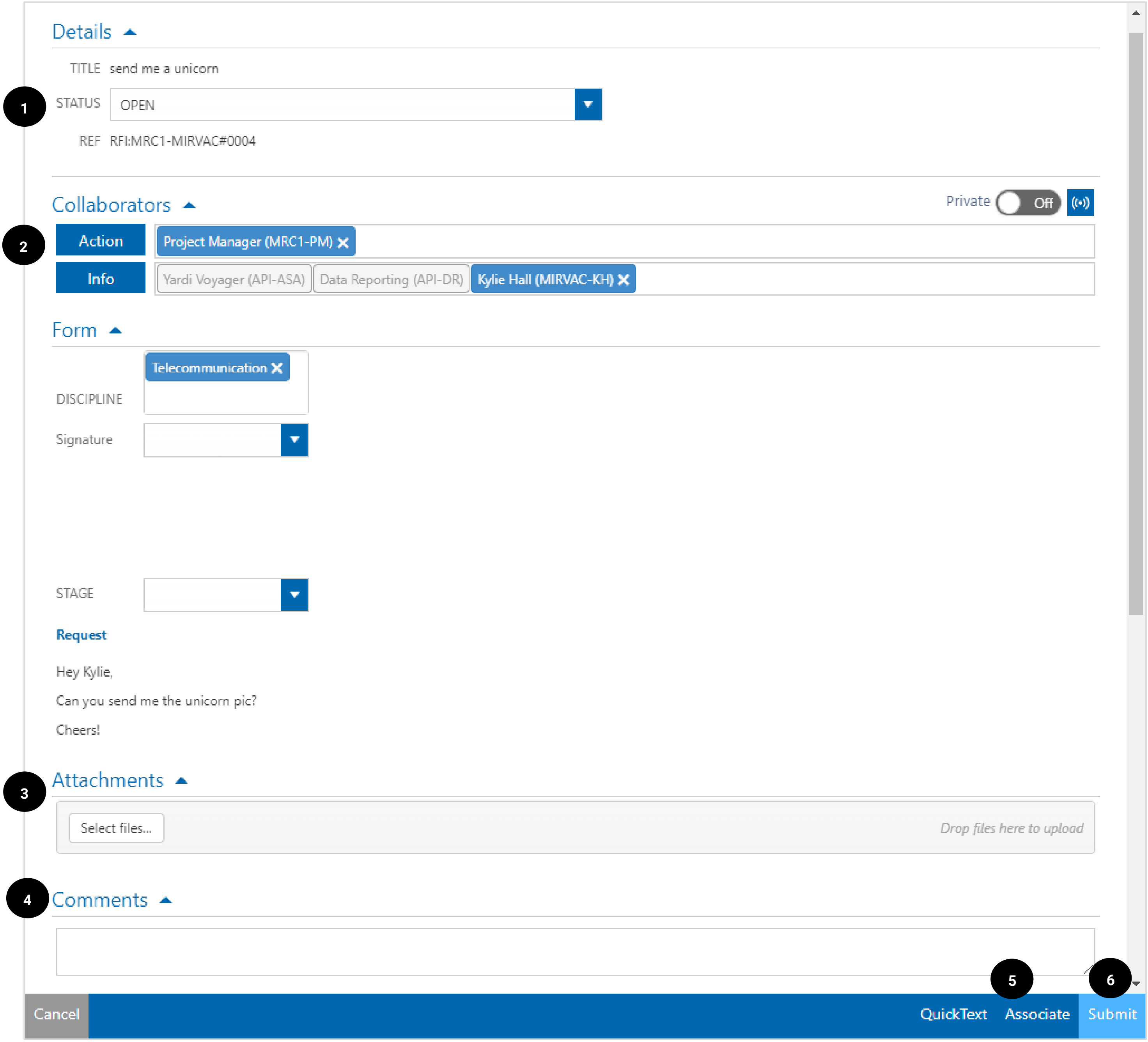
Preview emails have a **Respond** button that opens a version of the form in a browser window to allow more options.

Clicking the button opens the Respond screen.

Note: An 'override existing window' warning message may appear. If so, click Yes to proceed to open the response in a new window.

When responding to some correspondence types, the form allows additional actions. Comments can be added, the action/info users can be changed, the status of the form can be changed as well as adding attachments and associating documents.

When responding to an RFI, the action on user should be changed with each response to indicate who should provide the information. Once everything has been resolved the status is changed to Closed.



Action	Description
1. Check/Change **Status**	Check the status on the form and whether it needs to change. If a change is required, select the new status form the dropdown menu. **Note:** Status changes can only be made by specific users / groups for each form type
2. Check/Change **Users**	To change the action on user, **click and drag** the name from the info field to the action field. **Note:** Additional users can be added to forms in either the action or info field. Users **cannot** be removed from the correspondence.

Action	Description
3. Add **Attachments** (if required)	To add attachments, expand the attachment section and either drag the file or select files.
4. Add **Comment**	Enter response in the comments box.
5. **Associate** documents / forms (if required)	If required, use the associate button to link other correspondence forms or documents.
6. Click **Submit**	Click Submit to send the response to the users on the form (action and info users).

3.4 Split Correspondence

iTWOcx has the ability to split correspondence to create a side conversation that is **linked** back to the original. There are two main reasons to create a split correspondence:

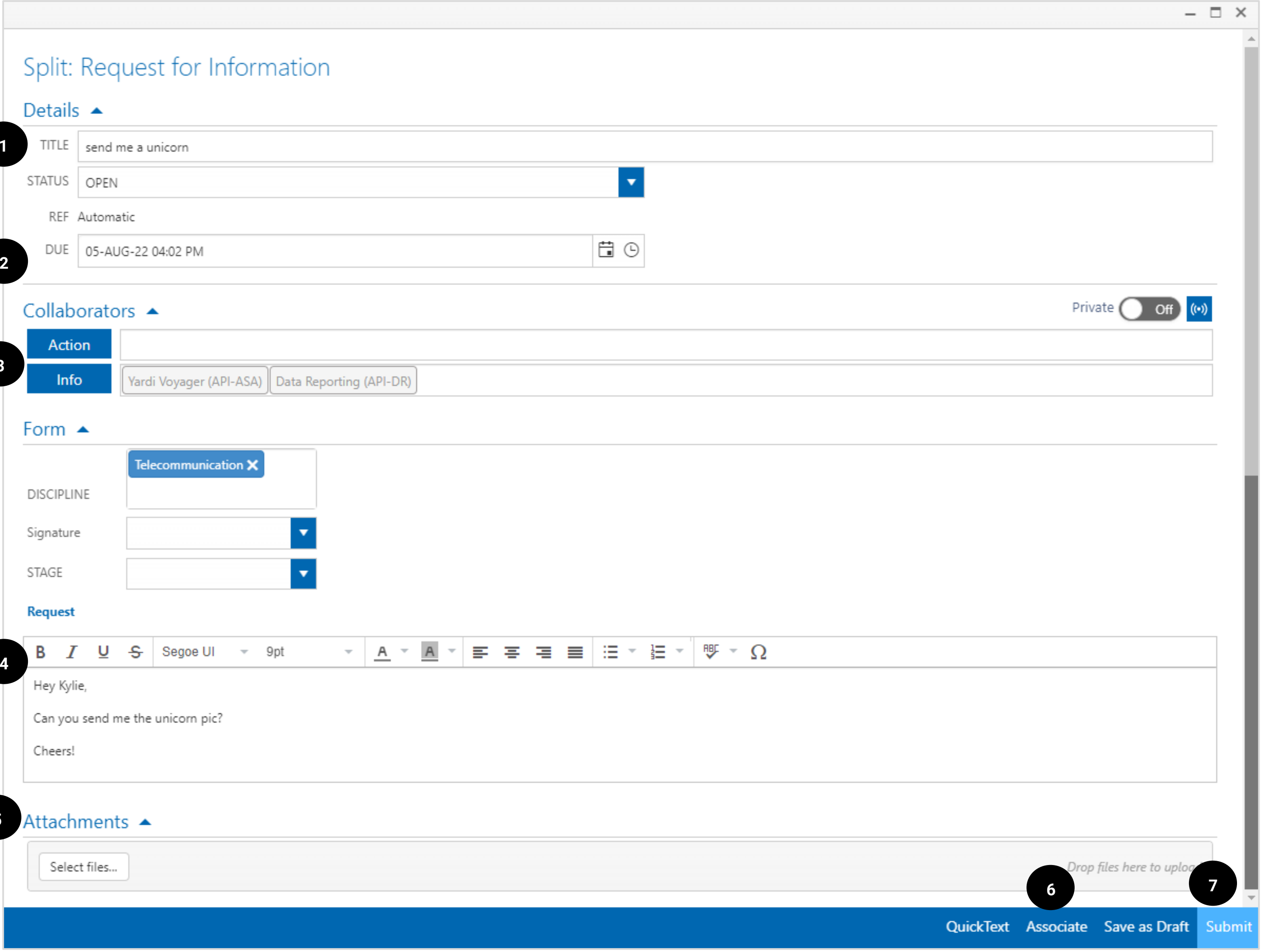
1. To create a related correspondence thread that is linked to the original request to maintain traceability (e.g. a Request For Information results in a need for a Request For Quotation. Using a split correspondence ensures the RFQ can be traced back to the original RFI)
2. To continue a conversation without some of the users. As users cannot be removed from an existing correspondence thread, the split function can be used to remove the users and create a new thread that is linked.

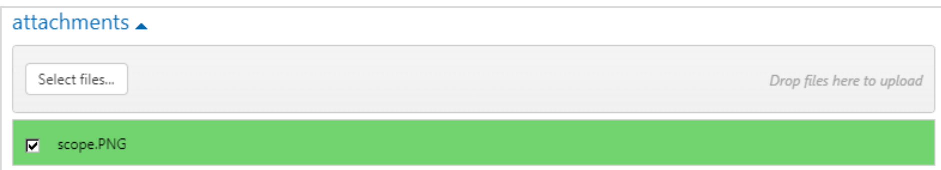
Each correspondence form has the option to Split on the bottom toolbar when viewed within iTWOcx.

Splitting is not available from an email notification; users must log into iTWOcx to create a split.

When the Split button is clicked, the original form type opens up with the existing title and the original comment/request. The users in the action / info fields are removed and need to be added.

Any uncontrolled attachments are available with the option to attach them to the split correspondence. Any linked documents or correspondence are not retained and must be associated to the correspondence form again.



Action	Description
1. Check **Title**	The title of the split correspondence is inherited from the original request. If required, update the title.
2. Check **Status**, **Type**, **Due Date**	The status, type and due date pre-populate. If required, update the fields.
3. Add **Users**	The action and info fields are empty. Users need to be added to the form. Type the users into the field or click the **action** or **info** button to launch the Select Addressee screen. Search for the user and click either **action >** or **info >** to move them to the righthand side. • **Action** – the user required to complete the task, respond to the message, etc. • **Info** – the users that need to be informed.
4. Add **Request**	The original request text is carried across to the split form. If required, update the request.
5. Select / Add **Attachments** (if required)	Existing attachments are available to select and add. Tick the checkbox to include.  Additional uncontrolled documents can be added by drag and drop or select files.

