ITWOCX PUBLICATION SPACE USER GUIDE

Publication Space

- Upload Documents
- Distribute Documents
- View and Review Documents
- Move, Download, Print and Delete
- Searching
- View History and Approvals

Table of Contents

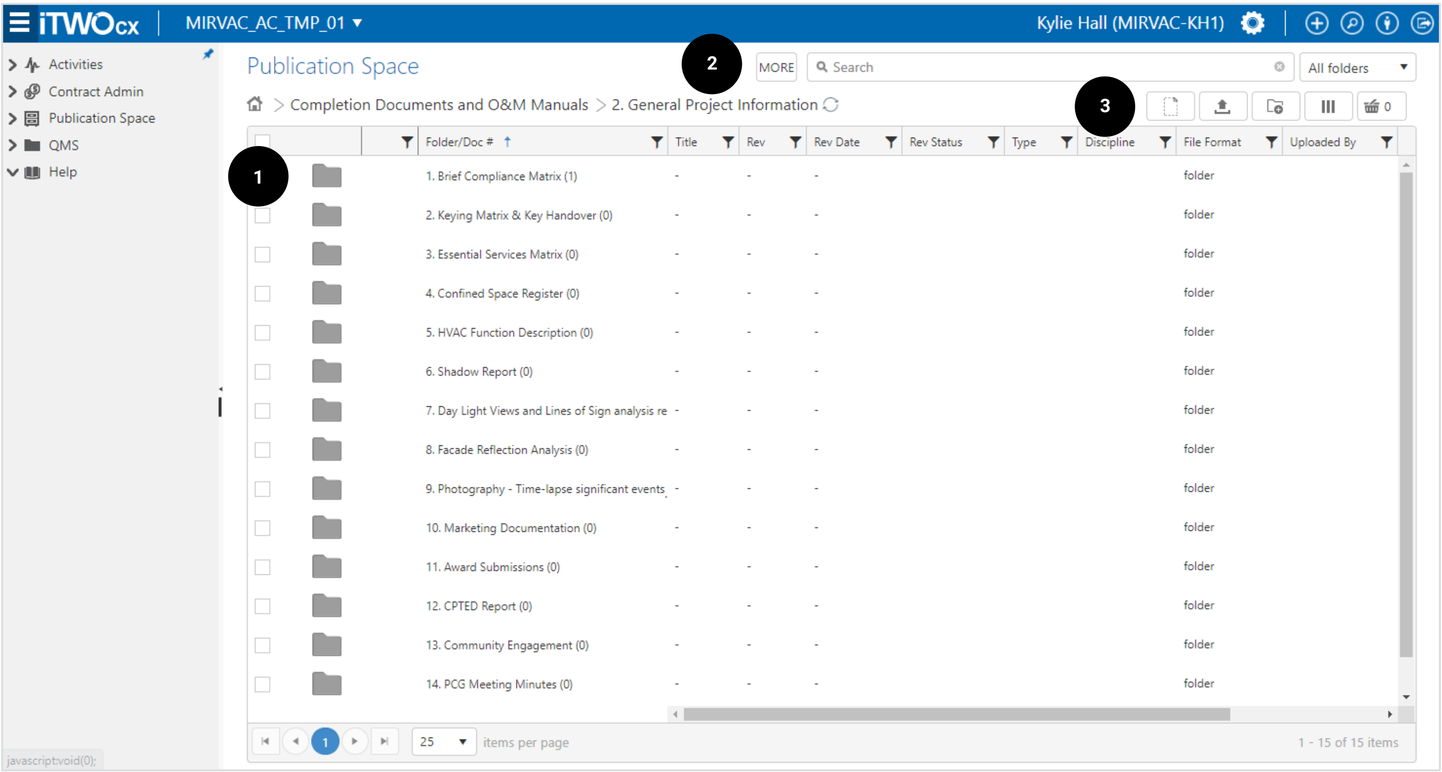
1 Publication Space

Publication Space is the repository for **revision controlled** documentation relating to a project. Documents can be shared, reviewed, marked up and approved within iTWOcx or by downloading and uploading new revisions.

1.1 Landing Page

The **landing page** shows a list of folders for the project. Depending on the project structure there may be specific folders for business units, document types, vendors etc. Users only see folders they have access to. Folder structure and authority levels are configured by the System/Project Administrator for the project.

Folders are not being used initially but may be introduced in the future with a standard format for each project instance.

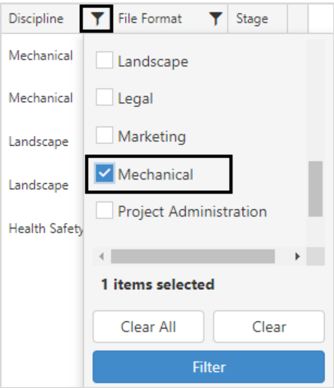


Screen Element	Description
1. **Folders List**	List of folders the user has access to. The number of sub folders or documents is shown in brackets after the folder name. • Click the folder icon or folder name to open the next level of folders or documents. • Breadcrumbs are available for easy navigation to higher level folders. • Each column can be filtered to further refine documents.
2. **Document Search**	A search tool to locate items within a specific folder or all folders. There are two main search options: 1. Click MORE to view a traditional search option. 2. Type in the search field for a dynamic search. Criteria can be added to narrow the search. A complete list is available by pressing /. Use * for wild card searches. Some examples of searchable items include Document #, Uploaded By, Revision Status, Keyword and File Type.

Screen Element	Description
3. **Actions**	Allows for additional actions to add items and change the view of the folder. Hover over the button to see the name.

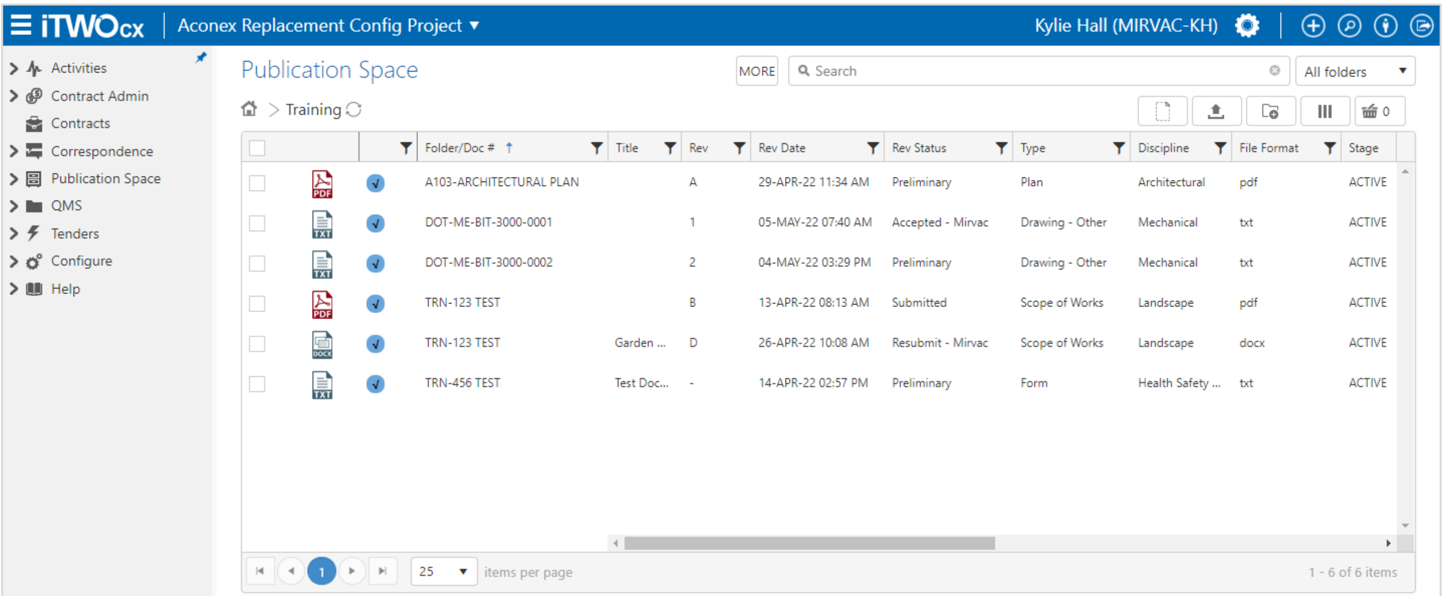
Icon	Description
	**Add Placeholder** – ability to add a placeholder for a future document. Add the document number, revision status and any other criteria.
	**Upload** – used to add a new document to the current folder. Opens a pop up to browse for documents.
	**Add Folder** – used to create a new sub folder.
	**Columns** – add or remove columns from the display.
	**Basket** – used to gather documents together across multiple folders. Useful to create a bulk list of documents to download, print, move or distribute.

The **columns** can be added / removed where needed and there is the ability to **filter** the list by a specific attribute.



1.2 Document Icons

At the lowest folder level, the individual documents are visible.



The **icons** provide information about the type of document and the status of the document. Refer to the table below for more information about the icons that may appear.

Icon	Description
	**File icons.** Identifies the extension type of document. For example .docx, .pdf, .xlsx, .txt, .jpeg, .png, .zip, .cad etc.
	**Placeholder icon.** Placeholders can be created in anticipation of a document. Set the attributes or rules for distribution while waiting for the document.
	**No entry symbol.** Indicates the document is not available as the document has not been distributed to the user.
	**Padlock.** The document is locked or is going through a workflow. The document can be viewed, downloaded and shared but new revisions of the document can't be added until the workflow has finished. Hover over the icon to see the **Lock Status** and details of the **workflow**.
	**Exclamation Point (blue).** Indicates a document has never been distributed.
	Exclamation Point (orange). Indicates a document requires distribution. Generally, this is after a document has been through a workflow review but has not been re-distributed.
	**Tick.** Indicates a document has been distributed.

2 Upload Documents

When adding documents to the project you can upload the content in two ways:

- Drag and Drop files directly to the folder
- Use the **Upload Button** to browse for files

Depending on the project set up there may be specific folders to upload documents to such as drawings, certifications, reports etc. Folders are managed on a per project basis and the structure may differ.

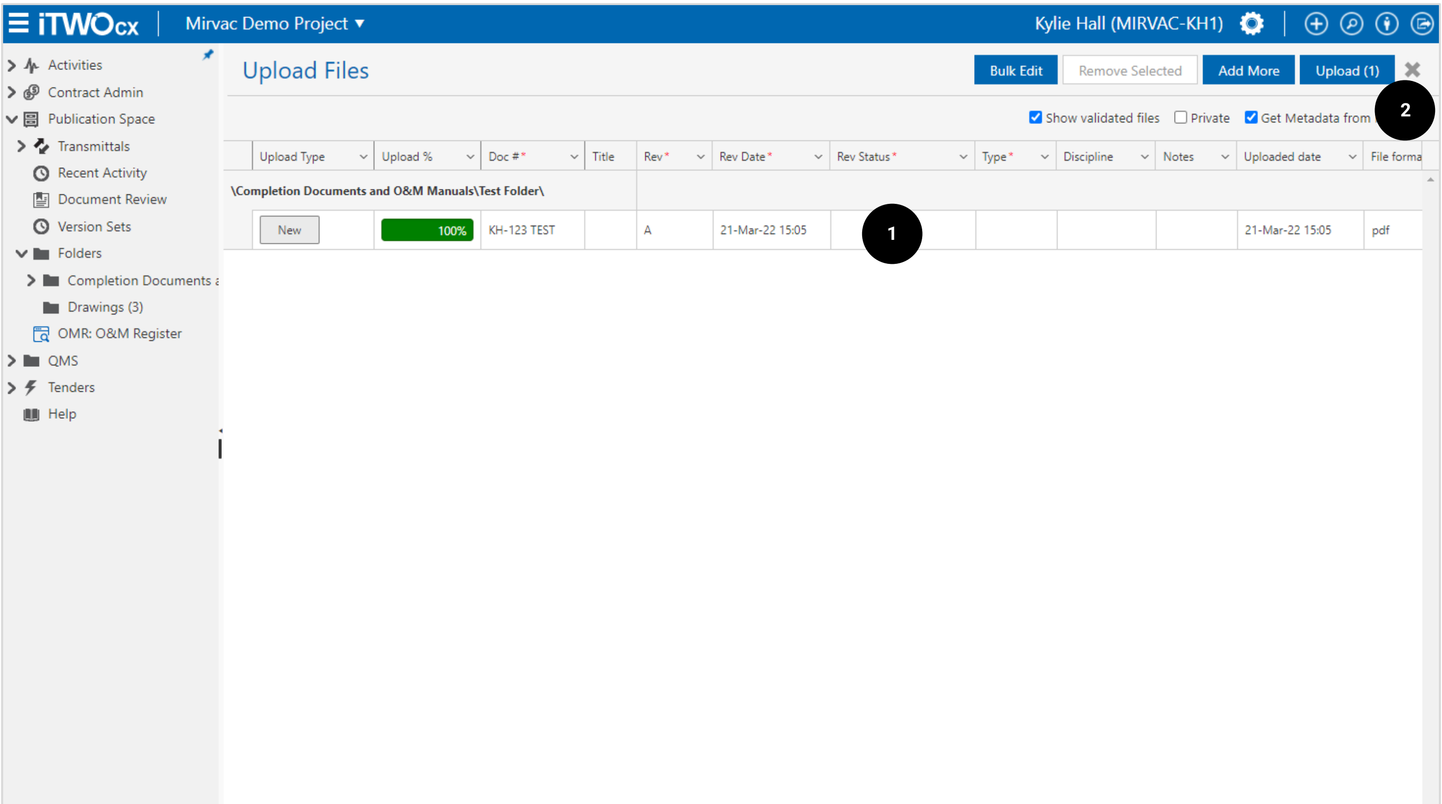
It is best practice to navigate to the folder location before uploading as it prevents the need to move documents at a later stage.

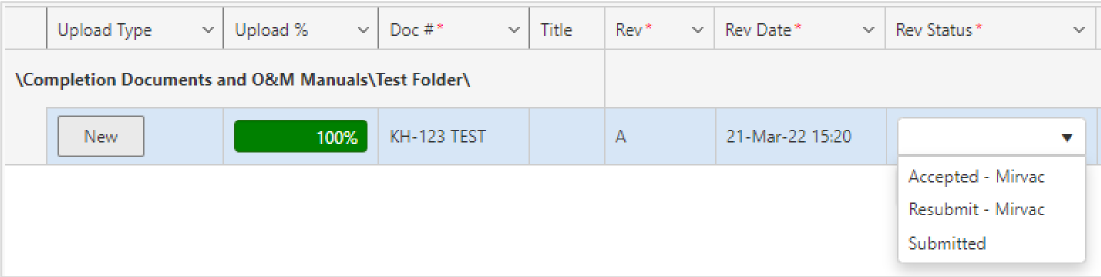
Once uploaded the document **attributes** need to be completed. iTWOcx uses the attributes of the document when managing revisions of an existing document in the system and when searching for items. It is imperative that this is added correctly when uploading documents.

2.1 Drag and Drop

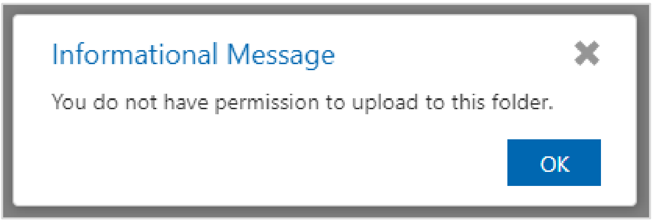
The fastest way to add a document to iTWOcx is to use the Drag and Drop function. Navigate to the required folder and **drag** the document into the folder or list.

Once added the **Upload Files** page is displayed.



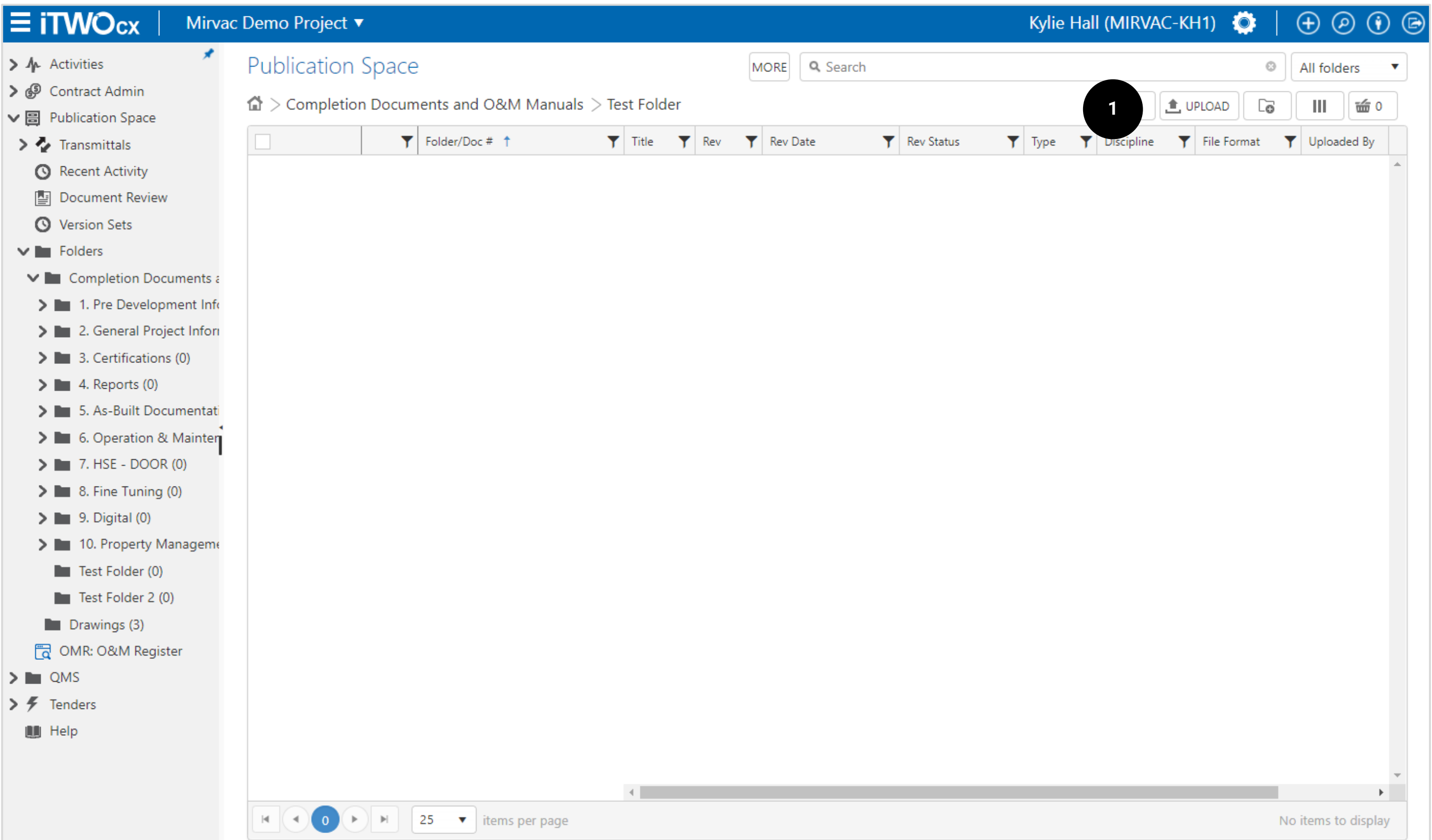
Step	Description
1. Complete required **Attributes**	Complete the required attributes for the document by selecting options from the dropdown menus. Mandatory items are marked with an asterisk (*). 
2. Click **Upload**	After clicking the upload button, the **Distribution Popup** screen appears. Refer to Distribute at time of Upload section for steps.

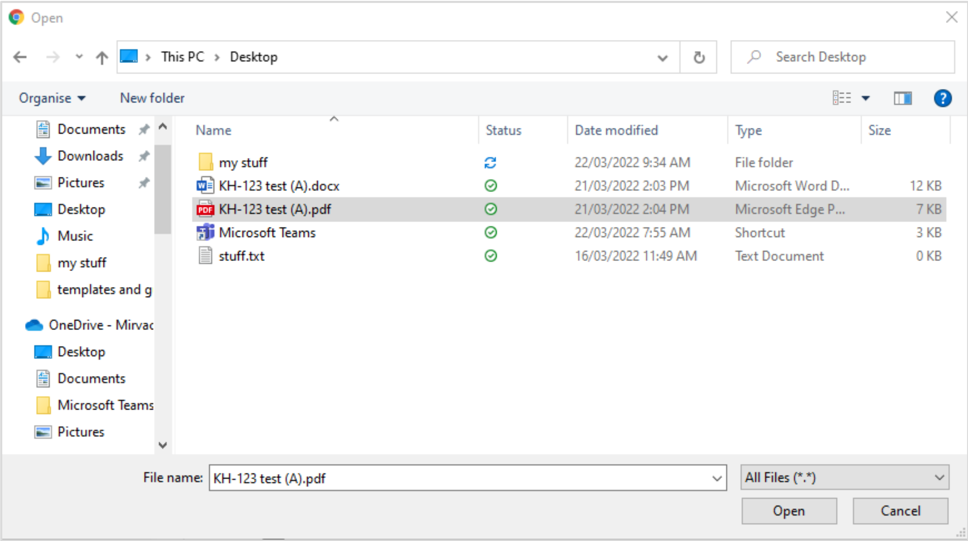
If you do not have permission to upload to a specific folder a message is displayed.

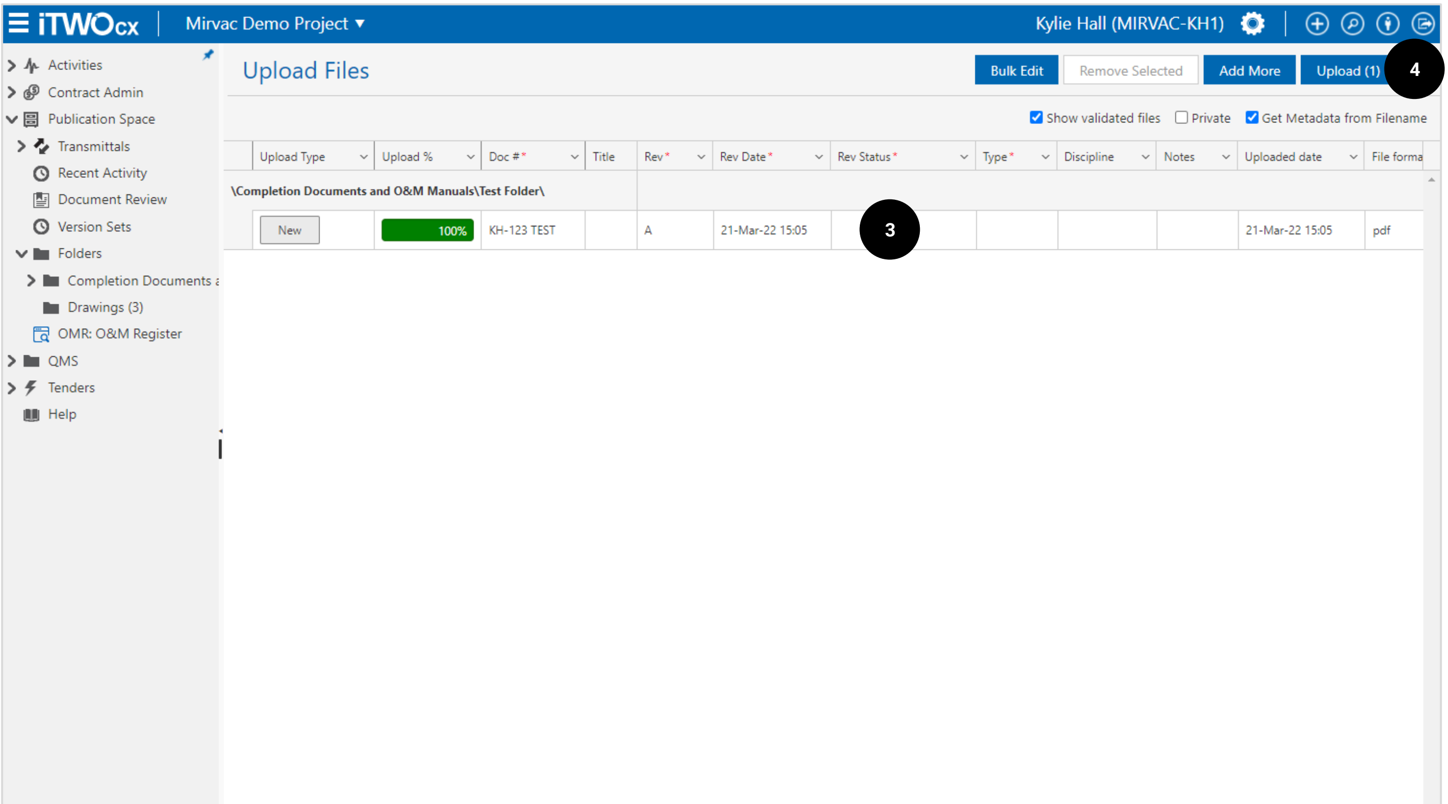


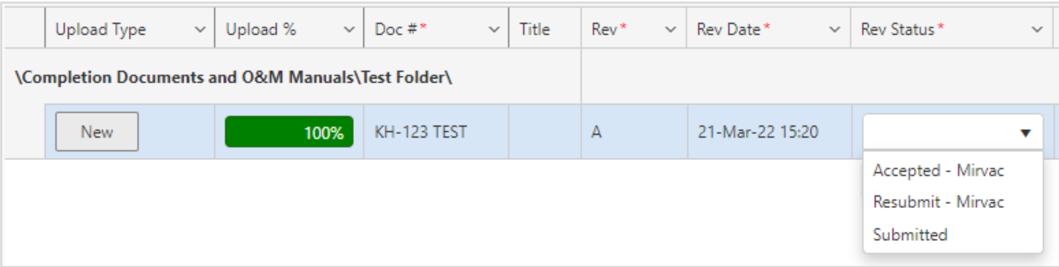
2.2 Upload Button

Another method to add documents is via the upload dialogue box.



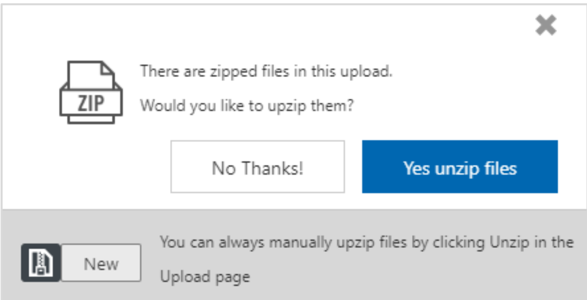
Step	Description
1. Click **Upload**	Navigate to the required folder in Publication Space and click **Upload**.
2. Locate **Document** and click **Open**	Browse files to locate the required document to upload. Click **Open**.  Once added the **Upload Files** page is displayed.



Step	Description
3. Complete required **Attributes**	Complete the required [attributes]() for the document by selecting options from the dropdown menus. Mandatory items are marked with an asterisk (*). 
4. Click **Upload**	After clicking the upload button, the **Distribution Popup** screen appears. Refer to [Distribute at time of Upload]() section for steps.

2.3 Adding Zip Files

Zipped/compressed folders can be added to iTWOcx by [drag and drop]() or via the [upload]() button. iTWOcx presents a popup giving the option to either unzip the files or not. The required attributes need to be completed as normal.

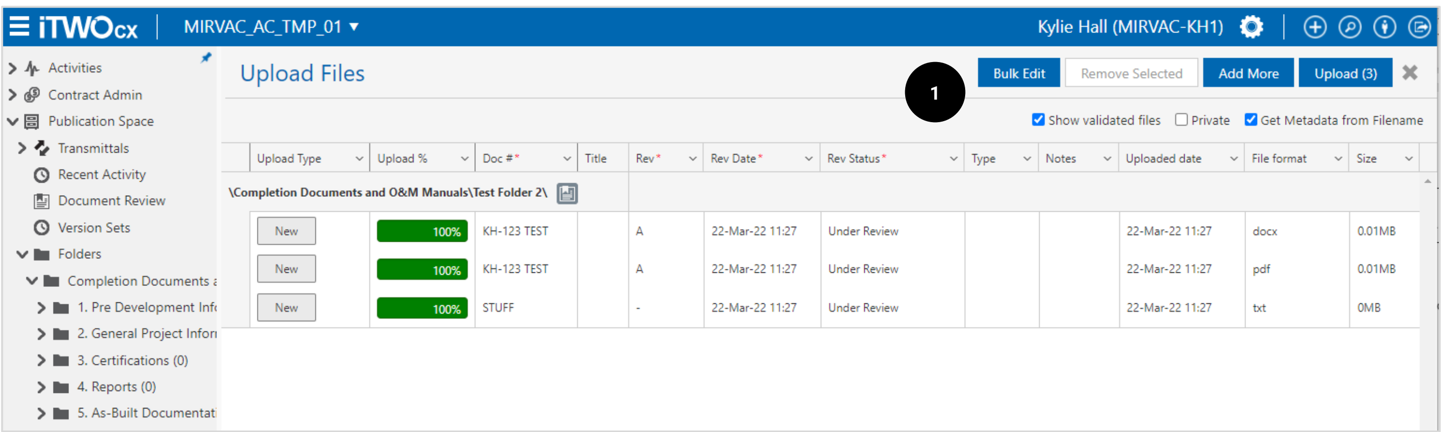


2.4 Adding Multiple Documents

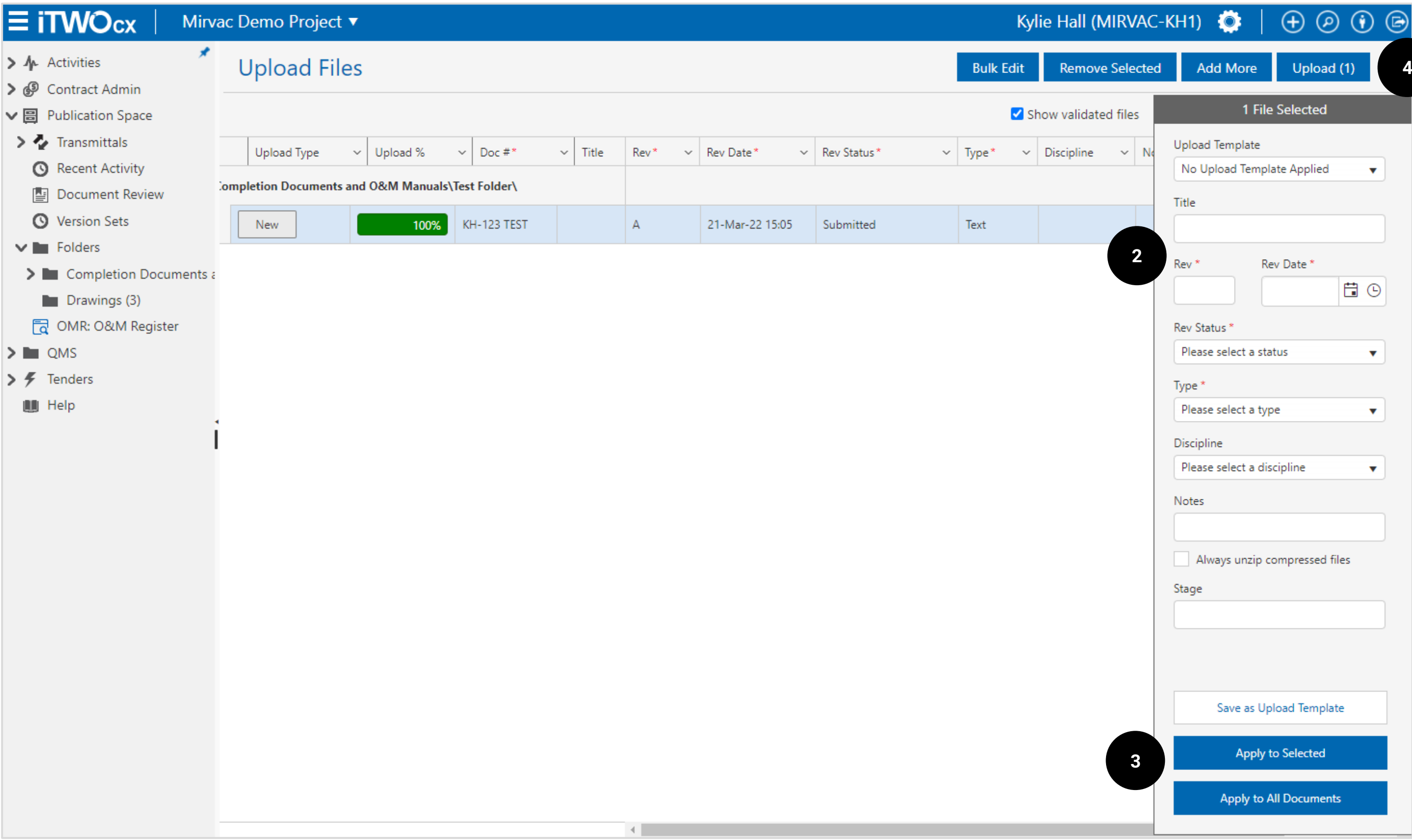
There are times when multiple documents need to be uploaded. iTWOcx can manage the addition of up to **2000 documents** at once. There are **no file size restrictions** for individual or bulk uploads.

Multiple documents can be uploaded by [drag and drop]() or via the [upload]() button.

After adding the documents, the Upload screen shows each document and their upload status. To complete the attributes for each document, the **Bulk Edit** feature can manage all documents at the same time.



Step	Description
1. Click **Bulk Edit**	Click Bulk Edit to open the bulk edit control panel.



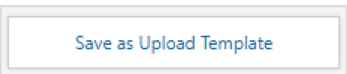
Step	Description
2. Complete **fields**	Complete the mandatory fields and optional fields where required.
3. Apply to Documents	Click **Apply to Selected** or **Apply to All** and the attributes are populated across the files.
4. Click **Upload**	Click **Upload** and then **distribute** where required.

Uploaded documents are automatically available to all members of the project from your company.

You'll need to distribute the document to provide access to anyone **outside your company**.

2.4.1 Upload Template

If the attributes completed is common for documents that will be uploaded in the future, the details can be saved as a template. Complete the fields and save as **upload template**.



When documents are uploaded in the future, select the applicable upload template from the dropdown menu to prefill the details.

2.5 Naming Convention / Attributes

iTWOcx has inbuilt smarts that populates some of the metadata / attributes based on the filename of the document being uploaded when a standard naming convention is used. It also uses the filename to determine whether a document is a new document or a revision of an existing document.

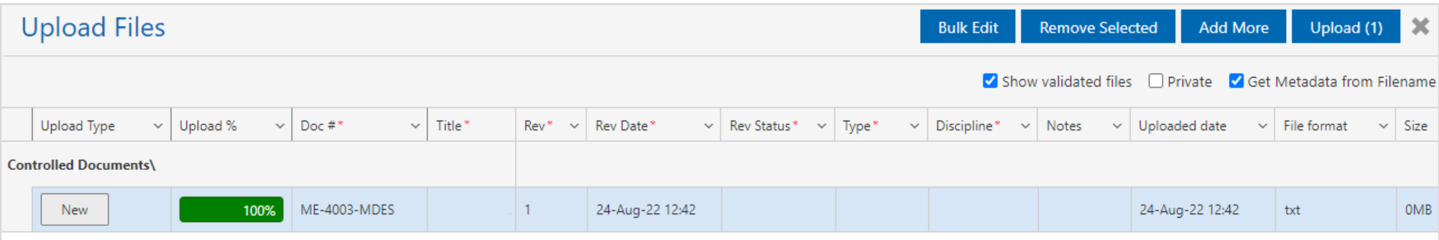
A standard naming convention is recommended for project files where possible and includes the discipline, document number and current revision. The preferred format is:

Discipline Code	-	Unique Identifier	-	Company Code	[Revision]
2 letter code		Number, title or description		4 letter code	Number or Letter in [] or ()

- Discipline Code = 2 letter prefix denoting the discipline (e.g. AR = Architecture)
- Unique Identifier = pre-defined doc number system (e.g. codes used by Mirvac Design), the document title or a code indicating building and floor.
- Company Code = each company is represented by a 4 letter code. This is either the first 4 letters of their name or a logical fit (e.g. initial). **Note:** this is not mandatory for Mirvac Design but is highly recommended.
- Revision = current revision of the document. Revisions must be listed within brackets [ ] or ( ) for version control.
- Use hyphen within document name (e.g. AU-council approval-MDEV[3].pdf).

Here is an example using the preferred naming convention **ME-4003-MDES[1].txt**

This filename structure pre-populates the relevant fields when uploaded (doc #, revision and file format).



The remaining mandatory fields, marked with a red asterisk, are to be manually updated. These include:

- Title – name of the document
- Revision Status – preliminary, for construction etc
- Document Type – drawing, plan, model, schedule, etc
- Discipline – architectural, electrical, HSE, marketing etc

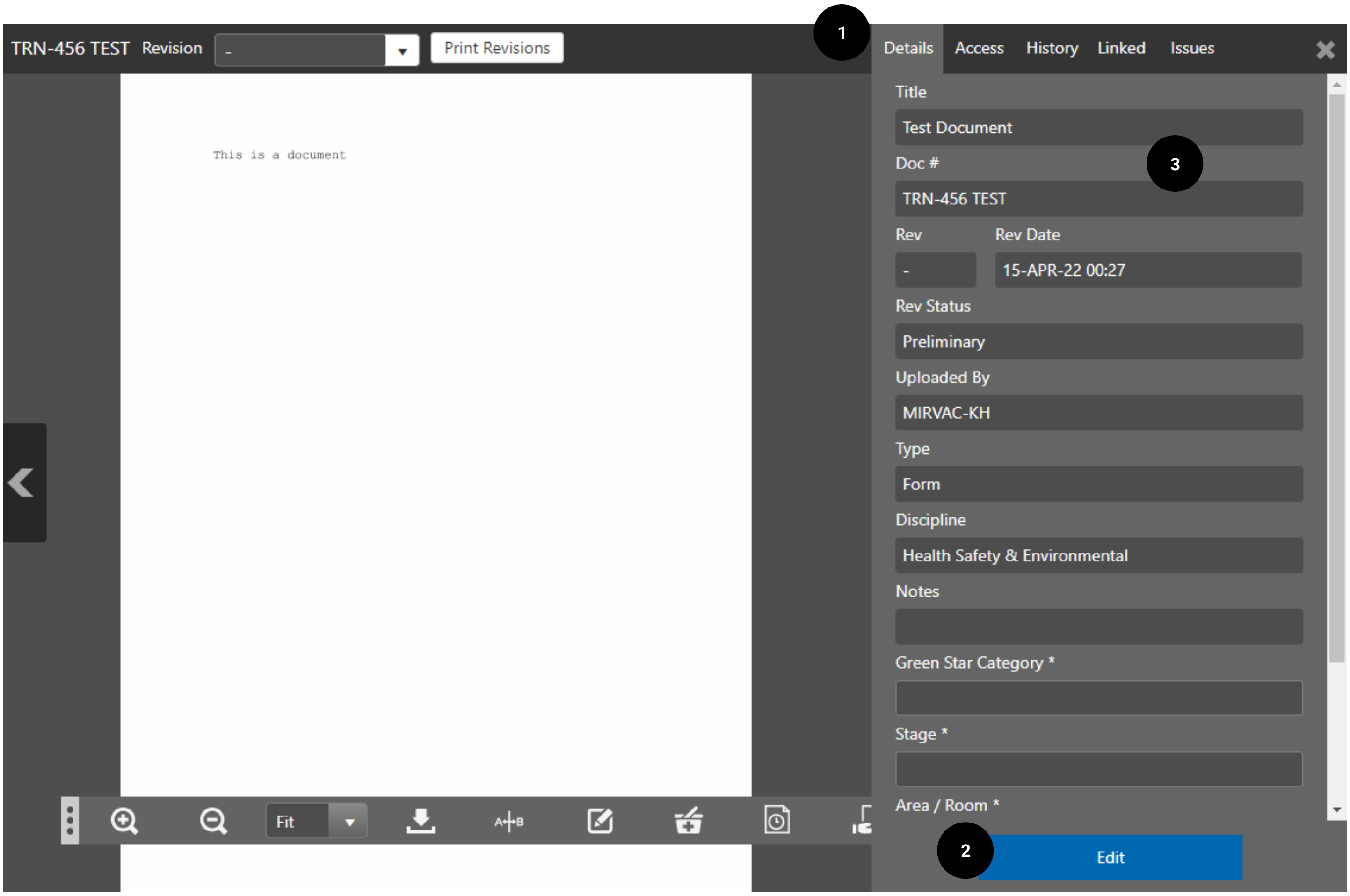
Other fields may be required for different divisions or stages of the project but are not used across the whole project. Ensure to update attributes where required.

> Automatic document numbering / naming may be introduced in the future. This will create the unique document identifier based off the metadata applied at the time of upload.

2.5.1 Editing Name / Attributes

Once a document has been uploaded, the document attributes can be changed if required. Ideally this should only be done to correct errors, as changing a document name may impact version control.

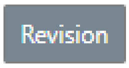
To change the attributes of a document, view the document and access the details pane.

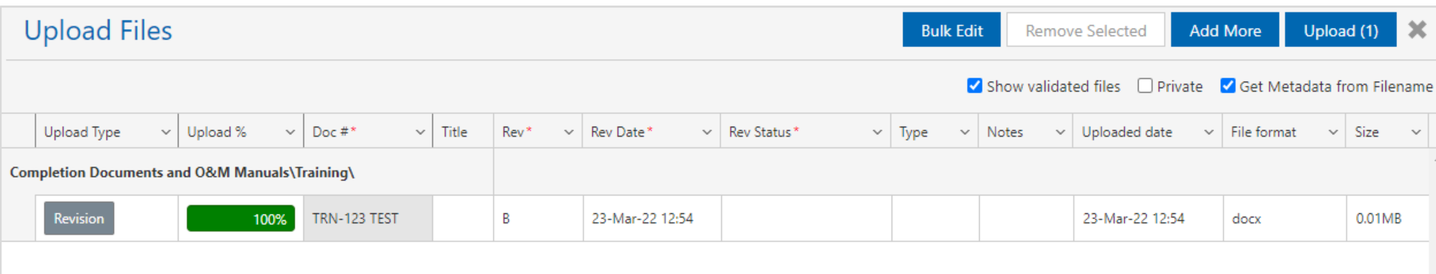


Step	Description
1. Click **Details**	Open the details pane
2. Click **Edit**	Click edit 
3. Change Details	Type new details in the field or select the required option from the dropdown menu
4. Click **Save**	Click Save 

2.6 Revisions

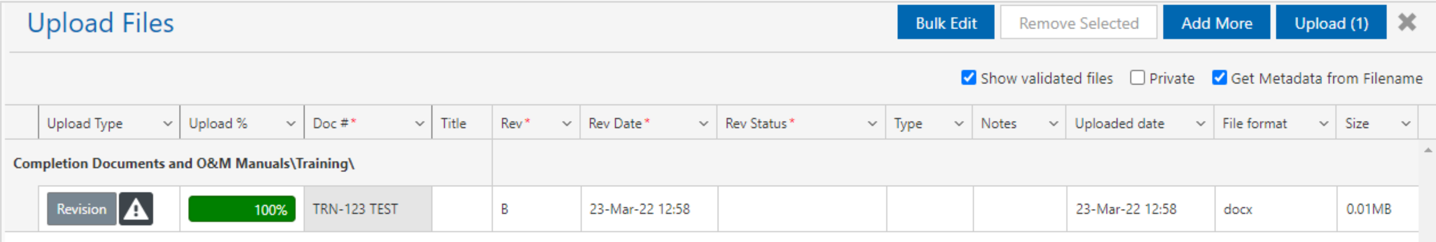
When uploading a new version of a document, the system recognises it as a **revision**. iTWOcx can also identify if the document already resides in another folder within the project instance.

When uploading a new version of an existing document, the **Upload Type** column displays 



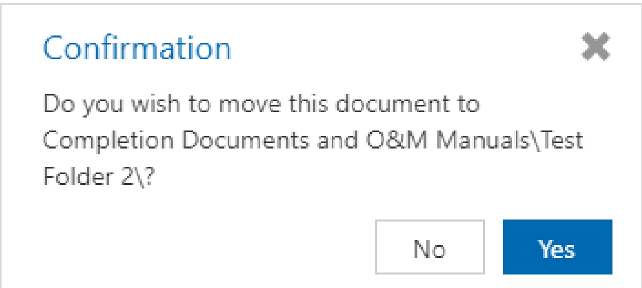
The system prepopulates the **Rev field** with the next in the series (letter or number). To continue with the upload, complete the remaining attributes and click upload.

When uploading a new version of an existing document that is in a **different folder location**, the **Upload Type** column displays both the **Revision** and a **Caution** icon 



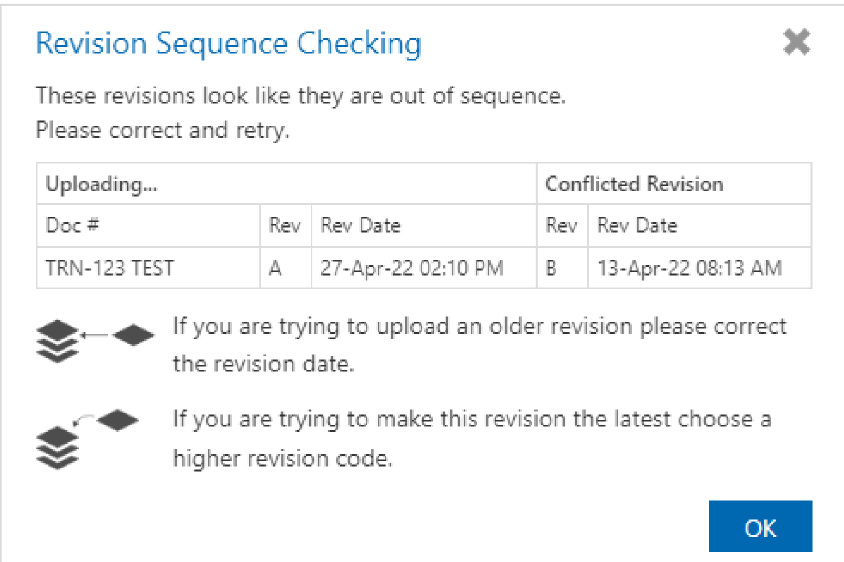
There are two options, move the new document to the same location as the original document, or move the original document and the new version to the new folder location. If neither option is right, the alternate option is to rename the file and create a new document.