Action	Description
6. **Associate** documents / forms (if required)	If required, use the associate button to link other correspondence forms or documents within iTWOcx to the form.
7. Click **Submit**	Click Submit to send the response to the users on the form (action and info users).

Remember: If you're splitting a form any linked iTWOcx documents / forms are not carried over. Items must be associated to the new split correspondence.

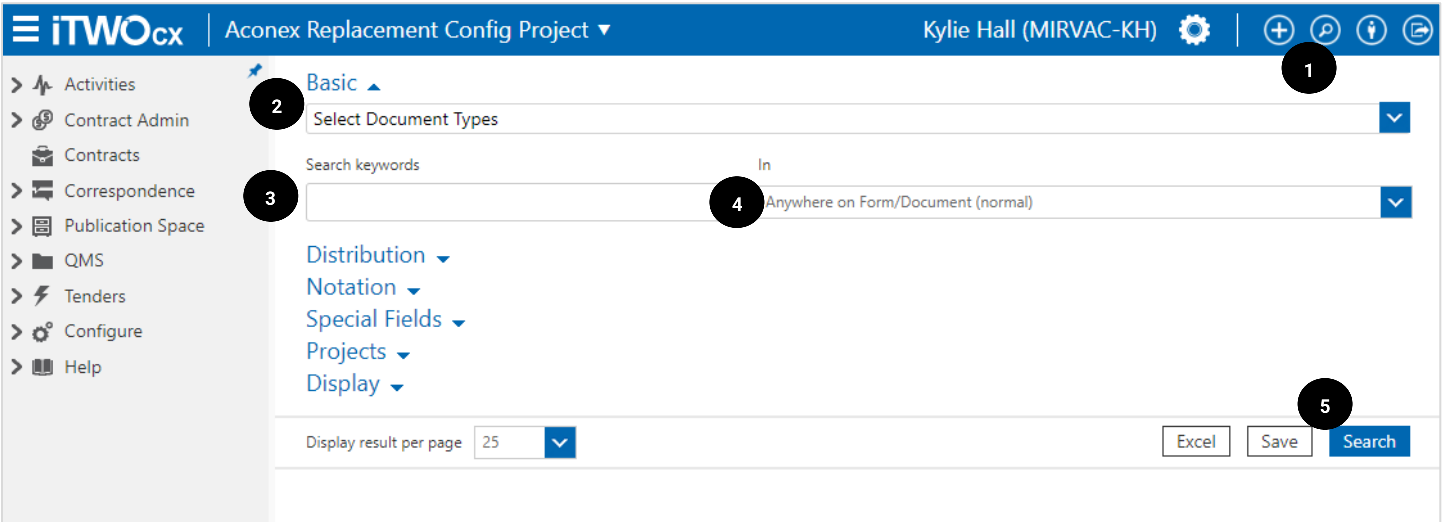
Any uncontrolled documents added as an attachment need to be checked to be included with the new split correspondence.

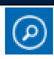
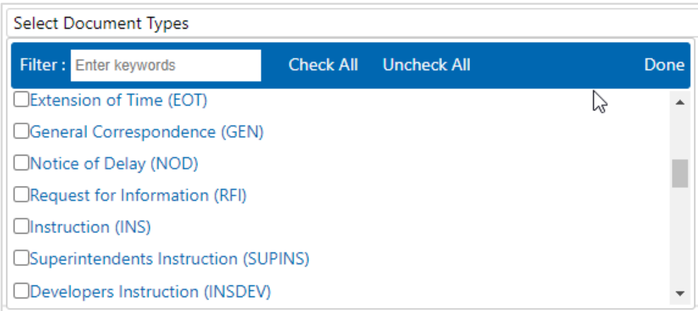
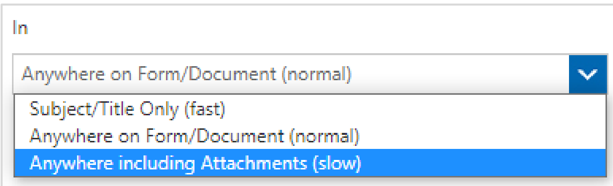
4 Searching for Correspondence

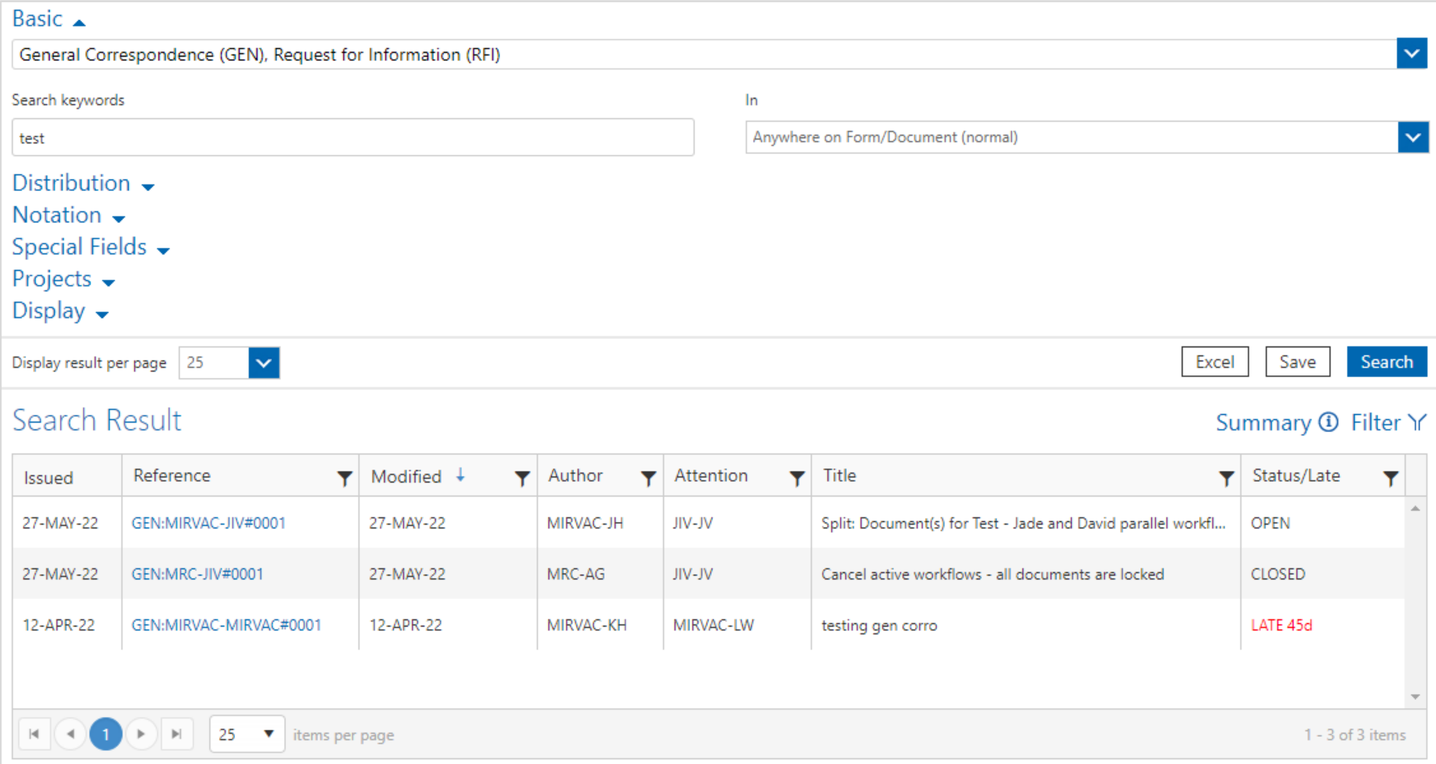
There are two main ways to search for correspondence within iTWOcx. The Global Search tool allows for searching across multiple correspondence types at the same time. The other option is within the correspondence register where users can filter and search on a specific correspondence type.

4.1 Global Search

The Global Search tool is access via the toolbar which is accessible from any screen in iTWOcx. The default setting is the expanded basic section to allow a keyword search across all document types.



Step	Description
1. Click **Magnifying Glass** icon	Click  Opens the Search screen. The default view is for the **Basic Keyword** search.
2. Select **Document Type**	Using the dropdown menu, select the **document type** to search. Multiple types can be manually selected or select the Check All option to search everything. 
3. Enter **keywords**	Add keywords into the field. Wildcard searches using * can be used.
4. Select the **level** of search	Change the level for the search from the dropdown. The default is set to search the form contents only. 
5. Click **Search**	The results are displayed.

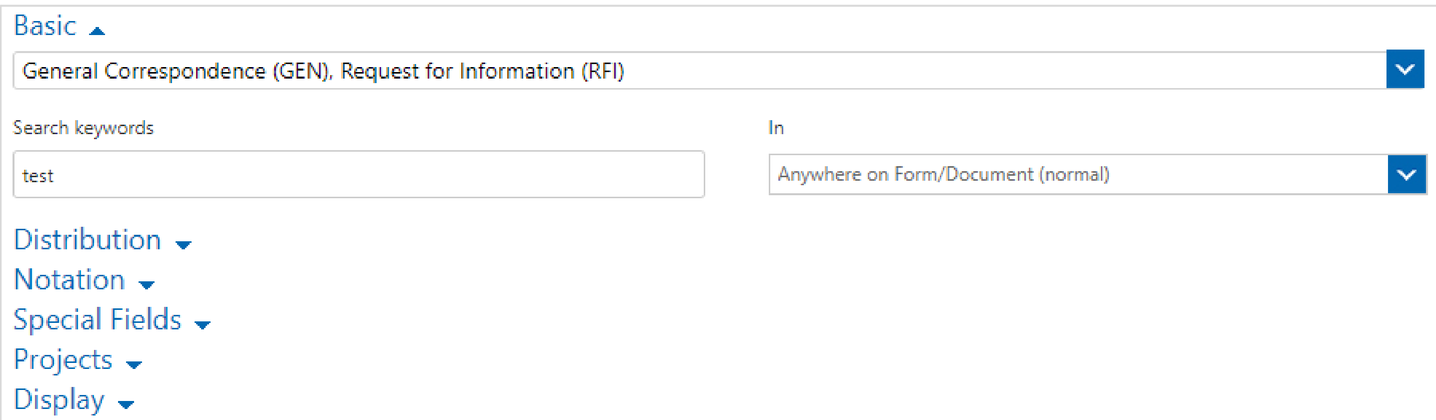


Step	Description
6. View Results	The results appear in the Search Result section. Items can be opened by clicking the **link**. Further **filtering** and **sorting** is available by clicking the column heading to sort the list, clicking the filter icon in the column heading or by clicking filter Filter in the top right. Clicking Summary shows the criteria selected/applied. Results can be exported to **Excel** or Saved as a saved search.

The search is conducted on any correspondence in iTWOcx where someone from your company is listed on the action or info fields.

4.1.1 Search Categories

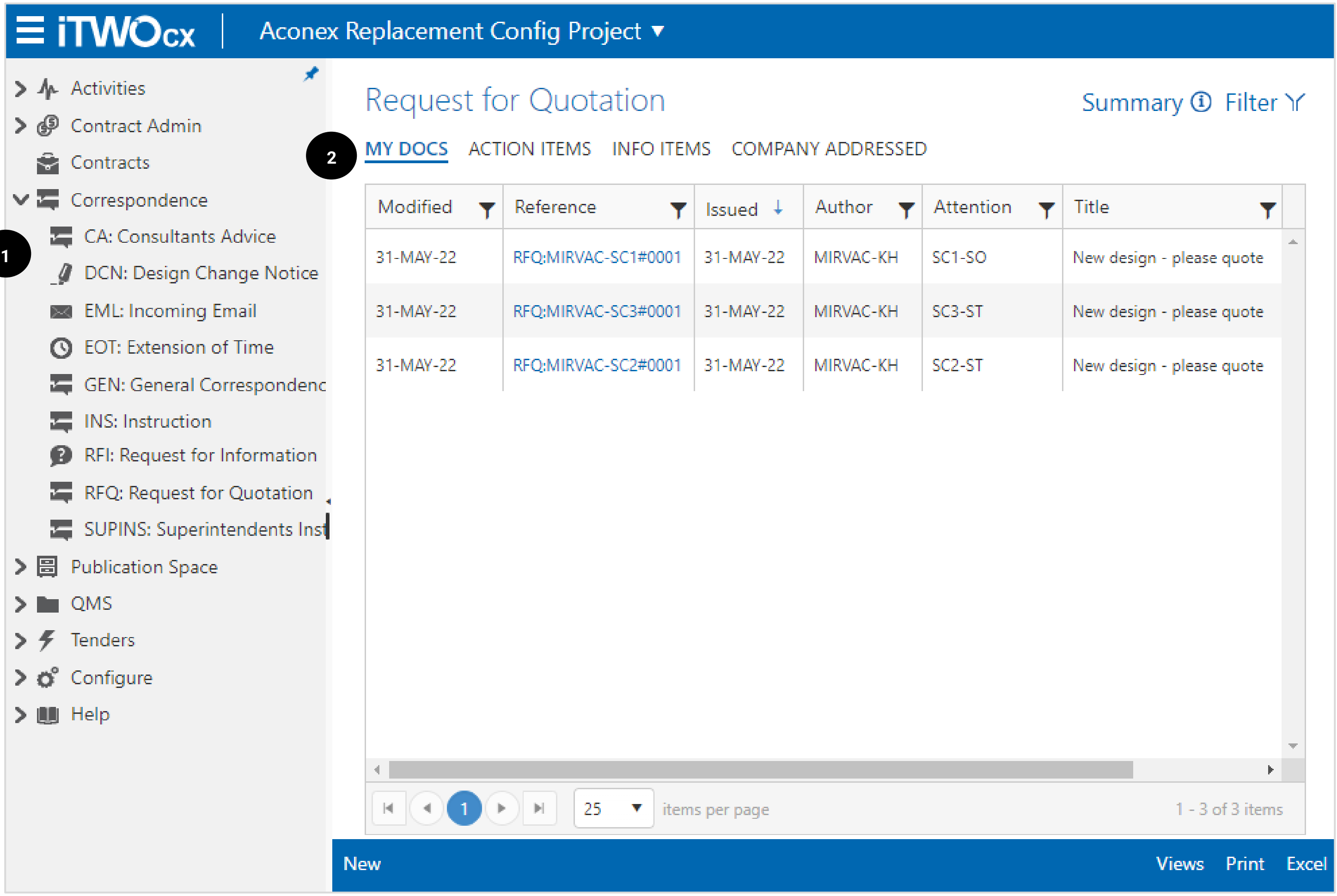
There are many criteria available for searching. They are grouped into different categories as outlined in the table below. Searches can be conducted using fields across one or more categories to refine the search.



Category	Description
Basic	The Basic search provides a **keyword** search. Searches can be completed across all document / form types, a particular type or multiple types. Keyword searches can be conducted across the correspondence text (default setting), just the title or within the attachments on a correspondence (this is a slower search option).
Distribution	Allows filtering by **users**, **dates** or **status**. A useful feature is to search for items created in the last X days by using a negative number in the Created Date field. e.g. -7 displays results from the last 7 calendar days.
Notation	Allows searching by the **author**. This is a quick way to search for documents from a particular company.
Special Fields	Used to identify correspondence with a **specific category** on a form e.g. area, discipline, stage, tender package etc. **Note:** some of these fields are optional on a form.
Projects	Allows for searches across **multiple project instances** that you have access to.
Display	Is used to change the way the search results are shown.

4.2 Correspondence Register Search

Within iTWOcx, every correspondence form type available to the user has a register in the menu. The register can be used to locate specific items instead of using the global search feature as there are some pre-built views that may assist.



Action	Description	
1. Navigate to register	Expand the Correspondence menu and click the register.	
2. Click required tab	The tabs across the top provide additional views.	
	My Docs	Correspondence created by the user.
	Action Items	Correspondence where the user is listed in the action field.
	Info Items	Correspondence where the user listed in the info field.
	Company Addressed	Correspondence sent / received to anyone within the same company as the user.
3. Sort / Filter if required	Further **filtering** and **sorting** is available by clicking the column heading to sort the list, clicking the filter icon in the column heading Clicking Filter in the top right opens the same categories from the Global Search. Clicking Summary shows the criteria selected/applied. Results can be exported to **Excel** or [Saved]() as a saved search.	

4.3 Exporting Search Results

A feature of both search methods is the ability to export the search results to excel. This is a great way of sharing information in an easy to view format that provides direct hyperlinks to the correspondence.

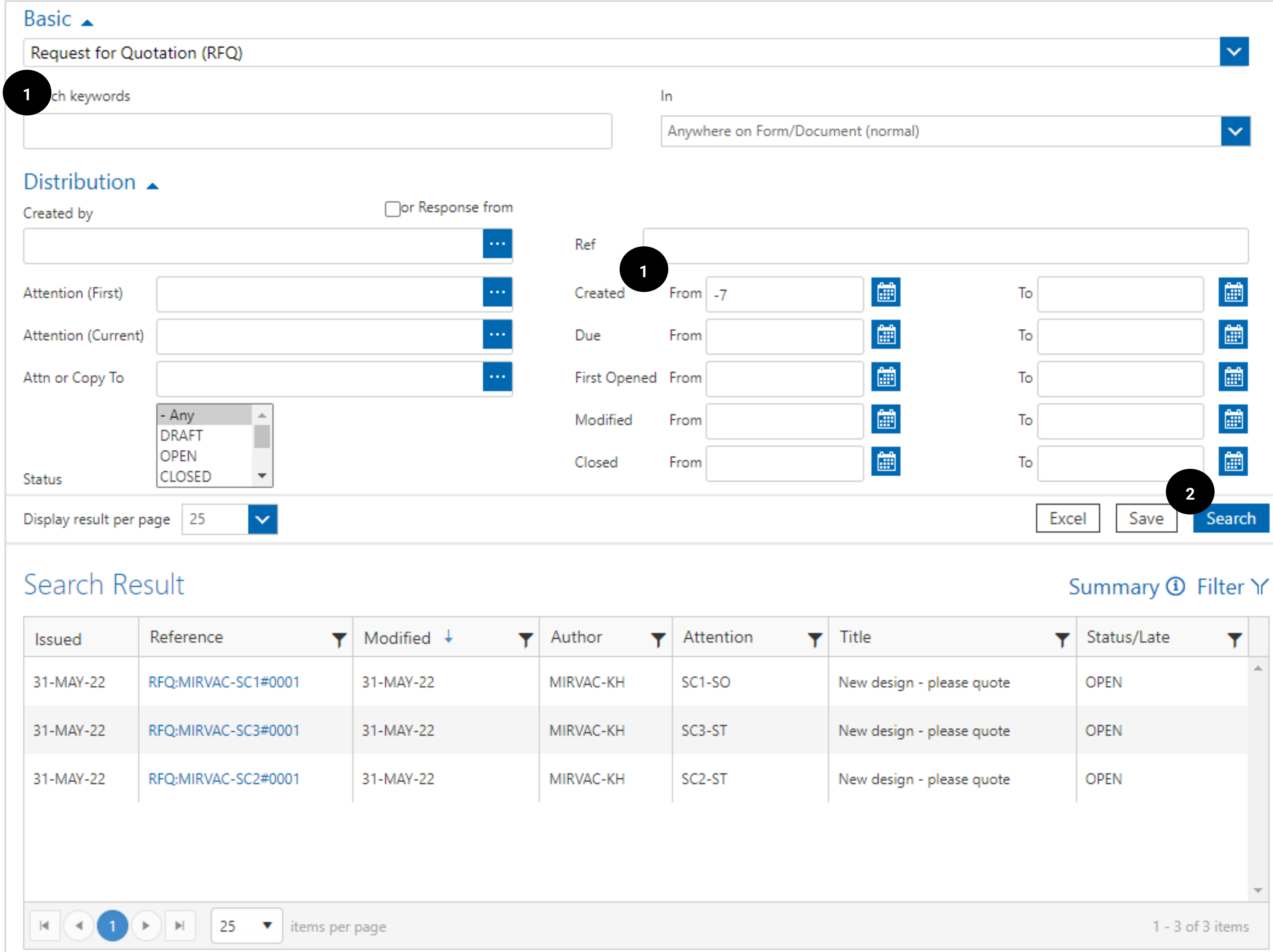
Document List

Issued	Reference	Modified	Author	Action		Status/Late	ICON
27-May-22	GEN:MIRVAC-JIV#0001	27-May-22	MIRVAC-JH	JIV-JV	Split: Document(s) for Test - Jade and David parallel workflow	OPEN	
27-May-22	WTX#0016	27-May-22	MRC-AG	MRC-AG	Document(s) for Test - Jade and David parallel workflow	CLOSED	
27-May-22	GEN:MRC-JIV#0001	27-May-22	MRC-AG	JIV-JV	Cancel active workflows - all documents are locked	CLOSED	
25-May-22	WTX#0013	27-May-22	RIB-AM	MULTIPLE	Document(s) for Training Test Review (Demo)	CLOSED	
26-May-22	WTX#0015	26-May-22	AA-AA	SE-SE	Document(s) for Training Test Review (Demo)	LATE3d	
26-May-22	WTX#0014	26-May-22	MRC1-DE	MULTIPLE	Document(s) for Training Test Review (Demo)	CLOSED	
25-May-22	WTX#0012	25-May-22	MRC1-DE	MULTIPLE	Subcontractor submitted Document(s) for Training Test Review (Demo)	CLOSED	
25-May-22	EML:AA-MIRVAC#0003	25-May-22	AA-AA	MIRVAC-SP	Sample test 3	LATE1d	
25-May-22	EML:AA-MIRVAC#0002	25-May-22	AA-AA	MIRVAC-SP	Test Email	LATE1d	
24-May-22	WTX#0011	24-May-22	MRC1-DE	MULTIPLE	Document(s) for Training Test Review (Demo)	CLOSED	
24-May-22	WTX#0010	24-May-22	RIB-AM	MULTIPLE	Review Workflow for presentation	LATE7d	

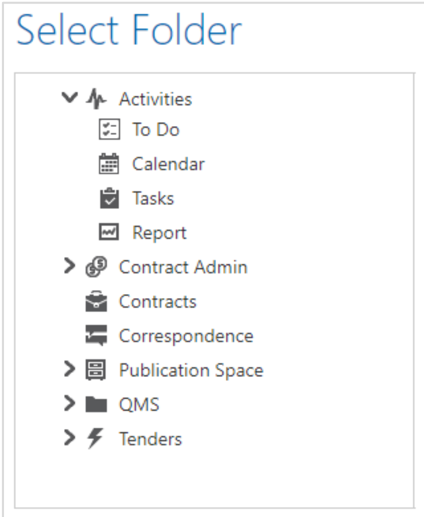
4.4 Saved Searches

To assist with repeat searches, iTWOcx can **save a search**. Saved Searches as particularly useful when repeated items are checked regularly.