Click the **caution icon** to see the confirmation pop up asking whether the document should be moved to the new document location.



2.6.1 Revision Sequence Checking

iTWOcx has an inbuilt revision sequence check. If a document is uploaded that conflicts with the current revision in the system an alert is displayed.



The conflict is displayed showing the revision and the date uploaded to the system. If the previous revision needs to be uploaded, the revision date needs to be changed to sometime prior to the current version.

3 Distribute Documents

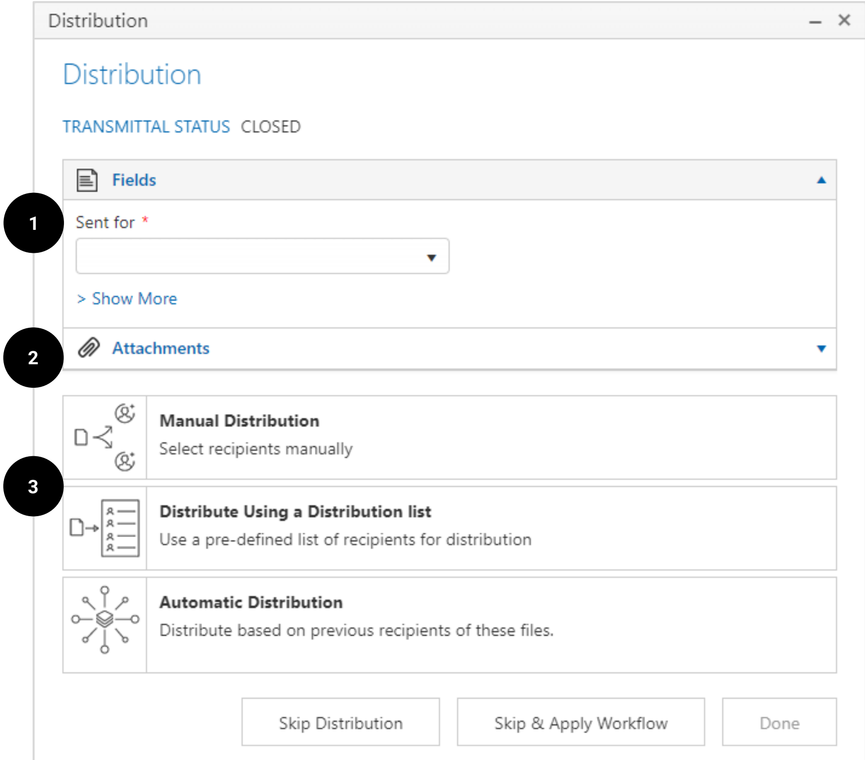
After [uploading a document](), the next step is to share it with the relevant people. This is achieved by **distributing** the document as a transmittal.

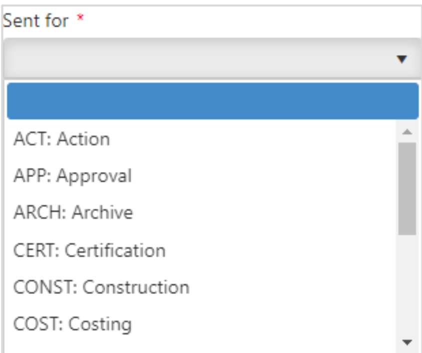
Distribution can be done at the time of document upload or at any point after it has been uploaded, via **manual distribution,** using a **distribution list** or via **automatic distribution** (note: the automatic distribution feature is currently switched off but may be turned on at a later date).

To share a document the recipient needs to be a user within the system. To have a user added, contact the System/Project administrator.

3.1 Distribute at Time of Upload

After uploading, the **Distribution pop up** is displayed. The Transmittal Status is **Closed** and cannot be changed.

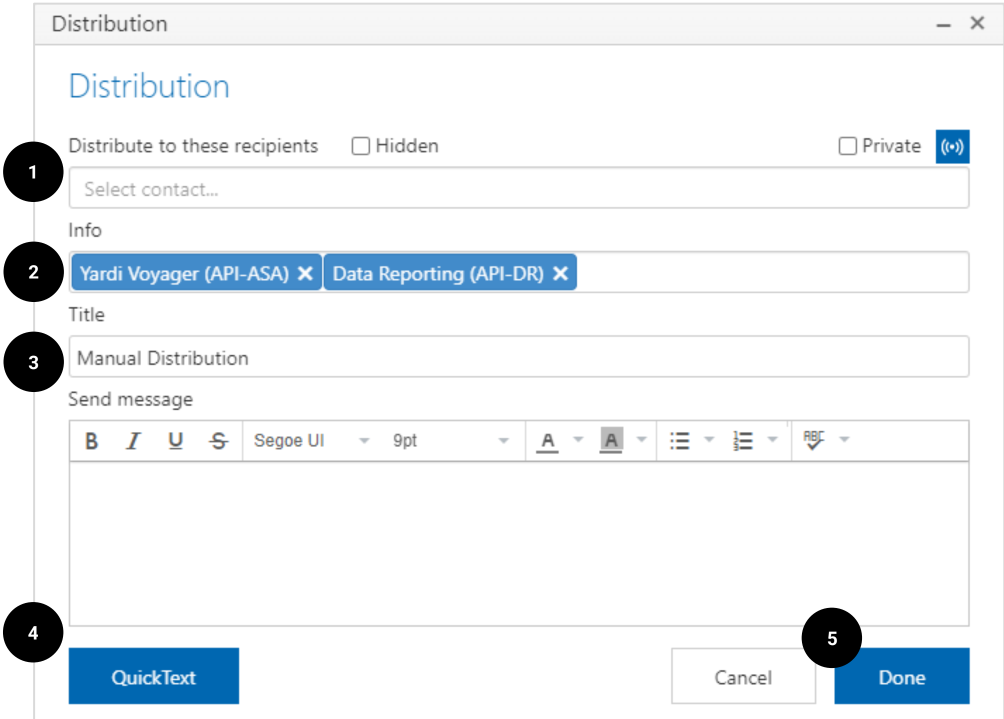


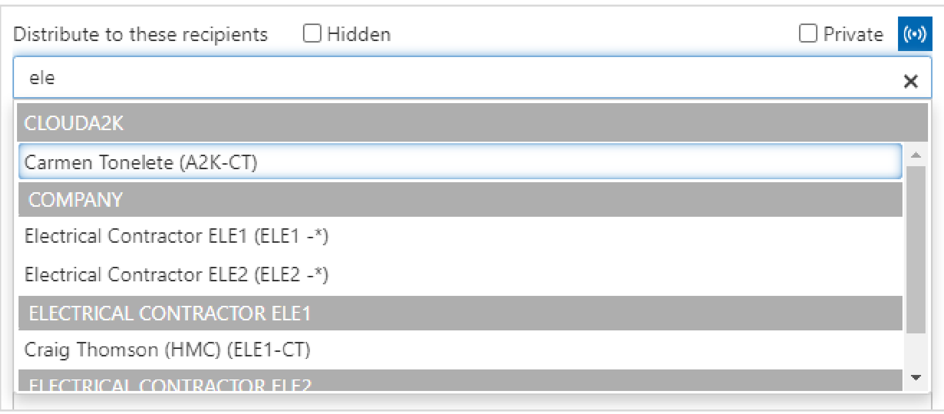
Step	Description
1. Select **Sent For** reason	The **Sent for** field is used to indicate the action required for the recipients. Select the type of action required. 
2. Add **attachments**	Attachments can be added to the transmittal to share non controlled documents. Any document added as an attachment is not uploaded to the Publication Space. This is a useful way to send supplementary information.

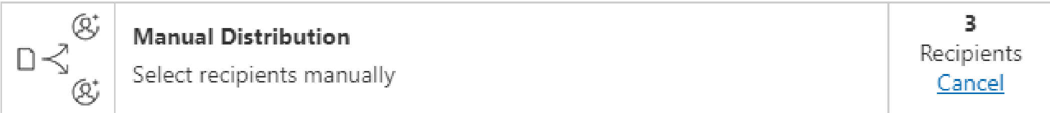
Step	Description
3. Select **Distribution Method**	There are three types of distribution: • **Manual distribution** is used to manually select the recipients each time. This can be individuals, companies or roles / groups. • **Distribution lists** can be created and used when documents are sent to the same people/groups frequently. • **Automatic distribution** is used to distribute a new revision of an existing to everyone that received a previous version of the document. It is also available when there is an automatic distribution set up for the folder. **Note:** Automatic distribution is current disabled.

3.1.1 Manual Distribution

Selecting Manual Distribution presents the following screen.



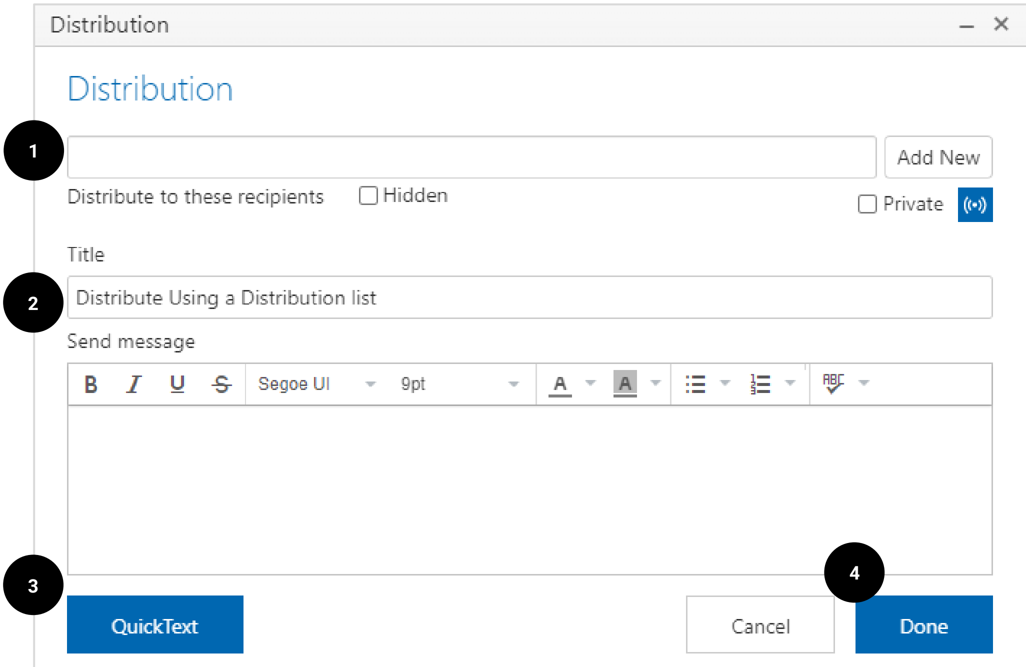
Step	Description
1. Click **Distribution to these recipients**	Select the users to receive the documents that are required to take action. This can be an individual, company, role etc. Start typing names to filter the list 

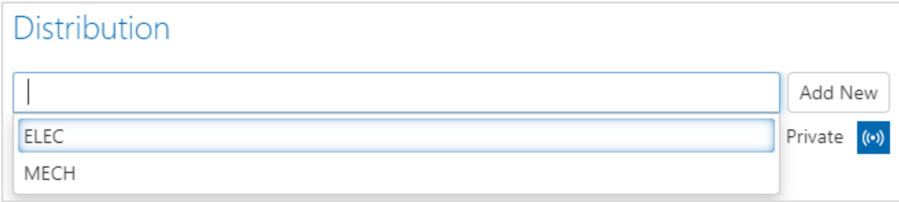
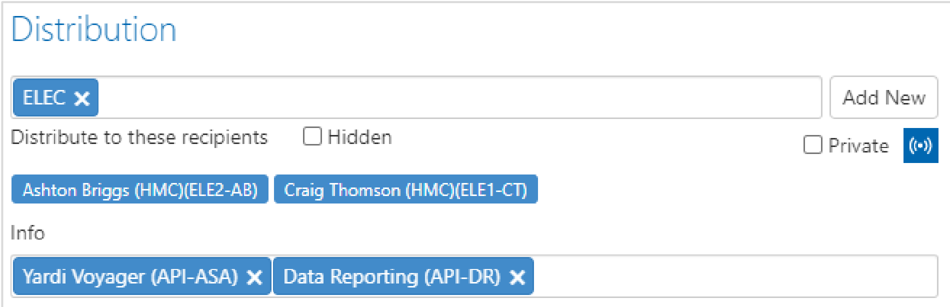
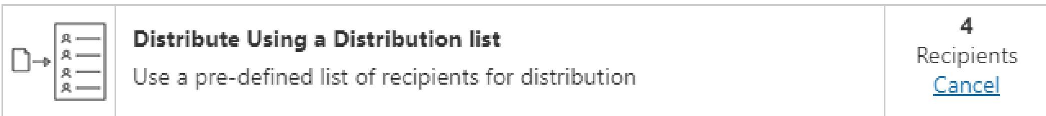
Step	Description
2. Add users to the **Info** field	Add additional people to the **Info** field. These are the users that are not required to take action but may need to be informed about the transmittal. Note – some users will be prepopulated by the system and cannot be removed.
3. Enter title and message	Add a relevant title and message, including any required action. This information appears in the email notification that is sent to all users.
4. Add **QuickText** (if required)	The QuickText option may be required. This is a templated message that has been created to be included for transmittals or correspondence, either shared across a project or created and used only by an individual user. Examples: A standard message outlining the required timeframe for a response based on the contract obligations. A personal message indicating office hours of a user.
5. Click **Done**	Once the details have been updated, click done. The distribution popup is displayed with the number of recipients. 
6. Click **Done**	Click Done on the main transmittal screen to send the transmittal.

It is possible to hide the names of recipients by ticking the **Hidden checkbox**. Recipients receive a copy of the transmittal with their name / company only. Recipients also see the name for anyone from the same company. Anyone in the Info field is visible to all recipients.

3.1.2 Distribution List

Selecting **Distribute Using a Distribution list** presents the following screen.

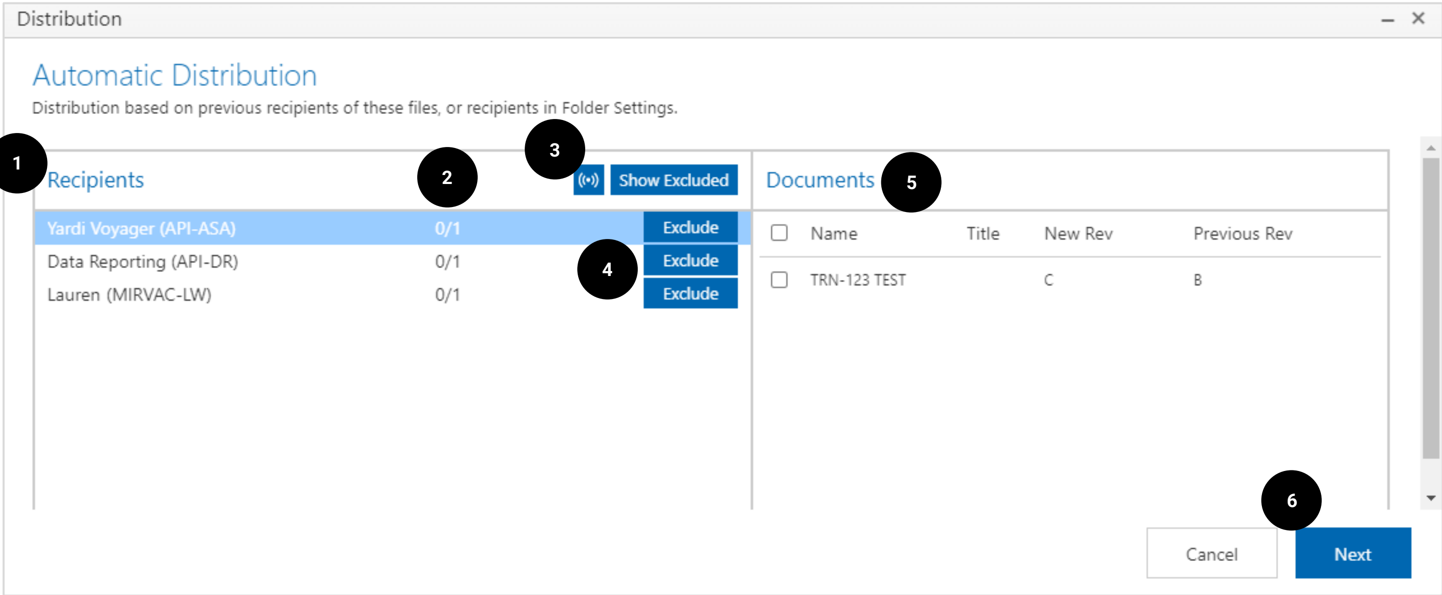


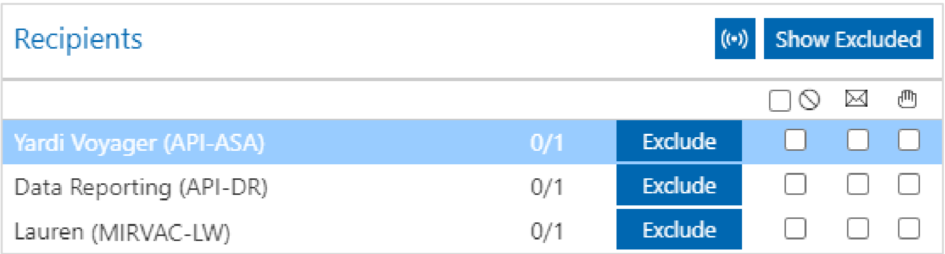
Step	Description
1. Click **Distribution to these recipients**	Select the distribution list.  The users from the distribution list are the populated into the relevant fields. 
2. Enter title and message	Add a relevant title and message, including any required action. This information appears in the email notification that is sent to all users.
3. Add **QuickText** (if required)	The QuickText option may be required. This is a templated message that has been created to be included for transmittals or correspondence, either shared across a project or created and used only by an individual user. Examples: A standard message outlining the required timeframe for a response based on the contract obligations. A personal message indicating office hours of a user.
4. Click **Done**	Once the details have been updated, click done. The distribution popup is displayed with the number of recipients. 
5. Click **Done**	Click Done on the main transmittal screen to send the transmittal.

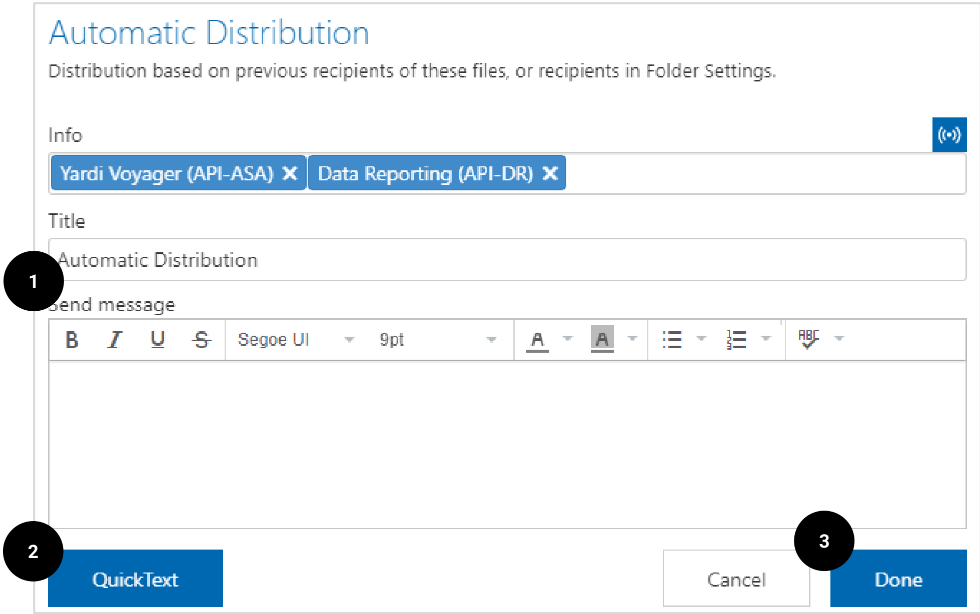
If a new distribution list is required, refer to the [Create Distribution List](#) section.

3.1.3 Automatic Distribution

Selecting **Automatic Distribution** presents the following screen. It shows a list of users that received a version of the document based on previous distribution or folder settings.



Screen Element	Description
1. Recipients	A list of recipients who have received a copy of the previous document revision are displayed. This includes people in both the action and info fields. For folder-based workflows, the list shows users set to receive new documents and revisions.
2. Numbers	The numbers indicate how many of the documents from the transmittal the user will receive. To ensure the user receives the new version highlight the name and tick the checkbox in the Document section. **Note:** This needs to be actioned for each recipient.
3. Broadcast	The broadcast icon allows for personal notifications settings to be overwritten.  Tick the relevant boxes to either suppress notification, force email notification or to indicate the transmittal will be delivered by hand to the user.
4. Include / Exclude	The Include / Exclude button is used to toggle whether a recipient will receive the transmittal. To prevent the document being sent to a user, click Exclude.
5. Documents	The document screen displays the current revision being distributed. If the user is highlighted, the details of the previous revisions received are displayed on the right hand side.
6. Next	Once selection has been made the Next button returns to the Automatic Distribution screen.

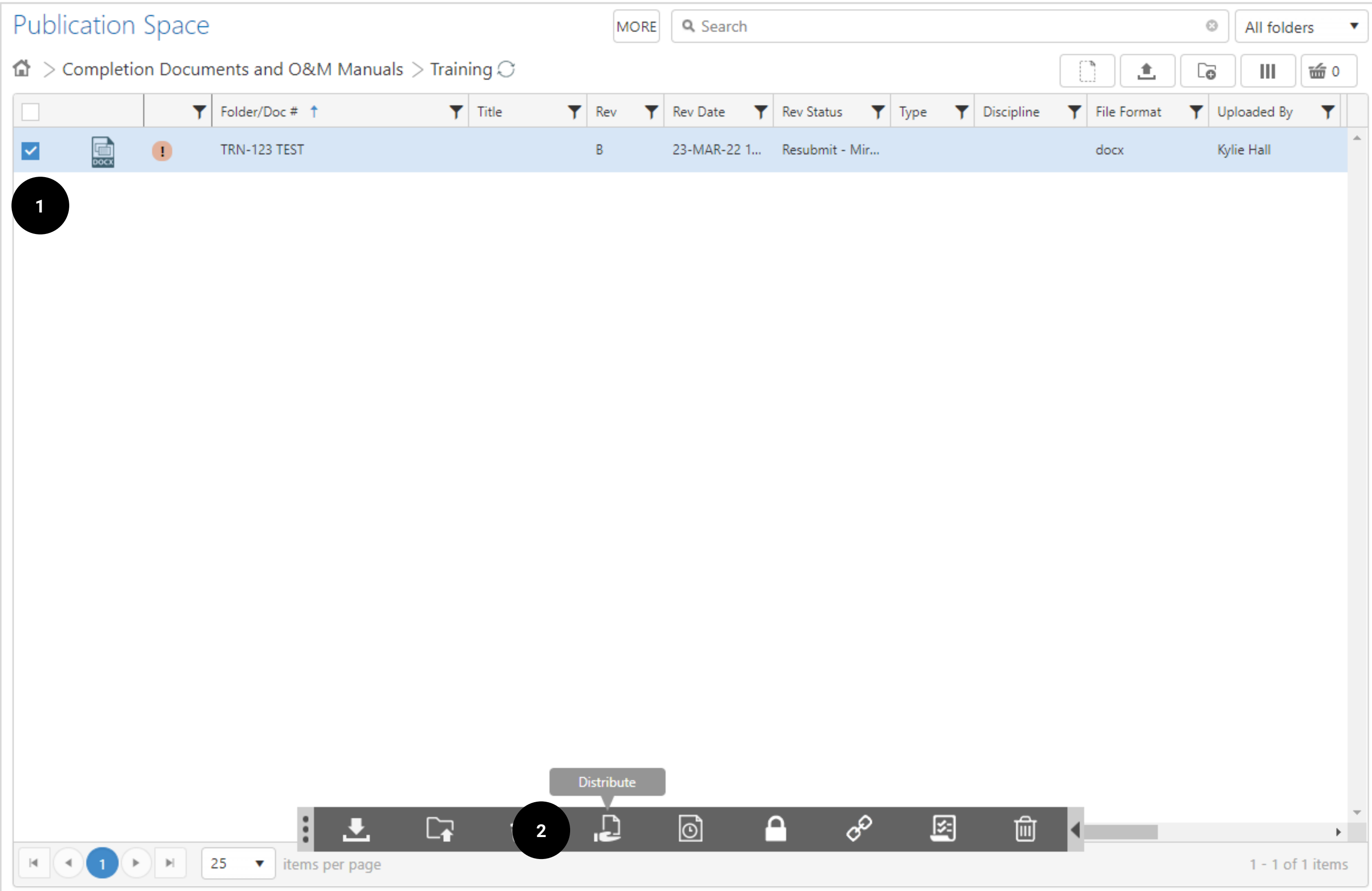


Step	Description
1. Enter title and message	Add a relevant title and message, including any required action. This information appears in the email notification that is sent to all users.
2. Add **QuickText** (if required)	The QuickText option may be required. This is a templated message that has been created to be included for transmittals or correspondence, either shared across a project or created and used only by an individual user. Examples: A standard message outlining the required timeframe for a response based on the contract obligations. A personal message indicating office hours of a user.
3. Click **Done**	Once the details have been updated, click done. The distribution popup is displayed with the number of recipients. 
4. Click **Done**	Click Done on the main transmittal screen to send the transmittal.

The automatic distribution feature is not currently active but may be turned on in the future.

3.2 Distribute a Document from the Tool Bar

At times existing documents need to be shared to additional users. The document can be shared directly the folder list or when viewing the document within iTWOcx.

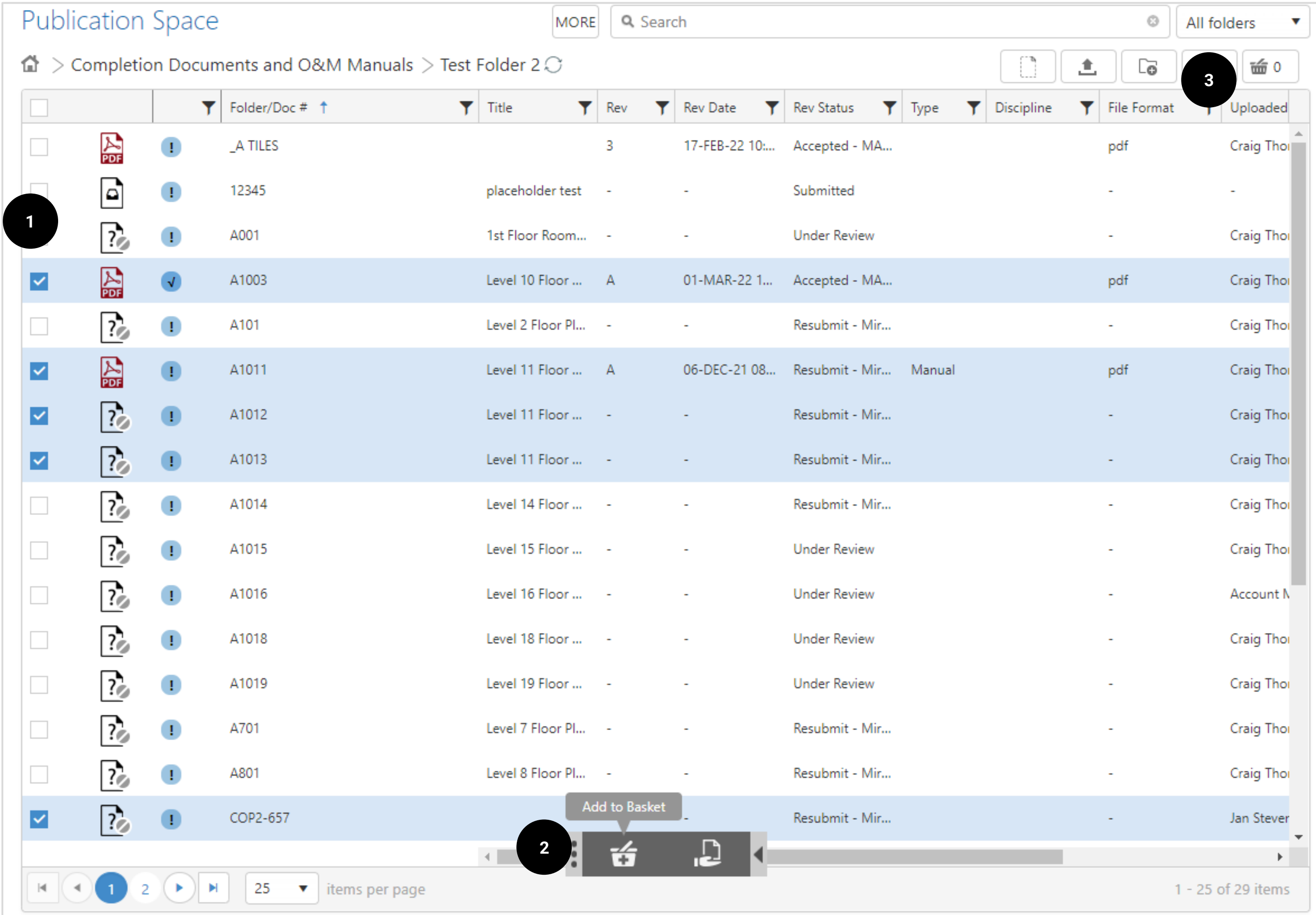


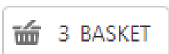
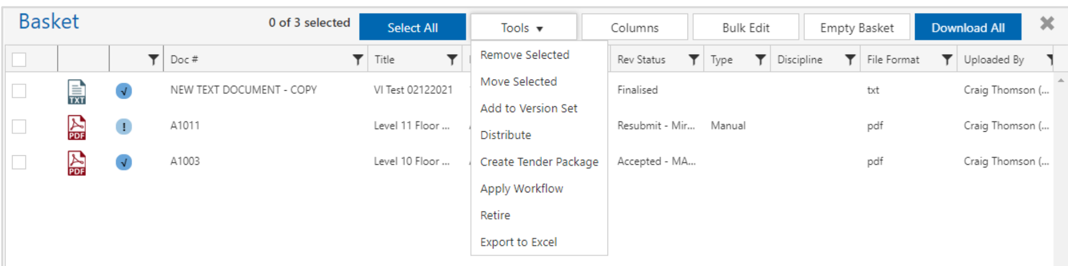
Step	Description
1. Select **Document**	Locate the document in the relevant folder.
2. Click **Distribute**	Click the **distribute icon** from the toolbar.  The distribution pop up displays. The remaining steps are the same as [distribute at time of upload](#).

If you are not ready to distribute a document, you can **Skip Distribution**. Remember, the document will not be visible to anyone outside your company until you distribute it

3.3 Using the Basket

At times it may be necessary to send a group of documents that exist in different folders. This is where the basket is most useful. The basket is a shopping cart where documents from various folders and locations are collected and distributed in one transmittal.

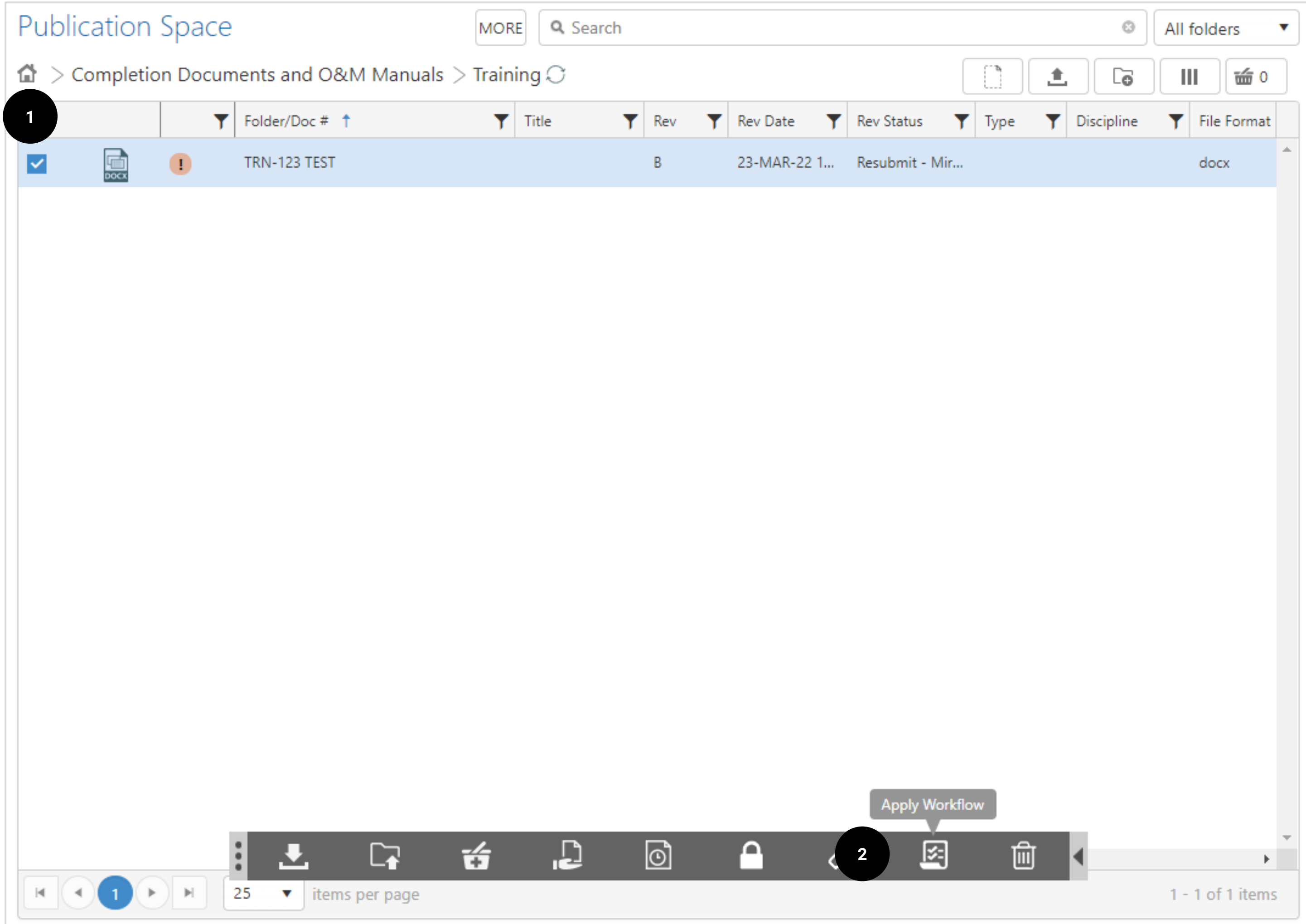


Step	Description
1. Select **Documents**	Navigate to the relevant folder and select the required documents.
2. Click **Add to Basket**	Click the Add to Basket icon from the toolbar.  Navigate to other folders and continue adding to basket as needed.
3. Click **Basket**	Once all documents are gathered, Click the **Basket** in the top right.  The Basket displays.
4. Select **Tools > Distribute**	Select **Tools > Distribute** from the dropdown menu.  The remaining steps are the same as distribute at time of upload.

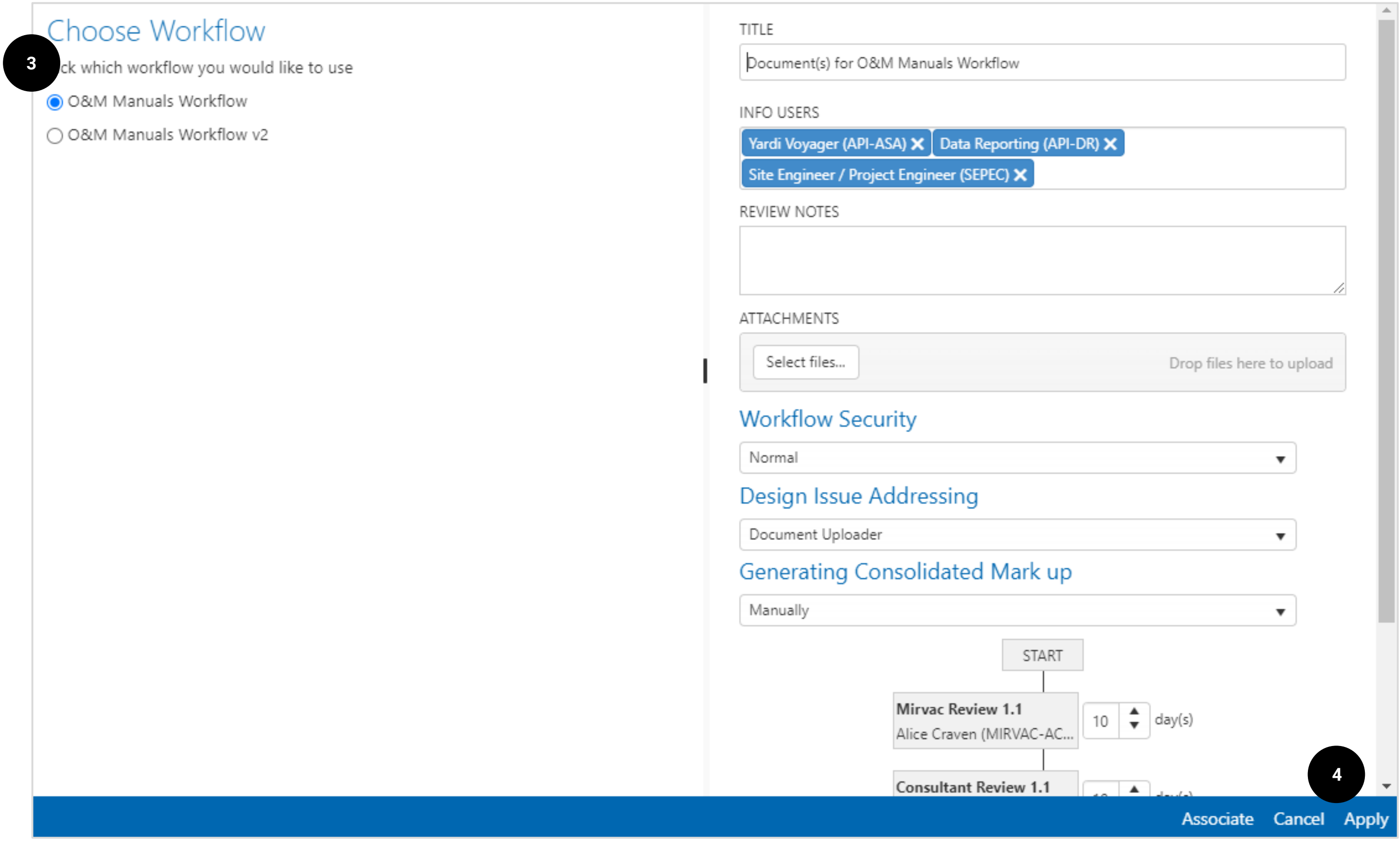
3.4 Distribute via Workflow

A **workflow** is used to send documents along a **defined path** before being distributed. This may involve one or more reviewers to approve the document before it can move to the next step in the workflow.

Workflows may be set up on a folder to automatically take effect on any uploaded document, applied when distributing a document or set on an individual existing document or basket of documents.



Step	Description
1. Select **Document**	Navigate to the relevant folder and select the required document.
2. Click **Apply Workflow**	Click the Apply Workflow icon  The configured workflows appear.



Step	Description
3. Select **Workflow**	Select the workflow from the list and the details populate on the right hand side of the screen. Review the recipients and the flow to ensure the correct workflow is selected **Note:** If there is only one workflow configured the choose workflow part of the screen is not displayed.
4. Click **Apply**	With the correct workflow selected, click Apply.  The workflow transmittal is sent to the required users.

The lock icon on a document means a workflow has been applied. A new version of the document cannot be added until the workflow is complete.

Hover over the document name and click the hyperlink to see the workflow.

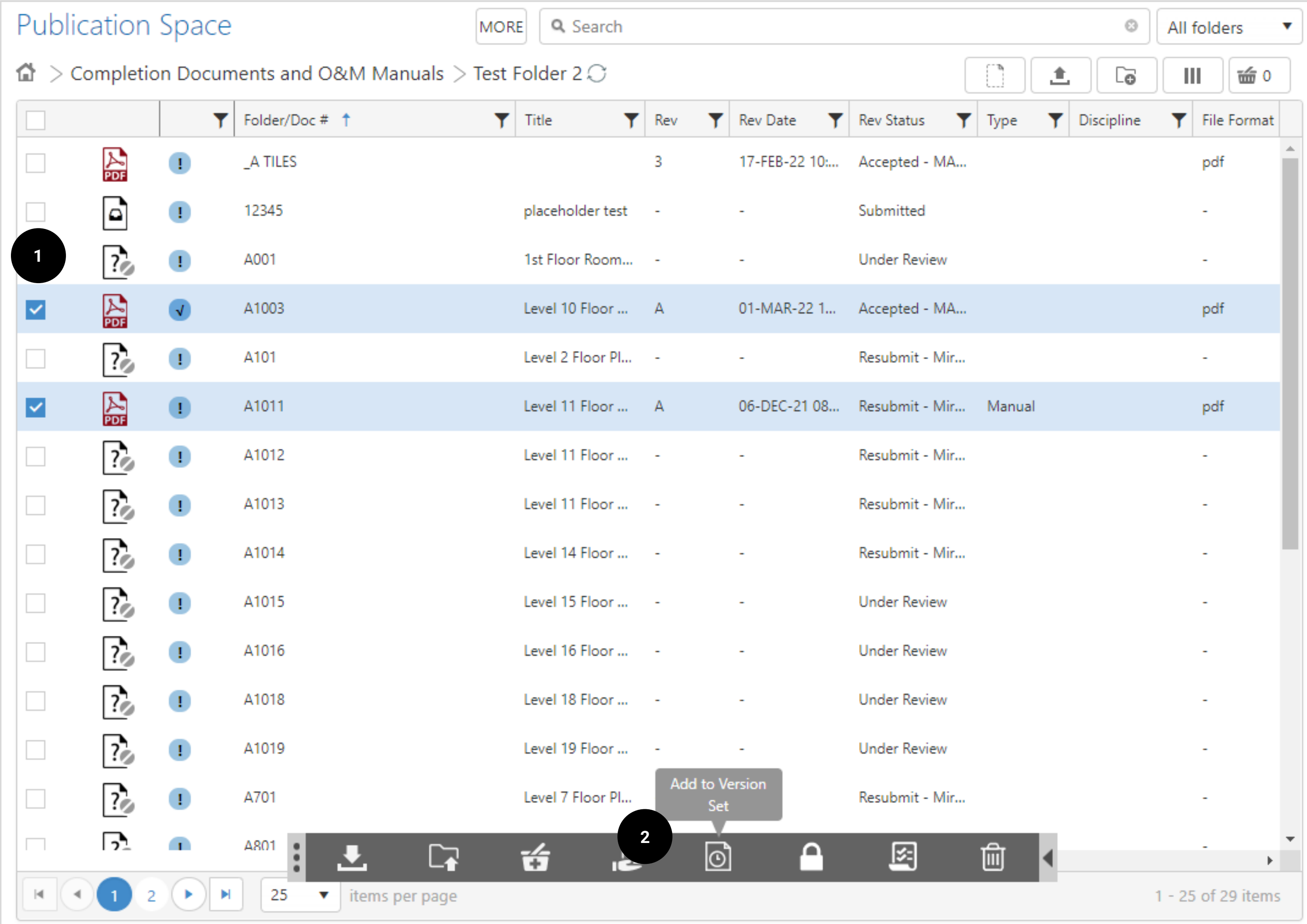
Once the workflow has reached the end, the documents are unlocked. Approved documents are distributed (if set up to auto distribute) and versions can be accessed to review mark ups and/or add new versions. A summary transmittal is issued with the status of each document to the users involved in the workflow.

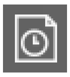
Workflows are created and maintained by selected users. Refer to the Create a Workflow section for steps.

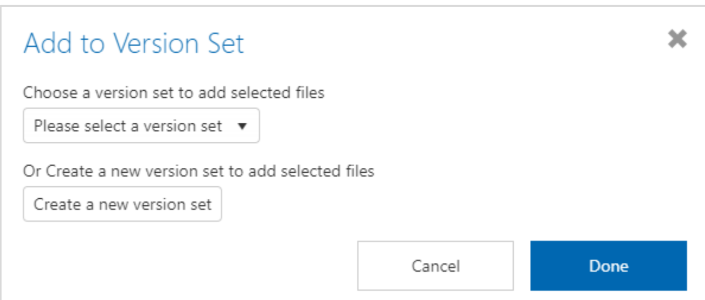
3.5 Version Sets

A **version set** is a bundle of documents that reflect a **moment of time**. The documents can still be updated and superseded within the standard folder, but the documents within the version set will not change. This is useful for creating point in time documentation for specific project milestones.