In the below example a search is created for any RFQs created in the last week.

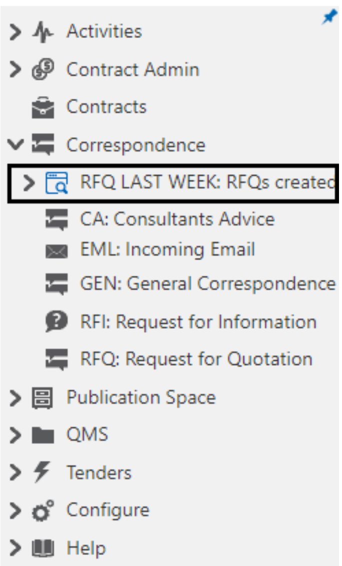


Action	Description
1. Complete Search	In this example the document type (RFQ) is selected and the created from date is selected as -7 days.
2. Click **Save**	After completing the required search, click **Save**. The **Save Search** section displays

Action	Description
3. Enter name and description	Enter a **name** and **description** for the search.
4. Select **Folder**	Click ··· next to the Folder field. The select folder pop up displays. Choose the required location for the saved search.  **Note:** If required, create a new folder to store all saved searches by clicking **New Folder**.
5. Add users to **Applicability** and **Editable** fields	Click ··· next to each field to add users. Users that can view the saved search are added to the Applicability field. This could be a user, a group / role, company etc. Users that can edit the search are added to the Editable field.
6. Click **Create**	This creates the saved search.

4.4.1 Locating Saved Searches

Saved searches are available in the relevant folder in the Menu Frame. (e.g. RFQ LAST WEEK in below image)



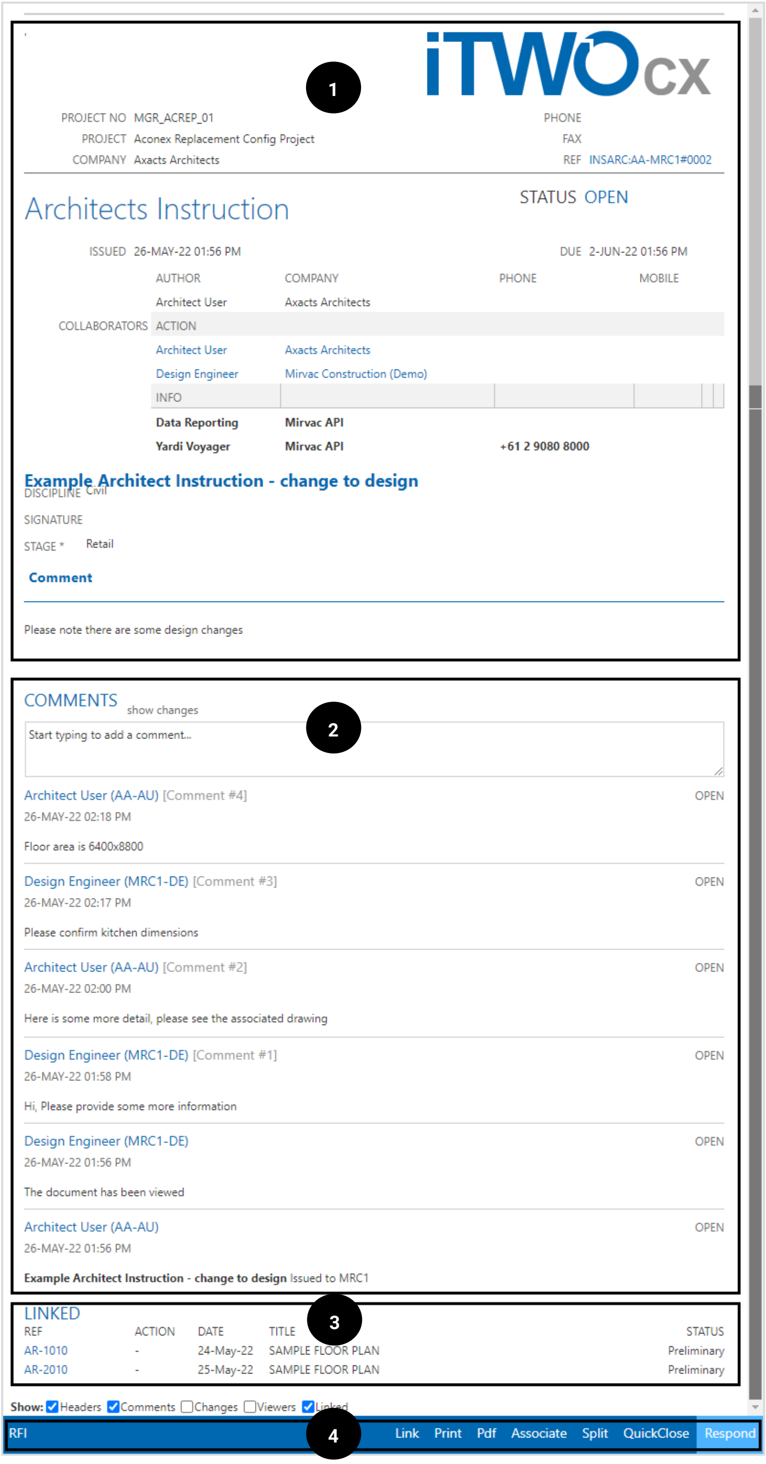
Click the Search Name to get a refreshed version of the search result. The results can be exported / downloaded.

The saved search can be deleted or edited at any time by the creator or anyone provided with editable access.

5 Tracking Correspondence

To track a conversation occurring within iTWOcx, the layout of the Correspondence form needs to be understood. There are four main areas within a correspondence form:

1. **Original request** at top of the form
2. **Comments** in the middle of the form
3. **Linked** shows other correspondence or associated documents at the bottom of the form
4. **Actions** in the blue toolbar at the end of the form



This is the basic layout for each form type. The next sections look at each area in more detail.

Original Request

At the top of the form the original request is shown. This shows the details of when it was issued, the status of the request, users/groups included, and the original message.

The example below shows a message from the Architect to the Design Engineer advising of a design change.

iTWOcx

PROJECT NO	MGR_ACREP_01	PHONE	
PROJECT	Aconex Replacement Config Project	FAX	
COMPANY	Axacts Architects	REF	INSARC:AA-MRC1#0002

Architects Instruction

STATUS OPEN

ISSUED 26-MAY-22 01:56 PM

DUE 2-JUN-22 01:56 PM

	AUTHOR	COMPANY	PHONE	MOBILE
	Architect User	Axacts Architects		
COLLABORATORS	ACTION			
	Architect User	Axacts Architects		
	Design Engineer	Mirvac Construction (Demo)		
	INFO			
	Data Reporting	**Mirvac API**		
	Yardi Voyager	**Mirvac API**	**+61 2 9080 8000**	

Example Architect Instruction - change to design

DISCIPLINE Civil

SIGNATURE

STAGE * Retail

Comment

Please note there are some design changes

Comments

Correspondence through iTWOcx works in a conversation thread. As people respond to the mail the comments are added to the form. The **newest** comment is on **top**, the **oldest** response is at the **bottom**.

In the example below a conversation is occurring between the Architect and the Design Engineer. The original request from the Architect to Design Engineer. The correspondence form was then viewed by the Design Engineer and the Design Engineer commented back. The conversation went back and forth until the floor area was provided.

The next step would be for the Design Engineer to close the form.

COMMENTS show changes

Start typing to add a comment...

Architect User (AA-AU) [Comment #4] OPEN

26-MAY-22 02:18 PM

Floor area is 6400x8800

Design Engineer (MRC1-DE) [Comment #3] OPEN

26-MAY-22 02:17 PM

Please confirm kitchen dimensions

Architect User (AA-AU) [Comment #2] OPEN

26-MAY-22 02:00 PM

Here is some more detail, please see the associated drawing

Design Engineer (MRC1-DE) [Comment #1] OPEN

26-MAY-22 01:58 PM

Hi, Please provide some more information

Design Engineer (MRC1-DE) OPEN

26-MAY-22 01:56 PM

The document has been viewed

Architect User (AA-AU) OPEN

26-MAY-22 01:56 PM

Example Architect Instruction - change to design Issued to MRC1

Linked

The Linked section shows any related correspondence or links to associated documents. This is where most of the tracking is done.

The example below shows two documents have been associated to this correspondence. This allows for quick access to items instead of needing to search for documents.

LINKED

REF	ACTION	DATE	TITLE	STATUS
AR-1010	-	24-May-22	SAMPLE FLOOR PLAN	Preliminary
AR-2010	-	25-May-22	SAMPLE FLOOR PLAN	Preliminary

Example – split correspondence

When splitting correspondence and creating the side conversation, the visibility of the linked messages is different for each user.

The example below shows Design Engineer splitting the conversation to ask Subcontractors for a quote.

LINKED

REF	ACTION	DATE	TITLE	STATUS
INSARC:AA-MRC1#0002	MULTIPLE	26-MAY-22	Example Architect Instruction - change to design	OPEN
RFQ:MRC1-SC1#0001	SC1-ST	26-MAY-22	change to design - please price	CLOSED
RFQ:MRC1-SC2#0002	SC2-ST	26-MAY-22	change to design - please price	OPEN
RFQ:MRC1-SC3#0001	SC3-ST	26-MAY-22	change to design - please price	OPEN

The linked section shows the **original correspondence from the Architect** and the **three subsequent RFQs** sent to the subcontractors as the Design Engineer was involved in every conversation. Tracking what the RFQ relates to is easy to do as the correspondence is linked back to the original architect instruction. The individual statuses of the RFQs can also be seen with one RFQ closed and the other two open.

The same correspondence viewed from the subcontractor would not show the conversation with the architect, nor the RFQs sent to the other subcontractors. It would appear as a single conversation.

Similarly, the architect would not see any of the RFQs.