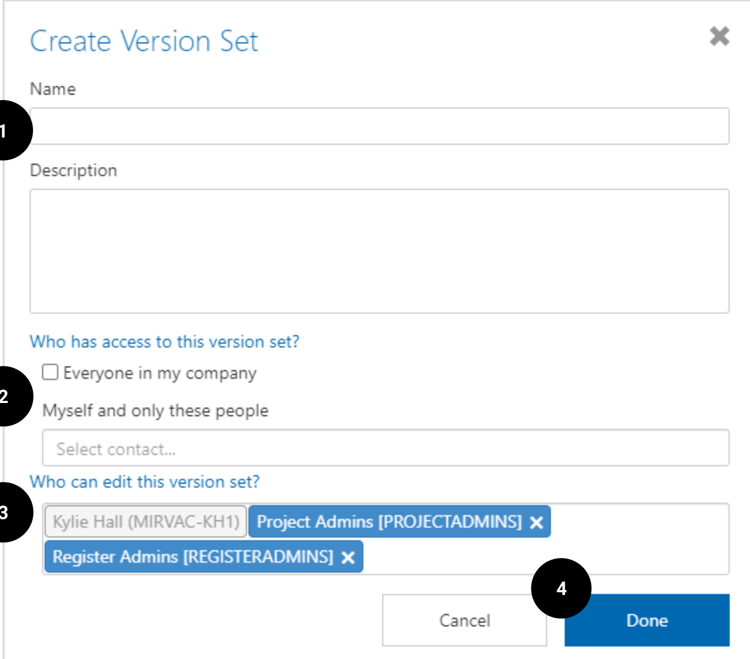
Version Sets are created by selecting files in a folder and selecting the **Add to Version Set** icon in the toolbar.



Step	Description
1. Select files	Select the files from the folder
2. Click **Add to Version Set**	Click the **Add to Version Set** icon from the toolbar.  The Add to Version Set popup displays.



To add documents to an **existing version set**, select the item from the dropdown menu. To Create a **new version set,** click the **Create a new version set** button.

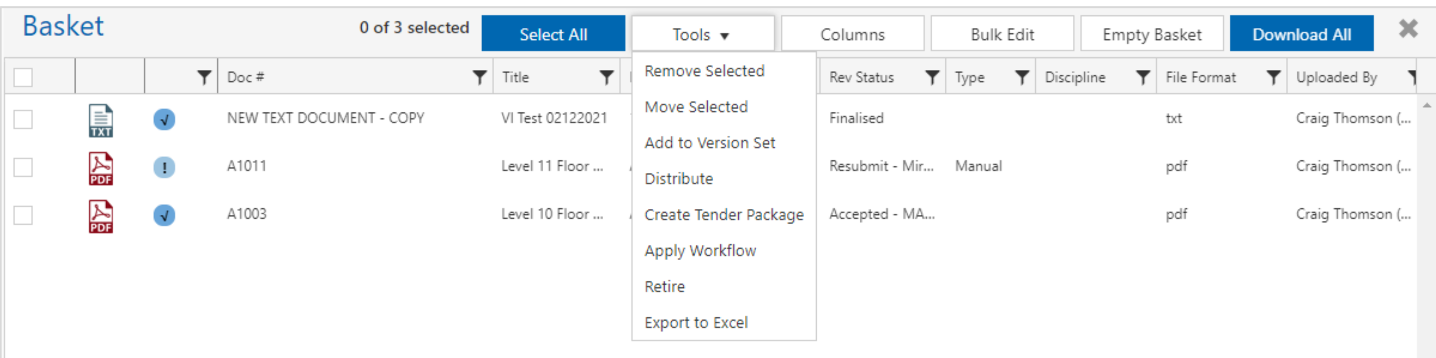


Step	Description
1. Add **Name** and **Description**	Enter a name for the version set. This name displays in the menu frame. A short description should be included to provide extra context.
2. Select **access level**	Set access level to the version set. Either tick **everyone in my company** or manually add users/groups.
3. Add **editable users**	Add users that can edit the version set.
4. Click **Done**	Click Done to save the version set.

The naming of a Versions Set should indicate the content/reason and the date.

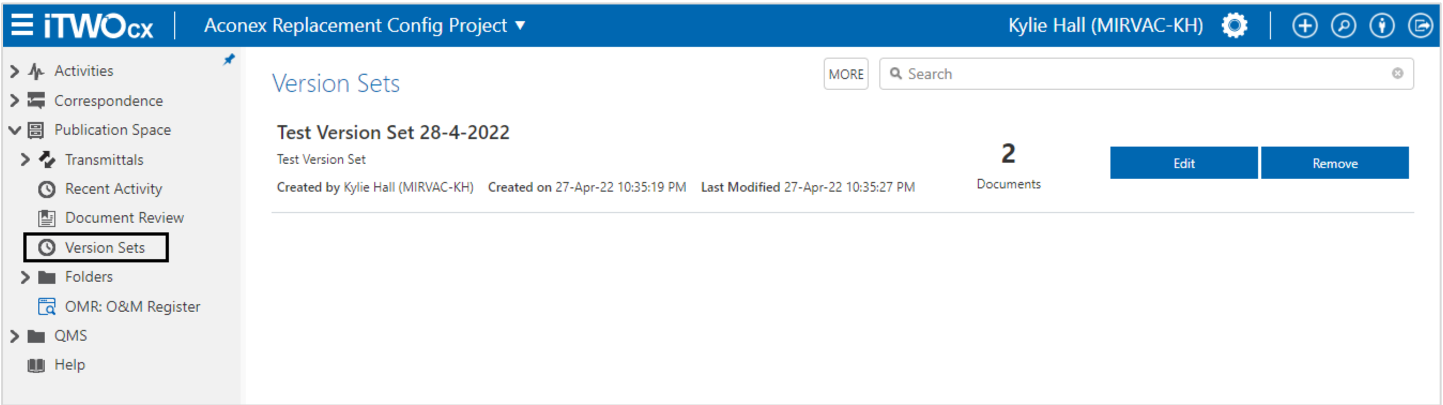
For example: Electrical Documents 11/11/2022.

Version Sets are also created by adding files to the basket and selecting **Tools > Add to Version Set**.



3.5.1 View Version Sets

Version sets can be viewed at any time by clicking on **Version Sets** in the menu frame.

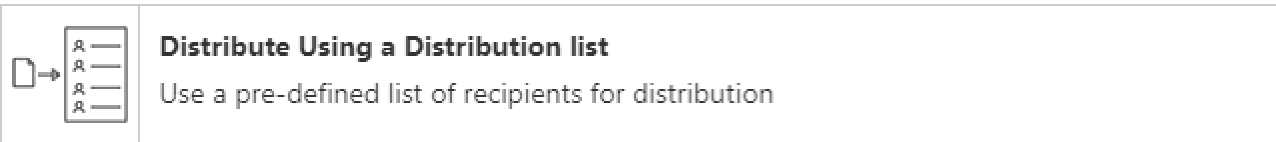


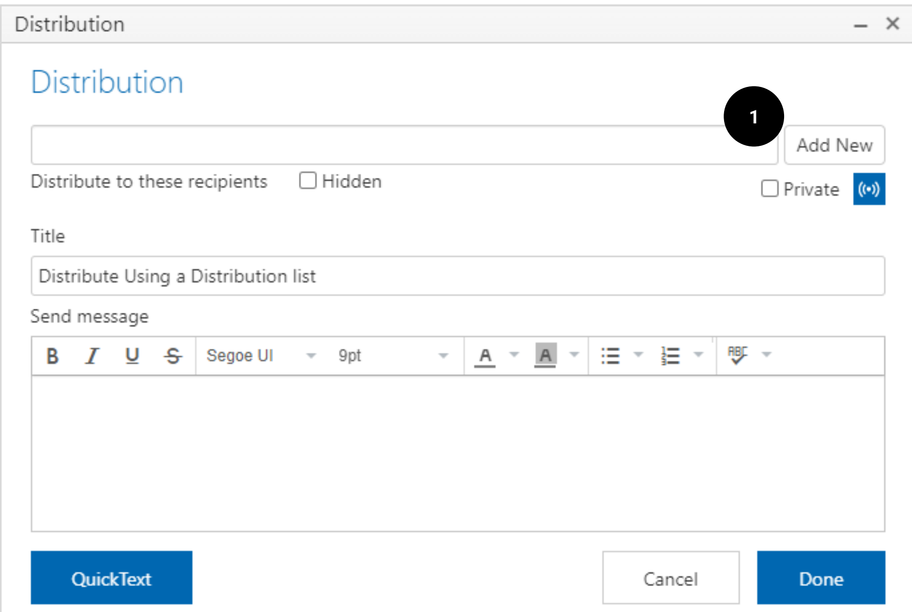
The version set details are listed, with the number of documents. The version set can be edited or removed depending on the access level provided when it was created.

3.6 Create a Distribution List

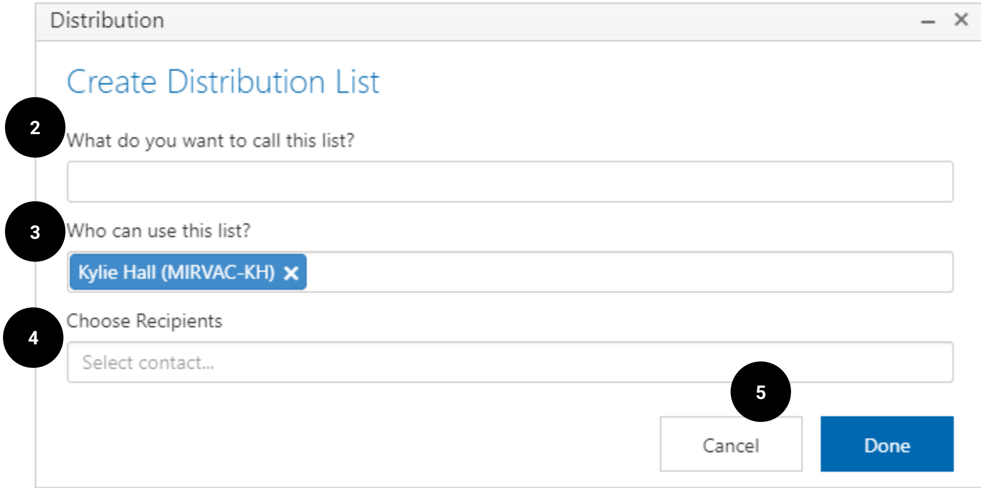
Distribution lists are created to make it easy to distribute documents to a set of users, rather than manually adding each time. Distribution lists can be created by anyone and shared with the project or only a few selected users.

A new Distribution List is created at the time of distribution from the **Distribute Using a Distribution list** option.





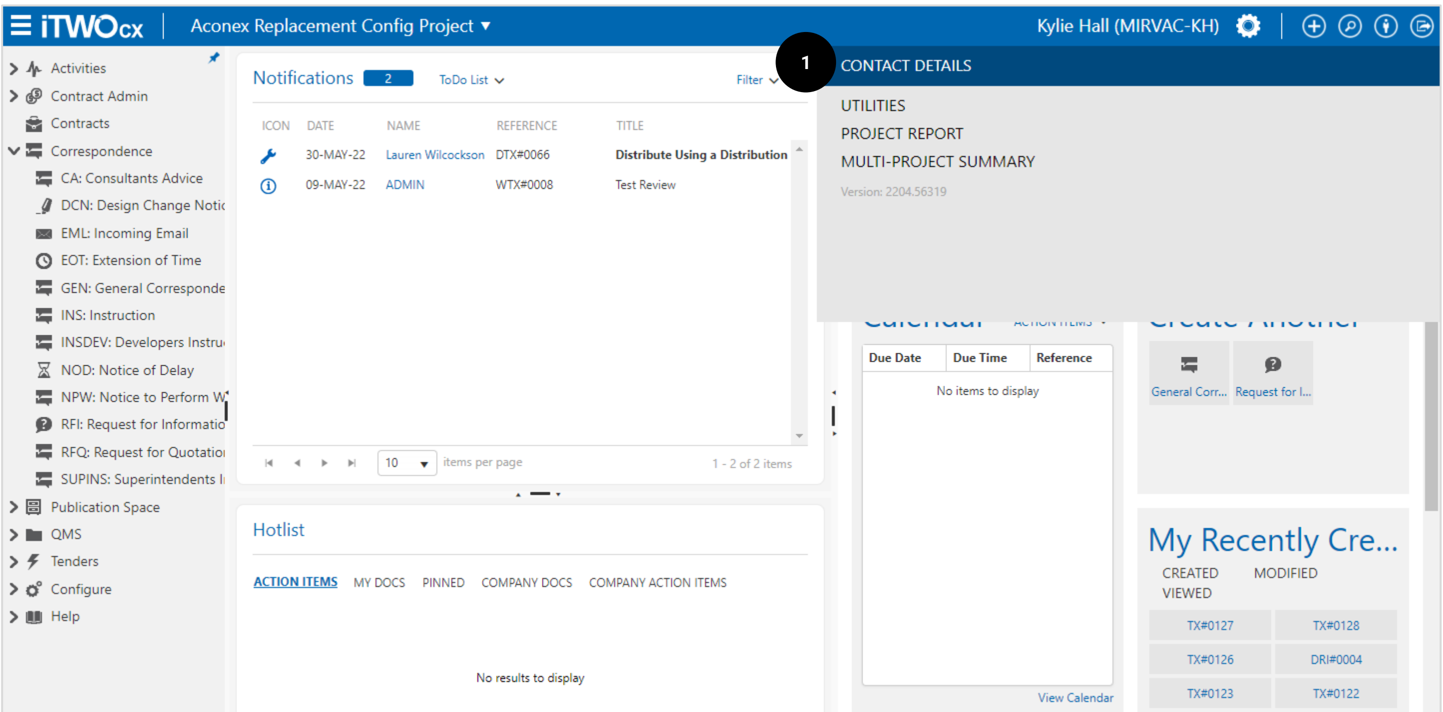
Step	Description
1. Click **Add New**	To create a new distribution list, click the add new button. The Create Distribution List popup is displayed

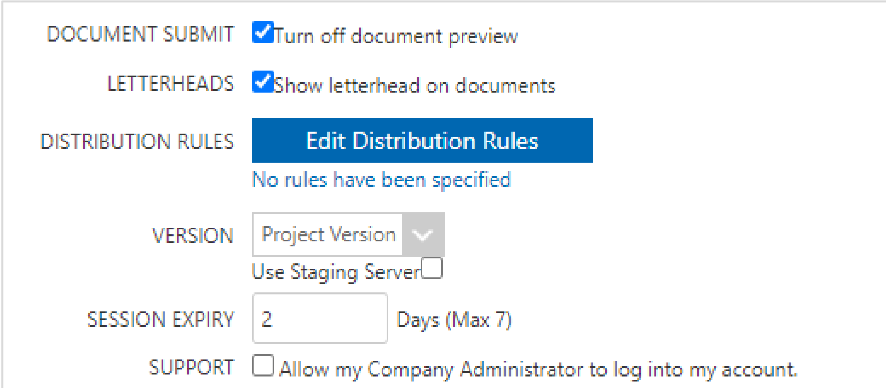


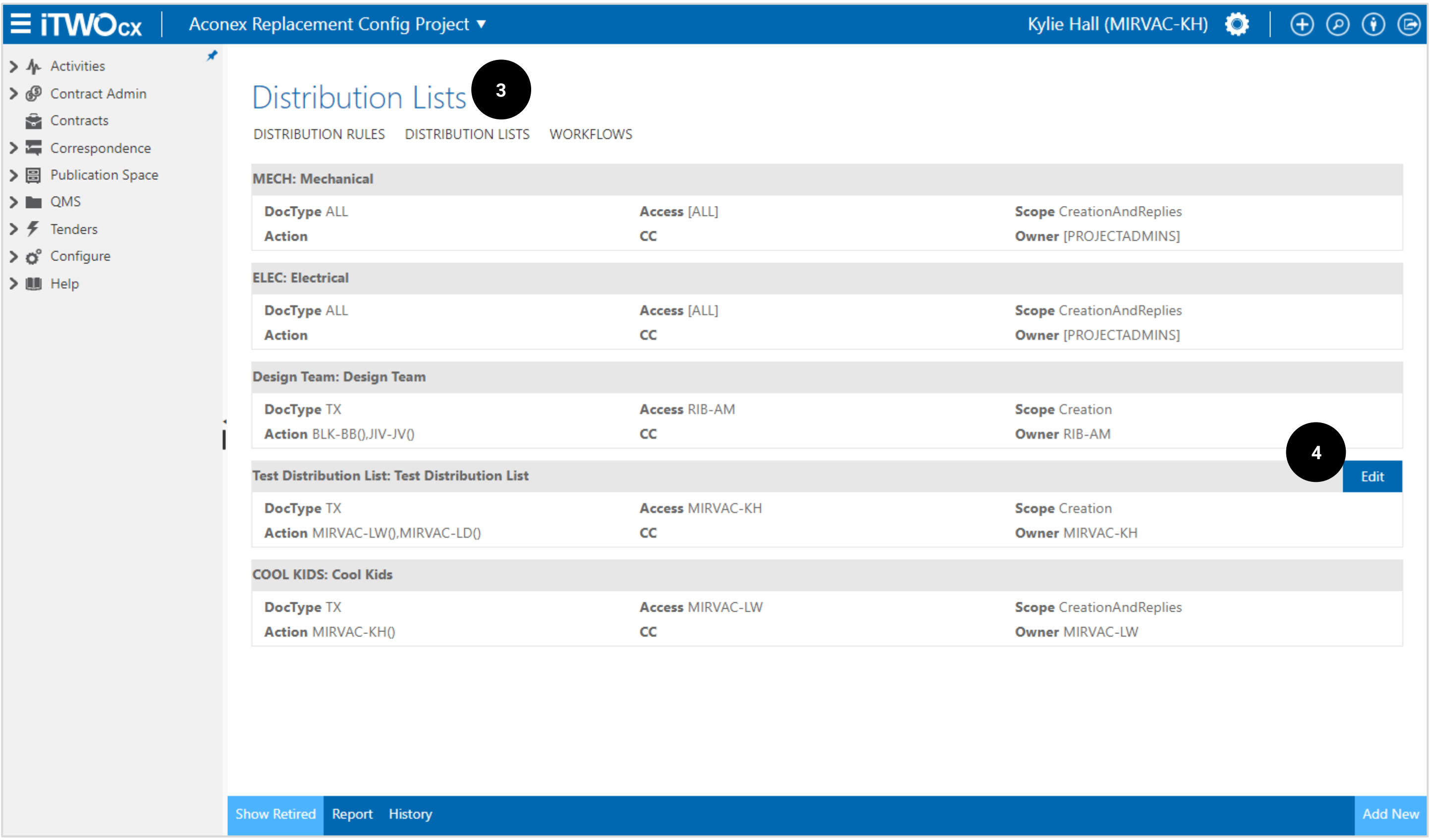
Step	Description
2. Add **Name**	Enter a name for the distribution list.
3. Add **Users who can use the list**	Add the name of any users that can access the list. This can be individual users, groups / roles or a company.
4. Add **recipients**	Add the users that will receive the documents.
5. Click **Done**	Click Done to save the distribution list.

3.7 Edit / Delete a Distribution List

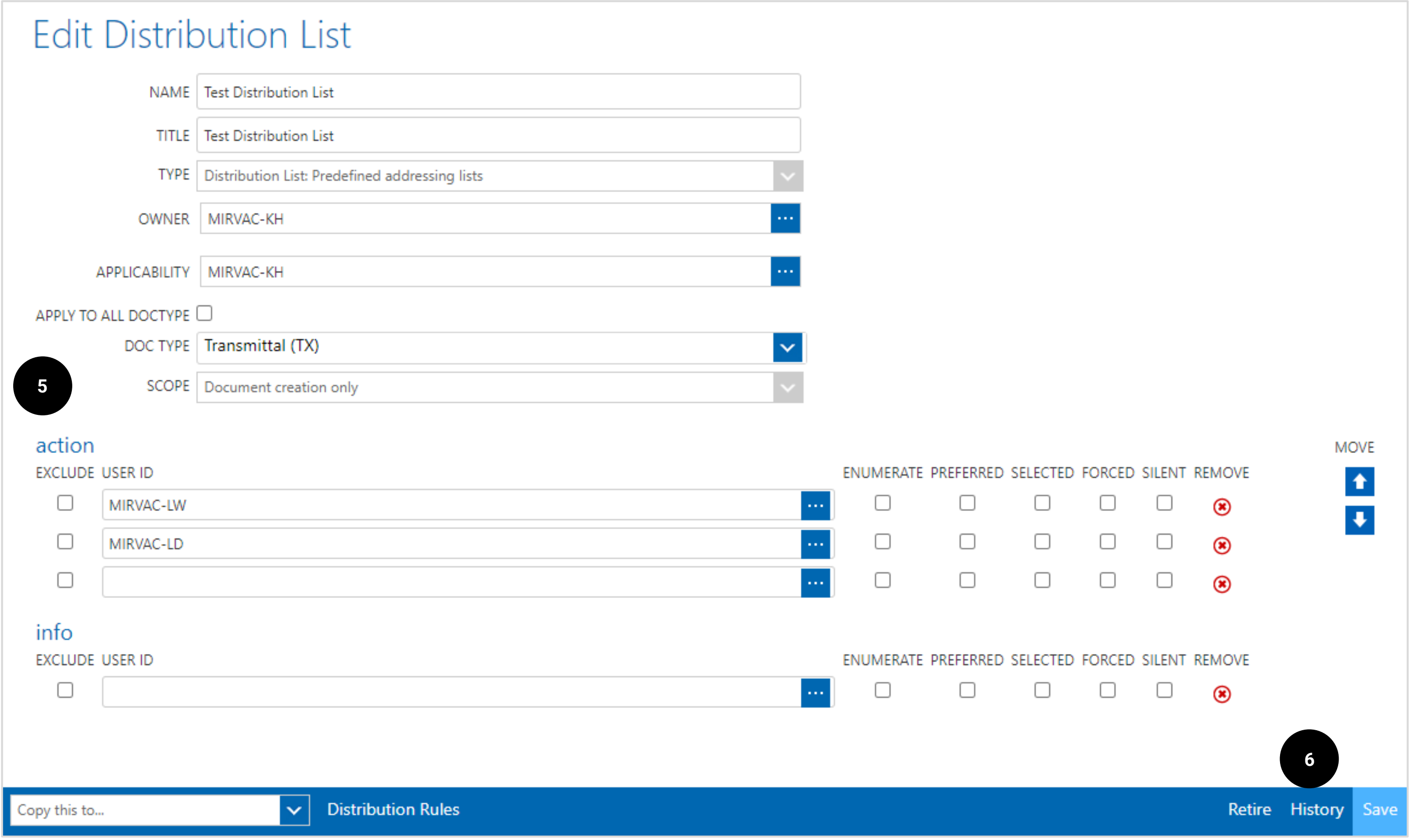
Once a distribution list has been created, the list can be edited or retired.



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



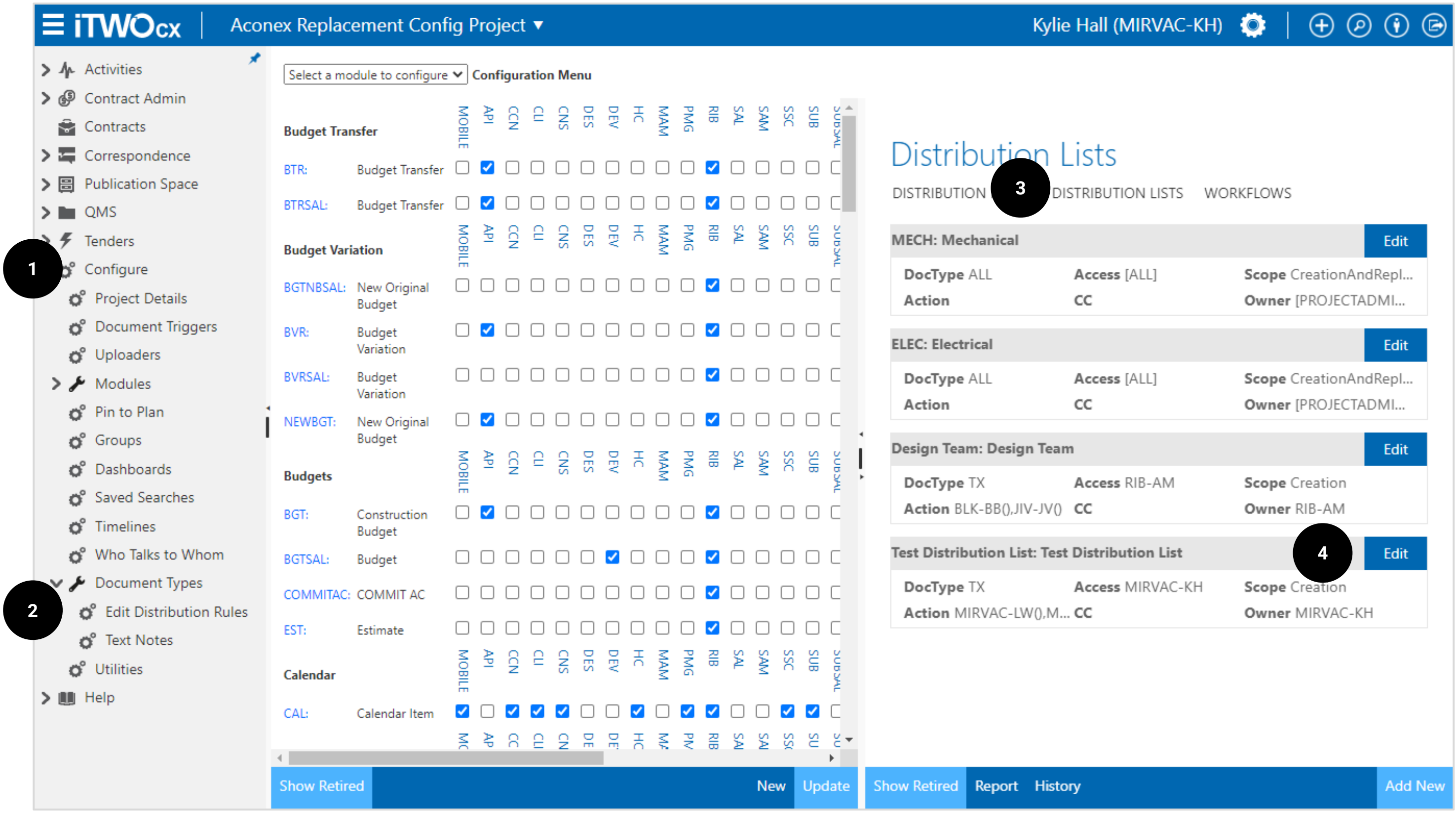
Step	Description
3. Click **Distribution List**	Click the distribution list tab
4. Click **Edit**	Click Edit next to the distribution list to edit / retire. Opens the edit distribution list (separate tab).



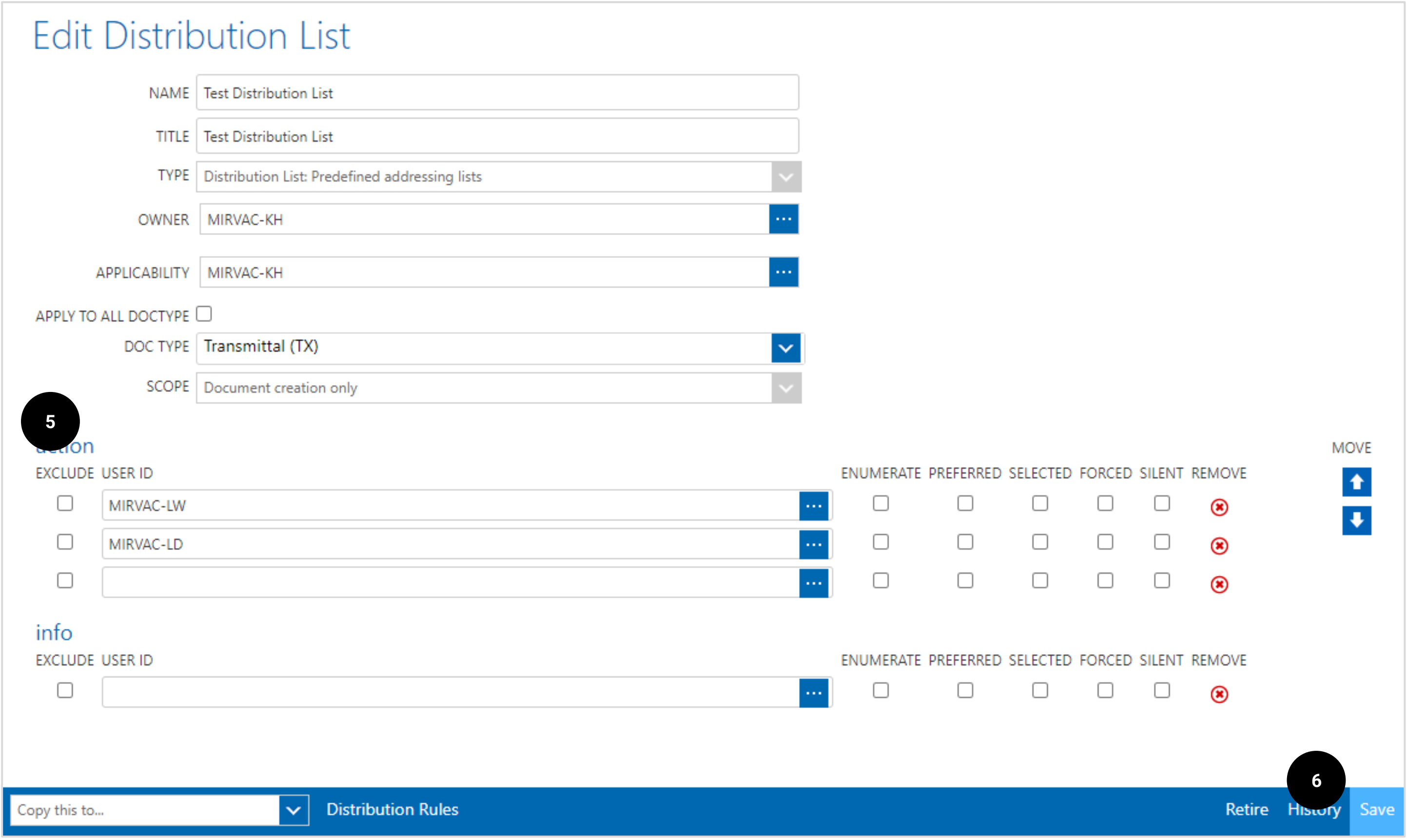
Step	Description
5. Make required changes	Update the required fields depending on the action required: • Update who can use the distribution list by clicking ··· near **applicability** and selecting the users, roles, groups etc. • To **remove a user**, click the ⊗ next to their name. • To **add a user**,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

3.8 Edit / Delete a Distribution List (Admin)

Project / system administrators can edit or retire a distribution list created by any user.



Step	Description
7. Click **Configure**	Click Configure in the menu frame to expand the section. This opens the configuration menu.
8. Click **Edit Distribution Rules**	Expand **Document Types** and click **Edit Distribution Rules**. This populates the screen on the right..
9. Click **Distribution Lists** tab	Ignore the left-hand section and click **Distribution Lists** tab in the right hand screen. This displays all current distribution lists.
10. Click **Edit**	Locate the required distribution list and click Edit. The **Edit Distribution List** page displays.

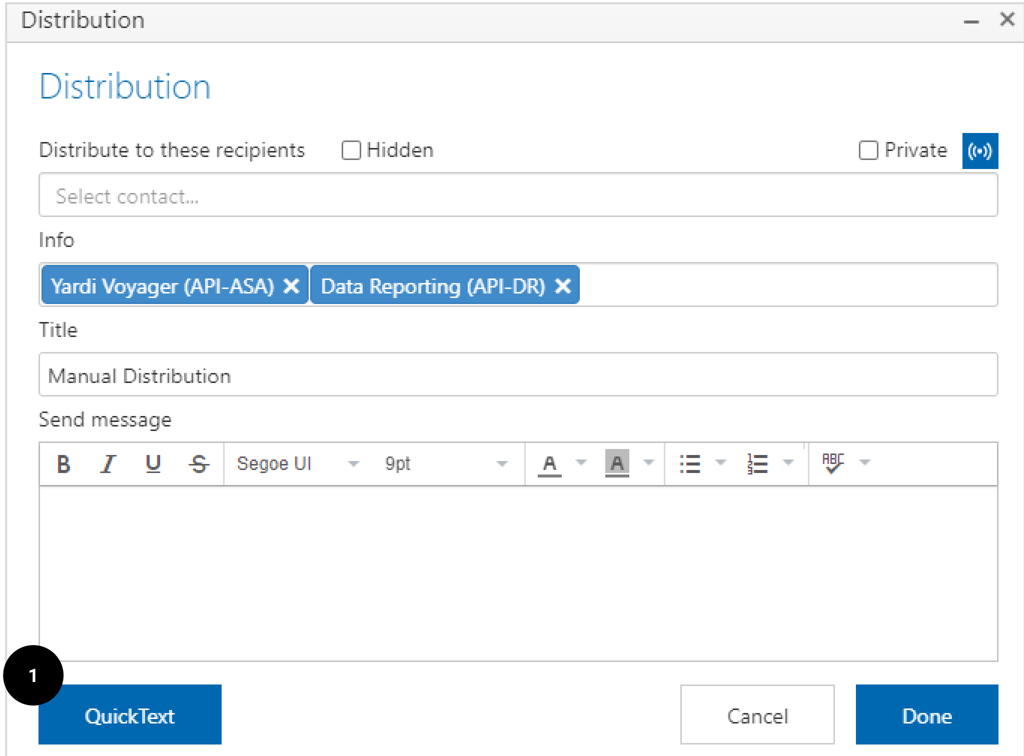


Step	Description
11. Make required changes	Update the required fields depending on the action required: • Update who can use the distribution list by clicking ··· near **applicability** and selecting the users, roles, groups etc. • To **remove a user**, click the next to their name. • To **add a user**,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

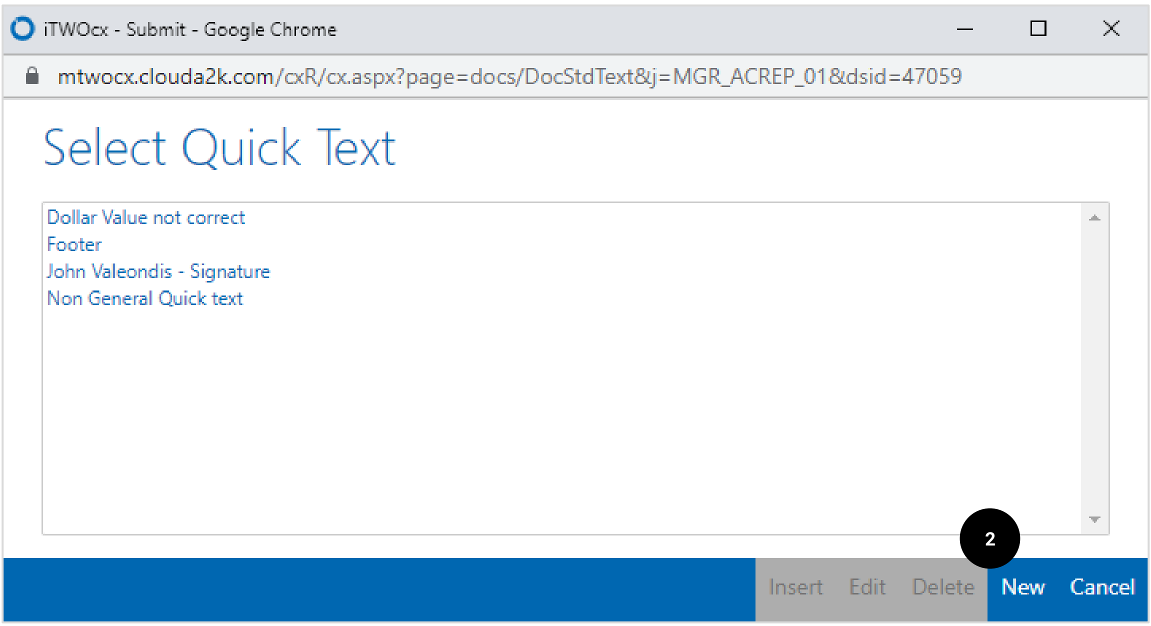
3.9 Create QuickText

When distributing a document, the option to add a quick text 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.

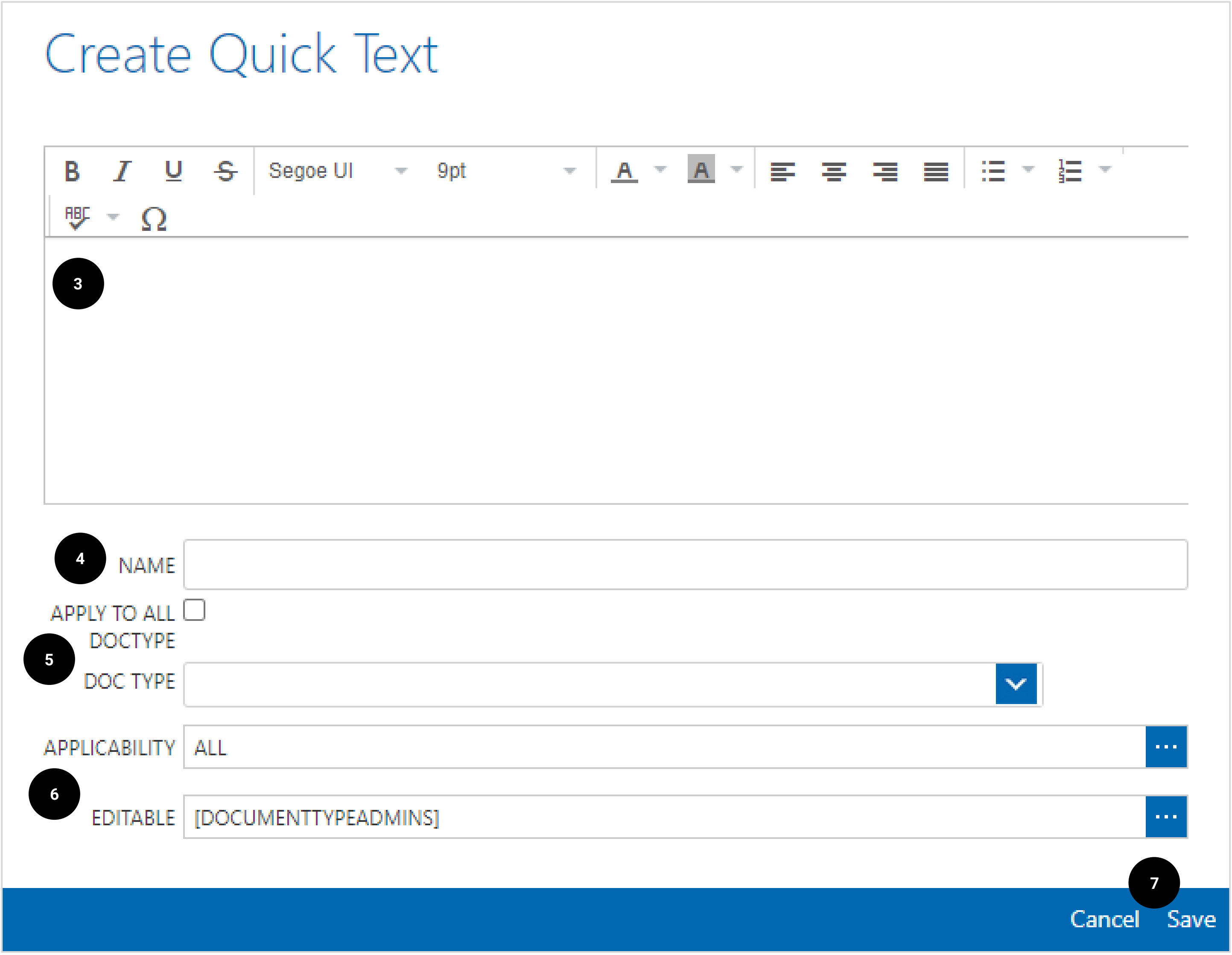
QuickText is created within the distribution screen (manual or distribution list).



Step	Description
1. Click **QuickText**	From the distribution screen, click QuickText. Opens the Select Quick Text window showing a list of existing QuickText options.



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



Step	Description
3. Enter **Message**	Enter the message into the comments box.
4. Add **name**	Add a title of the QuickText. This is what appears in the list so be descriptive.
5. 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.
6. 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).
7. Click **Save**	Saves the QuickText message.

4 View and Review Documents

iTWOcx allows users **view** documents and directly **compare** versions as well as **mark up** drawings. It also allows users to create a **Design Issue Review** while viewing and marking up drawings to save time.

4.1 View Documents

There are a few ways to view documents:

- From the email notification of a transmittal
- From the transmittal menu
- Searching / navigating to the folder

4.1.1 View Documents from a Notification

When a document is distributed to users, an email notification is sent. The email contains a summary showing who sent the transmittal, the date and a link to view the notification within iTWOcx.

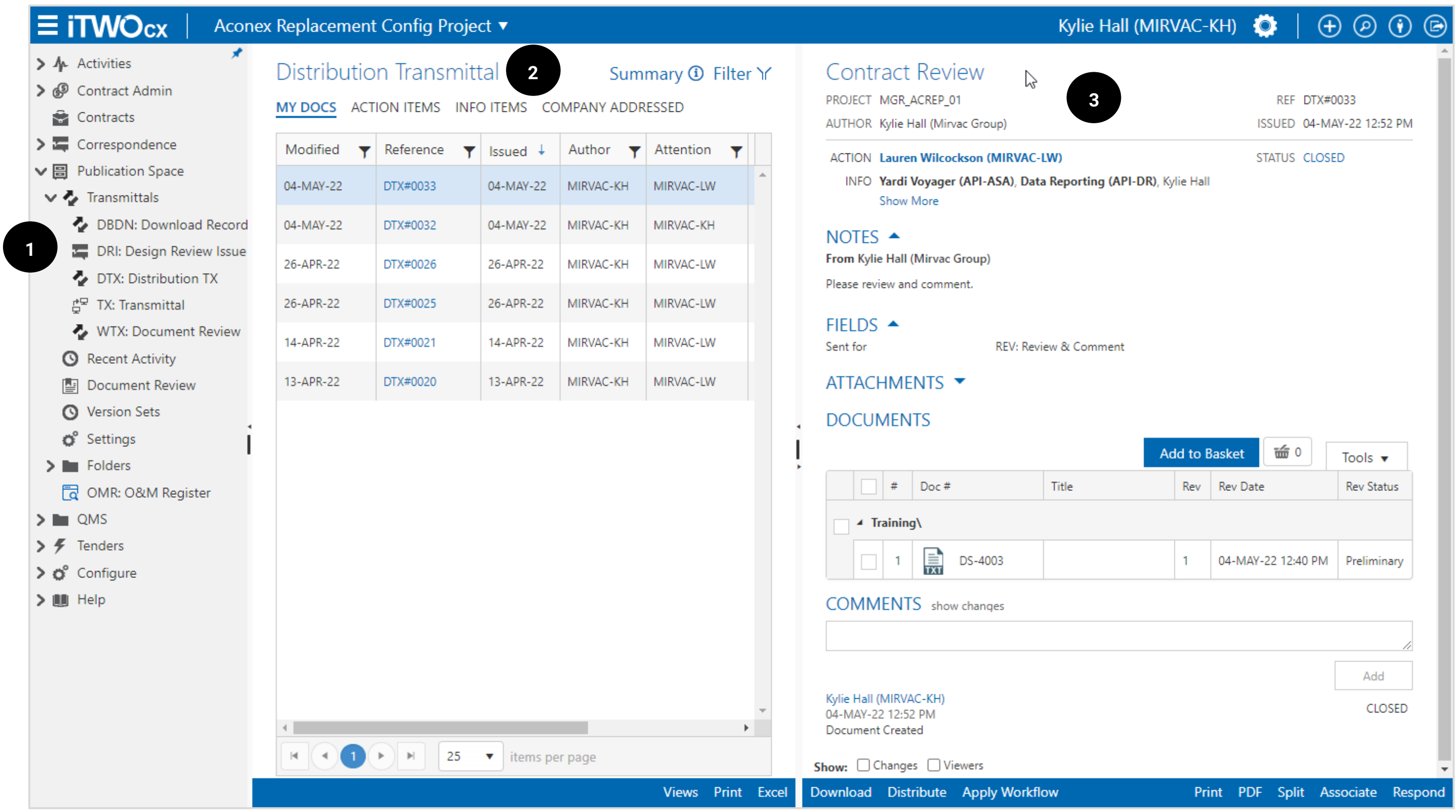
There are two types of email notifications available:

- Plain text email contains a **link to iTWOcx**. Users will view the notification in the Activities module and can access the documents and other comments within the system.
- Preview email contains a copy of the document that can be **downloaded** without the need to log into the system. Depending on the action required, users may need to access the system to view the notification from the Activities module or the Transmittal menu to take action.

To switch the type of notification you receive, access **Settings > Contact Details** and select the required option. Further information is available in the **Correspondence user guide**.

4.1.2 View Documents from Transmittal Menu

Another way to view documents is from the Transmittal menu. Navigate to **Publication Space > Transmittals**.