Actions

At the bottom of every correspondence form the toolbar shows the actions available. There may be different options on depending on the form type as shown below.

Items on the left are the quick create options (these are the typical split correspondence forms created based on the correspondence type). Items on the right are the quick actions that can be taken.

6 Notifications

There are two types of email notifications available:

- **Plain text email** contains a link to iTWOcx. Users need to log in to view the documents and other comments. Users can reply to the email and it will update iTWOcx or respond within iTWOcx.
- **Preview email** contains a copy of the correspondence, including documents that can be downloaded. The correspondence can be directly interacted with without the need to log into iTWOcx.

6.1 Plain Text Email

The following is an example of the plain text email received for a general correspondence.

CAUTION: This email originated from outside of the organisation. Do not act on instructions, click links or open attachments unless you recognise the sender and know the content is authentic and safe.

1

ACTION MIRVAC-KH initiated GEN:MIRVAC-MIRVAC#0001 for your attention
DATE 12-APR-22 10:53 AM
LINK https://mtwocx.clouda2k.com/MGR_ACREP_01:596206

2

PROJECT MGR_ACREP_01 - Aconex Replacement Config Project
SUBJECT testing gen corro

3

AUTHOR Kylie Hall
ACTION Lauren Wilcockson
INFO Data Reporting; Yardi Voyager; Kylie Hall
ISSUED 12-APR-22 10:53 AM

You have received this because your iTWOcx account is configured to send you notifications. You can change this setting in your contacts details under user options.

iTWOcx Support
cxsupport@clouda2k.com

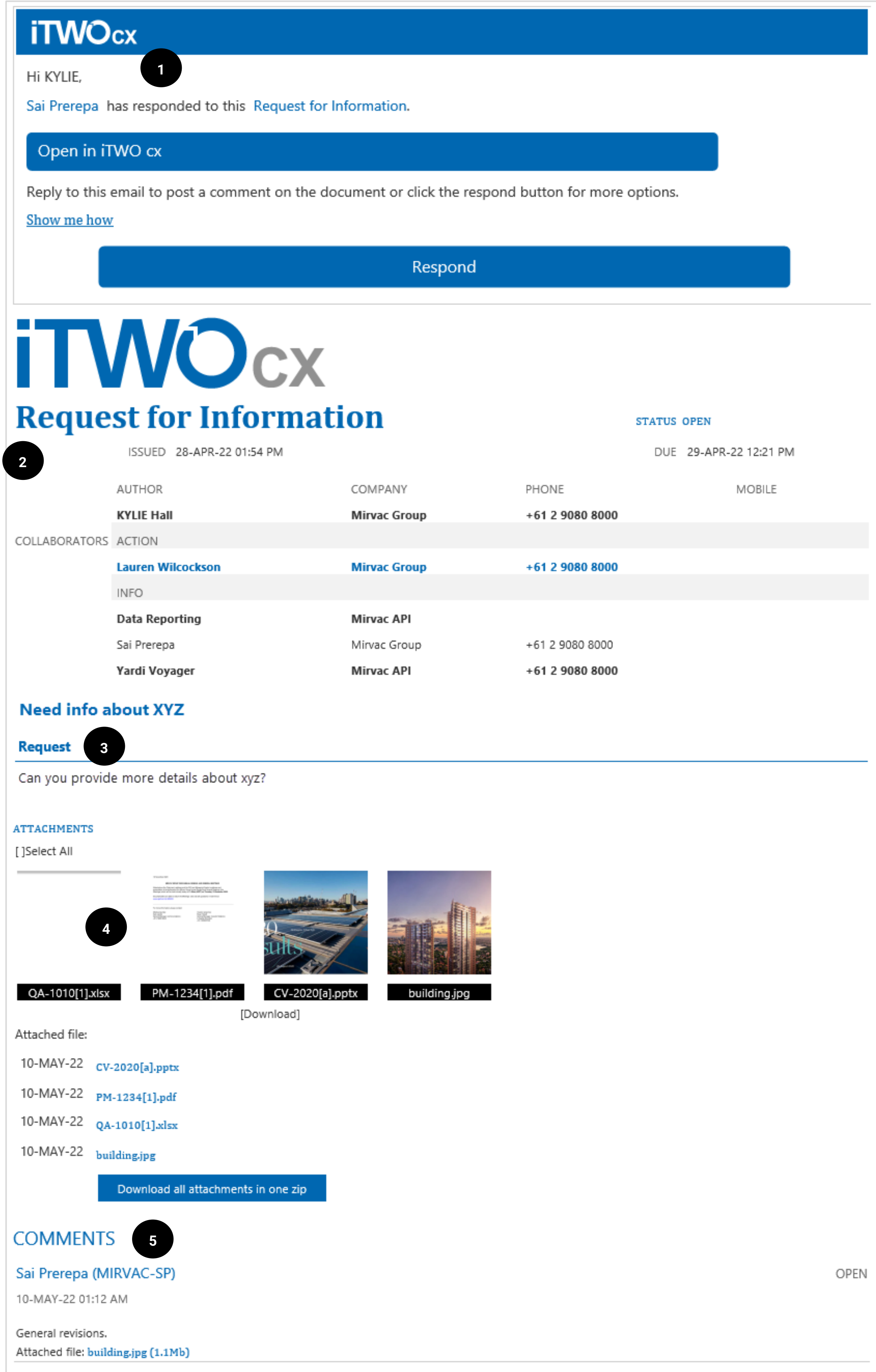
ID:[K3.1.2#918EE.FFF85565]

Screen Element	Description
1. Action	Summarises the details of the message with the item reference number, date issued and a link to launch iTWOcx and display the notification.
2. Subject	The title of the transmittal, correspondence or form.
3. Information	Displays the author and the users that need to complete the required action and those copied in for awareness.

The plain text email serves as a notification only. To see comments or attachments, you must click the link to open iTWOcx.

6.2 Preview Email

The following is an example of the preview email of an RFI.

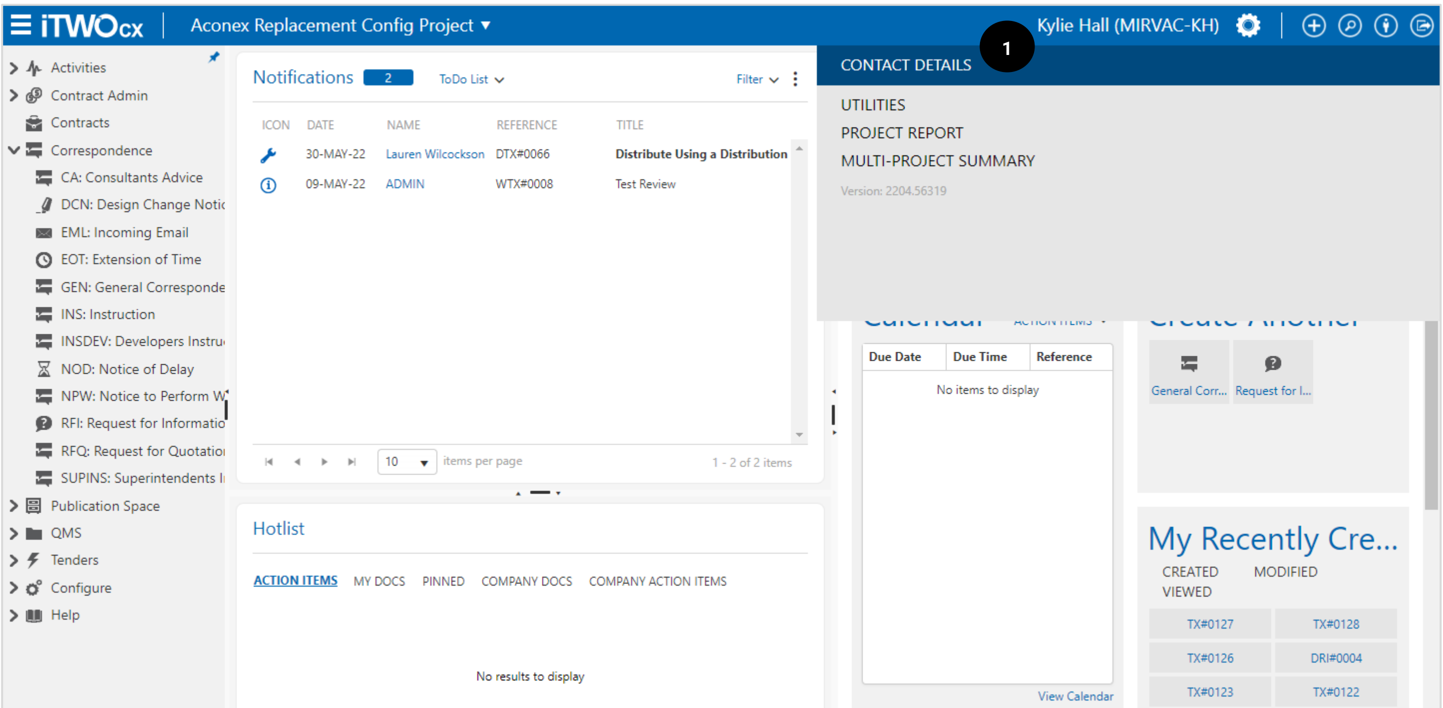


Screen Element	Description
1. Header	Shows the user that generated the item and the type of correspondence. Provides a link to **open the correspondence** in iTWOcx and a link to **respond** within iTWOcx. **Note:** Users can reply within the mail system (e.g. Outlook) to adda comment to the form.
2. Information	Shows the type of correspondence, the date issued, due date and status. The author, action and info users are clearly listed.
3. Request	Details of the original request.
4. Attachments	Any attachments relating to the form. Attachments can be opened and viewed individually. There is also a link to download the attachments in a zip file.
5. Comments	Details of the comment trail of the form. Newest comments are on top.

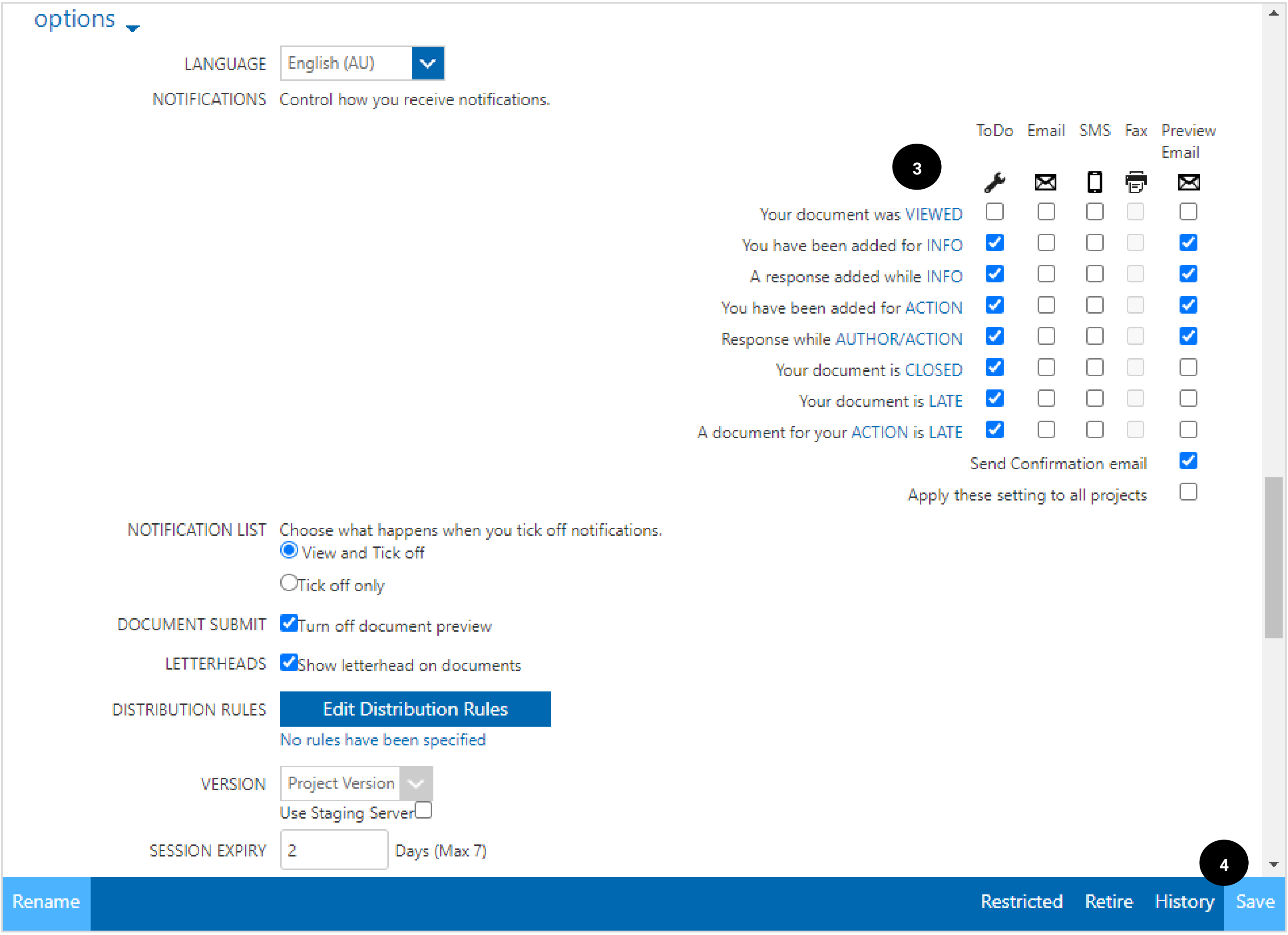
The preview email provides more information without the need to open iTWOcx.

6.3 Changing Preferences

Users can change the type of email notification received through Settings.



Action	Description
1. Access **Contact Details**	Click **Cog** > **Contact Details**



Action	Description
2. Scroll down	Scroll down to the Notification section.
3. Check boxes	Make relevant changes to the notifications received. **Note:** The system displays a warning message when certain items are unchecked when notifications are removed. It is best practice to keep these items checked.
4. Click **Save**	Saves the preferences.

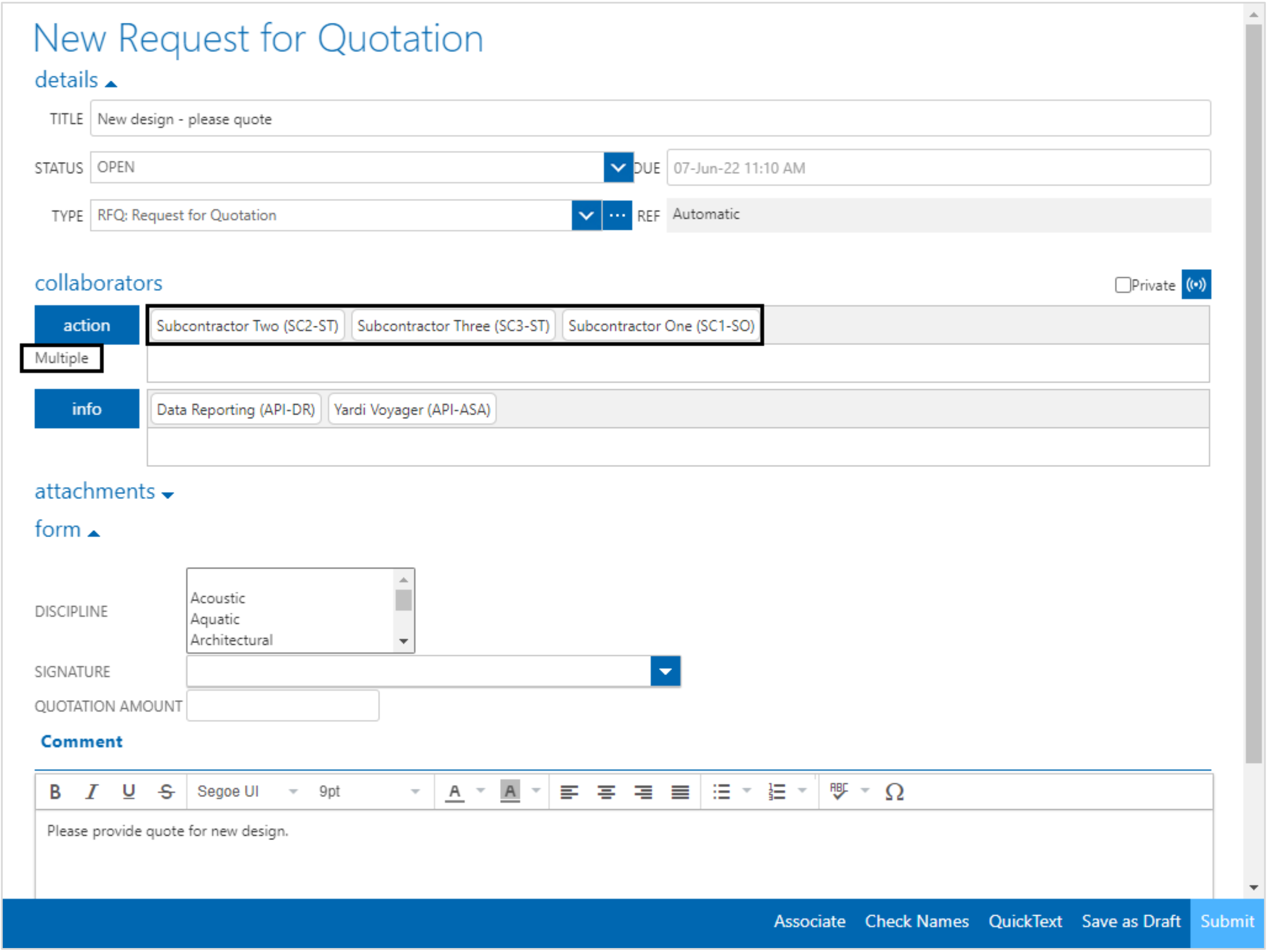
7 Correspondence Examples

The following correspondence types have some points of note. This includes in built approval process, quick actions, the ability to send one message to many users blindly etc.

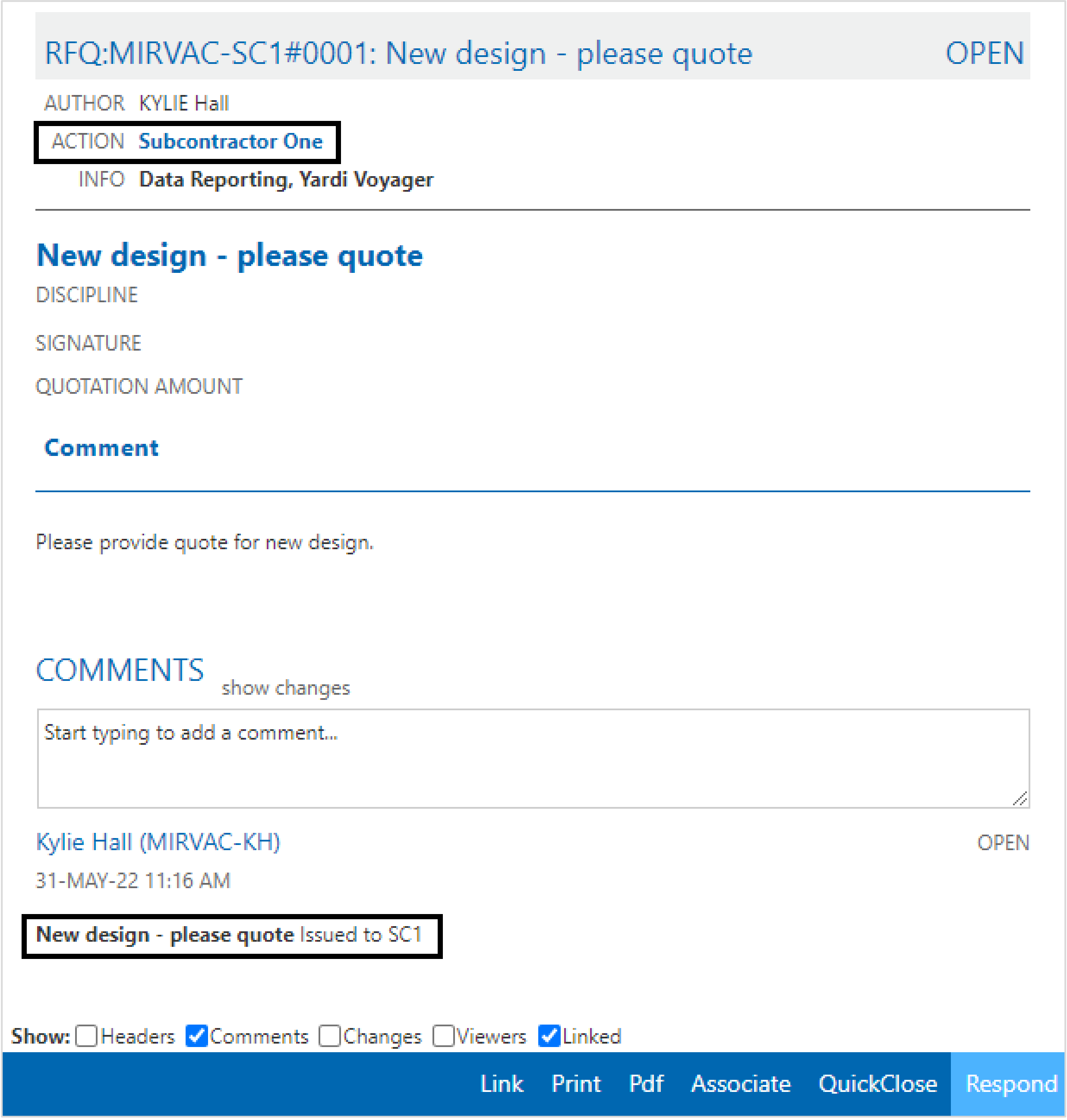
7.1 Request for Quotation (RFQ)

When sending a Request for Quotation, the form has an inbuilt feature that allows the one form to be created and sent to **multiple recipients**, without any of the recipients seeing the other names.