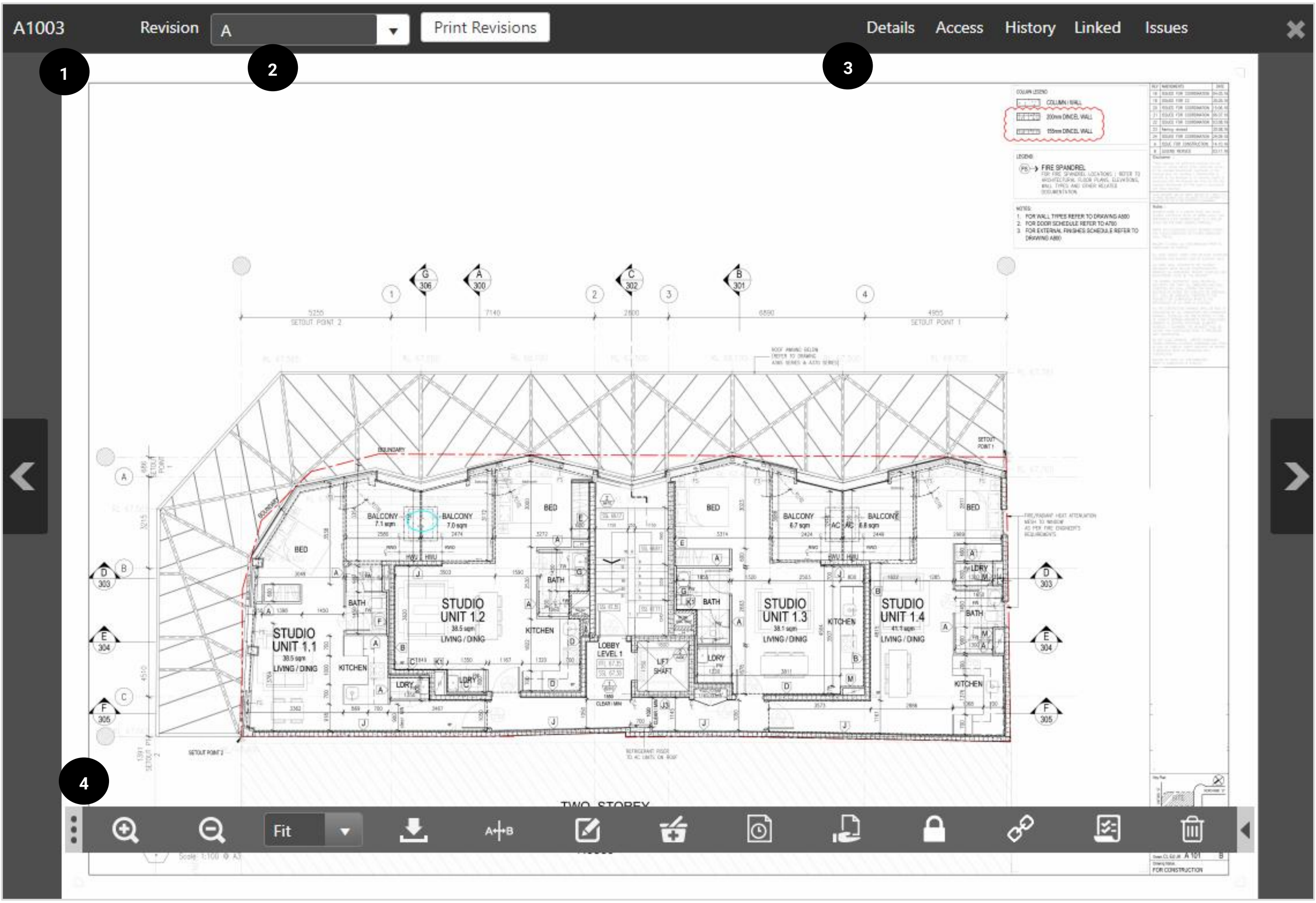
Screen Element	Description	
1. **Transmittal Menu Options**	The Transmittal Menu provides in-built views for transmittals.	
	DBDN: Download Record	Shows documents the user has downloaded.
	DTX: Distribution	Shows documents that have been distributed by the user.
	TX: Transmittal	Shows documents that have been uploaded by the user.
	WTX: Document Review	Shows the transmittals sent for document review via a workflow.
2. **List View**	Displays a list of transmittals. Click on the relevant row to display the detail on the right.	
3. **Notification**	The notification shows details of the transmittal and the documents are visible in the Document section. The folder location is also visible (eg Training) Documents can be opened by clicking the icon.	

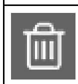
4.1.3 View documents from Search / Navigation

The final method of viewing a document is by searching for the item or navigating to document within the folder. For detailed steps on how to Search for Documents, refer to the relevant topic.

4.2 Document Viewer

After locating the relevant document and clicking the link or icon, it opens in the **Document Viewer**. The document viewer allows for comparing versions, making mark ups and viewing details and history of the document.

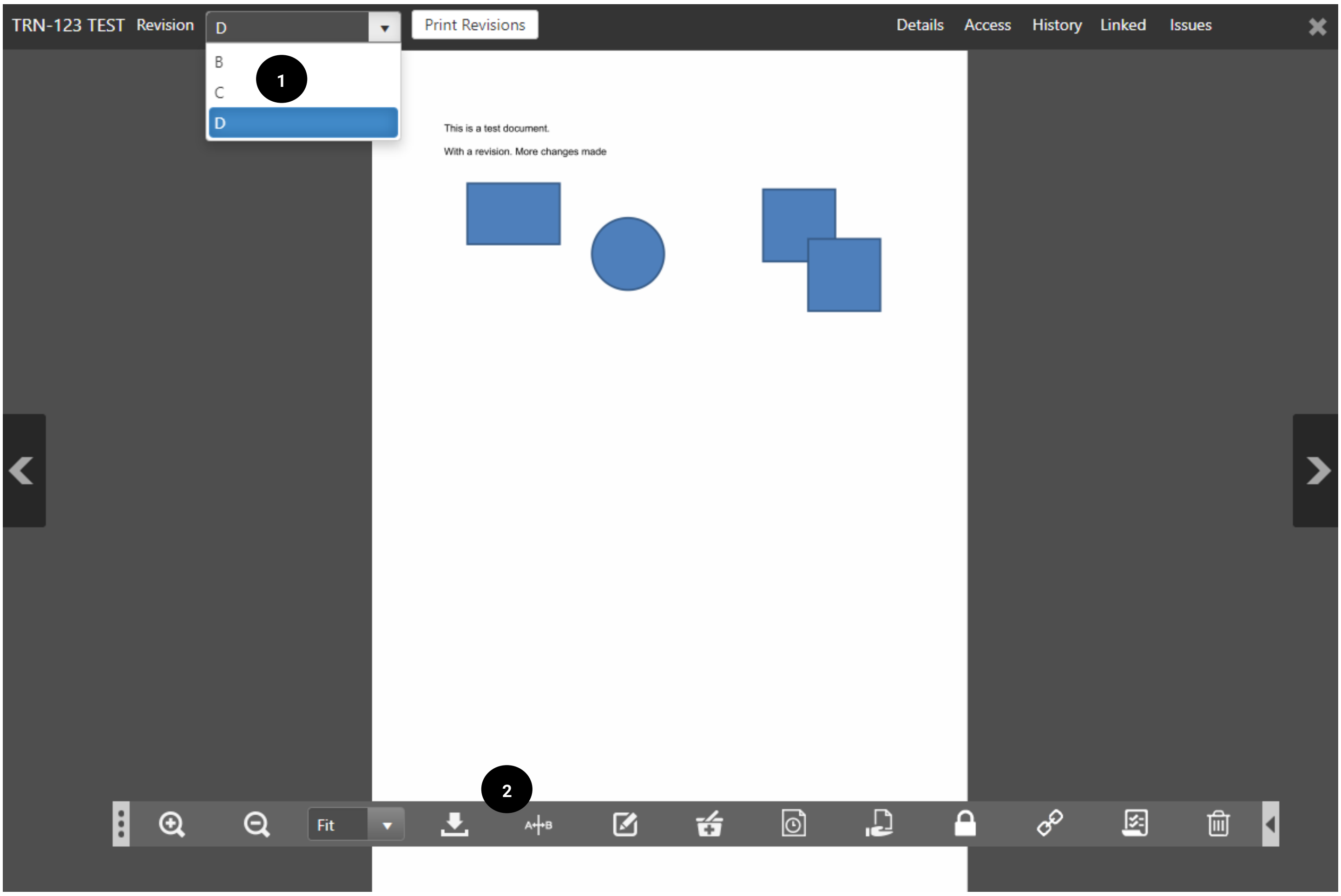


Screen Element		Description
1. **Filename / Doc #**		The filename / document number is displayed.
2. **Revision**		Shows the revision being displayed. Use the dropdown to switch to a previous version of the document. Print Revisions allows you to download revisions with mark ups as a pdf.
3. **Information Tabs**		The various tabs show more information about the document.
	Action	**Description**
	Details	Shows the metadata / attributes of the document. Fields can be edited.
	Access	Displays the users or groups that have access to the document and the level of access (e.g. read, write, all).
	History	Shows actions taken on the document in chronological order. See when the document was uploaded, downloaded, superseded, viewed or distributed (with links to the transmittals). Events can be toggled on / off.
	Linked	Shows linked forms / correspondence relating to the document.
	Issues	Displays any Design Review Issues or mark ups related to the revision. Items can be toggled on / off.
3. **Toolbar**		The toolbar lists all available actions for the document.
	Action	**Description**
		**Zoom in / out**.
		**Set zoom**. Change the zoom to a set percentage or fit the screen.
		**Download**. Downloads the document.
		**Compare Revision**. Opens the compare screen. When viewing two revisions changes are highlighted for easy comparisons.
		**Mark Up**. Let's you mark up the document using the inbuilt tools.
		**Basket**. Add the document to the basket.
		**Version Set**. Add the document to a version set.
		**Distribute**. Share the document to other users.
		**Lock Doc.** Locks the document to prevent it from being superseded by other users.
		**Generate Link.** Creates a link directly to the document, revision or page within a document to share with others.
		**Workflow**. Apply a workflow to the document.
		**Retire**. Remove a document from being visible to others.

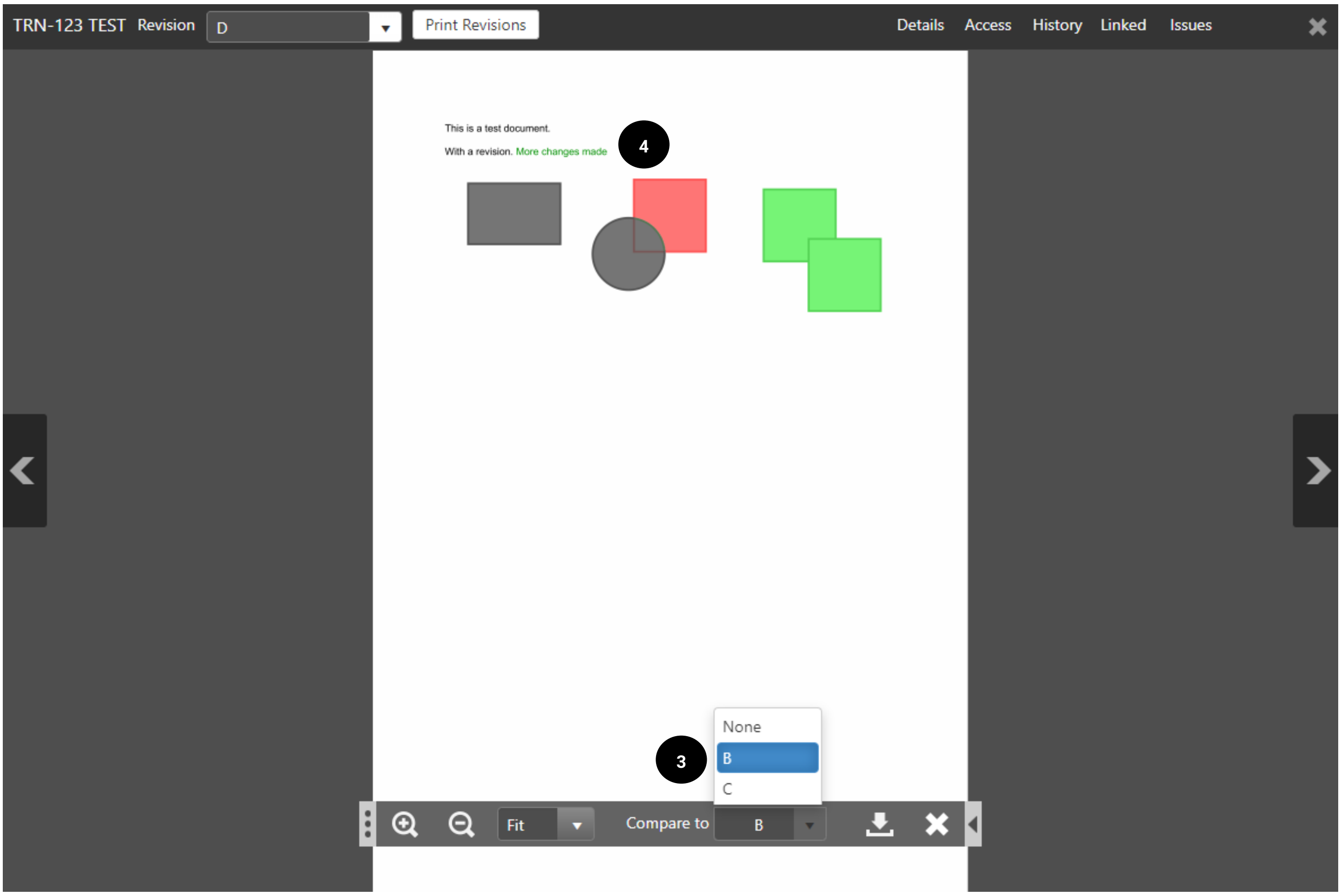
4.3 Compare Revisions

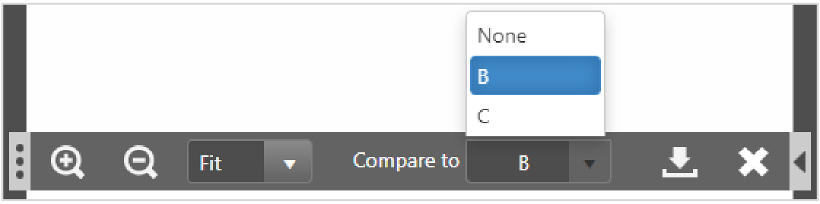
A useful feature of iTWOcx is the ability to view and **compare revisions** of the same document. The system highlights changes between the two versions visually.

To compare revisions open the document.



Step	Description
1. Click **drop down**	After opening the document, click the revision dropdown menu to see the available revisions. Select one of the revisions to view.
2. Click **Compare icon**	Click the **Compare** icon on the Document Details Toolbar.  The compare screen is displayed.

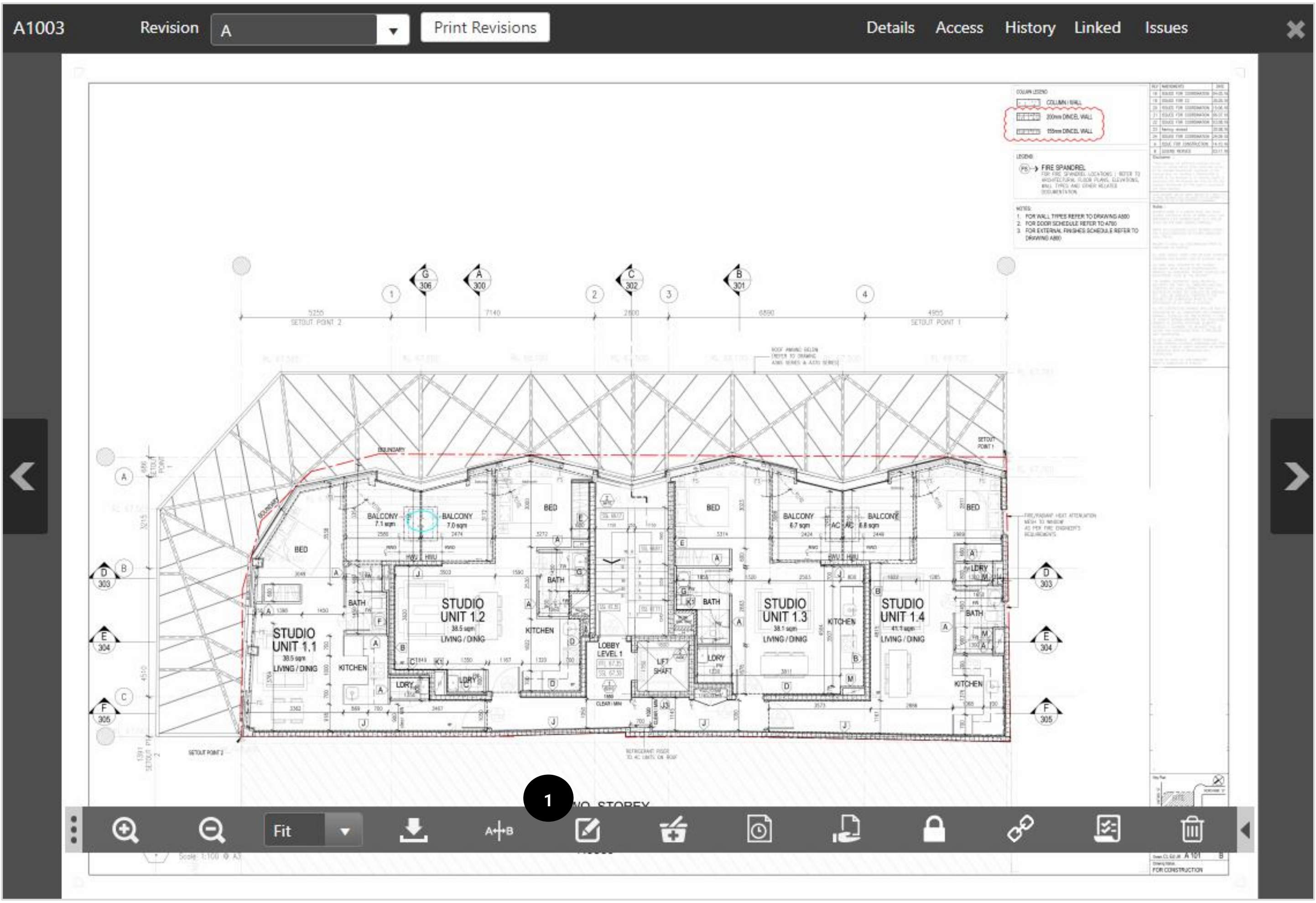


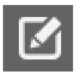
Step	Description
3. Select **Revision**	Select the revisions to view as a comparison from the dropdown menu. All options are available for selection to make it easy to trace back to when a change was made. 
4. View Changes	Changes are shown on screen for text, shapes etc: • **Red** – item has been removed since the revision. • **Green** – item has been added since the revision.

Compare revisions only works if the revisions are the same size / layout / zoom etc. It is best practice to upload drawings how they come out of modelling software to maintain integrity and take advantage of this feature.

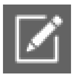
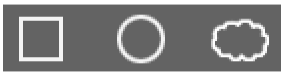
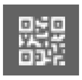
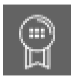
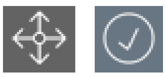
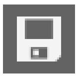
4.4 Mark Up Documents

As part of a review, users can mark up a document with iTWOcx using the in-built tools.



Step	Description
1. Click Mark Up	Open a document and click the Mark Up icon on the Document Details Toolbar.  The **Mark Up Toolbar** becomes available in the document viewer.

The following table shows the **Mark Up Toolbar** icons and their use.

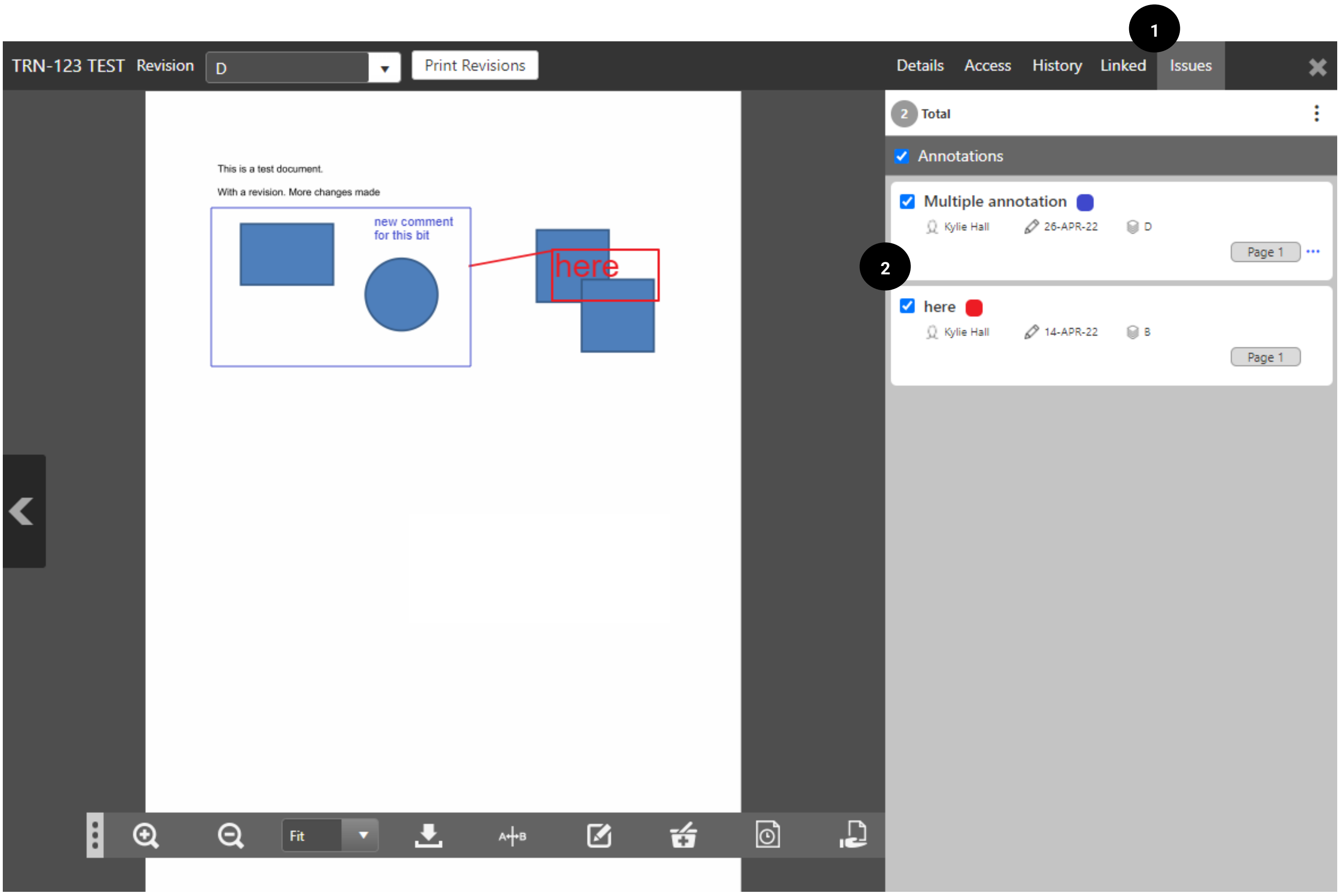
Icon	Description
	**Move and Pan** tool. Used to move around a drawing when zoomed in.
	Zoom in / out.
	Zoom to a set percentage or fit to screen.
	Change the **colour** of the line or shape. If multiple people are reviewing and marking up a document this is an easy way to distinguish between users.
	Freehand drawing tool.
	**Shapes**. Add a rectangle, ellipse or cloud.
	**Lines.** Add an arrow or line.
	Add a **text box** or a **callout box**. A callout box automatically generates a design review issue.
	**Add a QR code.** The QR code contains a direct link to the document in iTWOcx. It is recommended a QR code is added to drawings/documents that are printed and used on-site.
	Add a pre-configured stamp to the document. **Note:** Stamps can be configured by System / Project Administrators.
	**Highlight.** Creates a semi-transparent rectangle.
	**Log Issue.** Opens the New Design Review Issue screen to create a design issue whilst marking up the diagram.
	**Edit.** Puts the mark up into edit mode to be able to move existing marked up objects, text etc. The check icon is used to exit edit mode.
	**Undo** and **Redo** actions.
	**Save** the mark ups.
	**Back**. Exits out of the Mark Up screen and returns to the document viewer screen.

Select the tool, mark up the document. Once the mark ups are complete, ensure they are **saved**. If a callout has been added but no issue logged, a popup will display for a new design review issue.

> Adding a QR code to the document allows users on site to check they are looking at the most current revision of a printed drawing (requires access to the iTWOcx mobile app).

4.5 View Mark Ups

When viewing documents that are going through a review, the mark-ups of other users can be toggled on / off.



Step	Description
1. Click **Issues**	Open a document and click the **Issues** tab. The list of annotations / mark ups are visible.  This displays the colour of the mark up, the user that created them, the date and what revision it was against.
2. **Toggle** view	Toggle the annotations on / off by clicking the **checkboxes**.

4.6 Design Review Issue (DRI)

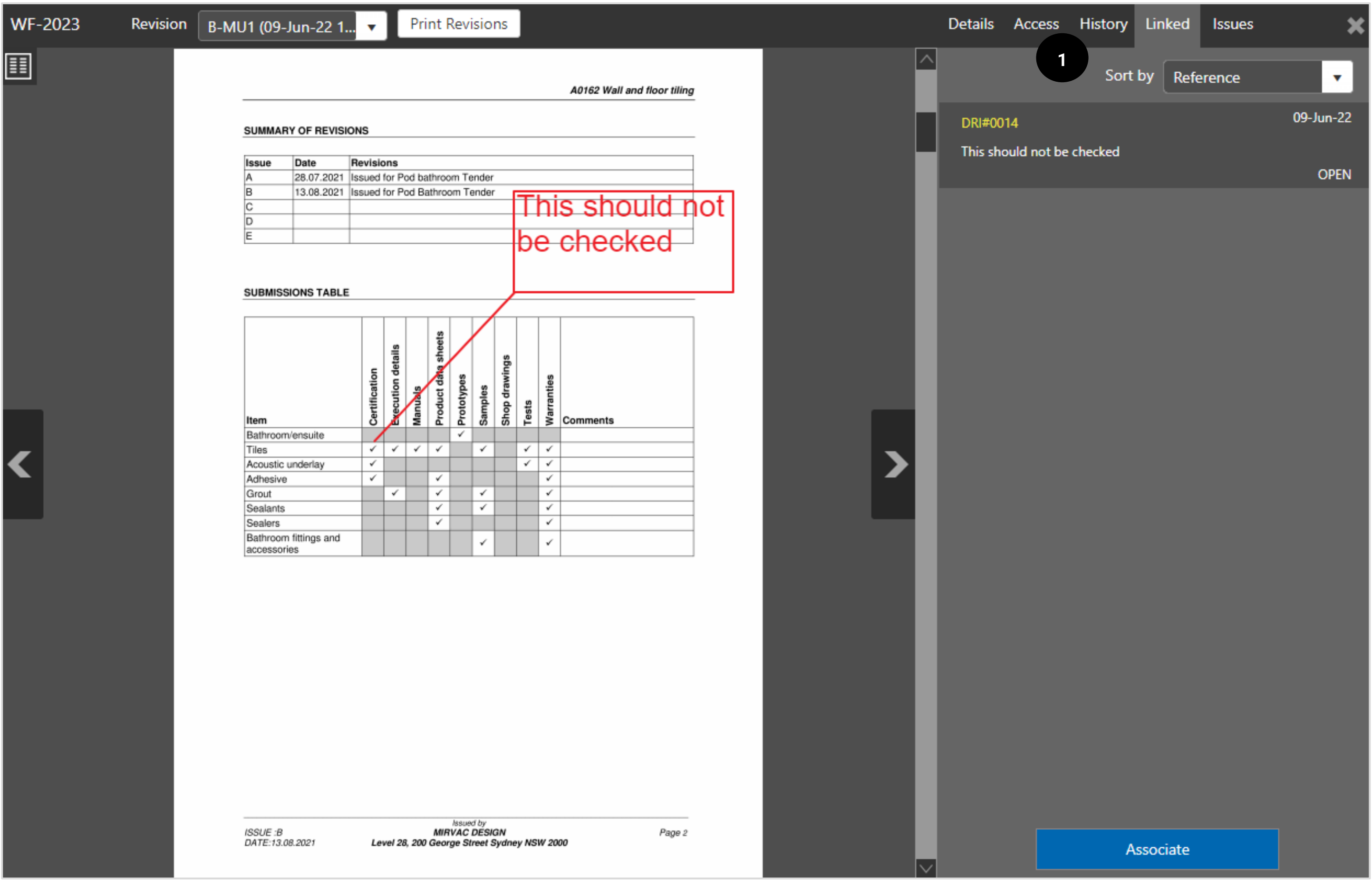
A Design Review Issue (DRI) is created within the document review process and is sent to the document uploader (or others) automatically, it does not require a separate workflow or correspondence.

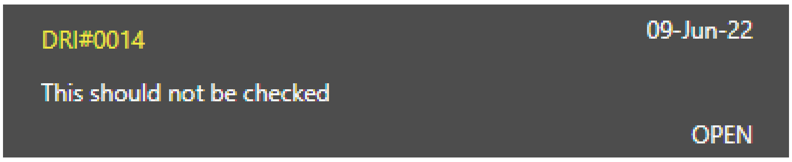
The document uploader (or others) can then review the issue, add comments and/or seek clarification. Once they have resolved the issue they can mark as fixed and upload a new version of the document or supporting documents. These are then reviewed and the fix is marked as resolved or failed.

The design review issues are linked to the document even if the workflow is complete. All issues are carried over to any new revisions to ensure traceability.

Design review issues are not being used initially but may be introduced at a future stage. Steps are listed here for future need.

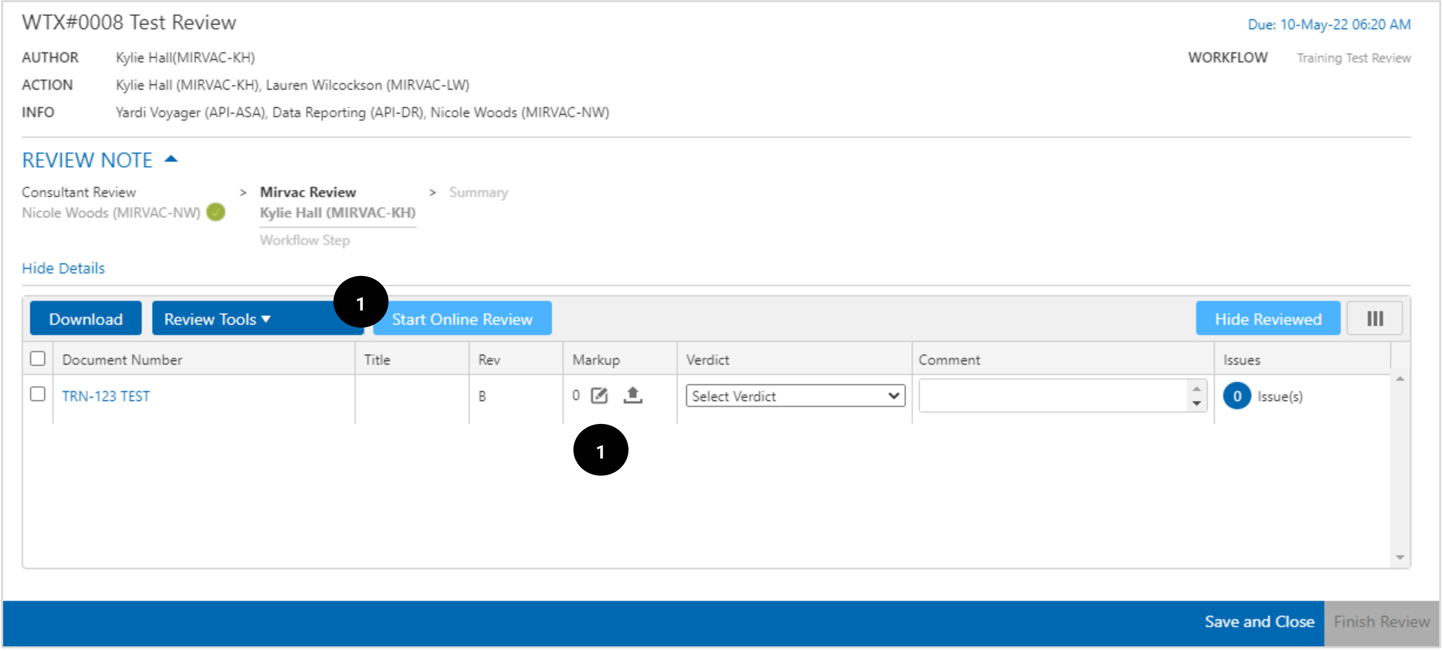
When viewing documents, the **Linked** tab shows design review issues.



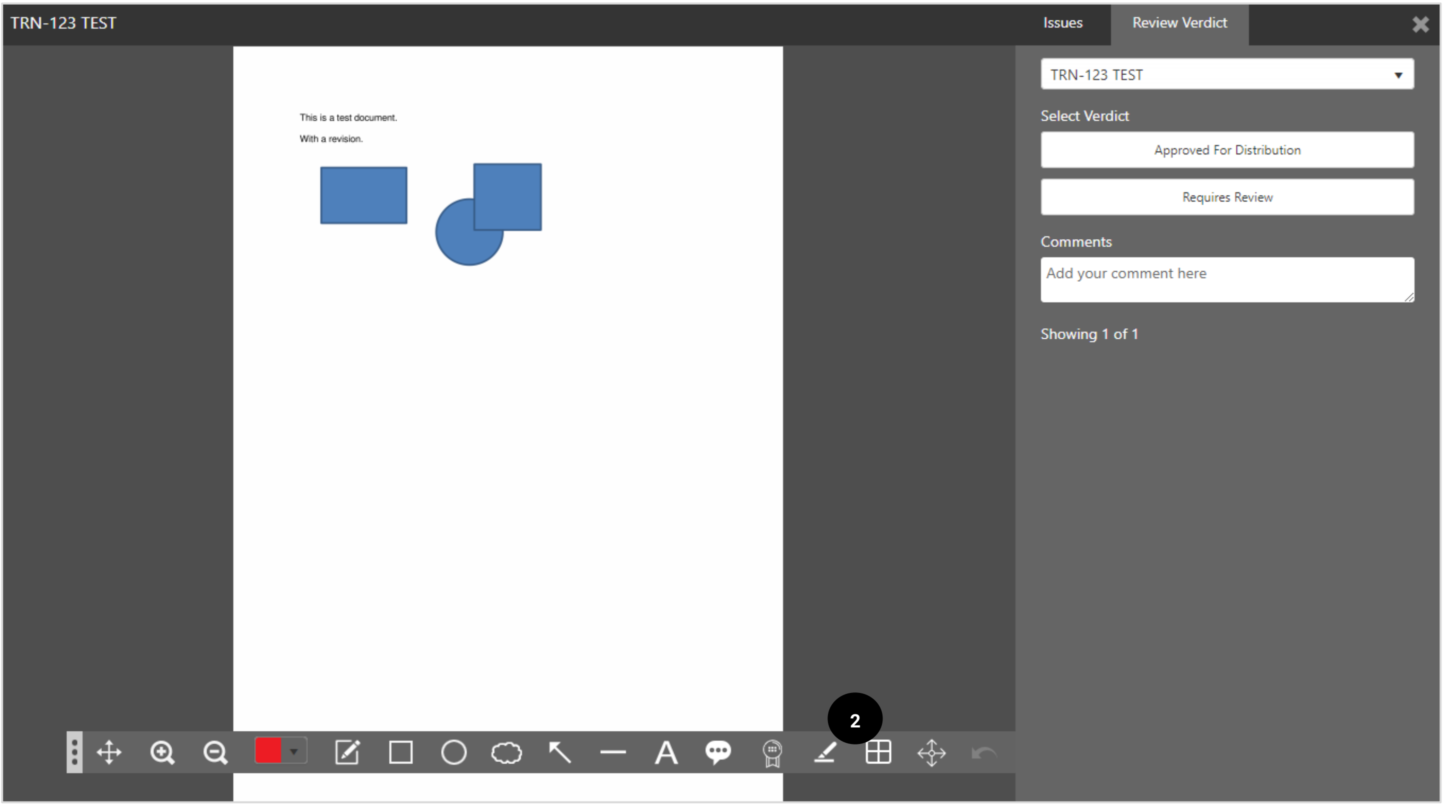
Screen Element	Description
1. **Linked tab**	Open a document and click the **Linked** tab. The Design Review Issues (DRI) are visible.  There is a **link** to the design review issue (e.g. DRI#0014), the date it was created, the contents of the DRI and the status.

4.6.1 Create a Design Review Issue

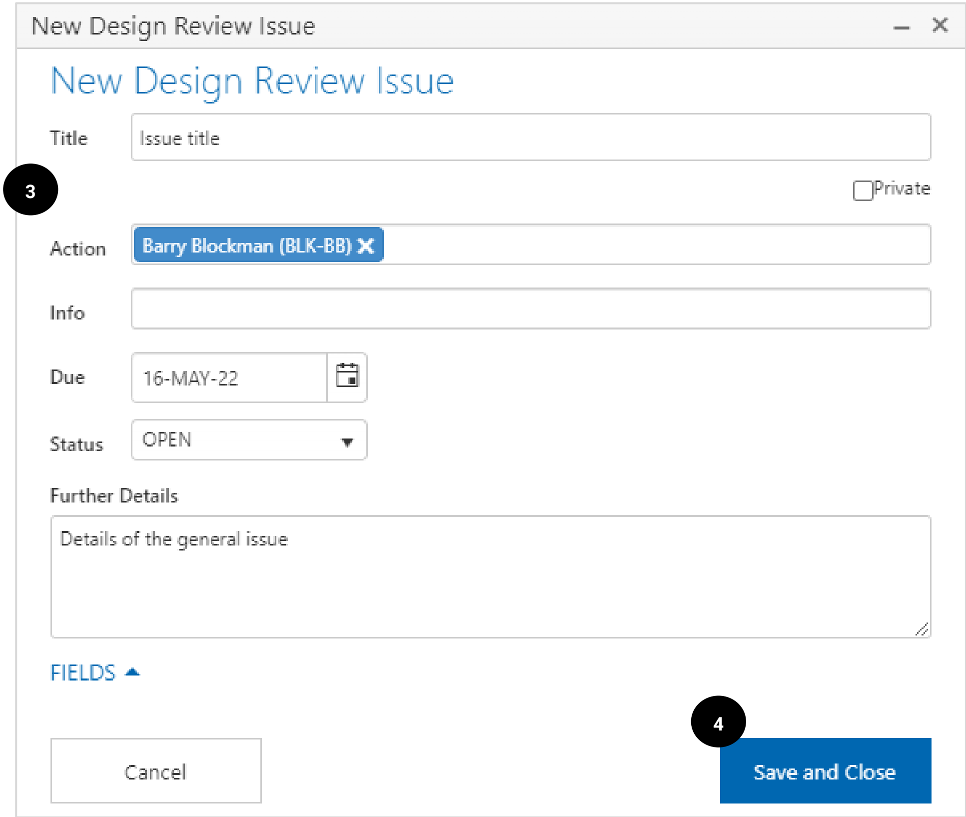
Design Review Issues are created as part of the workflow review. Users can create a Design Review Issue within the Mark Up tool by using the **log issue** icon.



Step	Description
1. Click **Start Online Review**	Open the workflow transmittal. Click **Start Online Review** or click the **Mark Up** icon. The document reviewer opens with the mark up toolbar.



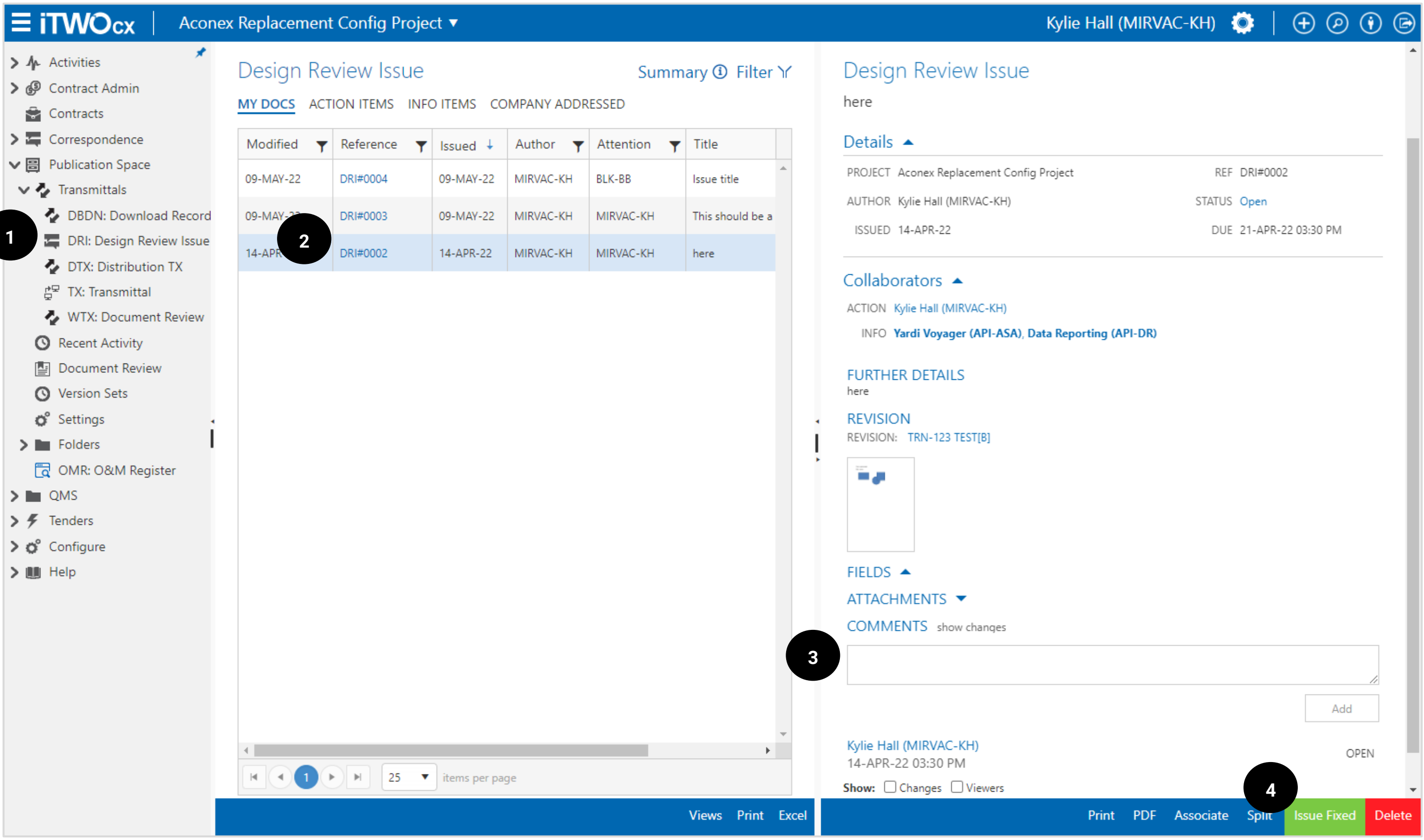
Step	Description
2. Click **Log Issue** icon	Click the log issue icon to create a general design review issue for the whole document.  The New Design Review Issue popup displays.



Step	Description
3. Complete fields	Update the required fields: • add the title of the issue • update the action on field if required (defaults to document uploader) • add users to info field if required • update due date • update status (defaults to open)
4. Click **Save and Close**	The issue is created and linked to the document.

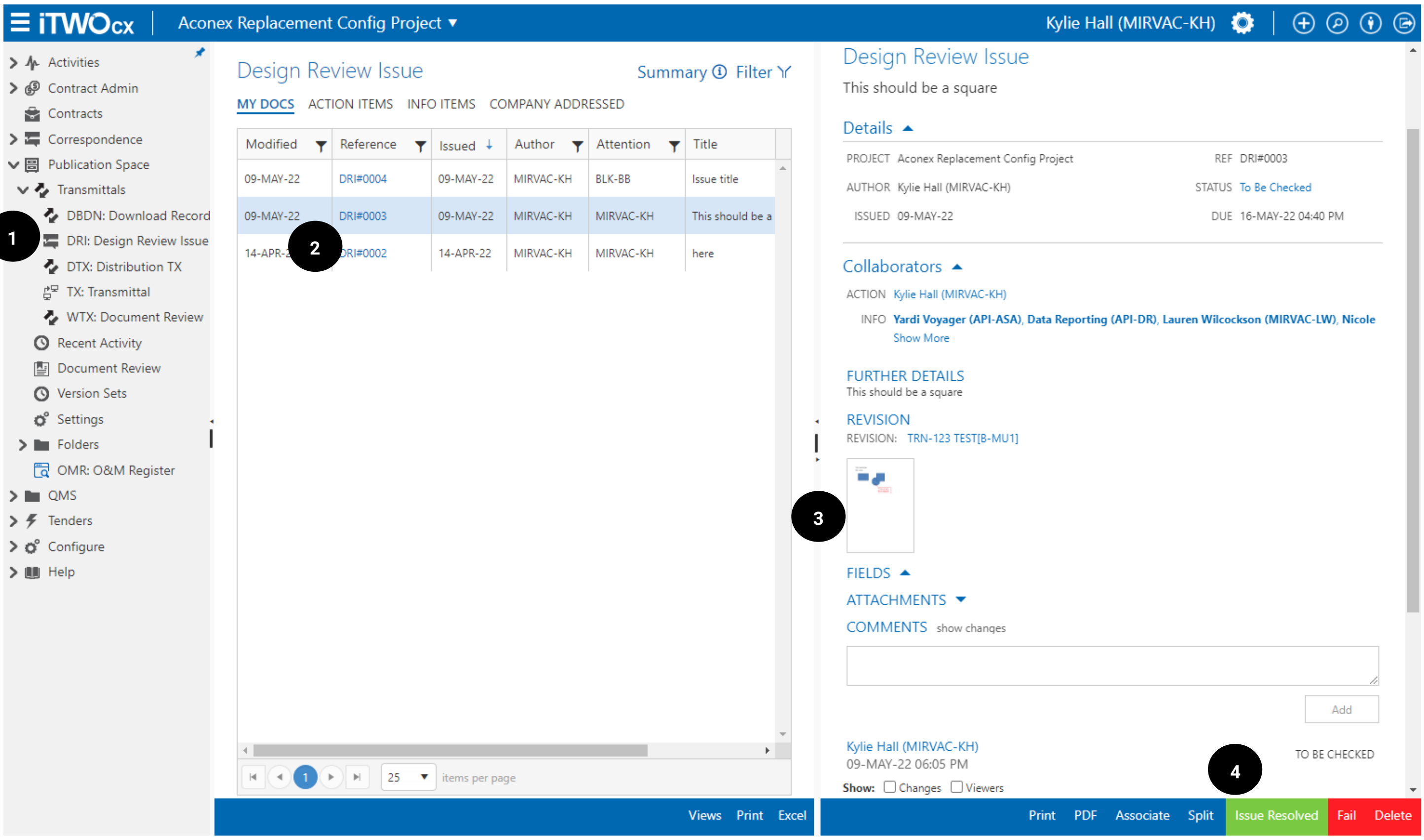
4.6.2 Resolve a Design Review Issue

When a design review issue is created it is assigned to the document uploader or a nominated user. The user then adds comments and/or and supporting documentation and indicates the issue has been resolved.



Step	Description
1. Locate the **Design Review Issue**	Navigate to **Publication Space > Transmittals > Design Review Issue**
2. Open the DRI	Click the **DRI reference ID** hyperlink. Displays on the righthand side.
3. Add **Comments**	Add relevant comments to the DRI.
4. Click **Issue Fixed**	If the issue has been resolved, click **Issue Fixed.** A notification is sent to the original reviewer and the status of the DRI is changed to **To Be Checked**.

The original reviewer then has the opportunity to check the comments and any new revisions of the document before either marking the issue as resolved or failing the DRI resolution.



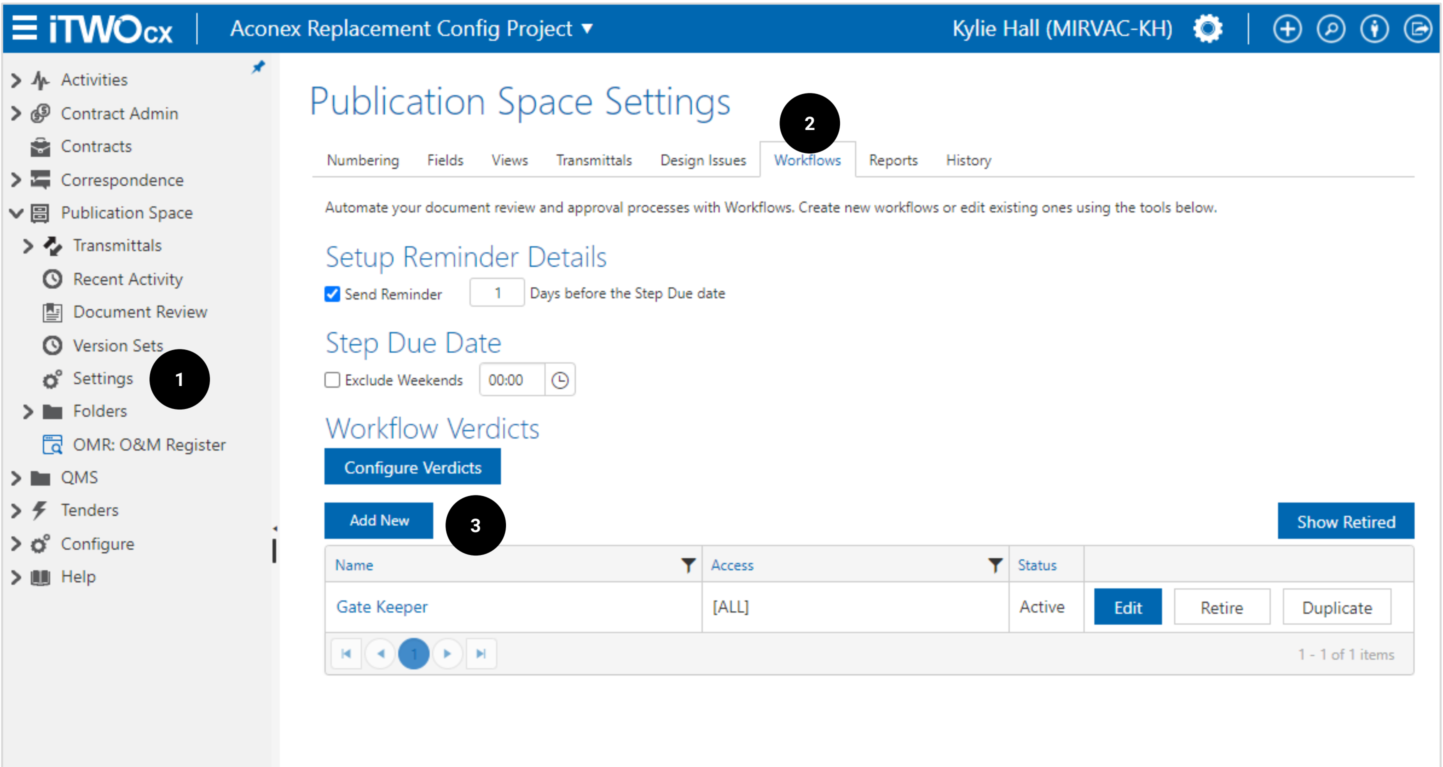
Step	Description
1. Locate the **Design Review Issue**	Navigate to **Publication Space > Transmittals > Design Review Issue**
2. Open the DRI	Click the **DRI reference ID** hyperlink. Displays on the righthand side.
3. Review resolution	Review comments, documents or attachments that show the issue has been addressed.
4. Click relevant response	Click relevant option: • **Issue Resolved** – changes the status to **resolved** • **Fail** – changes the status to **open**

If the DRI resolution is failed the document uploader is notified of the rejection. The review process continues until the issue is resolved.

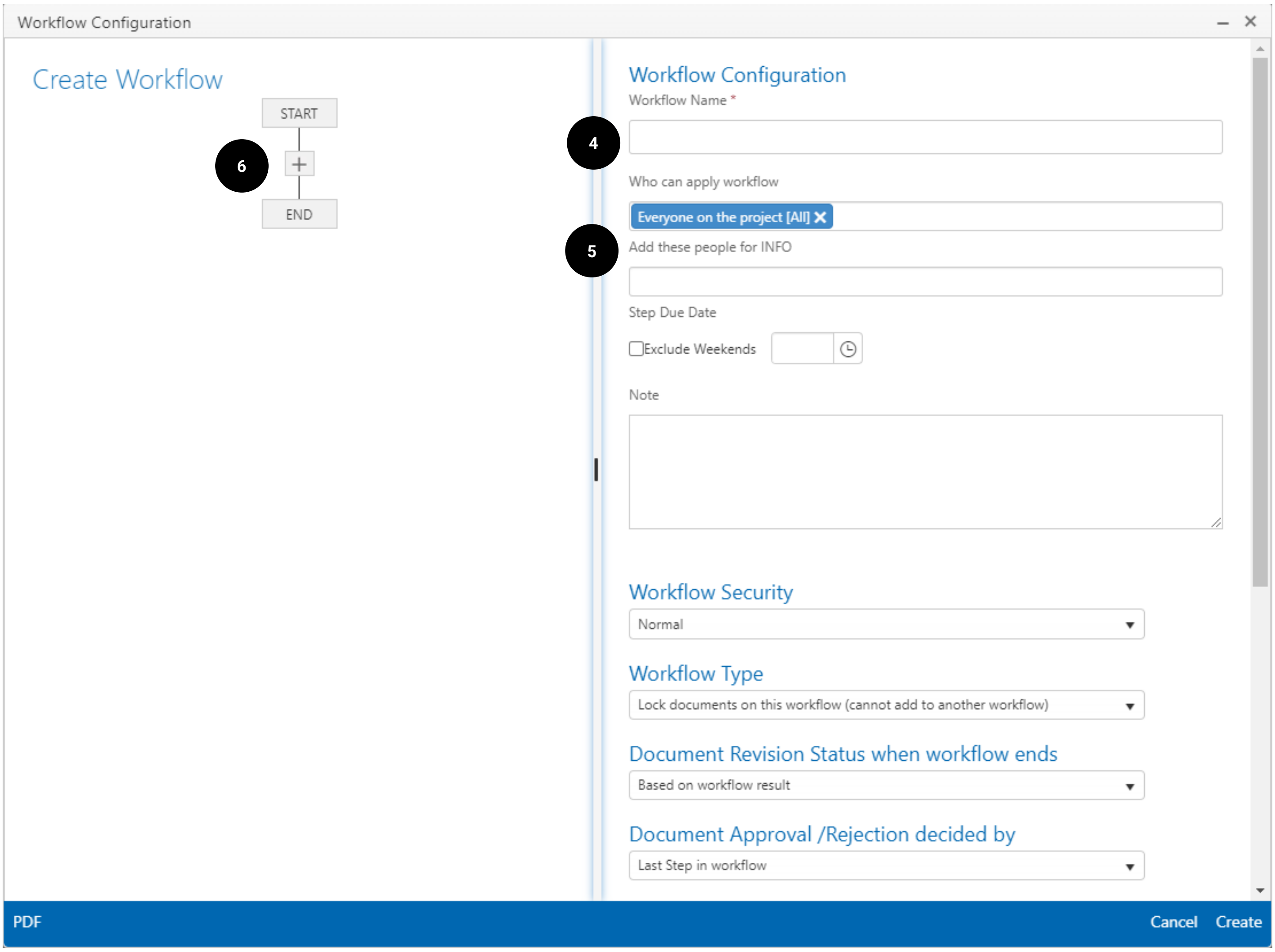
Remember that issues are linked to any revision of the document and therefore new versions can be uploaded and reviewed without losing the linked issues.

4.7 Create a Workflow (Admin)

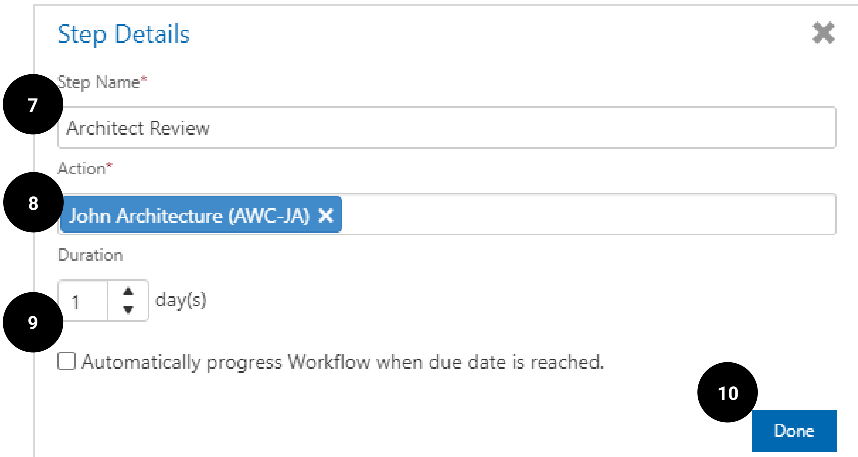
Workflows are used to send documents through a set path for review and approval. Workflows are created for each project instance by the System / Project Administrator.

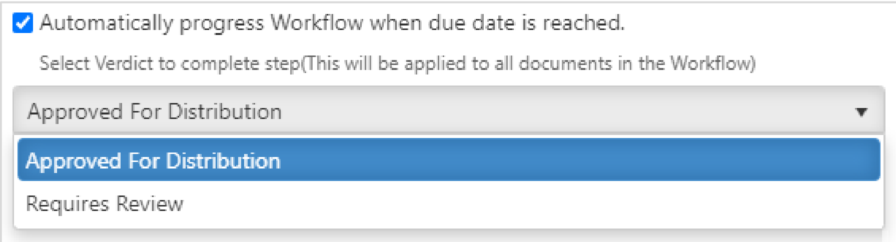
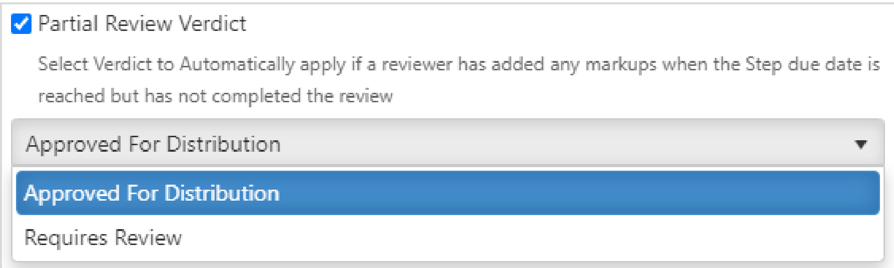


Step	Description
1. Click **Settings**	Expand the Publication Space in the menu frame and click the module settings.
2. Click **Workflows** tab	Click the workflows tab. A list of available workflows is displayed.
3. Click **Add New**	The Workflow Configuration page is displayed

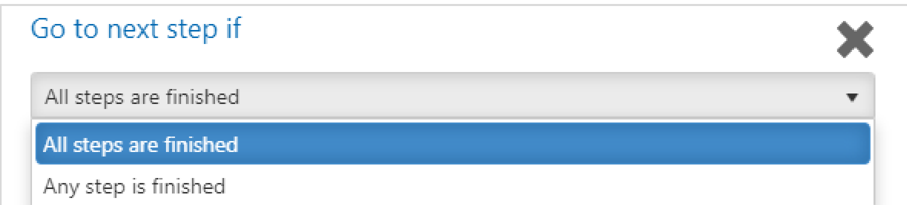


Step	Description
4. Add Workflow Name	Enter the name for the workflow
5. Update **users**	The default setting is the workflow can be applied by everyone. To change, add/remove as required. Add people in the info field where required.
6. Add **Workflow Step**	Click **+** in the workflow to add the first step in the review. The Step Details popup displays

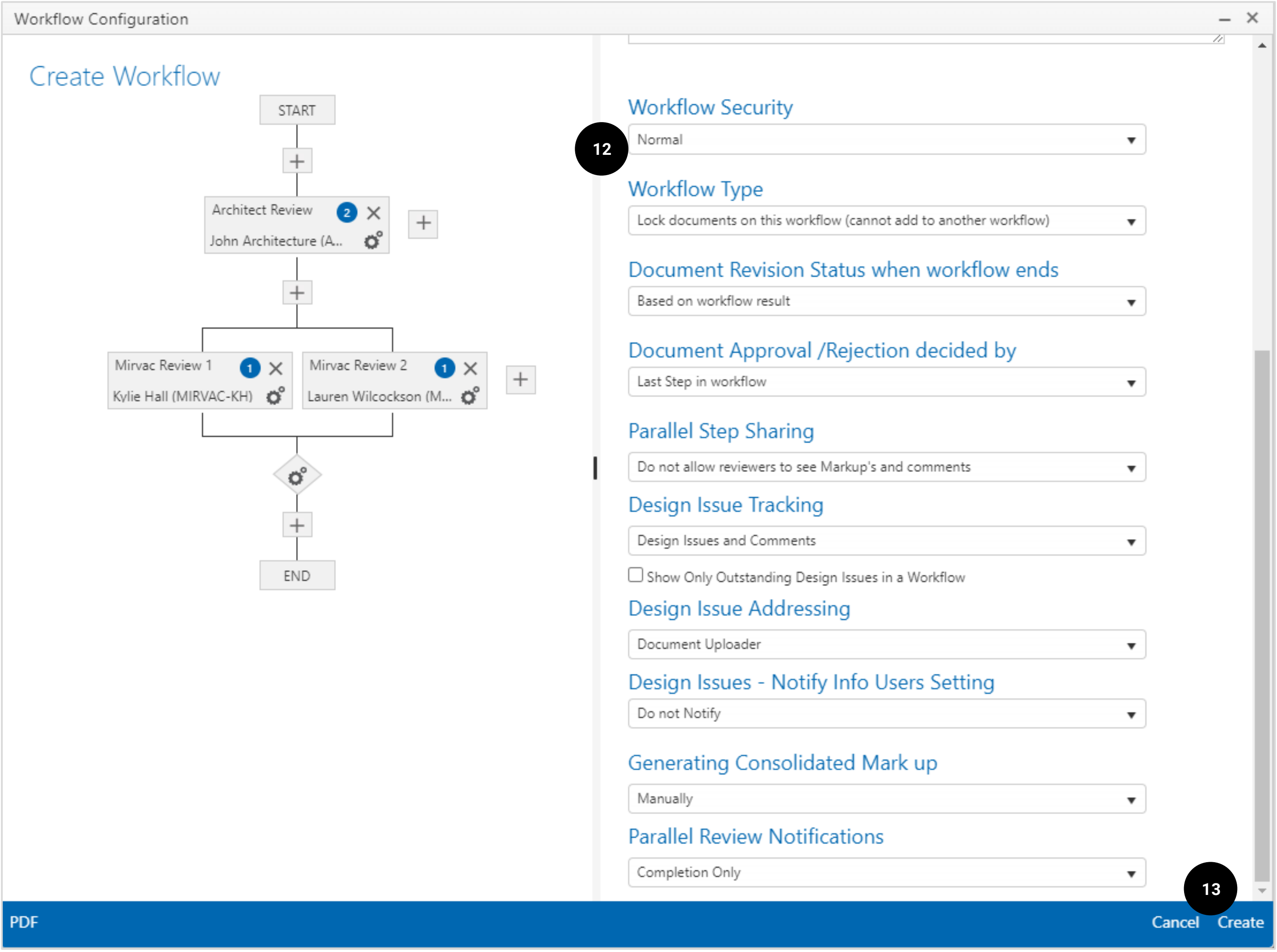


Step	Description
7. Add **Step Name**	Enter the name for the step.
8. Add **users**	Add users into the **Action** field. Multiple users can be added, as can groups / roles. It is best practice to use a role rather than an individual to ensure the workflow continues working if there is a change in personnel.
9. Set **days** and **auto progress**	Determine the length of time for the step, in days. This is the length of time the reviewer has to complete the review before it is considered late. Select the Automatically progress checkbox if the required action for the workflow is to continue at the end of the set timeframe irrespective of the completion of the review step.  Select whether partial review verdict is required. 
10. Click **Done**	Click **Done** to save the step.
11. Continue adding workflow steps	Click **+** to continue to add steps in the workflow until all have been captured.

Steps can be added in sequence or in parallel. When creating parallel steps, a decision box is required to set whether each step needs to be complete, or just one.



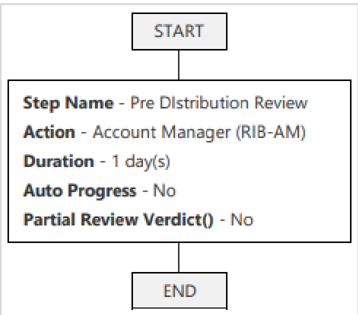
After setting up the required steps in the workflow, the overall workflow settings need to be checked and updated. This determines how the documents are treated during the review stages, how to manage rejected reviews, notifications, etc.



Step	Description	
12. Configure workflow	Select the relevant options from the dropdown menus.	
	Option	**Description**
	Workflow Security	Select from Normal or Private.
	Workflow Type	Set whether the documents are to be **locked** whilst going through the review. If locked, the documents can't be distributed to others for review until the workflow is complete.
	Document Revision Status	Set whether the **document revision status** is updated based on the result of the workflow.
	Document Approval / Rejection	Select whether the workflow is **rejected** as soon as one reviewer rejects or defined by the final step in the workflow.
	Parallel Step Sharing	Set whether parallel reviewers can see the **mark ups and comments** left by other reviewers.
	Design Issues Tracking	Set what is **tracked** during the review - Design Issues and Comments, Comments only or issues only.

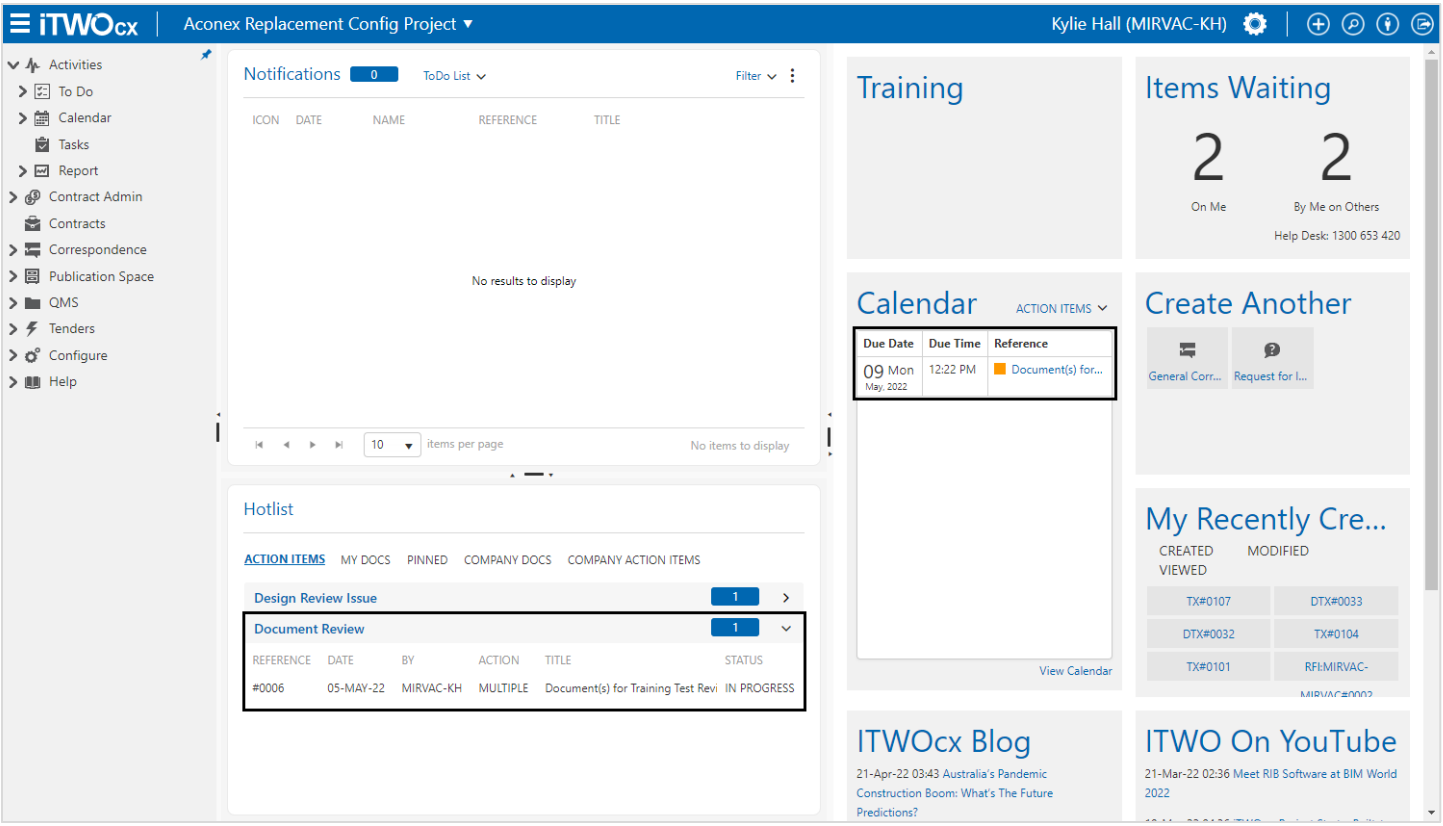
<table>
<tr><th>Step</th><th colspan="2">Description</th></tr>
<tr><td rowspan="6">12. Configure workflow (cont)</td><td colspan="2">Select the relevant options from the dropdown menus.</td></tr>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Design Issues Addressing</td><td>Set the person to receive the action of the design issues that are created during the workflow – document uploader, workflow initiator, issue creator, a custom user (need to add the user) or set as manual to be selected each time.</td></tr>
<tr><td>Design Issues - Notifications</td><td>Select between Do not notify and Notify as per user settings</td></tr>
<tr><td>Consolidated Mark Up</td><td>Select between manual or automatic consolidation of mark ups</td></tr>
<tr><td>Parallel Review Notifications</td><td>Set how parallel reviewers are notified when the step is complete.
Completion only – notified once everyone has completed their review.
All reviews – notified each time anyone completes their review</td></tr>
<tr><td>13. Click Create</td><td colspan="2">Click Create to save the workflow.</td></tr>
</table>

To see the full details of the workflow, click **PDF** in the action toolbar. This downloads a printer friendly version that shows each step in detail as per the below example.

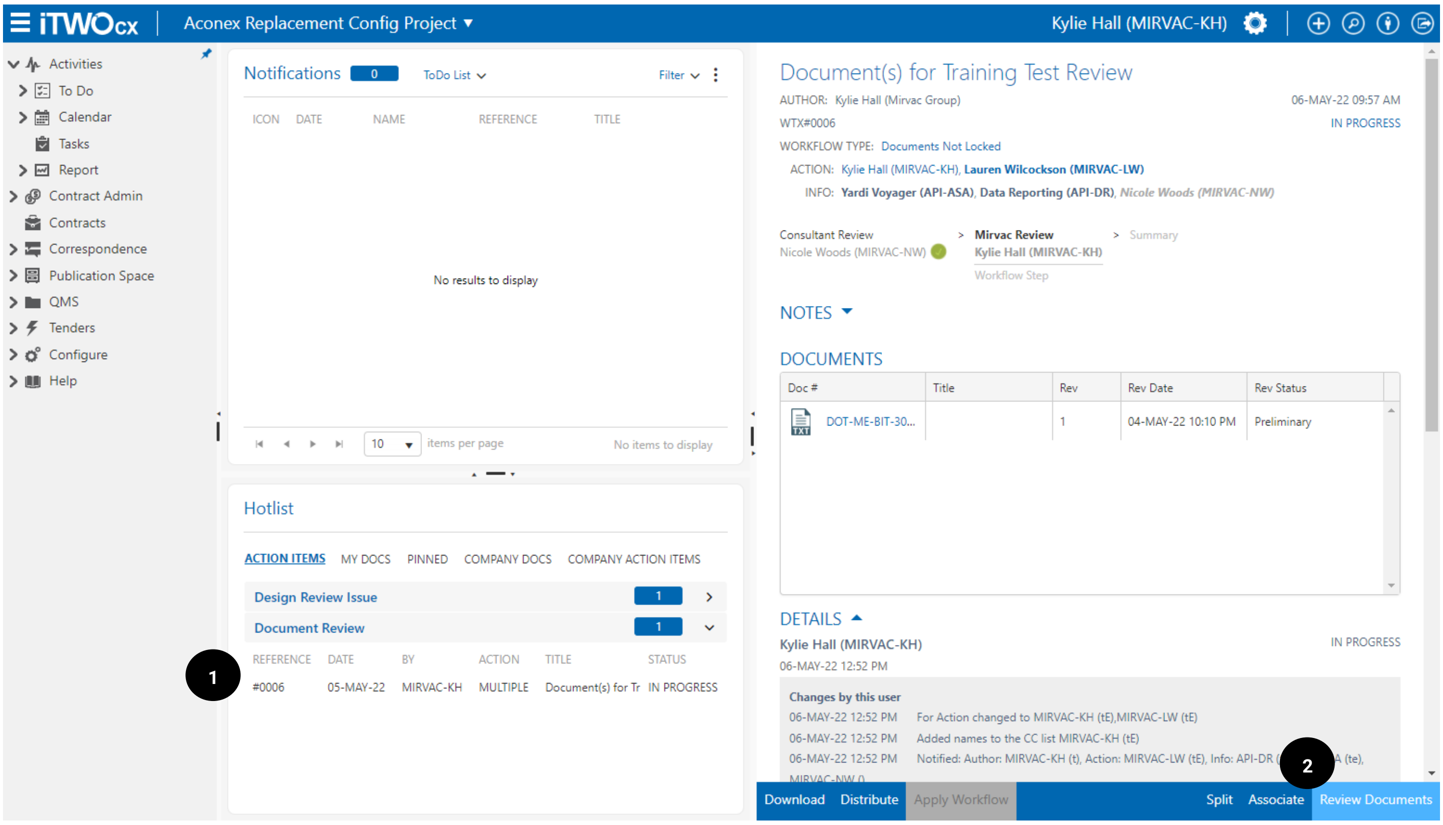


4.8 Complete a Workflow Review

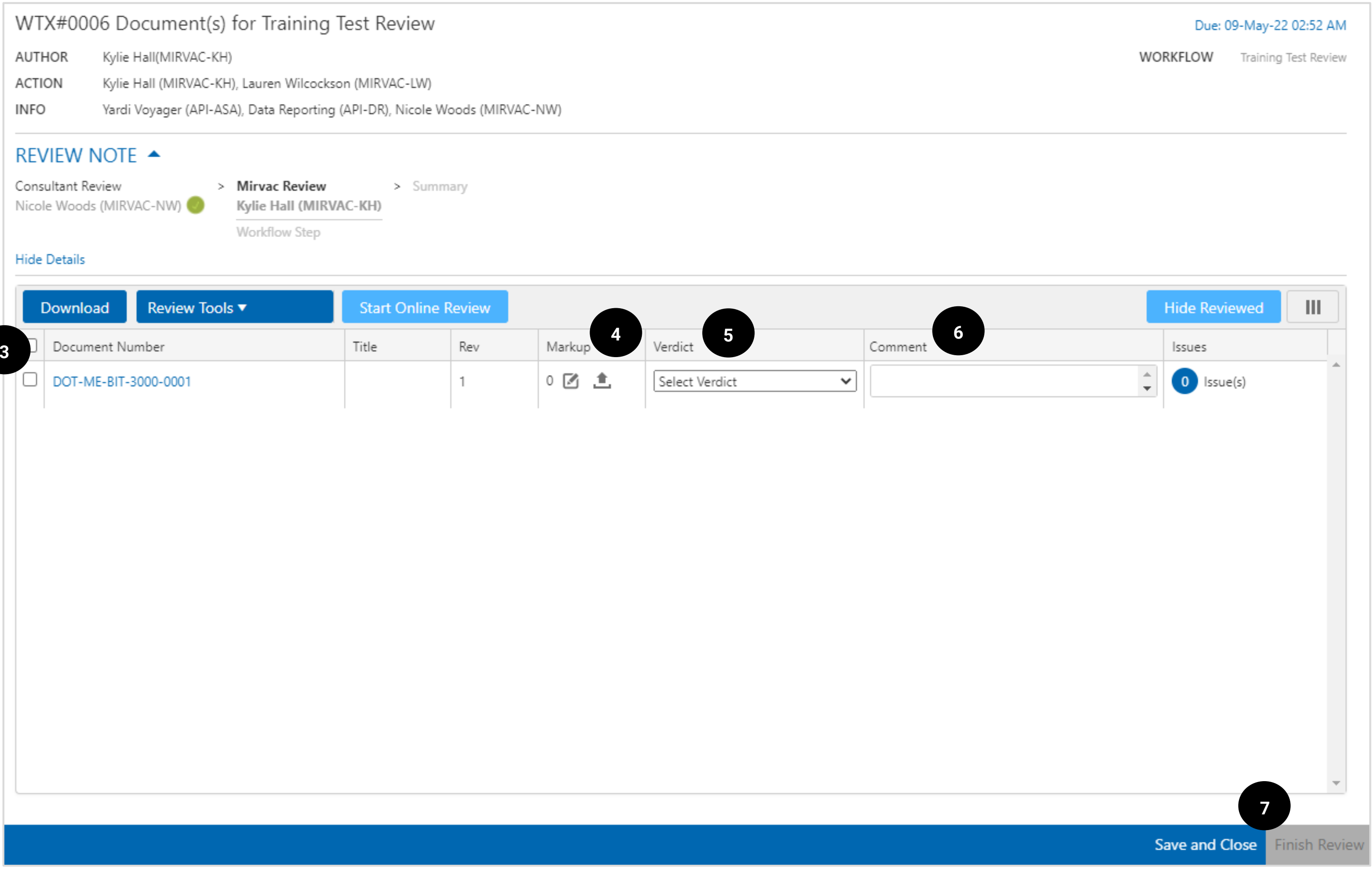
When documents are shared for review they are sent via a **Workflow Transmittal (WTX)**. The users that need to complete the action are sent an **email notification** and the action item is visible in the **Activities Module > Hotlist** and in the **calendar widget**.

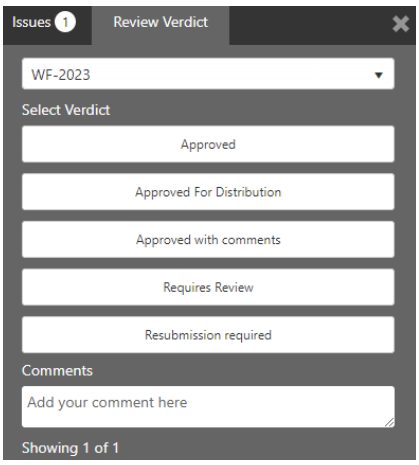


To complete a review, open the item to view on the righthand side of the screen.



Step	Description
1. **Click item**	Click the review item to open it on the righthand side of the screen
2. **Click Review Documents**	Click Review Documents. The Workflow screen opens

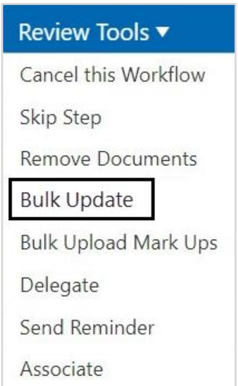


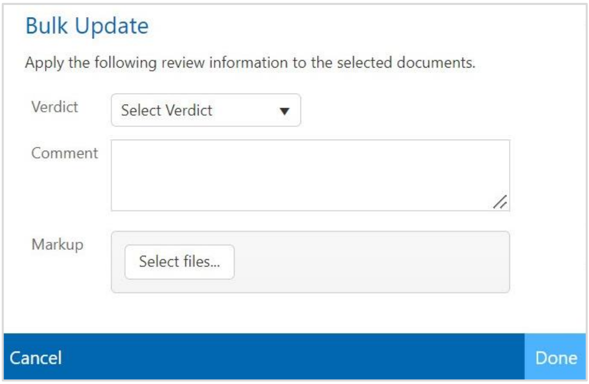
Step	Description
3. **View Document**	There are two options to view the document: 1. Click the **Download** button to save to your computer to open and view 2. Click the **file name** to open and view the document The latest revision of the file, including any mark ups attached in previous steps of the workflow, is displayed/downloaded
4. Complete **Mark-up**	If required, complete mark ups to the document by clicking the Mark Up icon . Refer to [Mark Up Documents] section for further details.
5. Apply **Verdict**	Select the **Verdict** from the dropdown menu: • Approved • Approved for Distribution • Approved with Comments • Requires Review • Resubmission required. **Note:** Users can also apply the verdict and add comments within the mark up tool directly on the Review Verdict tab. 

Step	Description
6. Add **Comments**	Add supporting comments.
7. Click **Finish Review**	Click **Finish Review** if all required actions are taken. Note: Button is greyed out until a verdict has been applied to each document. Finish Review To save the work reviewed to date and pick up at a later time, click **Save and Close**. Save and Close

Apply Bulk Verdict

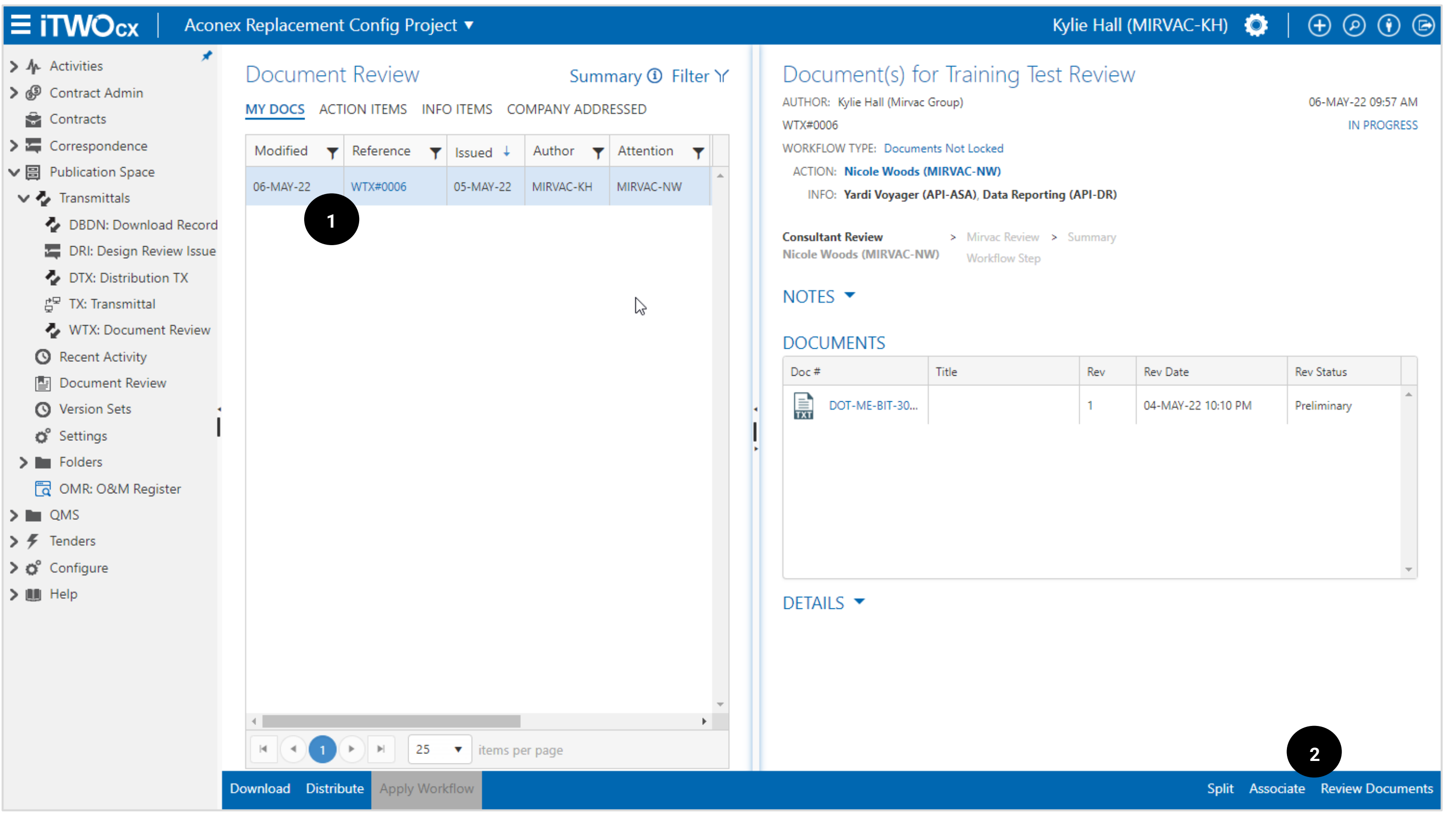
If reviewing multiple documents, a bulk decision can be made. From the review tools, use **Bulk Update** and complete the **verdict** and **comments.**



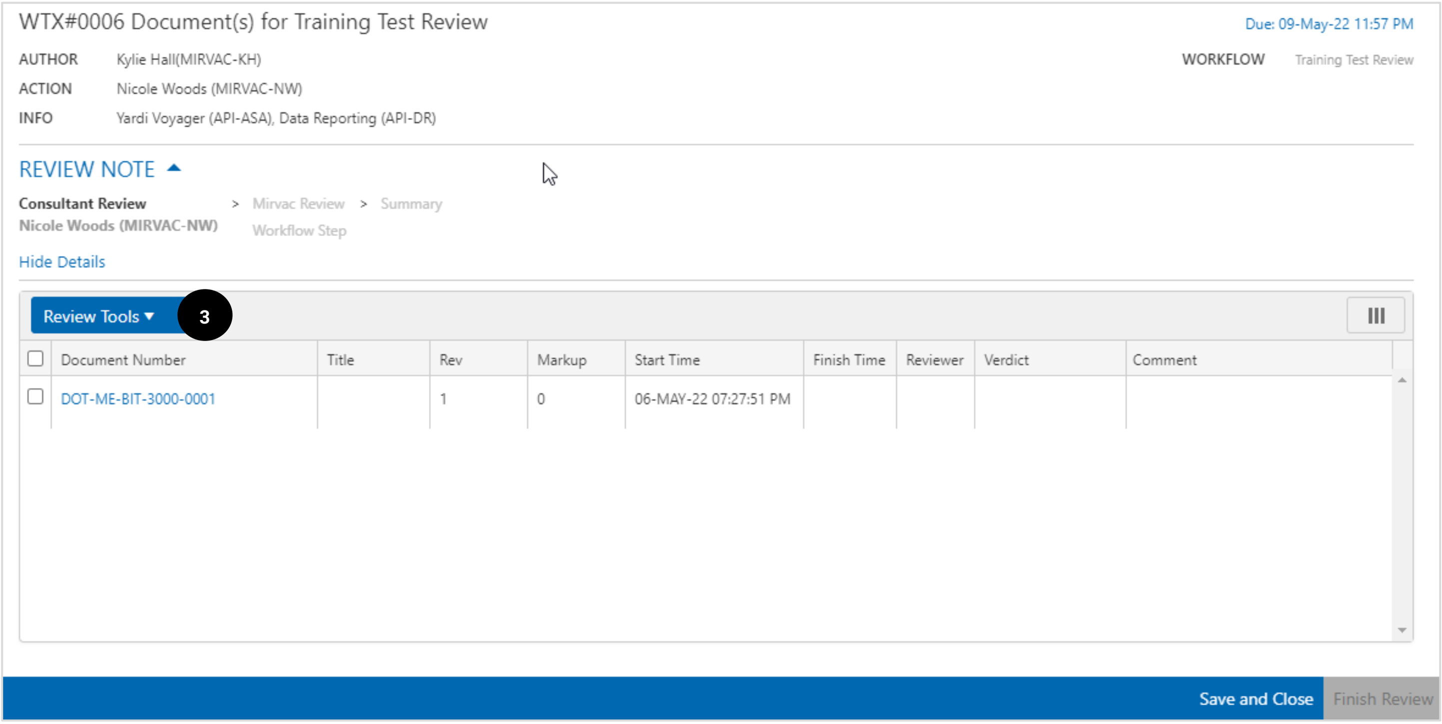


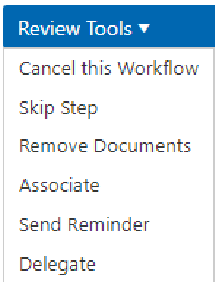
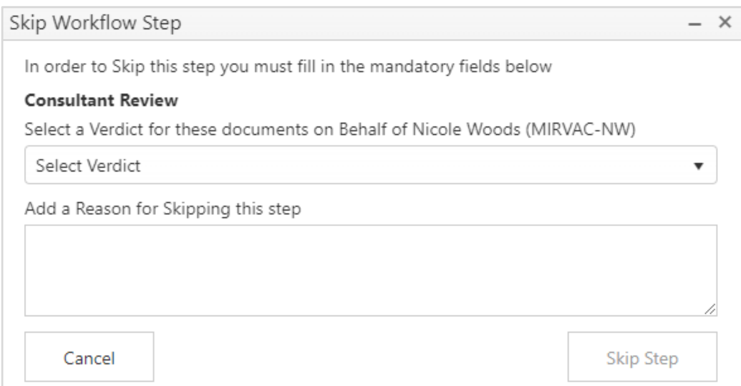
4.9 Skip a Step in a Workflow (Admin)

Steps in a workflow can be skipped by an administrator. The following steps outline how to achieve this.