Each recipient in the **action** field (e.g. Subcontractor One, Subcontractor Two and Subcontractor Three) receives a separate copy of the form addressed only to them.



The corresponding notification received by Subcontractor One is shown below. There is no indication that the RFQ went to other users in the action field and the trail at the bottom of the mail only shows the one user.

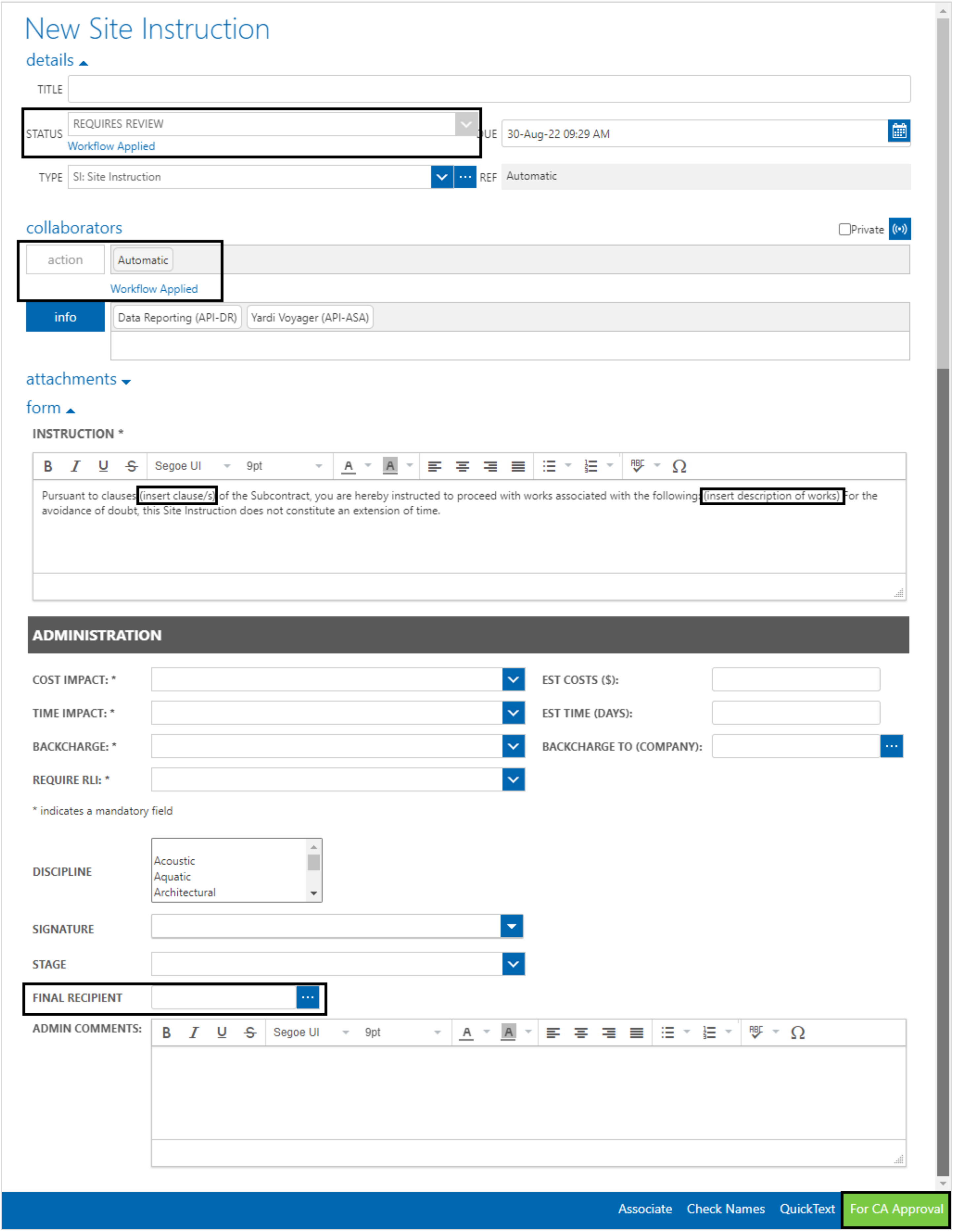


7.2 Site Instruction (SI)

The Site Instruction form has an inbuilt approval process that goes to the Contract Administrator and Project Manager prior to being sent to the end user.

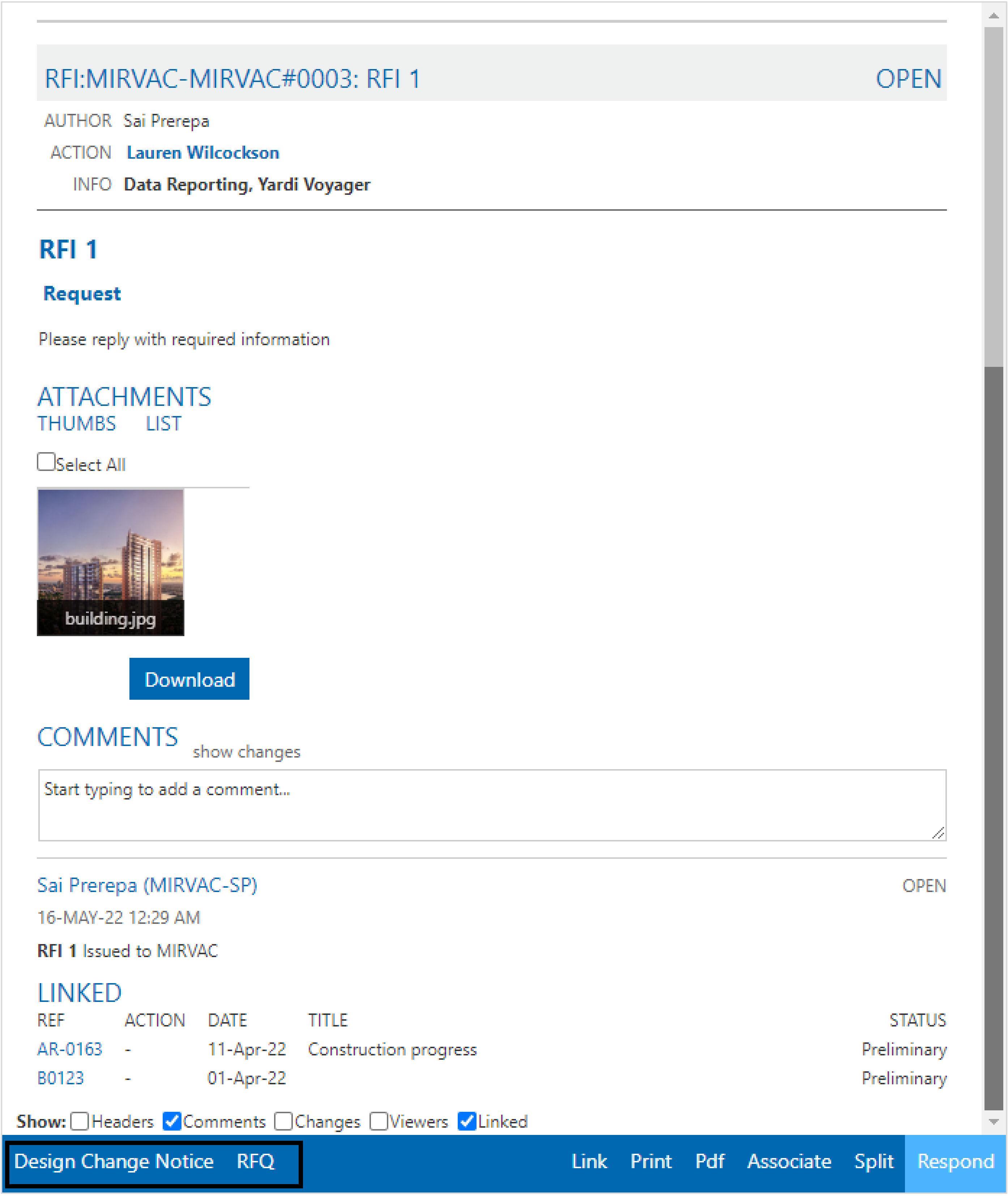
When creating an SI, the end user is added to the **final recipient** field instead of the Action field. The Submit button is replaced by a **For CA Approval** button and the form is sent to the contract administrator. Once approved, it is sent to the Project Manager for approval before being released. The status of the form automatically updates as it progresses.

The below screenshot shows the initial form that requires approval. Take note of the **Status**, the **Action** field greyed out, the **final recipient** field, the **admin comments** field (not visible to the final recipient), the **For CA Approval** button instead of the submit and the section in the instruction box that requires updating. Note that this is a blank SI template.


New Site Instruction
details
TITLE
STATUS
REQUIRES REVIEW
Workflow Applied
DUE
30-Aug-22 09:29 AM
TYPE
SI: Site Instruction
REF
Automatic
collaborators
Private
action
Automatic
Workflow Applied
info
Data Reporting (API-DR)
Yardi Voyager (API-ASA)
attachments
form
INSTRUCTION *
Segoe UI
9pt
Pursuant to clauses (insert clause/s) of the Subcontract, you are hereby instructed to proceed with works associated with the following: (insert description of works) For the avoidance of doubt, this Site Instruction does not constitute an extension of time.
ADMINISTRATION
COST IMPACT: *
EST COSTS ($):
TIME IMPACT: *
EST TIME (DAYS):
BACKCHARGE: *
BACKCHARGE TO (COMPANY):
REQUIRE RLI: *
* indicates a mandatory field
DISCIPLINE
Acoustic
Aquatic
Architectural
SIGNATURE
STAGE
FINAL RECIPIENT
ADMIN COMMENTS:
Segoe UI
9pt
Associate
Check Names
QuickText
For CA Approval

7.3 Request for Information (RFI)

When receiving an RFI, quick actions are available from the toolbar to create the other correspondence types such as RFQ and Design Change Notice to expedite the process. Clicking the option opens a new form