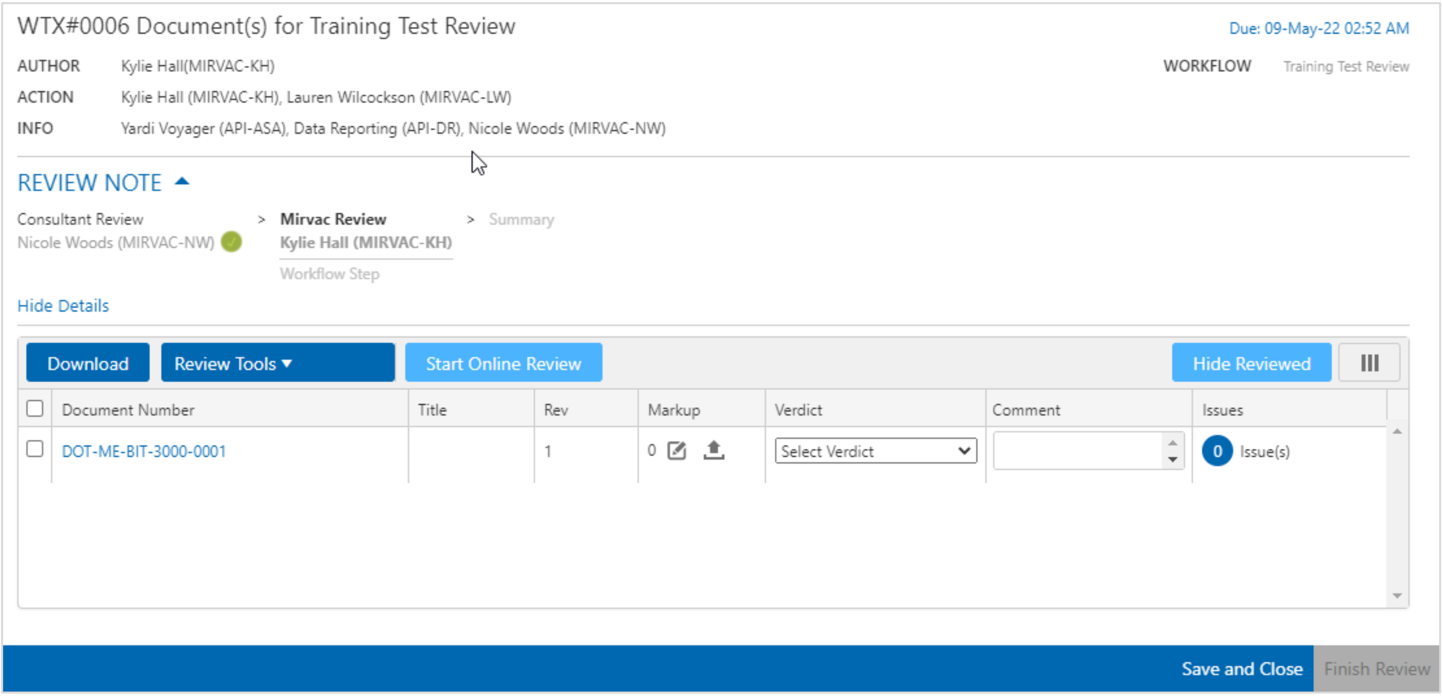


Step	Description
1. Open **Document Review Transmittal**	Navigate to **Publication Space > Transmittals > WTX: Document Review.** Click the required workflow transmittal. Request is displayed on righthand side of screen.
2. Click **Review Documents**	Click Review Documents. The Workflow screen opens.



Step	Description
3. Click **Review Tools**	Open the review tools dropdown menu  **Note:** Delegate can be used to assign to another user instead of skipping the step completely.
4. Select **Skip Step**	The Skip Workflow Step pop up displays 

Step	Description
5. Select **Verdict** and **Add reason**	Select the required option for the verdict: • Approved • Approved for Distribution • Approved with Comments • Requires Review • Resubmission required. Add the reason for skipping the step.
6. Click **Skip Step**	Click Skip Step. The Workflow screen opens.



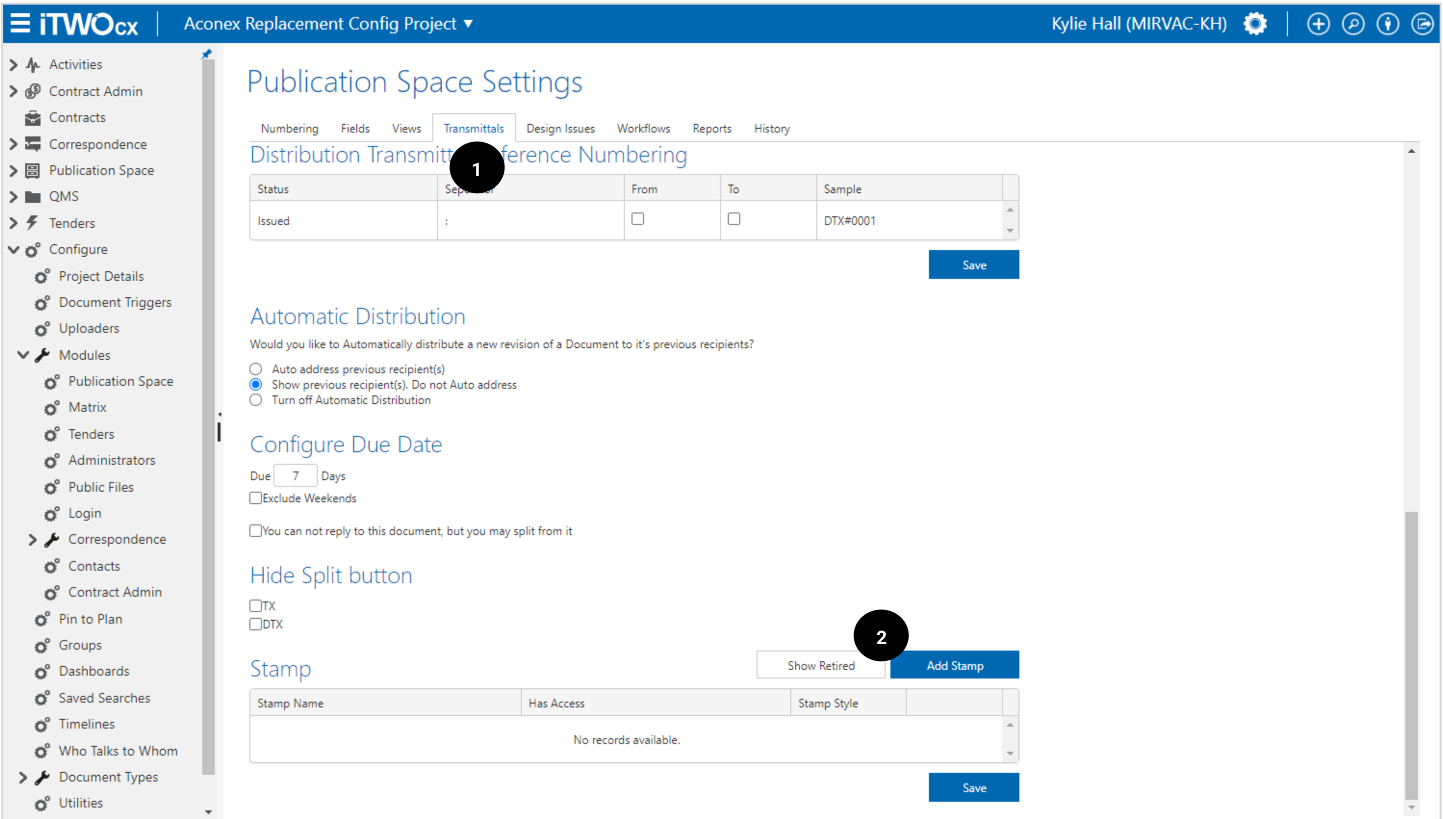
The step shows the **green tick** next to the step that has been skipped. Relevant notifications are sent to the next user / group / role in the workflow.

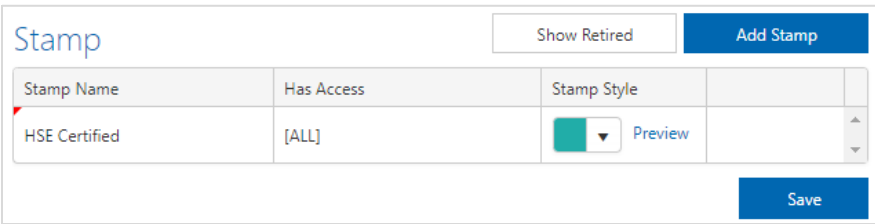
When skipping a step, the other users in the workflow receive notification the step has been skipped and the reason why.

06-MAY-22 12:52 PM Kylie Hall changed verdict of DOT-ME-BIT-3000-0001 to Approved For Distribution (Skip Step)
06-MAY-22 12:52 PM Kylie Hall Completed the Step on Behalf of Nicole Woods (MIRVAC-NW) with the reason : User left company

4.10 Create a Stamp (Admin)

Stamps are useful tools to add to documents to indicate something is approved, rejected, certified etc. Stamps can be created and customised on a per project basis and are text based.



Step	Description
7. Navigate to **Transmittal Settings**	Navigate to **Configure > Modules > Publication Space** Click the **Transmittal** tab.
8. Click **Add Stamp**	Scroll to the bottom of the transmittal tab to the Stamp section. Click **Add Stamp**.
9. Create **Stamp**	Enter a name for the stamp. Select the users that can access the stamp. Select the colour for the stamp from the dropdown menu. 
10. **Hover mouse** over Preview	Hover the mouse over the preview link to see the stamp.
11. Click **Save**	The stamp is now available for use within the mark-up tools.

5 Move, Download, Print and Delete

Over the course of a project, documents may need to be moved, downloaded, printed or deleted.

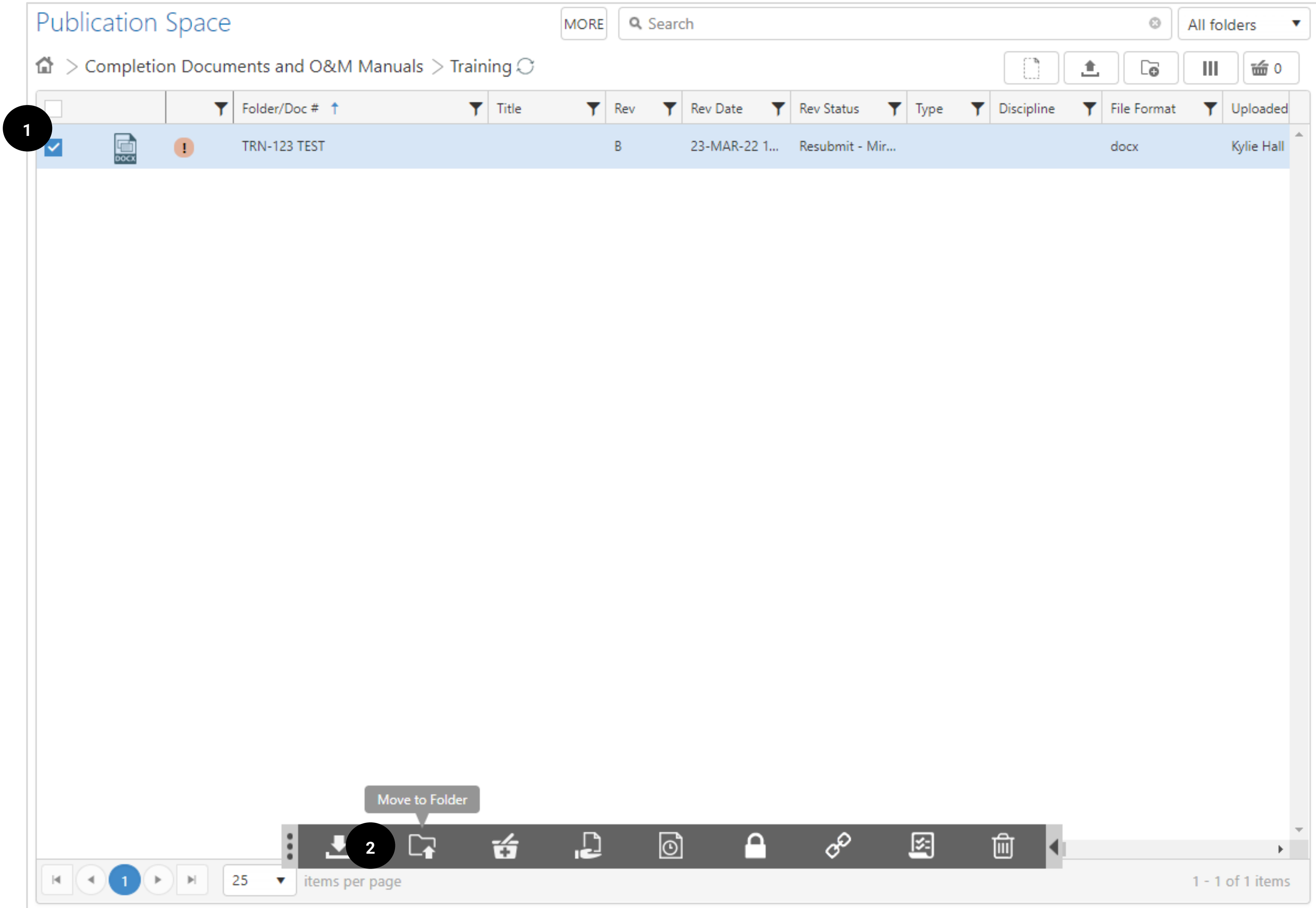
5.1 Move Documents

If a document is uploaded into the wrong folder, it can be moved to another folder by:

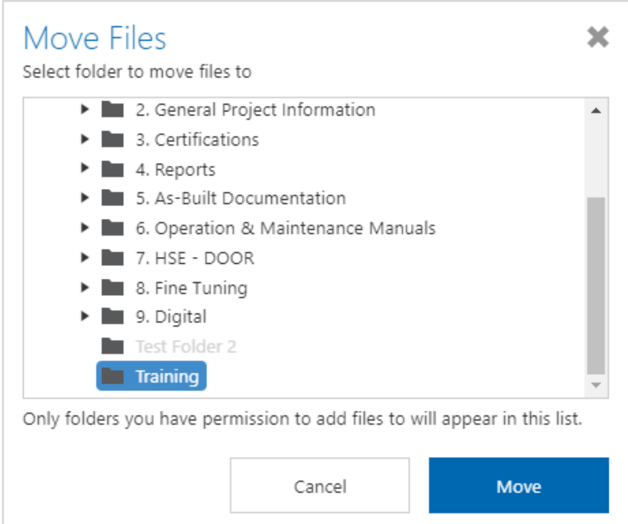
- Using the **move to folder** feature
- Using the **basket**

5.1.1 Move to Folder

Move to folder is generally used to move one or more documents from one folder to another folder.

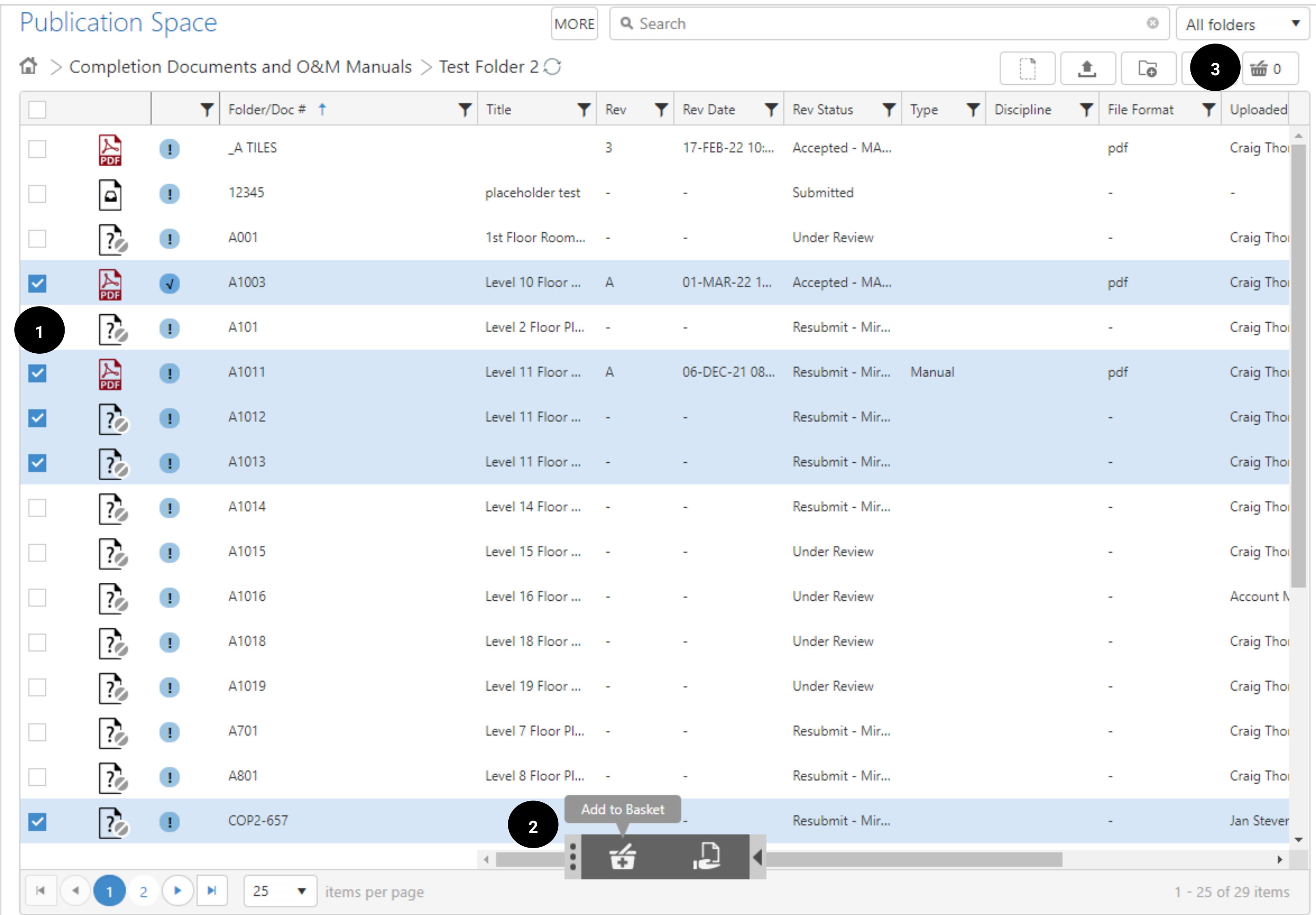


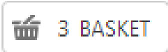
Action	Description
1. Select Document	Highlight or tick the required document
2. Click **Move to Folder** icon	Click the move to folder icon  The Move Files pop up displays.

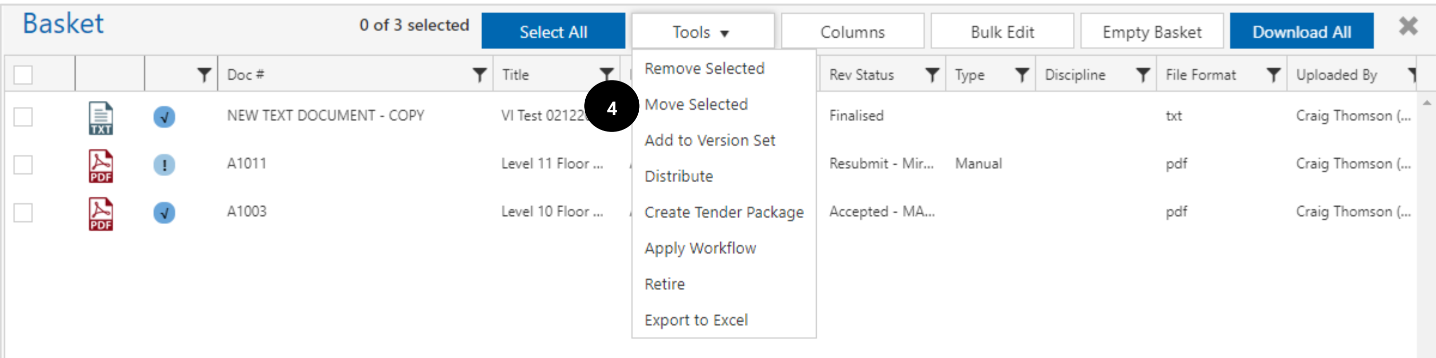
<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>3. Select folder location</td><td>Locate the required folder location from the folder hierarchy.

</td></tr>
<tr><td>4. Click Move</td><td>Click Move and the file is moved to the new location.</td></tr>
</table>

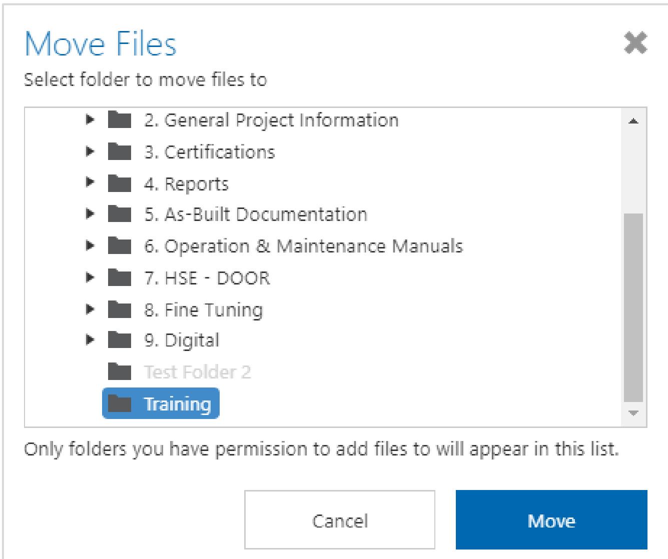
5.1.2 Move Using the Basket

The Basket is used when moving multiple documents to a new folder. This can include a whole folder, or documents across different folders.



Action	Description
1. Select Document	Tick the required documents to move.
2. Click **Add to Basket**	Click Add to Basket icon.  Navigate to other folders and continue adding documents to the basket as needed.
3. Click **Basket**	Click **Basket** from the top right.  The Basket displays.



Action	Description
4. Select **Tools > Move Selected**	From the basket, select **Tools > Move Selected** from the drop down menu. The Move files popup displays.
5. Select folder location	Locate the required folder location from the folder hierarchy. 
6. Click **Move**	Click Move and the file is moved to the new location.

5.2 Download Documents

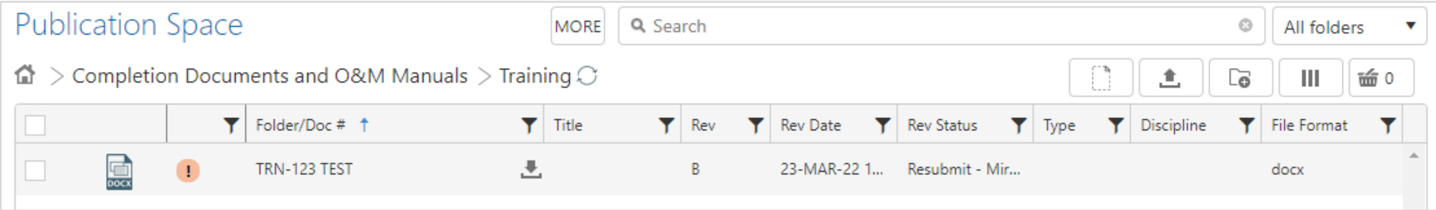
At times you'll need to download a document, or multiple documents, to complete required actions.

There are a few ways to download:

- From the folder list
- When viewing a document
- Bulk download from the basket
- Downloading from a transmittal notice

5.2.1 Download from Folder List

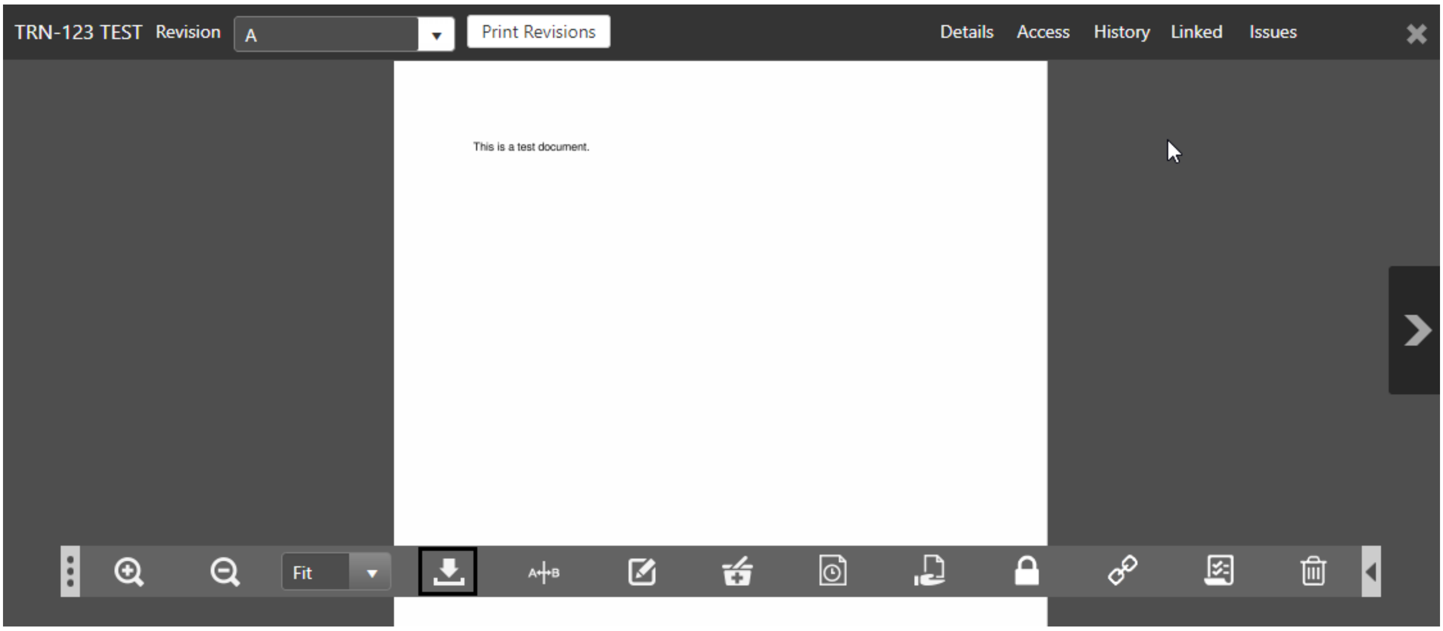
Download from the folder list is an easy way to access a document or an entire folder of documents.



Action	Description
1. Locate Document	Navigate to the folder containing the document.
2. **Hover** over Doc# or Select document	Hover over the name to reveal the download icon or select the document to reveal the document toolbar.
3. Click **Download**	Click the download icon. The document is downloaded to the computer and available.

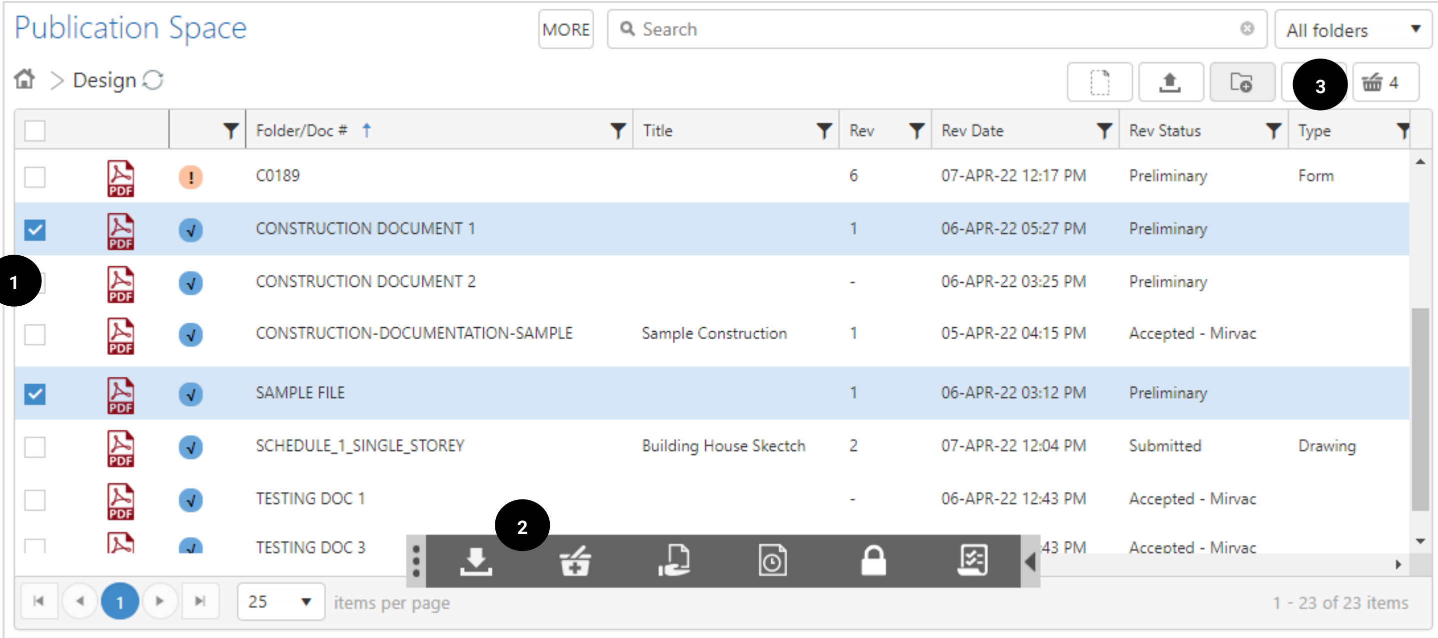
5.2.2 Download while Viewing a Document

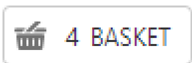
When viewing a document, the download icon is available in the toolbar. Simply click the download icon .

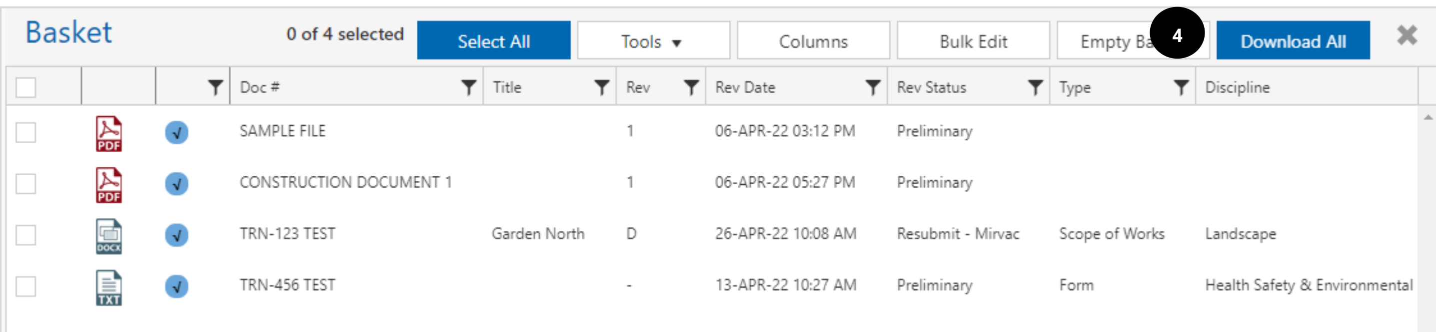


5.2.3 Bulk Download from the Basket

The Basket is used to download multiple documents across a range of folders.



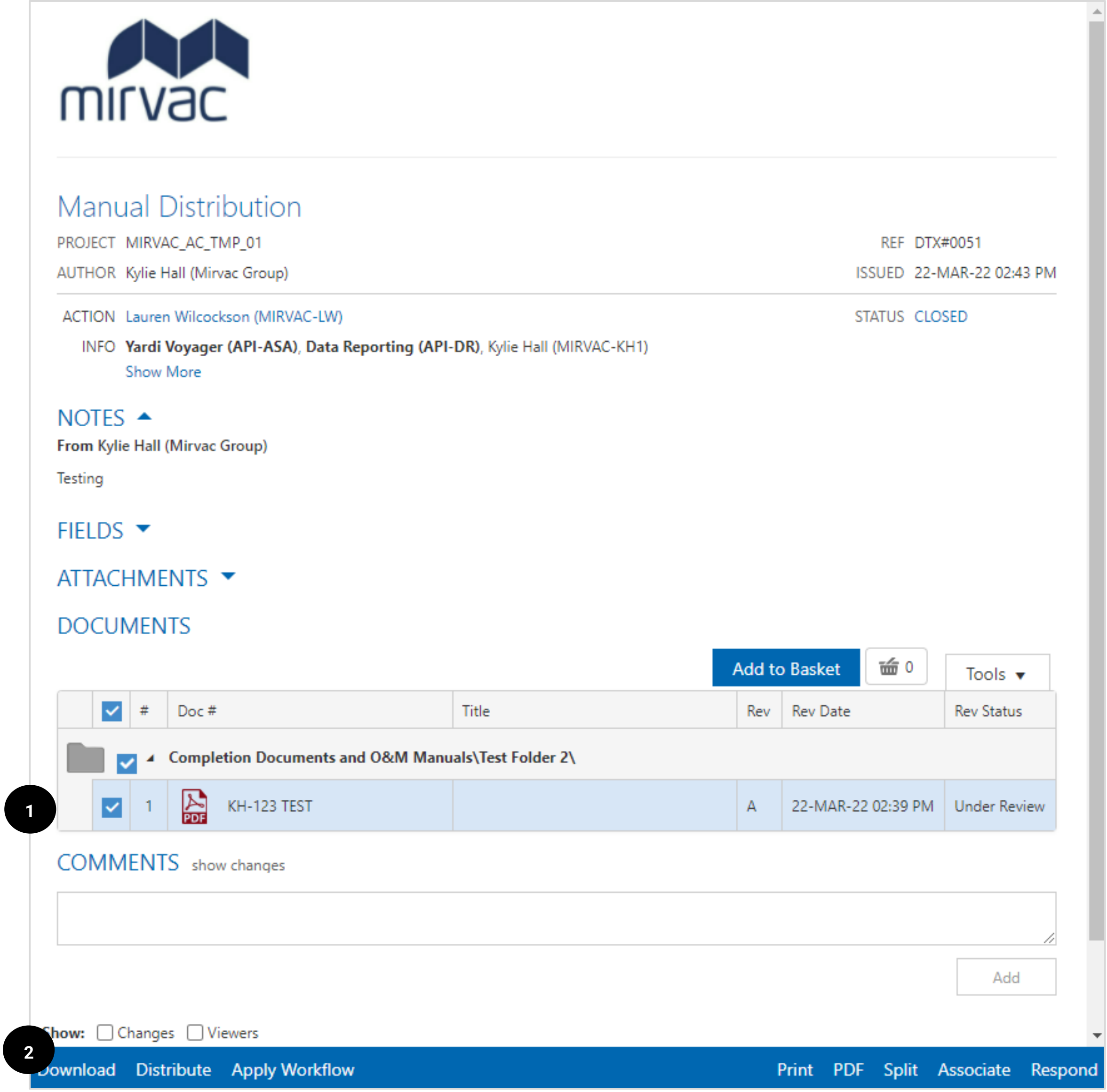
Action	Description
1. Select Documents	Tick the required documents.
2. Click **Add to Basket**	Click Add to Basket icon.  Navigate to other folders and continue adding documents to the basket as needed.
3. Click **Basket**	Click **Basket** from the top right.  The Basket displays.



Action	Description
4. Select **Download All**	From the basket, select Download All The Move files popup displays.

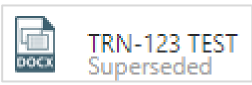
5.2.4 Download from a Transmittal Notification

When a transmittal notification is received the document can be viewed within the publication space or downloaded directly from the notification. Click on the **link** in email to view notification in iTWOcx.



Action	Description
1. Tick Document	Tick document(s) to download.
2. Click Download	Click Download in the bottom menu bar. If required, click the document name to open it in the viewer first and then click download from the toolbar.

The transmittal notification shows whether the document has been superseded. This allows users to quickly see if there is another version available.



To view a current revision, open the document and change the revision in the document viewer. You can compare revisions directly and download the required version

5.3 Print Documents

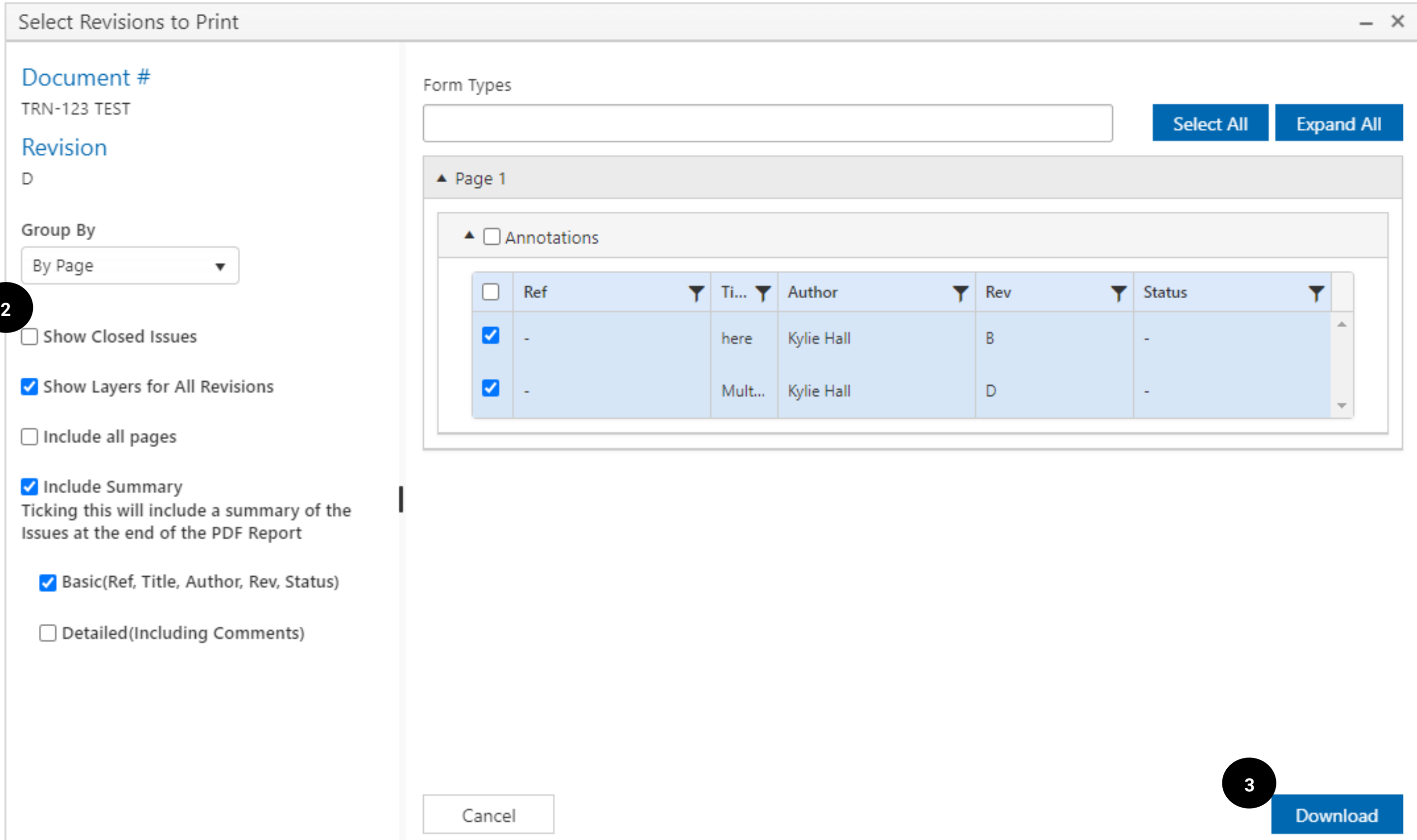
Direct printing through iTWOcx is not available. Documents need to be downloaded locally and then printed.

Documents can be sent to a **print vendor via a transmittal** for them to download and print, providing they are a user in the system.

Individual documents and revisions can be saved as a single pdf by using the **Print Revisions** feature in the Document View and then downloaded. There are options to download with the mark ups, with all revisions etc.

Navigate to the document and open it.

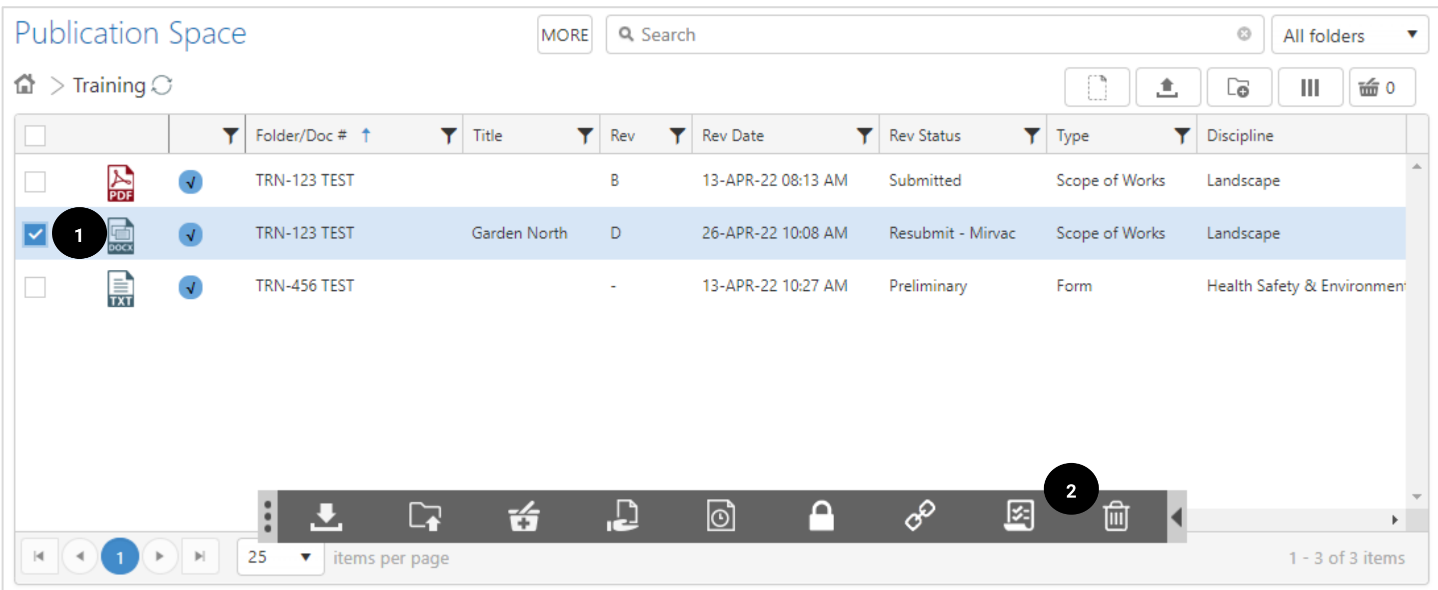
Action	Description
1. Click **Print Revisions**	Click **Print Revisions.** The Print screen appears.

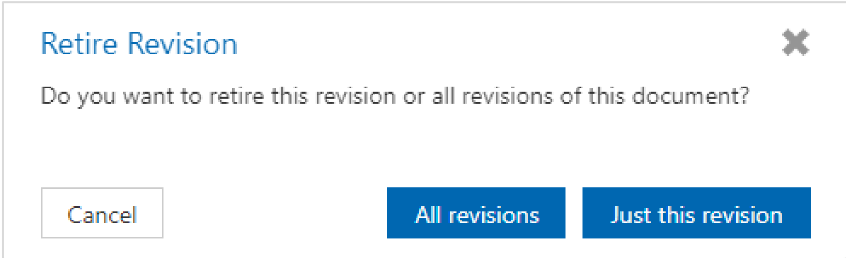


Action	Description
2. Select **criteria**	Sort via page number or by reviewer. Choose whether to show layers on revisions or which pages to include etc. Tick the required layers and form types to include.
3. Click **Download**	Click the download button. A pdf document is created and downloaded ready for local printing

5.4 Delete / Retire Documents (Admin)

Deleting documents on iTWOcx is not possible. If you accidentally upload the wrong file, you can **retire** a document to remove it from view, but it cannot be removed from the system.

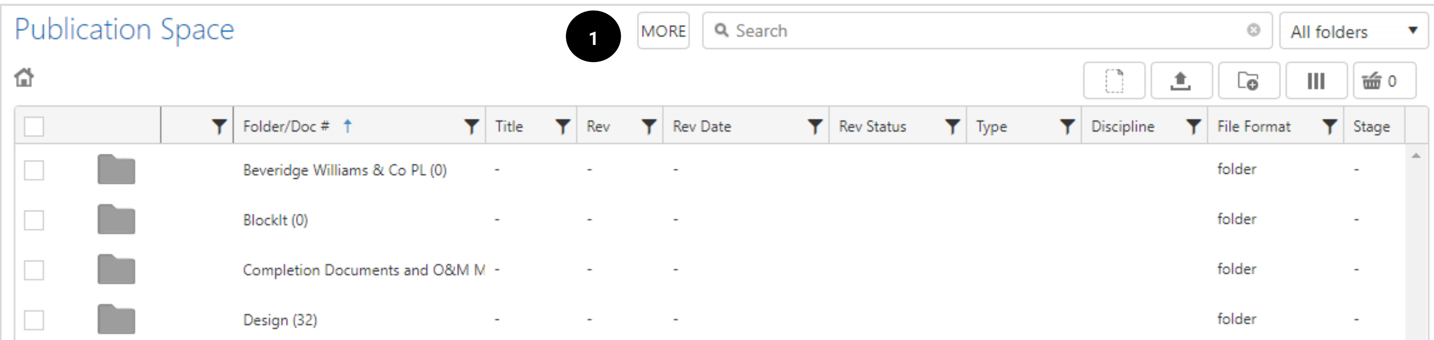


Action	Description
1. Select **Document**	Tick the document to retire.
2. Click **Retire**	Click the **Retire** icon  The Retire Revision popup displays.
3. Select **Retirement option**	4. Select option to retire – All revisions or Just this revision  The document is removed from the list but is still available on the system.

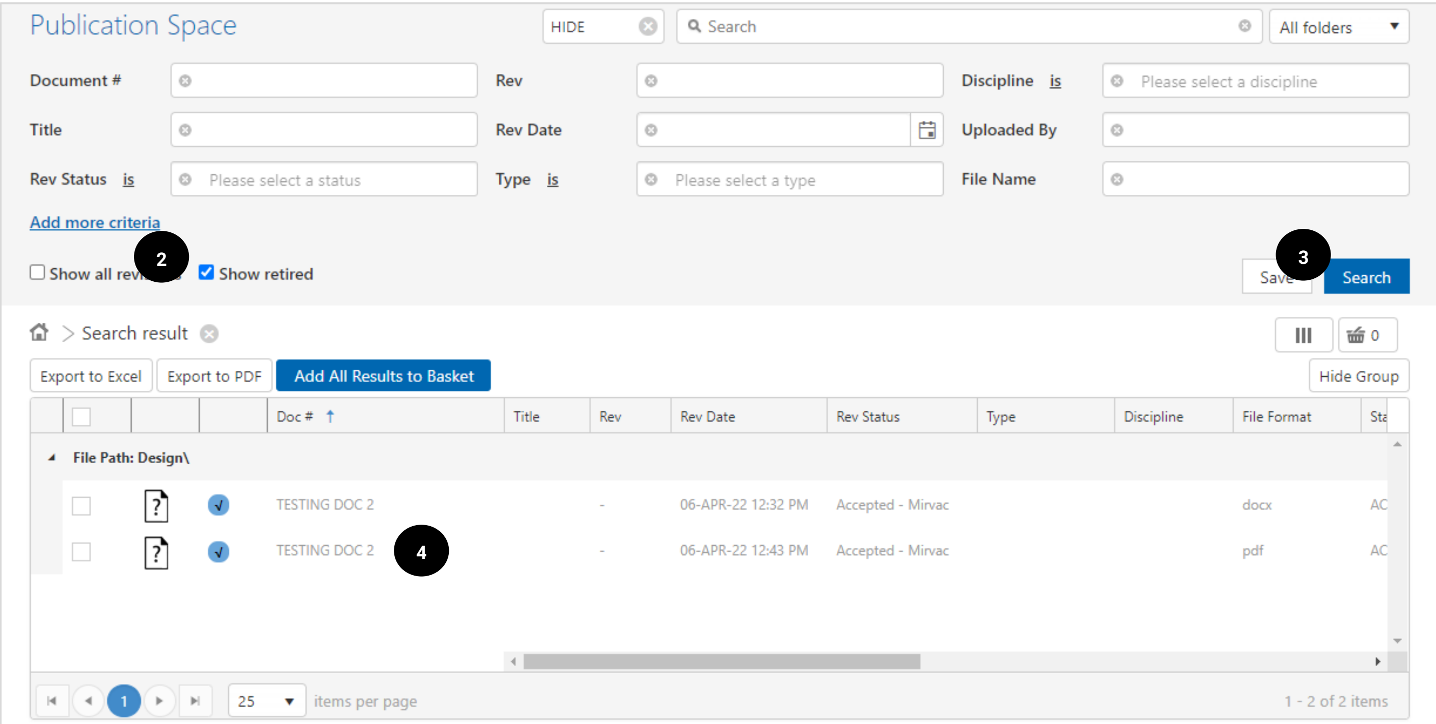
Only a System/Project Administrator can retire a document. The System/Project Administrator can view retired documents and restore if required.

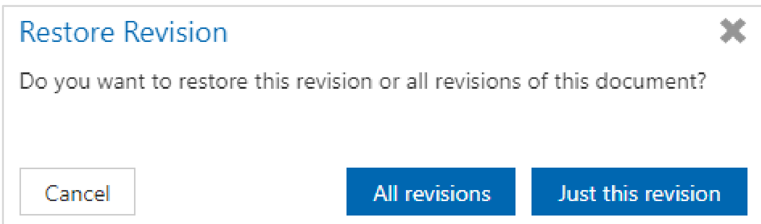
5.4.1 Restore a Retired Document (Admin)

System / Project Administrators can restore retired documents. The easiest way is to use the advanced search option to locate retired documents.



Action	Description
1. Open **Advanced Search** screen	Navigate to the Publication Space. Click **MORE** in the search section to open the advanced search section.



Action	Description
2. Click **Show Retired**	Tick the Show retired checkbox
3. Click **Search**	The retired documents are displayed.
4. **Open** document	Click the document to open it.
5. Click **Restore**	From the document toolbar, click the Restore icon. 
6. Select what to restore	Decide which revisions to restore and click the applicable option.  The document is restored to its original folder location.

6 Searching

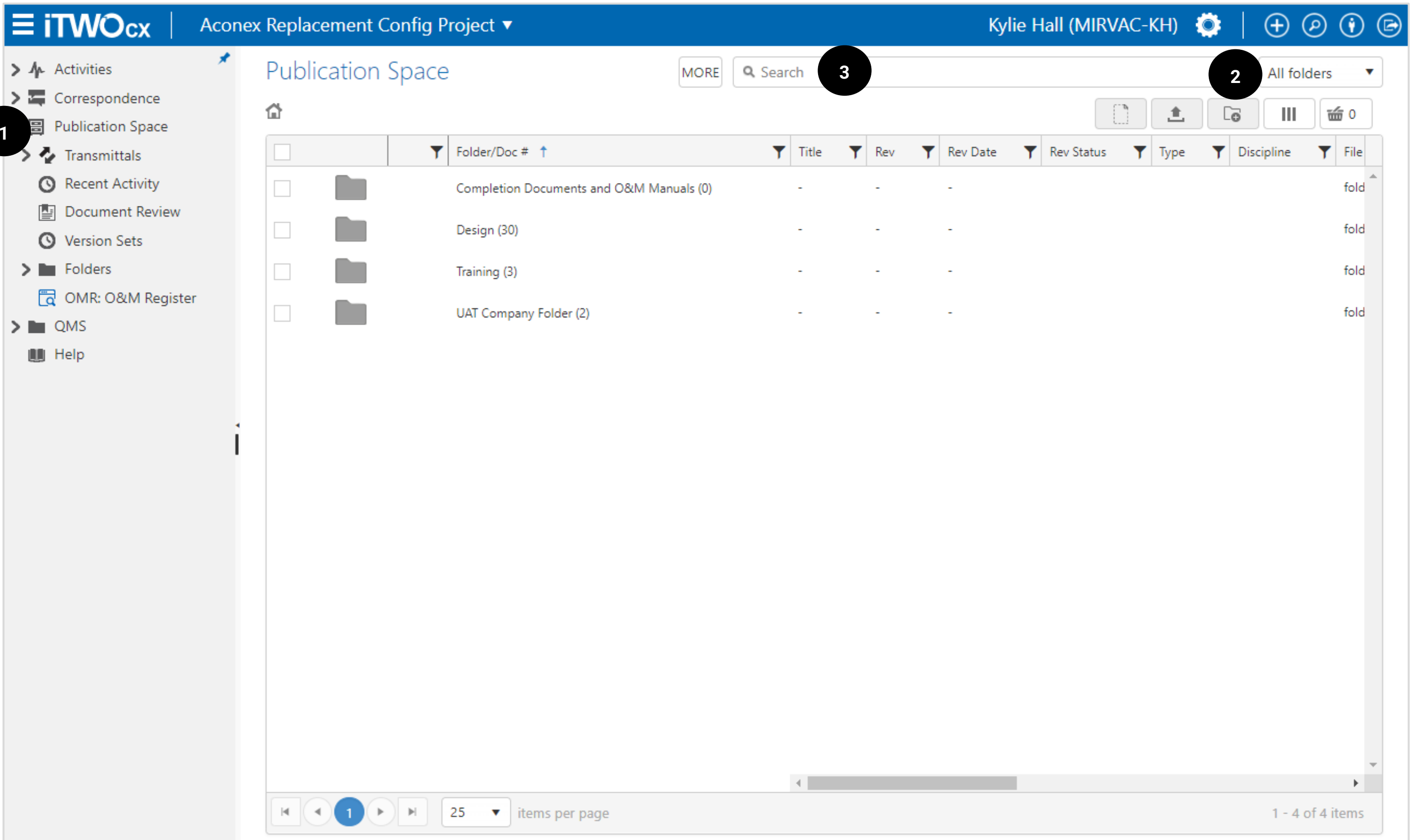
Searching within the Publication Space can be achieved by a **simple search**, **advanced search** or by a **smart search** function. Searches can be **saved** to make it easier to locate the same information in the future. Searches can be run within a single project or across multiple projects.

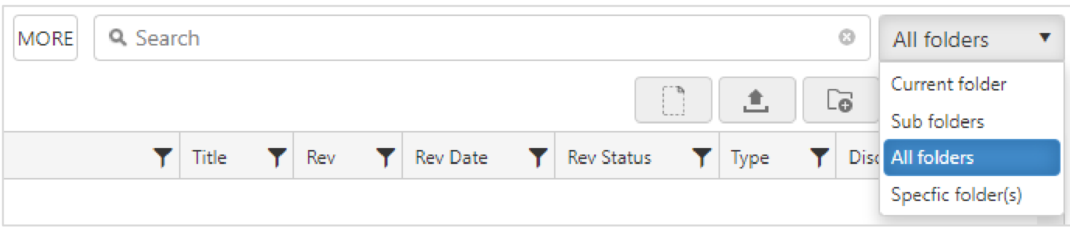
Searching in iTWOcx does not allow for keyword searches within the body of the text of the document itself.

6.1 Search for Documents

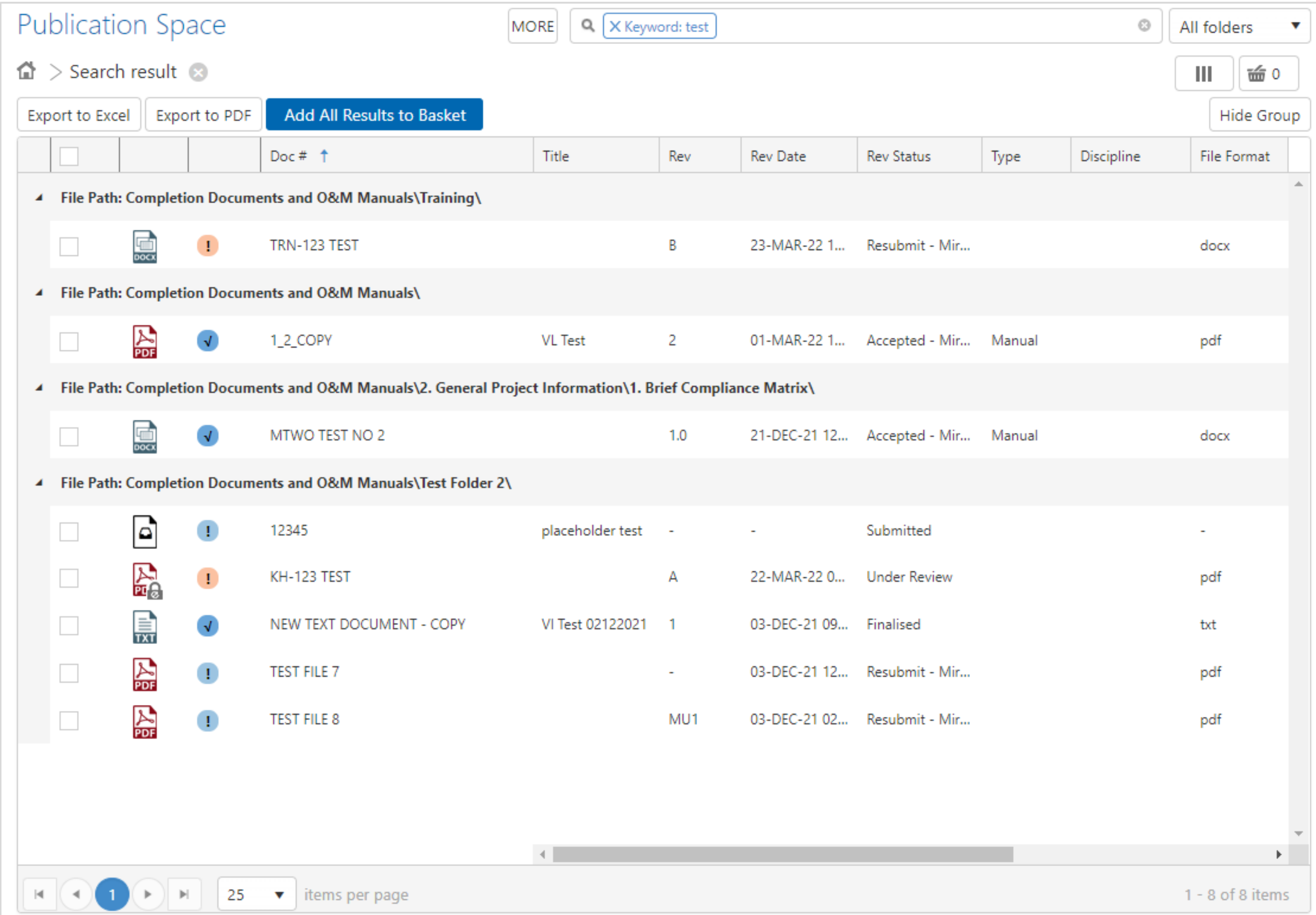
6.1.1 Simple Search

The **Simple Search** uses keywords entered directly into the search field.



Action	Description
1. Navigate to the **Publication Folder**	Click Publication Folder in the menu to access the document search tool.
2. Select **Folder Level**	Change the folder level to perform the search from the dropdown menu. 
3. Enter **Keyword**	Type a **Keyword** in the search field.
4. Press **Enter**	Press Enter to conduct search. The search results display.

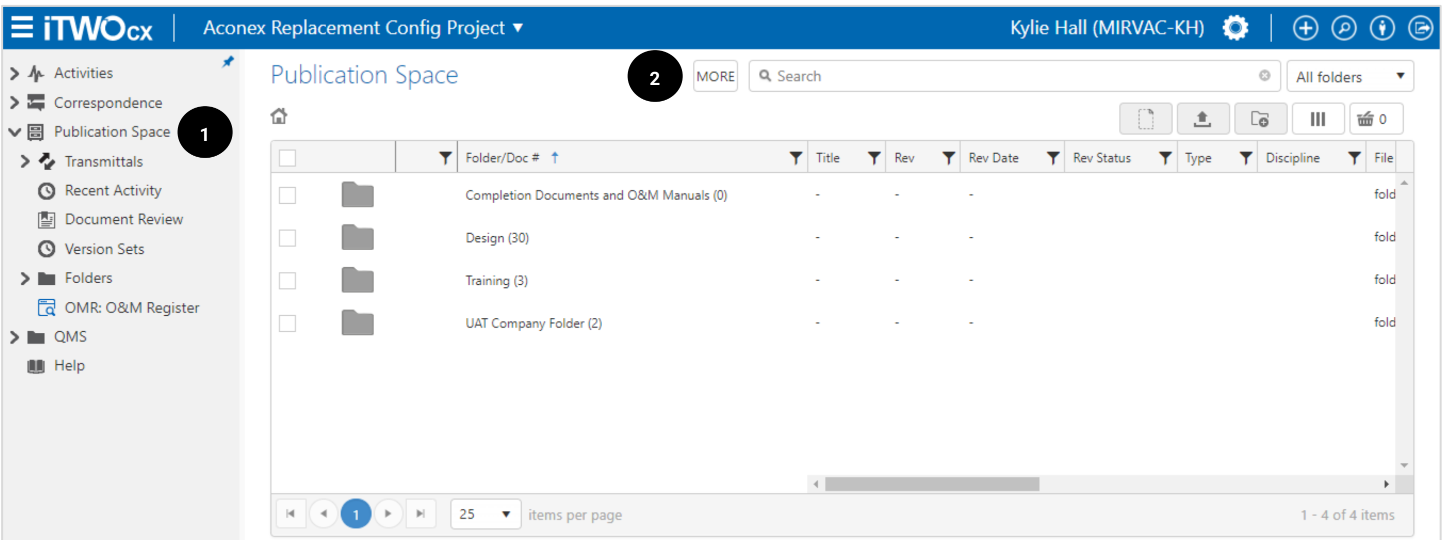
Search Results



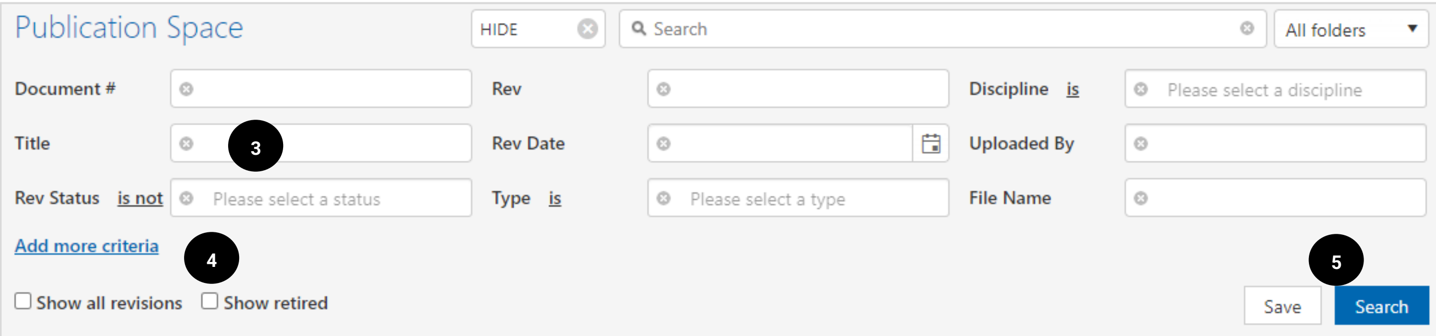
From here the results can be exported or added to the basket. Standard actions can be performed such as view, download, distribute etc. See relevant topics for detailed steps.

6.1.2 Advanced Search

The Advanced Search provides additional criteria in a standard search format. The advanced search allows searching for revisions and retired documents.



Action	Description
1. Navigate to the **Publication Folder**	Click Publication Folder in the menu to access the document search tool.
2. Click **More**	Click **More** next to the search field to reveal the advanced search screen.

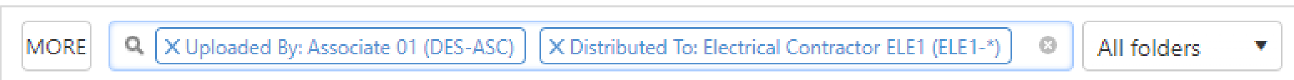


Action	Description
3. Enter Criteria	Complete the fields as required. Additional criteria can be added if required by clicking the **Add more criteria** link Tick the Show
4. Add additional criteria	If required, additional criteria can be added by clicking the **Add more criteria** link. Tick Show all revisions or Show retired checkboxes if needed
5. Click **Search**	Click **More** next to the search field to reveal the advanced search screen.

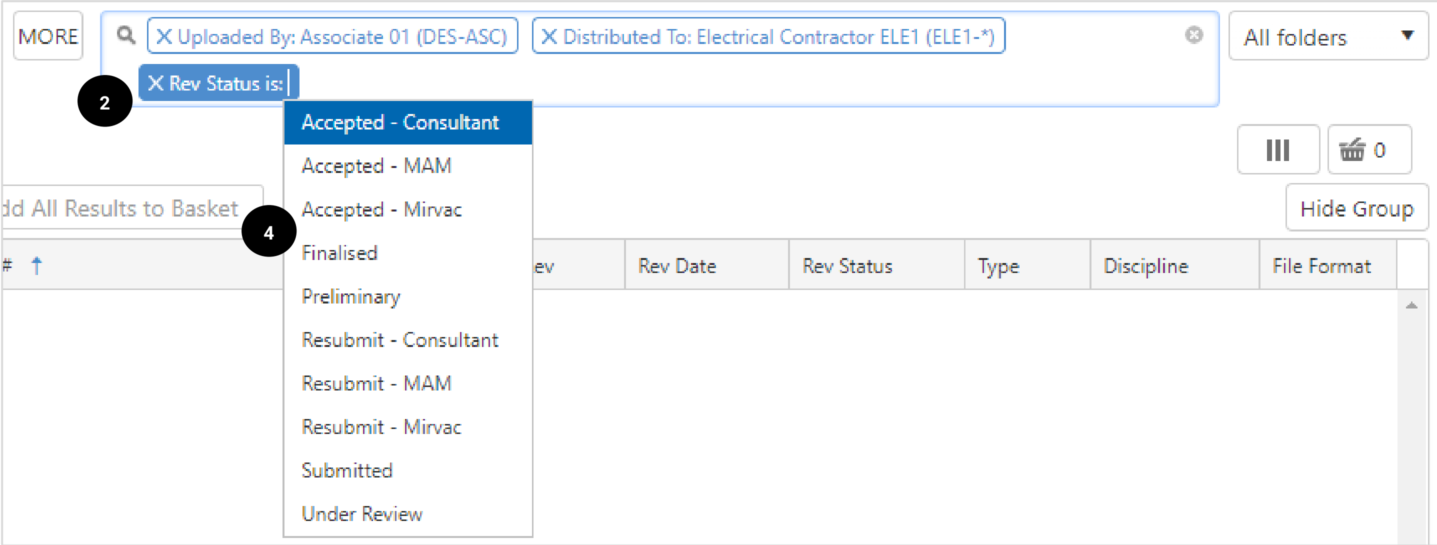
The search results display and the standard actions can be performed – view, download, distribute etc. See relevant topics for detailed steps.

6.1.3 Smart Search

The smart search feature allows specific criteria to be entered to filter the results. Items such as uploaded by, distributed to, dates, file name, keyword, revision status etc.



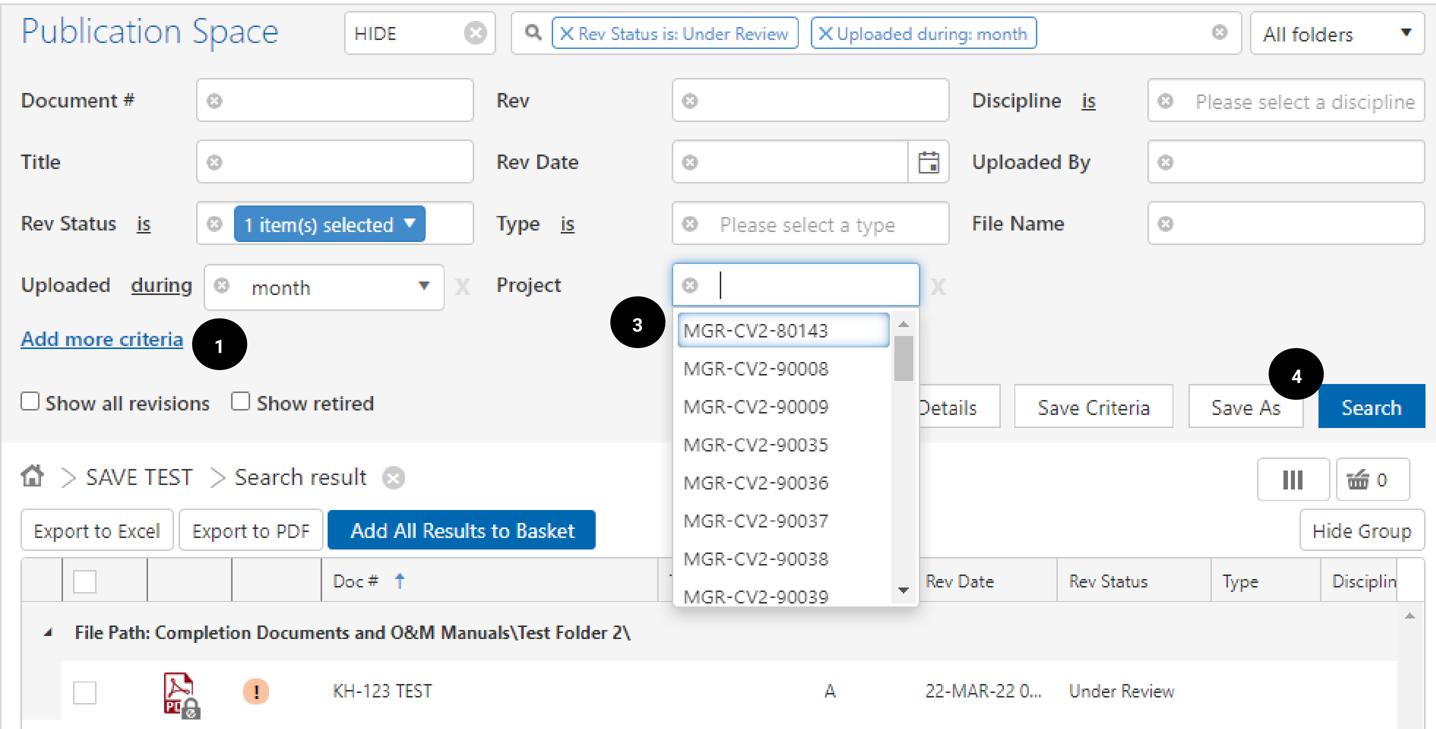
Action	Description
1. Navigate to the **Publication Folder**	Click publication space in the menu to access the document search tool.

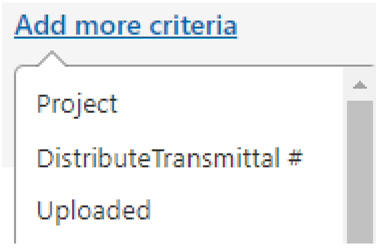


Action	Description
2. Type / or criteria name	Start **typing** the criteria or type **/** in the search field to bring up a list of options.
3. Select first option	Select **first option** from the dropdown.
4. Select secondary option	Click withing the search option to show the dropdown or field. Complete **secondary option** from the dropdown or type in field (depends on option selected)
5. Add more criteria	Continue to add criteria as needed
6. Press **Enter**	Press enter on keyboard. The search results display and the standard actions can be performed – view, download, distribute etc

6.2 Searching Across Multiple Projects

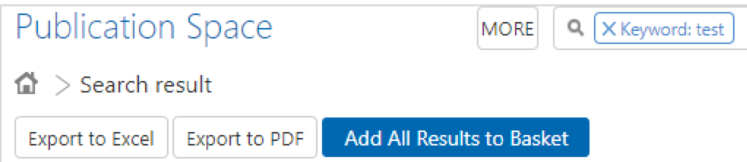
It is possible to complete a search across multiple projects within iTWOcx using the **advanced search** feature.



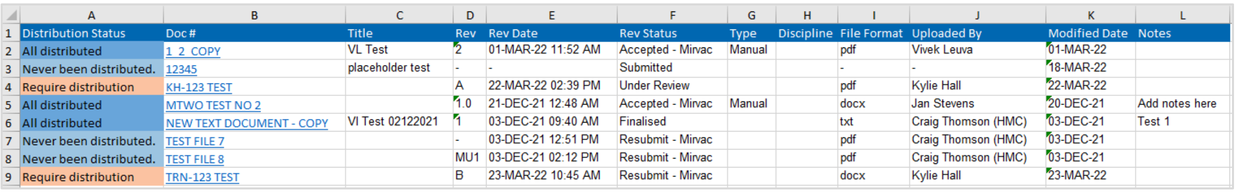
Action	Description
1. Click **Add more criteria**	From the advanced search screen, click add more criteria hyperlink.
2. Tick **Project**	Select project from the dropdown menu.  The new Project field is displayed.
3. Select **required projects**	Select the **required projects** from the list. Multiple projects can be selected.
4. Click **Search**	The search results

6.3 Exporting Search Results

A feature of all search options is the ability to export the search results to excel or pdf. This is a great way of sharing information in an easy to view format. Click on the required option and the file will download.

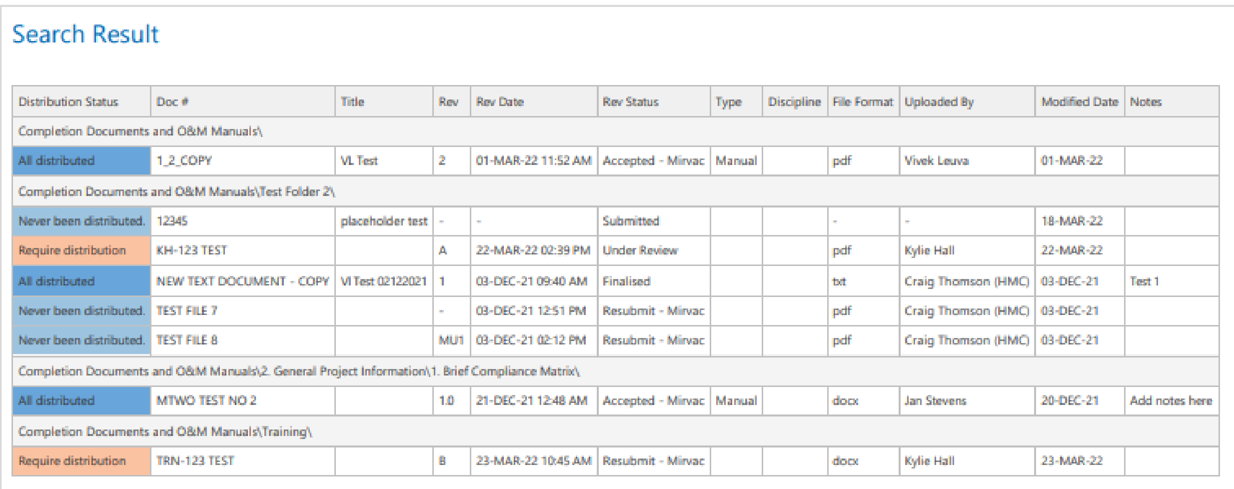


Export to Excel result – provides direct hyperlinks to the document



	A	B	C	D	E	F	G	H	I	J	K	L
1	Distribution Status	Doc #	Title	Rev	Rev Date	Rev Status	Type	Discipline	File Format	Uploaded By	Modified Date	Notes
2	All distributed	1_2_COPY	VL Test	2	01-MAR-22 11:52 AM	Accepted - Mirvac	Manual		pdf	Vivek Leuva	01-MAR-22	
3	Never been distributed.	12345	placeholder test	-	-	Submitted			-	-	18-MAR-22	
4	Require distribution	KH-123 TEST		A	22-MAR-22 02:39 PM	Under Review			pdf	Kylie Hall	22-MAR-22	
5	All distributed	MTWO TEST NO 2		1.0	21-DEC-21 12:48 AM	Accepted - Mirvac	Manual		docx	Jan Stevens	20-DEC-21	Add notes here
6	All distributed	NEW TEXT DOCUMENT - COPY	VI Test 02122021	1	03-DEC-21 09:40 AM	Finalised			txt	Craig Thomson (HMC)	03-DEC-21	Test 1
7	Never been distributed.	TEST FILE 7		-	03-DEC-21 12:51 PM	Resubmit - Mirvac			pdf	Craig Thomson (HMC)	03-DEC-21	
8	Never been distributed.	TEST FILE 8		MU1	03-DEC-21 02:12 PM	Resubmit - Mirvac			pdf	Craig Thomson (HMC)	03-DEC-21	
9	Require distribution	TRN-123 TEST		B	23-MAR-22 10:45 AM	Resubmit - Mirvac			docx	Kylie Hall	23-MAR-22	

Export to PDF result shows the folder location of the documents

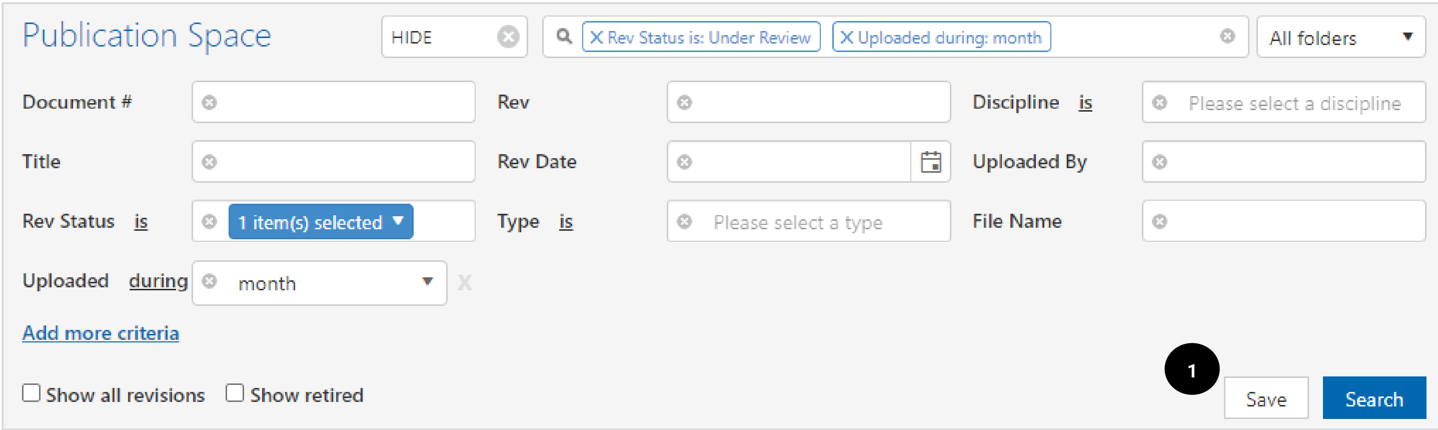


Search Result

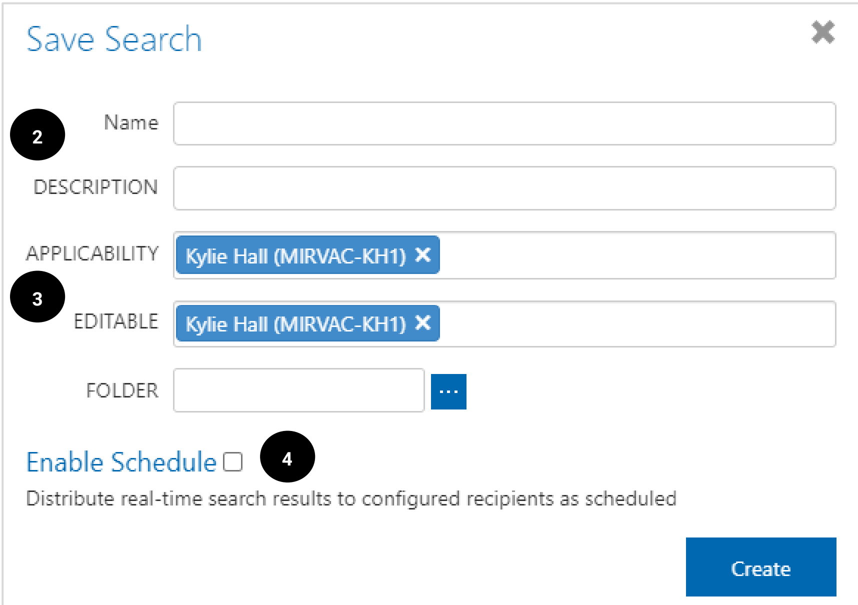
Distribution Status	Doc #	Title	Rev	Rev Date	Rev Status	Type	Discipline	File Format	Uploaded By	Modified Date	Notes
Completion Documents and O&M Manuals\											
All distributed	1_2_COPY	VL Test	2	01-MAR-22 11:52 AM	Accepted - Mirvac	Manual		pdf	Vivek Leuva	01-MAR-22	
Completion Documents and O&M Manuals\Test Folder 2\											
Never been distributed.	12345	placeholder test	-	-	Submitted			-	-	18-MAR-22	
Require distribution	KH-123 TEST		A	22-MAR-22 02:39 PM	Under Review			pdf	Kylie Hall	22-MAR-22	
All distributed	NEW TEXT DOCUMENT - COPY	VI Test 02122021	1	03-DEC-21 09:40 AM	Finalised			txt	Craig Thomson (HMC)	03-DEC-21	Test 1
Never been distributed.	TEST FILE 7		-	03-DEC-21 12:51 PM	Resubmit - Mirvac			pdf	Craig Thomson (HMC)	03-DEC-21	
Never been distributed.	TEST FILE 8		MU1	03-DEC-21 02:12 PM	Resubmit - Mirvac			pdf	Craig Thomson (HMC)	03-DEC-21	
Completion Documents and O&M Manuals\2. General Project Information\1. Brief Compliance Matrix\											
All distributed	MTWO TEST NO 2		1.0	21-DEC-21 12:48 AM	Accepted - Mirvac	Manual		docx	Jan Stevens	20-DEC-21	Add notes here
Completion Documents and O&M Manuals\Training\											
Require distribution	TRN-123 TEST		B	23-MAR-22 10:45 AM	Resubmit - Mirvac			docx	Kylie Hall	23-MAR-22	

6.4 Saved Searches

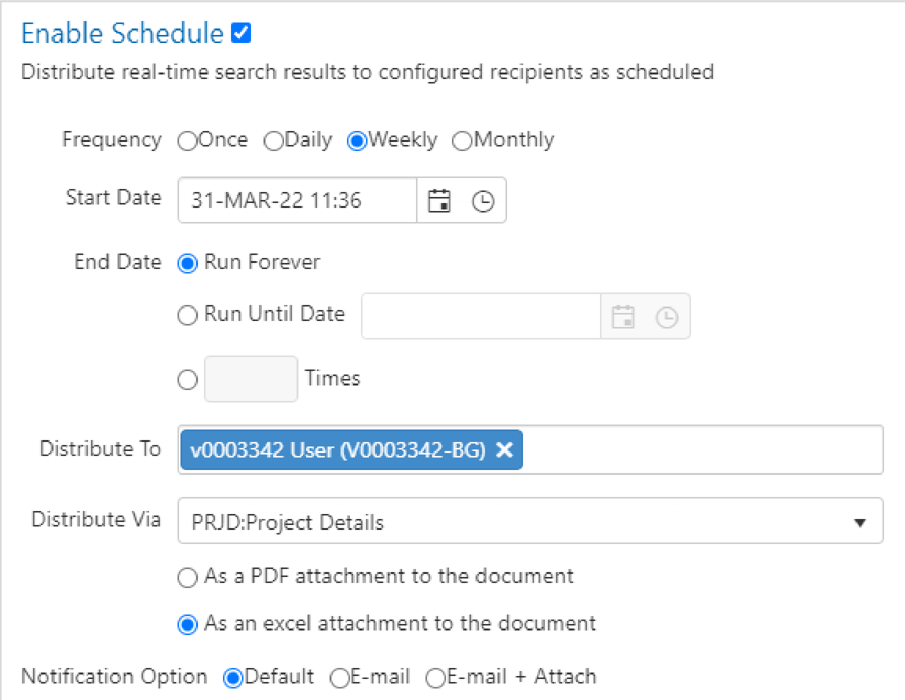
To assist with repeat searches, iTWOcx can **save a search** created by Advanced Search or Smart Search. Saved searches can also be set to automatically run and send a **report** to users. Complete the search using advanced or smart search and open the advanced search screen.



Action	Description
1. Click **Save**	After completing the required search, go to the advanced search screen. Click Save. The **Save Search** popup displays



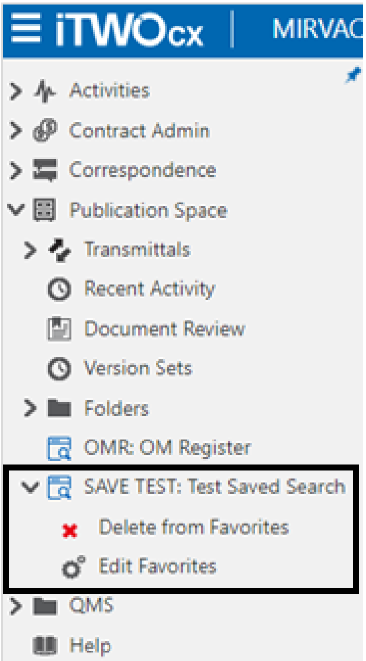
Action	Description
2. Enter **name** and **description**	Enter a **name** and **description** for the search.
3. Add users to **Applicability** and **Editable** fields	Users that can view the saved search are added to the Applicability field. This could be a user, a group / role, company etc. Users that can edit the search are added to the Editable field.
4. Tick **Enable Schedule** (if required)	To set up a recurring report for the search that is automatically distributed to users, tick enable schedule. The page is expanded with distribution options (image below).



Action	Description
5. Enter **schedule criteria**	Enter the details of the schedule, distribution, format and notification.
6. Click **Create**	Click create to save the search.

6.5 Locating Saved Searches

Saved searches are available in the **Publication Space Menu Frame**. (eg SAVE TEST in below image)



Click the **Search Name** to get a **refreshed** version of the search result. The results can be exported, distributed, downloaded etc.

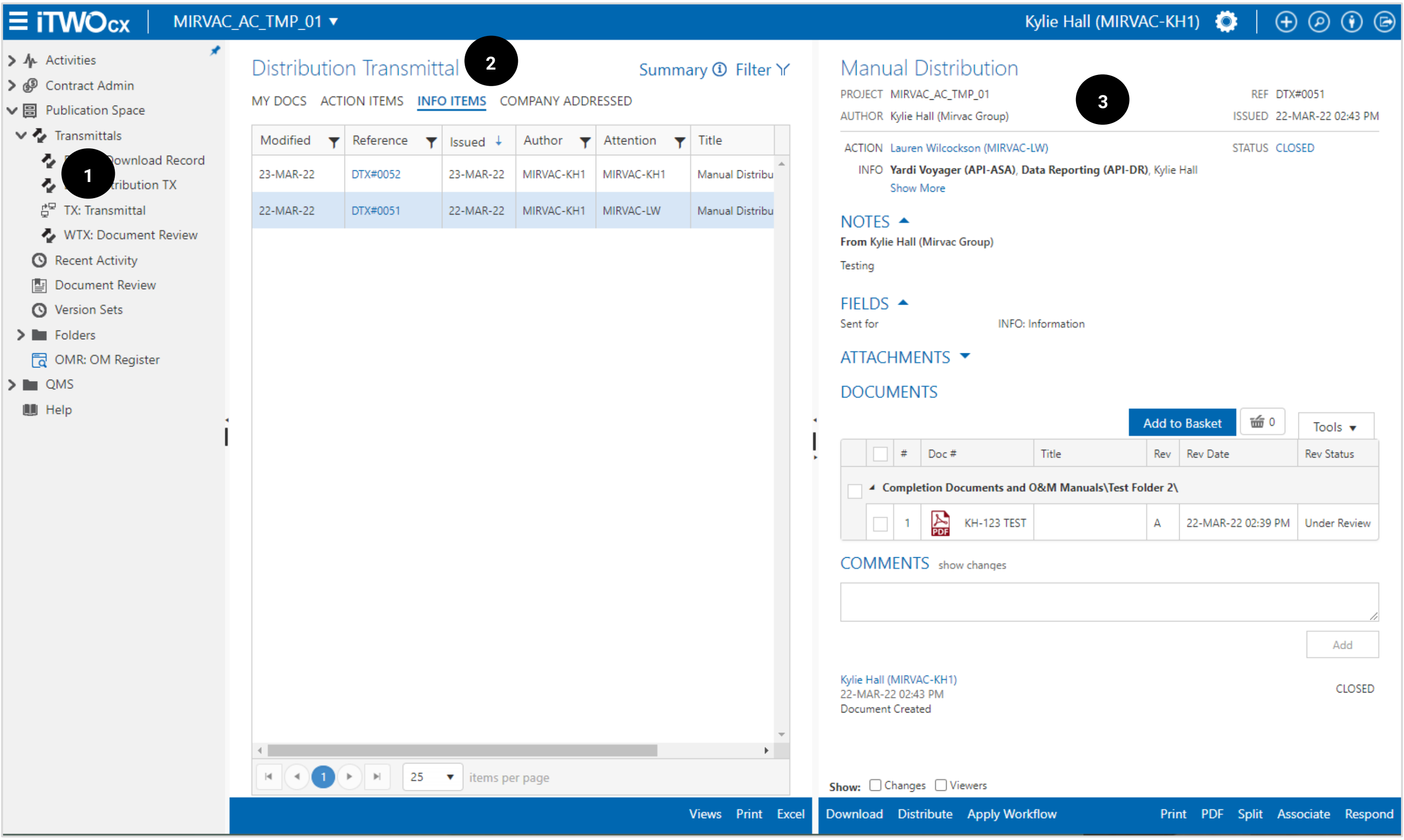
The saved search can be **Deleted** or **Edited** at any time by the search creator or anyone provided with editable access.

7 View History and Approvals

There are times when it is necessary to view the history of a transmittal, an individual document or an approval workflow. There are a few methods depending on the type of history required.