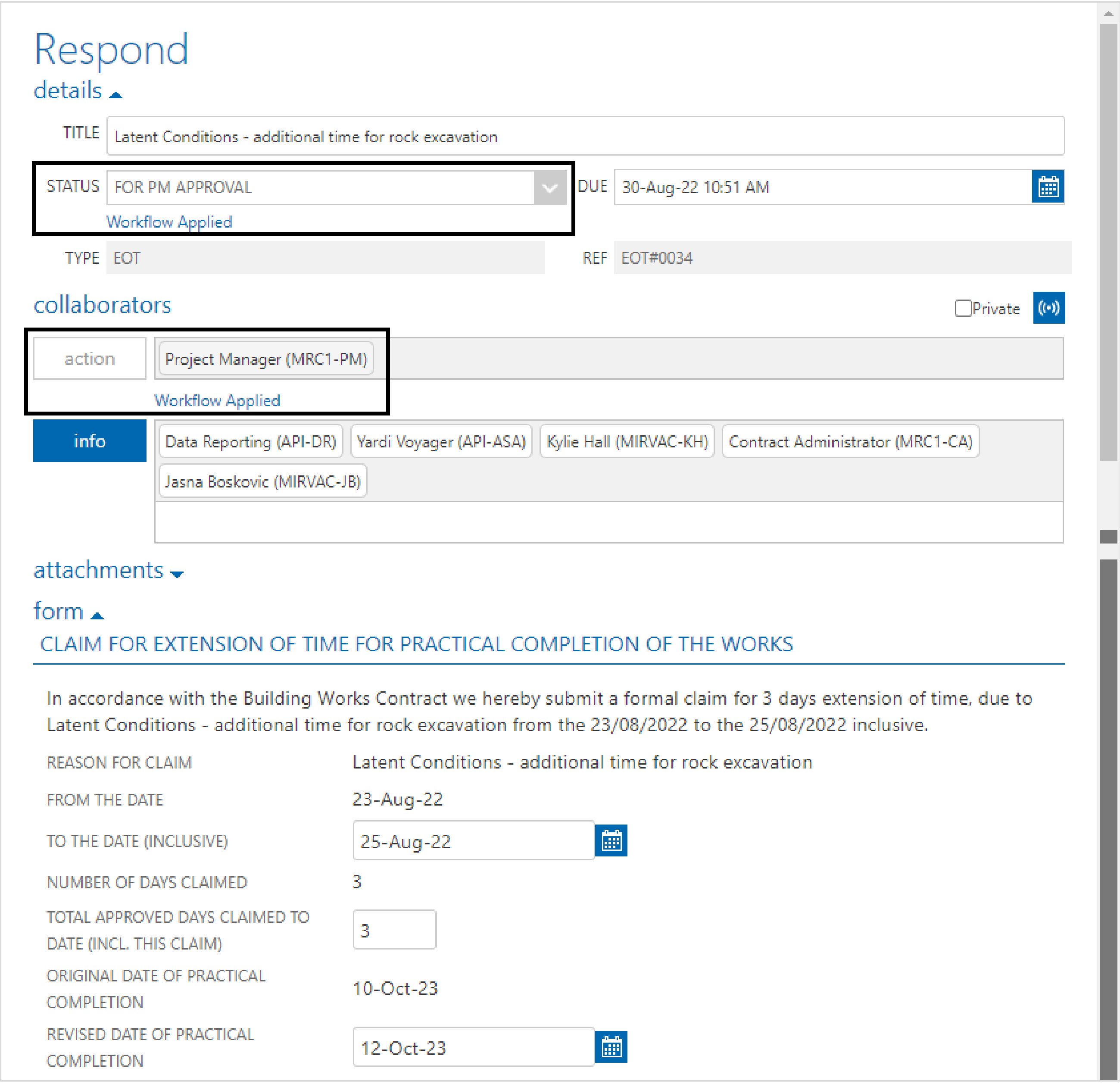


7.4 Extension of Time (EOT)

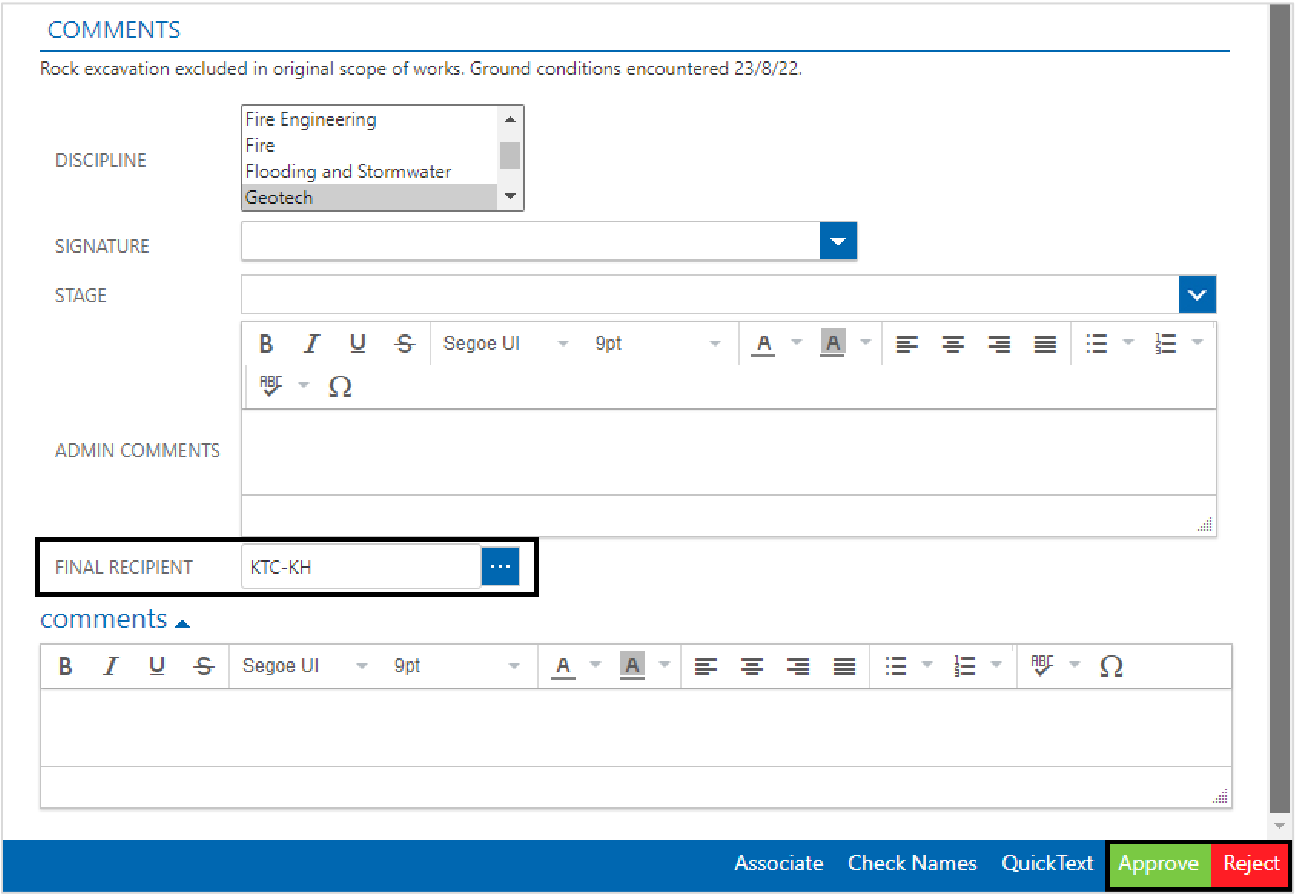
The Extension of Time form has an inbuilt approval process that goes to the Contract Administrator and Project Manager prior to being sent to the end user.

When creating an EOT, the end user is added to the **final recipient** field instead of the Action field. The Submit button is replaced by a **For CA Approval** button and the form is sent to the contract administrator. Once approved, it is sent to the Project Manager for approval before being released. The status of the form automatically updates as it progresses.

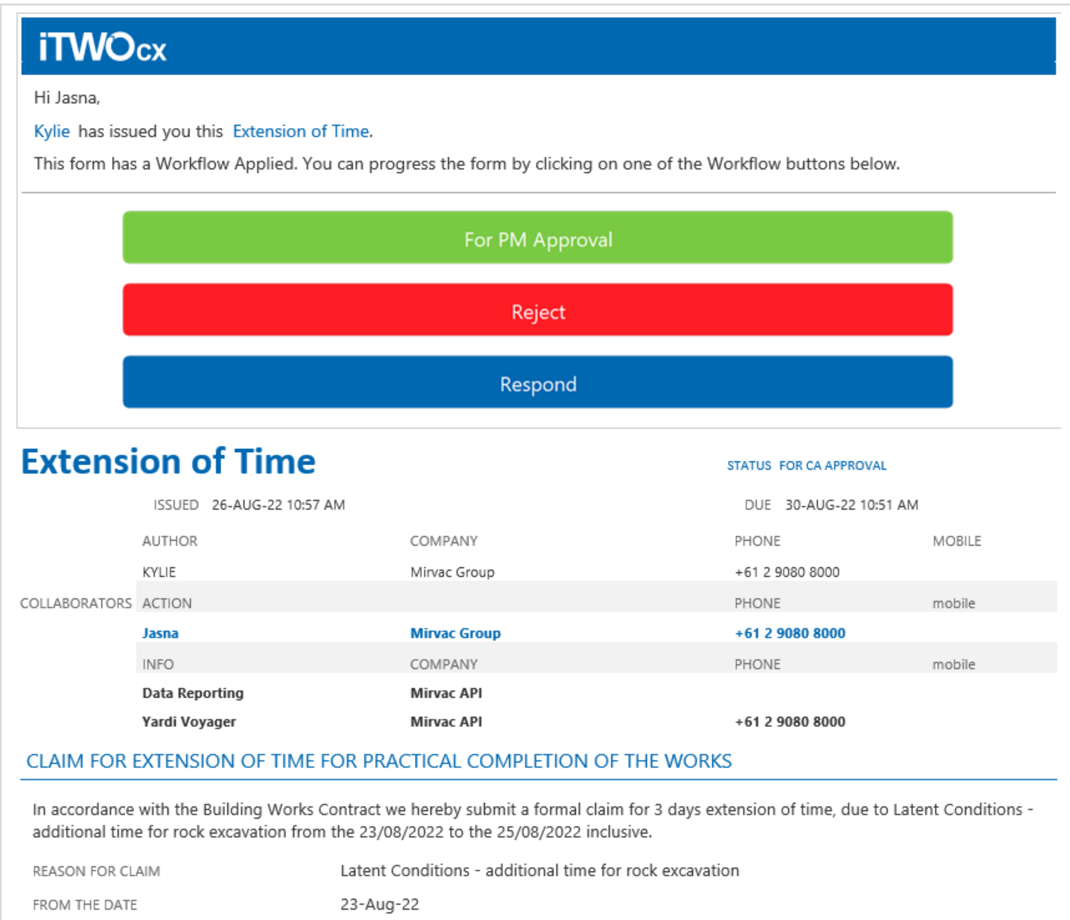
The below screenshot shows the form approved by the Contract Administrator that requires PM approval. Take note of the **Status**, the **Action** field greyed out, the **final recipient** field, the **admin comments** field (not visible to the final recipient) and the **Approve and Reject** buttons.



Continued on next page.



The preview email received by the approvers has the details of the EOT and the option to approve or reject.



8 Glossary of Terms / Acronyms

Term / Acronym	Definition
CA	Contract Administrator.
EOT	Extension of Time. A correspondence type.
iTWOcx	The collaborative construction project management system.
GEN	General Correspondence. A correspondence type.
PM	Project Manager.
RFI	Request for Information. A correspondence type.
RFQ	Request for Quotation. A correspondence type.
RIB	Vendor responsible for iTWOcx system.
SI	Site Instruction. A correspondence type.

Document Control

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Review / Sign Off

Name	Role	Review / Sign Off	Date