7.1 View Transmittal History

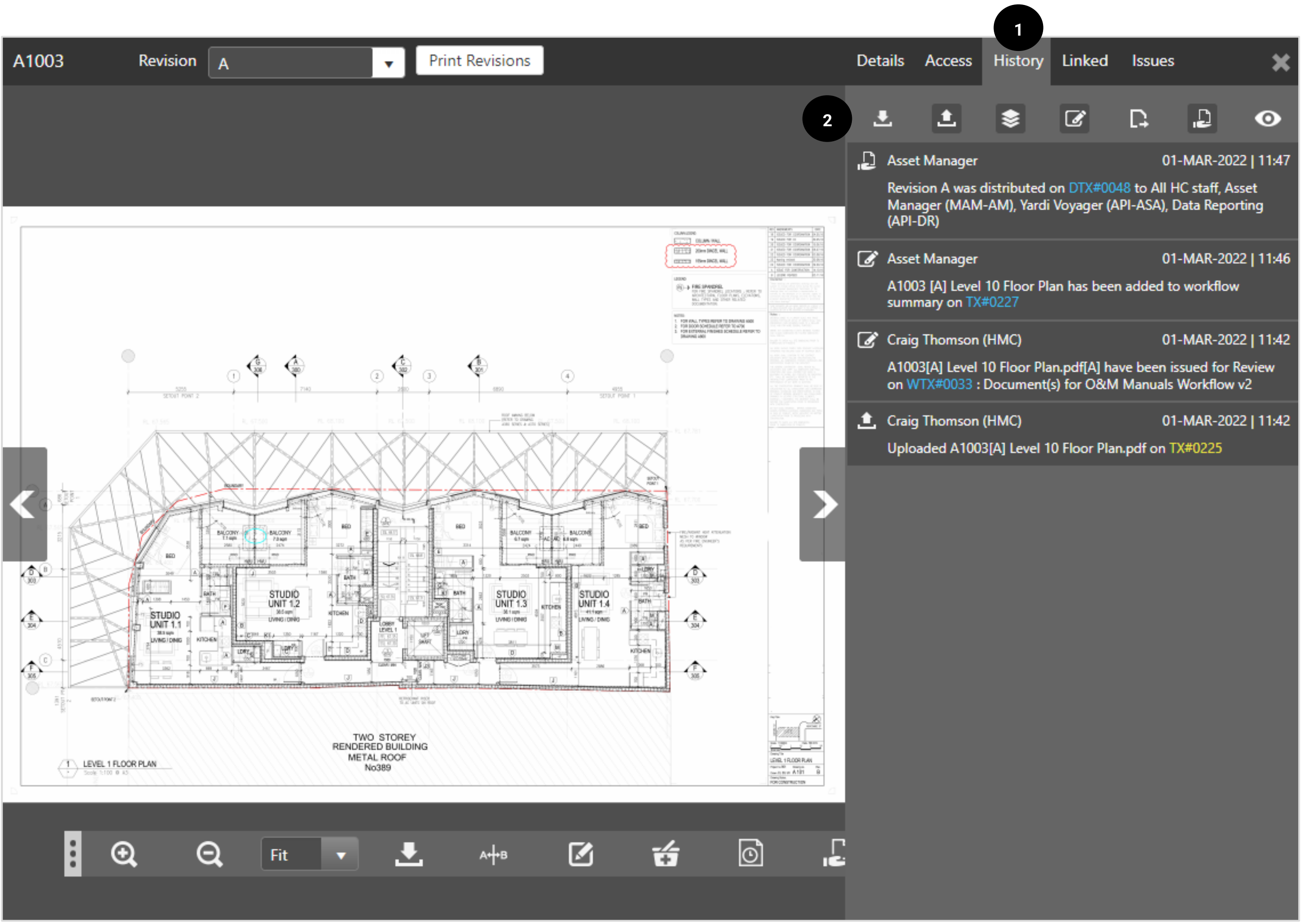
Transmittals can be tracked in the **Transmittals** section within the Publication Space. This provides a view on when a transmittal was sent, who was included in the transmittal, the version of the document and any comments on the transmittal. It also shows if there was any correspondence linked from the transmittal.



Screen Element	Description	
4. **Transmittal Menu Options**	The Transmittal Menu provides in built views for transmittals.	
	DBDN: Download Record	Shows documents the user has downloaded.
	DTX: Distribution	Shows documents that have been distributed by the user.
	TX: Transmittal	Shows documents that have been uploaded by the user.
	WTX: Document Review	Shows the transmittals sent for document review via a workflow.
5. **List View**	Displays the items of the selected transmittal view in a list, with the most recent at the top. Tabs across the top provide additional views.	
	My Docs	Transmittals created by the user.
	Action Items	Transmittals sent by others with the user listed in the action field.
	Info Items	Transmittals sent by others with the user listed in the info field.
	Company Addressed	Transmittals sent to anyone within the same company as the user.
6. **Detail View**	Displays details of the transmittal selected from the list view.	

7.2 View Document History

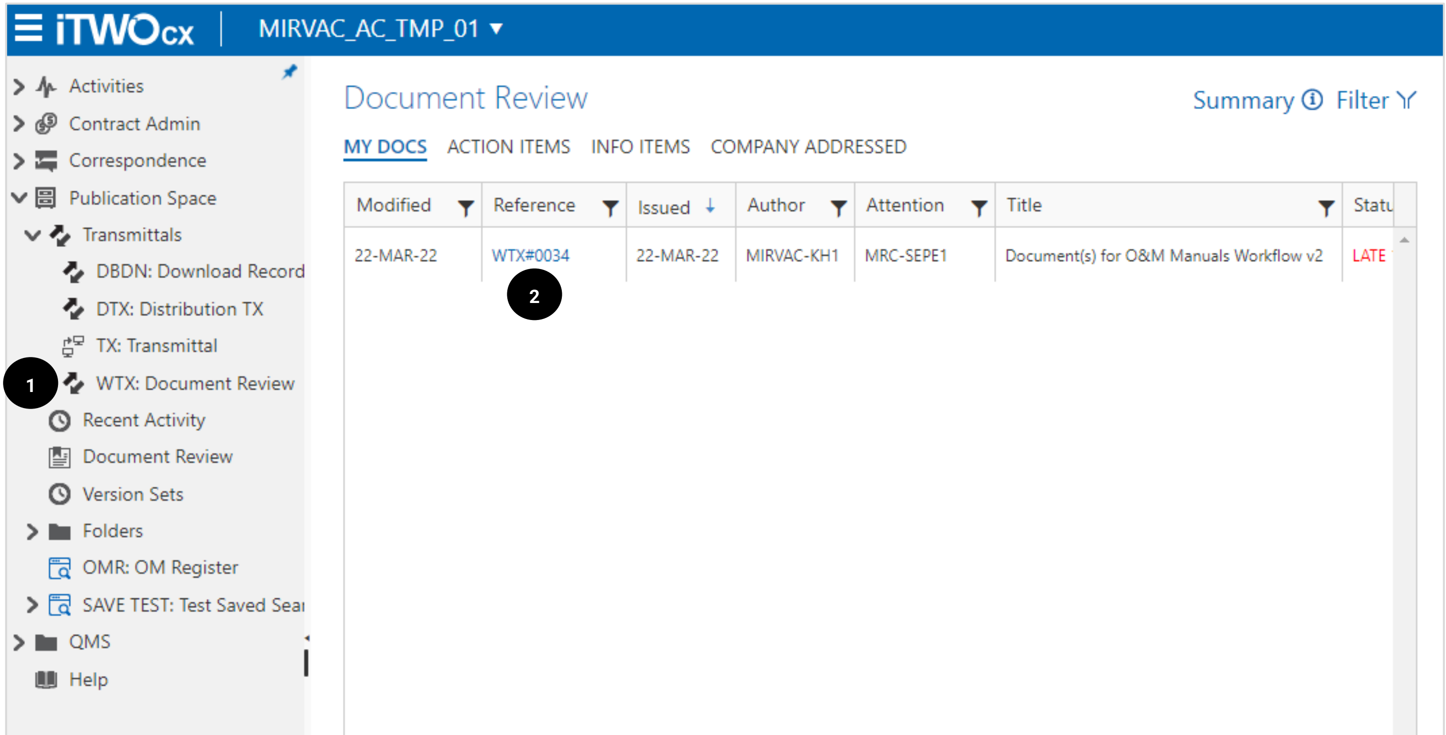
To view the history of a specific document, open the document and access the **History** tab.



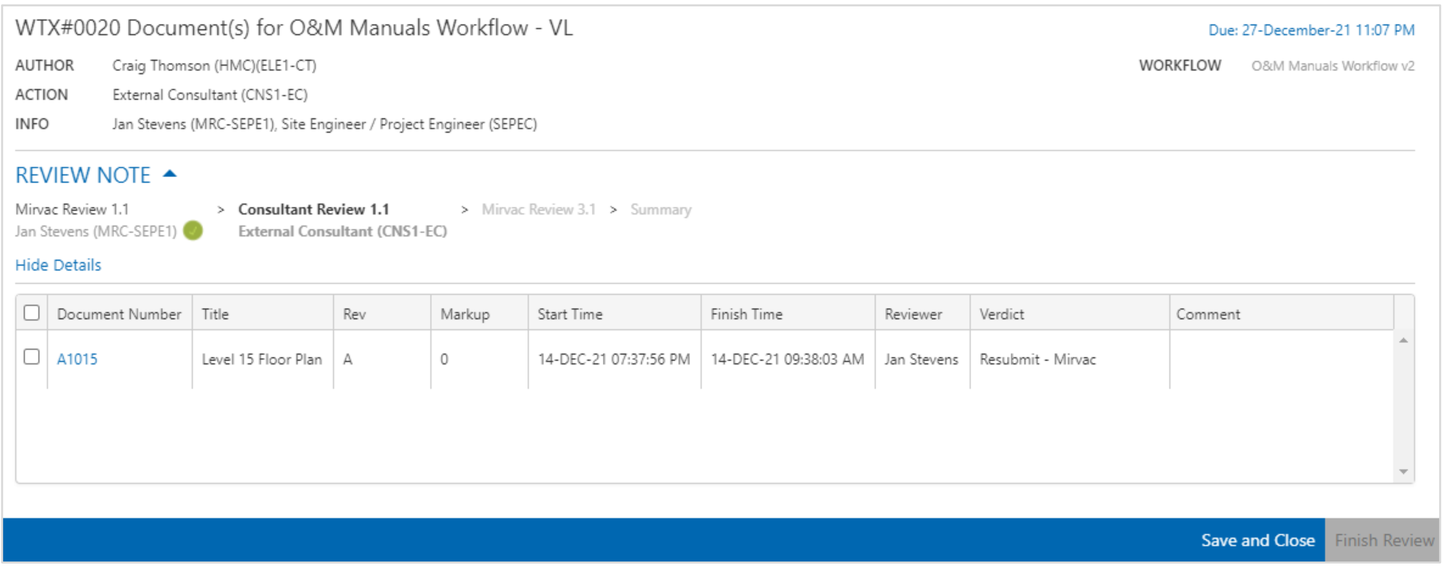
<table>
<tr><th>Action</th><th colspan="2">Description</th></tr>
<tr><td>1. Click History</td><td colspan="2">The screen displays information relating to the document.</td></tr>
<tr><td rowspan="8">2. Toggle icons on / off</td><td colspan="2">Toggle the icons to view the required details.</td></tr>
<tr><td></td><td>Download. Shows when a document was downloaded, including user details and dates.</td></tr>
<tr><td></td><td>Upload. Shows when the document was uploaded and by whom.</td></tr>
<tr><td></td><td>Superseded. Displays the details of the revisions – which version was superseded, when and by which user. It also contains links to the transmittal.</td></tr>
<tr><td></td><td>Change. Displays changes to the revisions status, changes to attributes etc.</td></tr>
<tr><td></td><td>Publish. Shows when the document was published.</td></tr>
<tr><td></td><td>Distribute. Details the transmittal details – who sent it, who received it, when it was distributed and contains a link to the transmittal.</td></tr>
<tr><td></td><td>Viewed. Shows the users that have viewed the document and which revision.</td></tr>
</table>

7.3 View Approval History

When transmittals are sent following a defined workflow, the progress can be tracked in the **WTX: Document Review** view, or by clicking on the **Transmittal Reference ID** in any other part of the system.



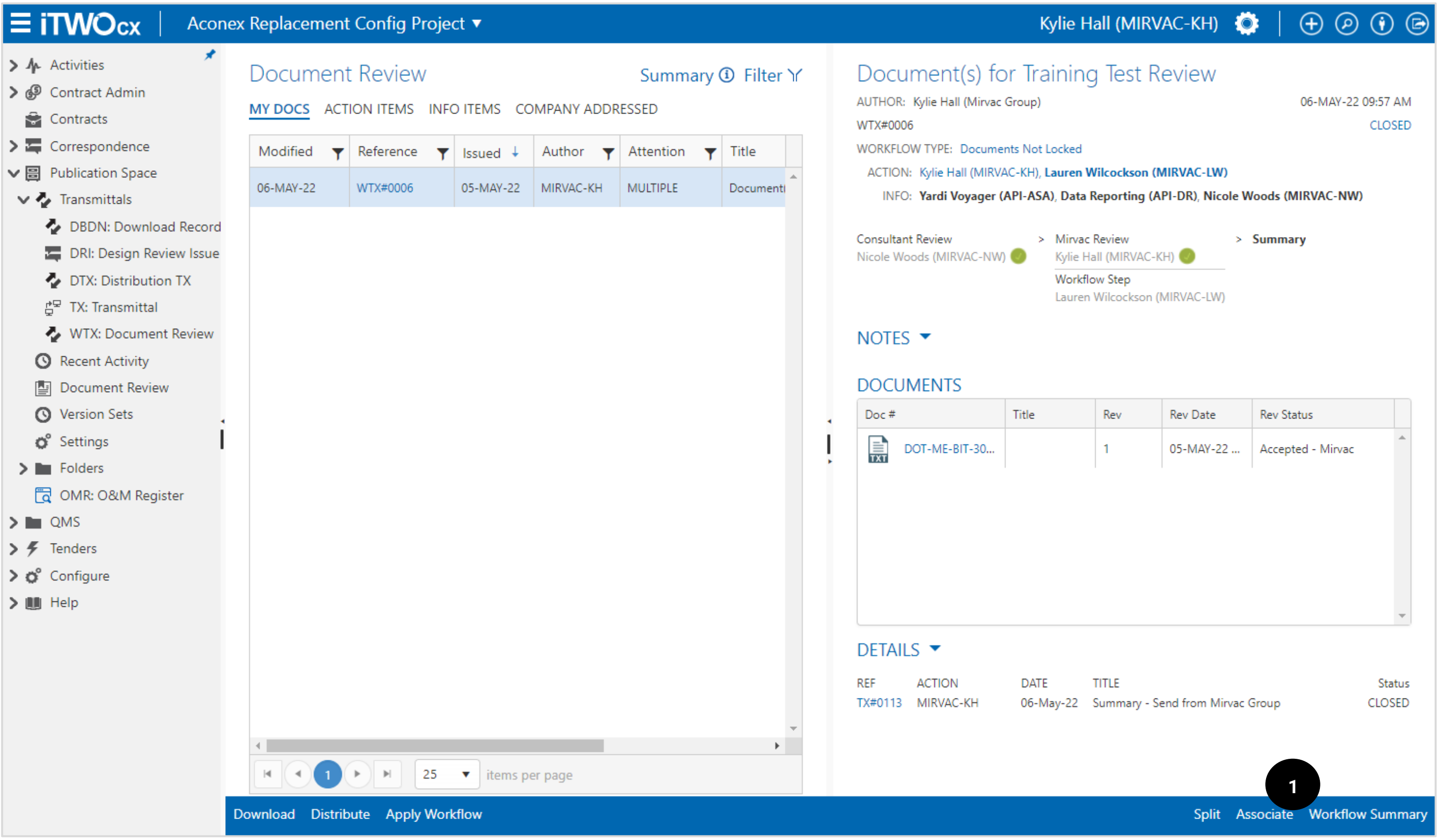
Action	Description
1. Open Document Review menu	Navigate to **Publication Space > Transmittals > WTX: Document Review**. The screen displays the workflows. **Note:** The **Tabs** across the top and the **Filter** can be used to find specific transmittals.
2. Click **Transmittal Reference**	Click the **Transmittal Reference ID** to view the details.



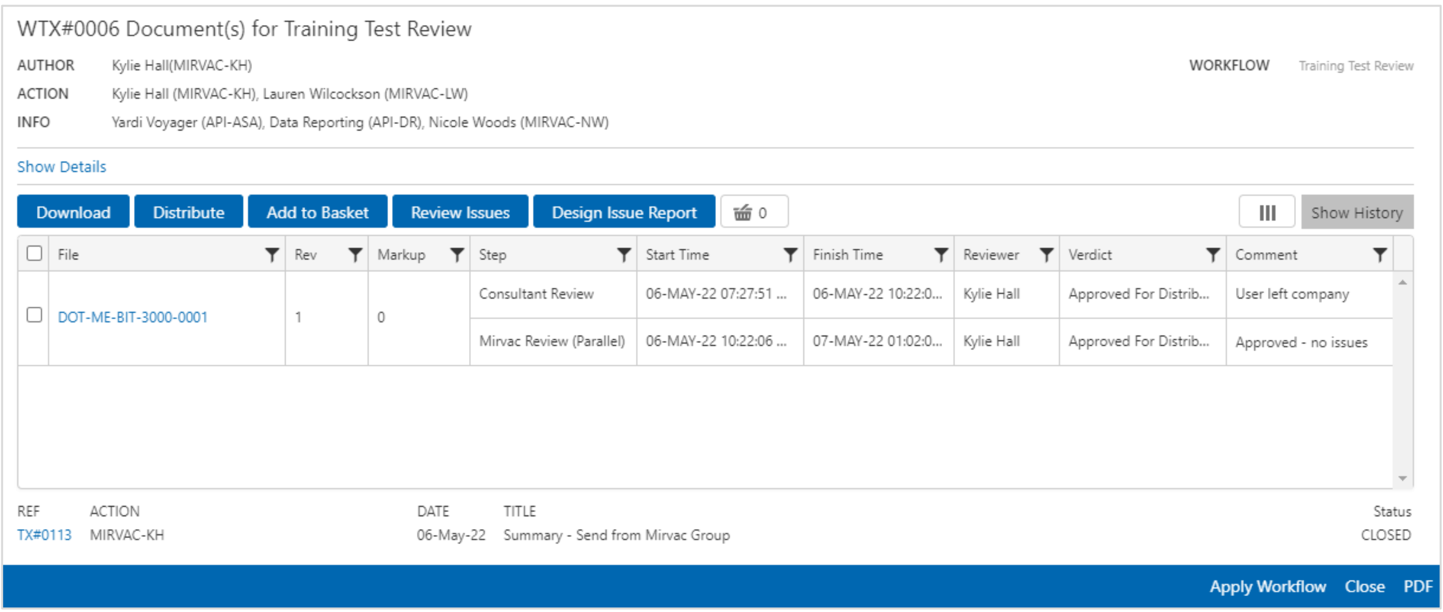
The process flow is listed in the **Review Note** section. In this example the first two stages of the review are complete, the next stage is to be completed by the Asset Manager.

Completed Review

The below image shows a completed review.



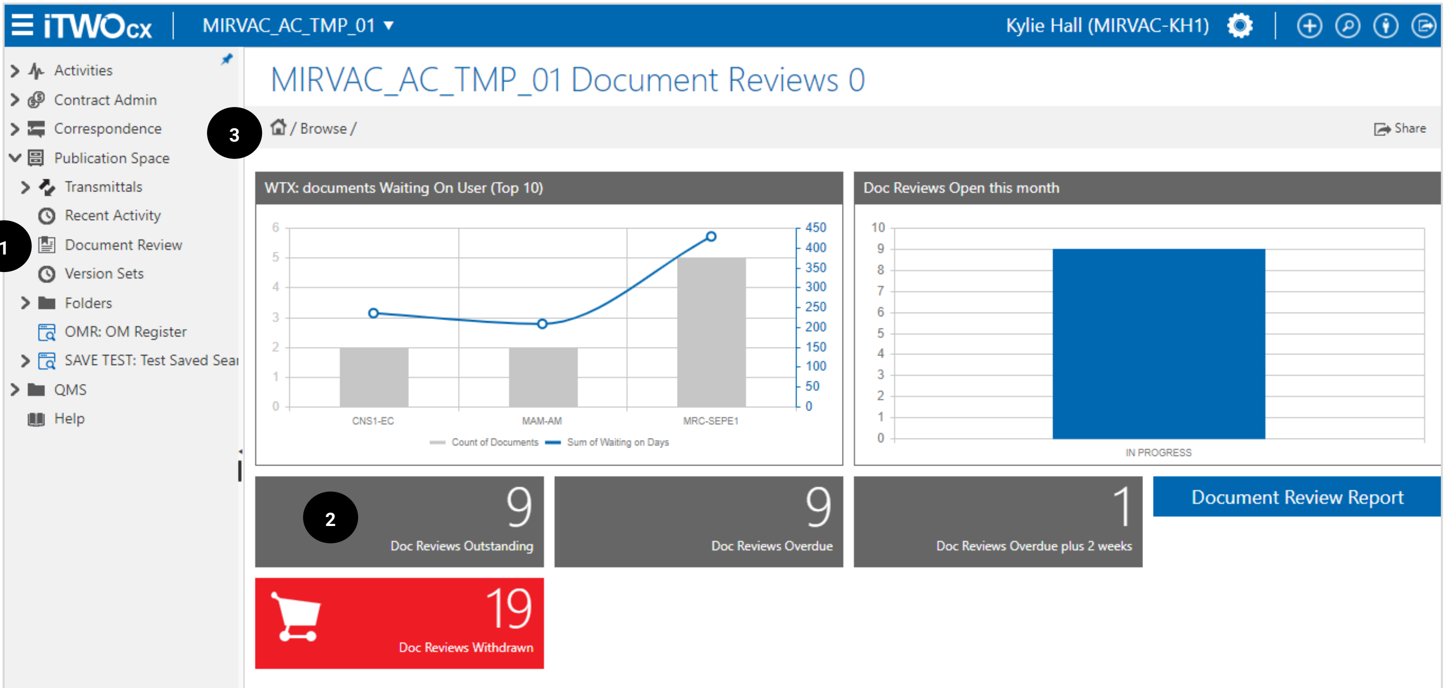
Action	Description
1. Click **Workflow Summary**	The **Workflow Summary** shows see details of all review steps and their actions.



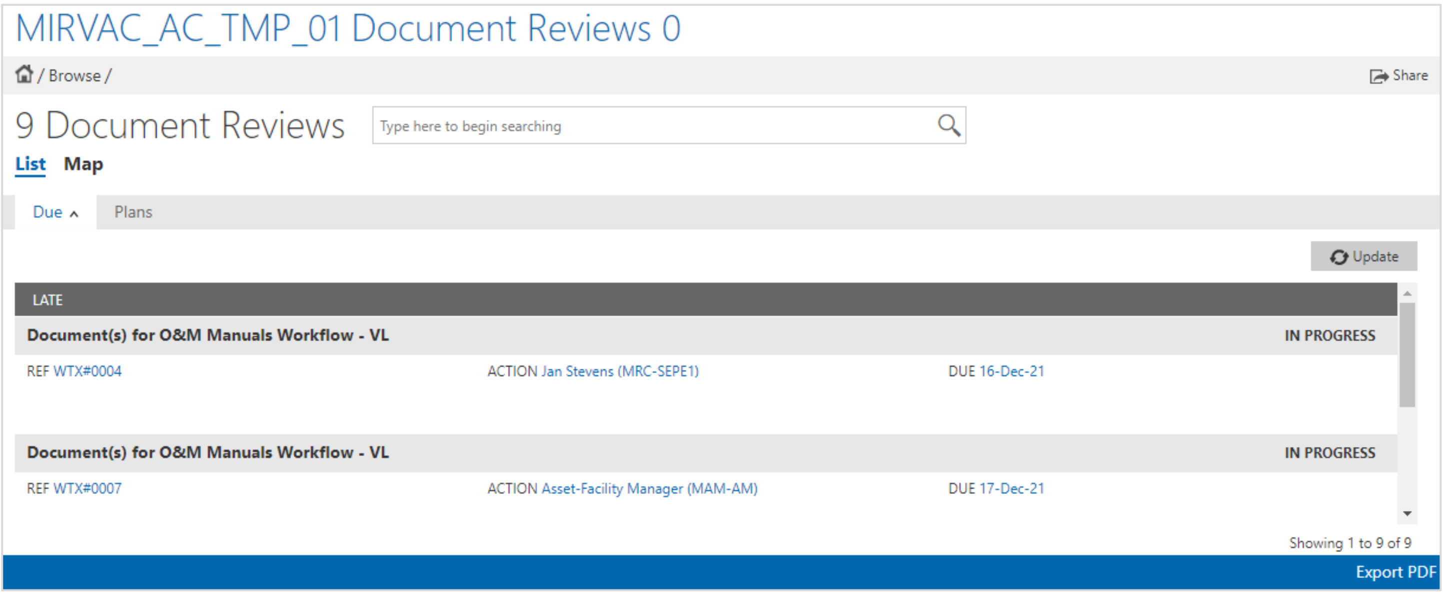
For each document, the review step is listed with the reviewer, comments and verdict listed.

7.4 Document Review Dashboard

An inbuilt feature within iTWOcx is the **Document Review Dashboard**. It provides a snapshot of the workflows across the project and their status.



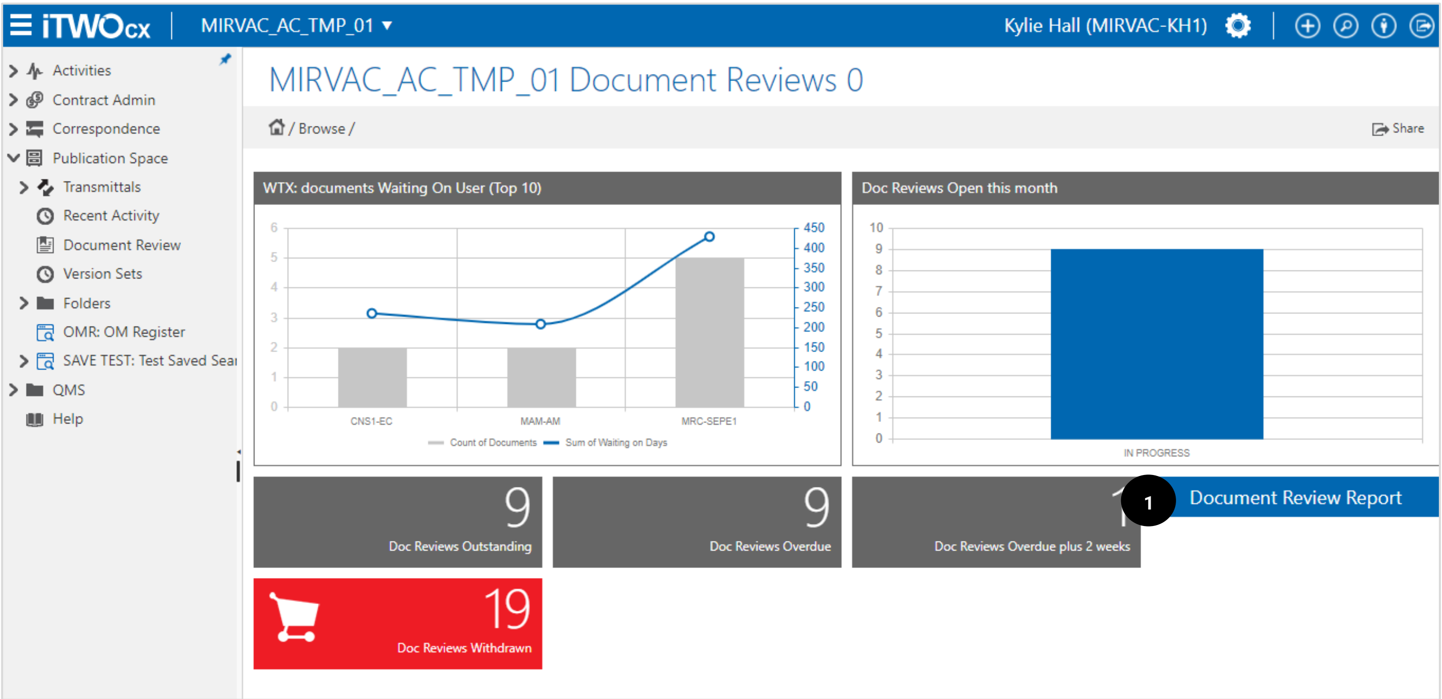
Action	Description
1. Click **Document Review**	Open **Publication Space > Document Review** from the menu frame to open the dashboard for the project.
2. Click **tiles** for more information	Each tile can be interacted with to drill down to view more details. For example, the **Doc Reviews Outstanding** tile lists outstanding workflows with the oldest on top. An example of this is displayed below.
3. Click **Home**	Click **Home** to return to the dashboard at any time.



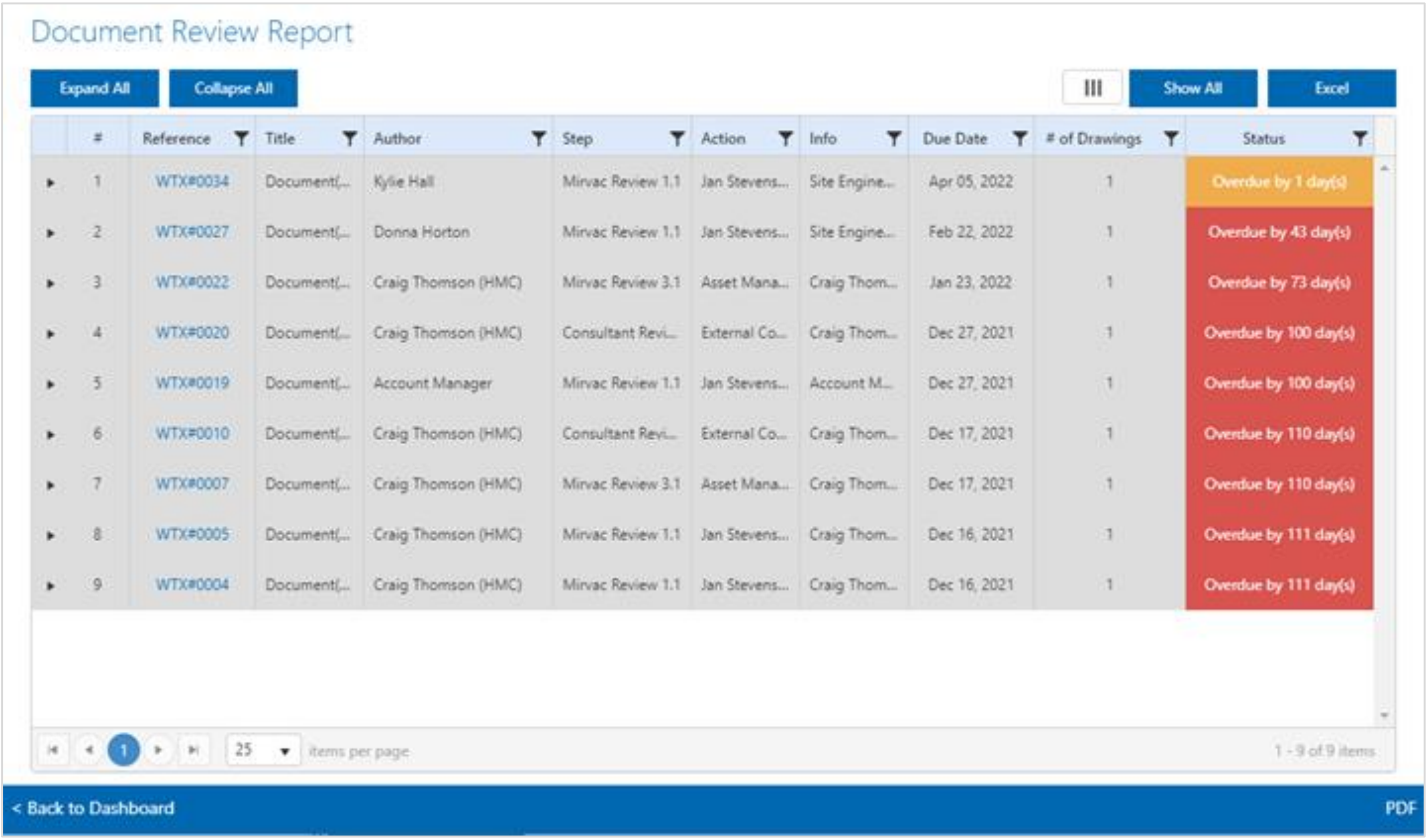
Each item can be clicked to view the workflow, see who was included, view documents and comments etc. Once open, action can be taken directly from this screen (eg distribute, review etc) without needing to navigate to another location.

7.5 Document Review Report

Users can access the **Document Review Report** to see a list of outstanding items. The report shows the workflow reference, title, author, step of the workflow, due date and the status column indicating the number of days past the due date. Users can export the report to excel or pdf to share with others if required.



Action	Description
1. Click **Document Review Report**	Access **Publication Space > Document Review** from the menu frame to open the dashboard. Click the **Document Review Report** button.



Expand the section ▶ to see the document details

◢	3	WTX#0022	Document(...	Craig Thomson (HMC)	Mirvac Review 3.1	Asset Mana...	Craig Thom...	Jan 23, 2022	1	Overdue by 73 day(s)

	Document Number	Title	Rev	Latest Rev	Markup	Rev Date	Rev Status
▶	A1018	Level 18 Floor Plan	A	A	0	10-JAN-22 08:33 AM	Under Review

Expand further to see the workflow steps that have been taken and any comments from the reviewers.

◢	3	WTX#0022	Document(...	Craig Thomson (HMC)	Mirvac Review 3.1	Asset Mana...	Craig Thom...	Jan 23, 2022	1	Overdue by 73 day(s)

	Document Number	Title	Rev	Latest Rev	Markup	Rev Date	Rev Status
◢	A1018	Level 18 Floor Plan	A	A	0	10-JAN-22 08:33 AM	Under Review

Step	Date/Time	Reviewer	Verdict	Comment
Mirvac Review 1.1	10-Jan-22 08:34:58 AM	Jan Stevens	Accepted - Mirvac	accepted jan 10-01-2022
Consultant Review 1.1	10-Jan-22 08:35:39 AM	External Consultant	Resubmit - Consultant	resubmit-make changes noted on d
Mirvac Review 3.1		Asset Manager	Resubmit - Consultant	

Users can export the report to **excel (1)** or **pdf (2)**.

Document Review Report

Expand All | Collapse All | Show All | 1 Excel

	#	Reference	Title	Author	Step	Action	Info	Due Date	# of Drawings	Status
▶	1	WTX#0034	Document(...	Kylie Hall	Mirvac Review 1.1	Jan Stevens...	Site Engine...	Apr 05, 2022	1	Overdue by 1 day(s)
▶	2	WTX#0027	Document(...	Donna Horton	Mirvac Review 1.1	Jan Stevens...	Site Engine...	Feb 22, 2022	1	Overdue by 43 day(s)
◢	3	WTX#0022	Document(...	Craig Thomson (HMC)	Mirvac Review 3.1	Asset Mana...	Craig Thom...	Jan 23, 2022	1	Overdue by 73 day(s)

	Document Number	Title	Rev	Latest Rev	Markup	Rev Date	Rev Status
▶	A1018	Level 18 Floor Plan	A	A	0	10-JAN-22 08:33 AM	Under Review

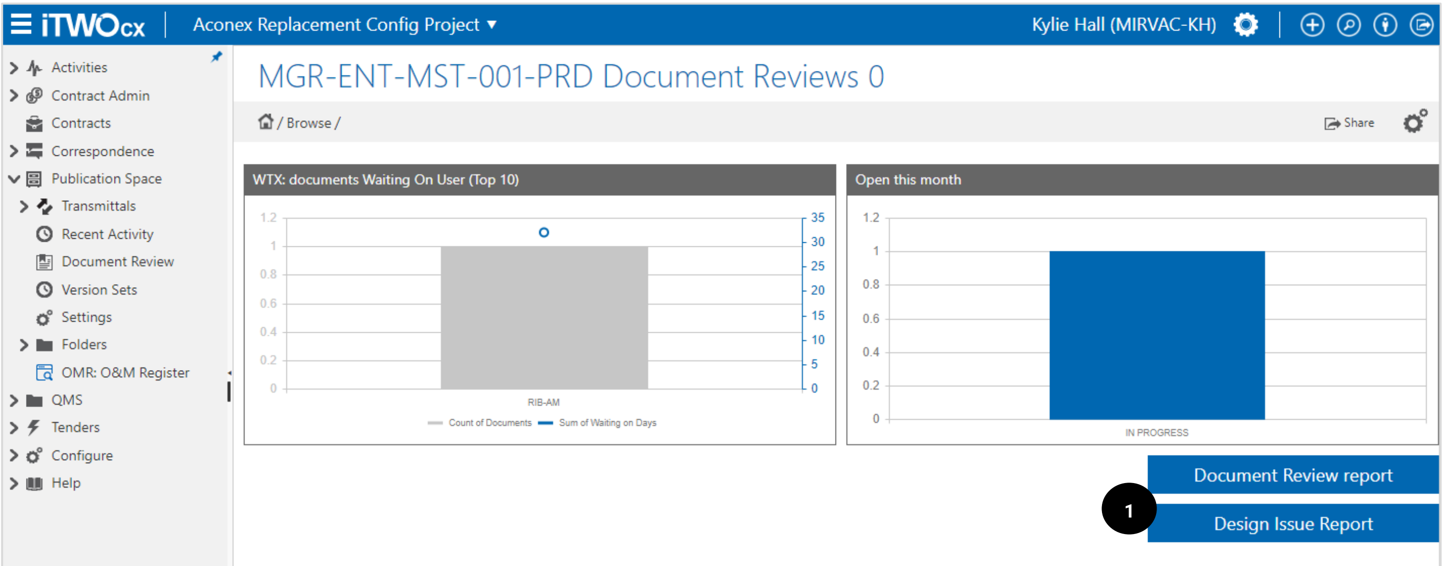
	#	Reference	Title	Author	Step	Action	Info	Due Date	# of Drawings	Status
▶	4	WTX#0020	Document(...	Craig Thomson (HMC)	Consultant Revi...	External Co...	Craig Thom...	Dec 27, 2021	1	Overdue by 100 day(s)
▶	5	WTX#0019	Document(...	Account Manager	Mirvac Review 1.1	Jan Stevens...	Account M...	Dec 27, 2021	1	Overdue by 100 day(s)
▶	6	WTX#0010	Document(...	Craig Thomson (HMC)	Consultant Revi...	External Co...	Craig Thom...	Dec 17, 2021	1	Overdue by 110 day(s)
▶	7	WTX#0007	Document(...	Craig Thomson (HMC)	Mirvac Review 3.1	Asset Mana...	Craig Thom...	Dec 17, 2021	1	Overdue by 110 day(s)
▶	8	WTX#0005	Document(...	Craig Thomson (HMC)	Mirvac Review 1.1	Jan Stevens...	Craig Thom...	Dec 16, 2021	1	Overdue by 111 day(s)
▶	9	WTX#0004	Document(...	Craig Thomson (HMC)	Mirvac Review 1.1	Jan Stevens...	Craig Thom...	Dec 16, 2021	1	Overdue by 111 day(s)

1 | 25 items per page | 1 - 9 of 9 items

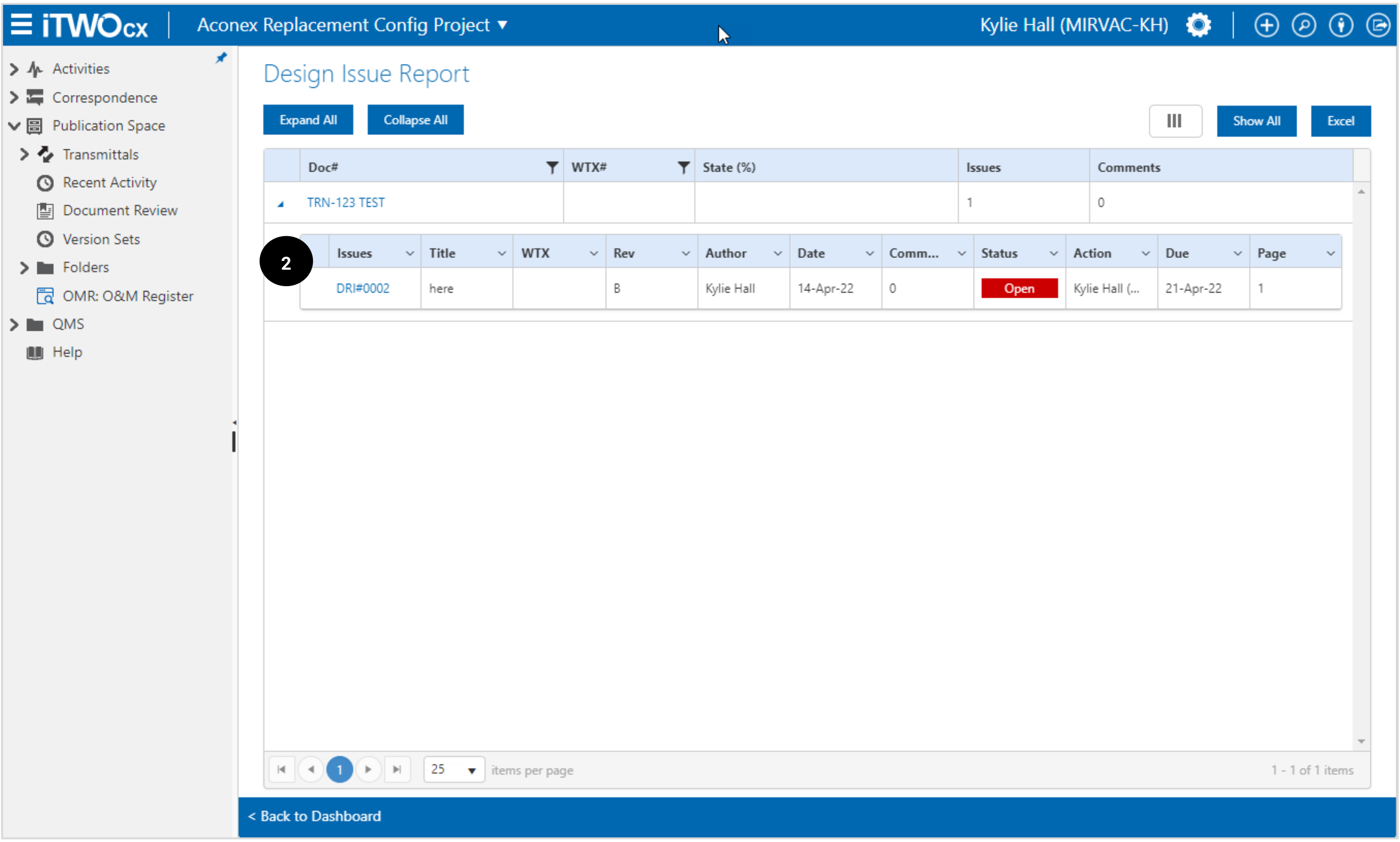
< Back to Dashboard | 2 PDF

7.6 Design Issue Report

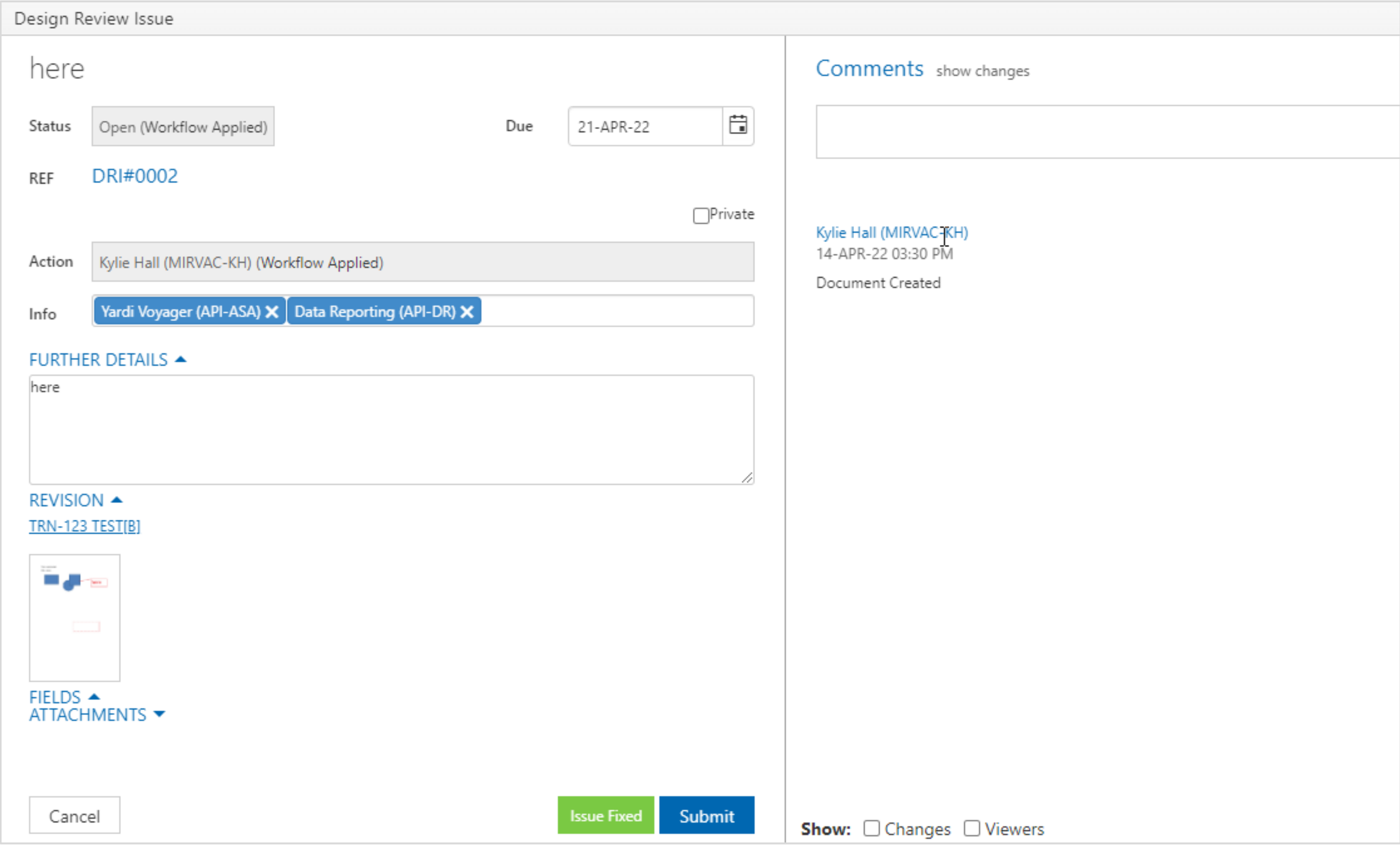
Another inbuilt report is the **Design Issue Report**. This report shows the status of any design review issues (DRI). Users can export a list of items to excel. Users can also open the DRI and complete action from this report without needing to navigate to another area



Action	Description
1. Click **Design Issue Report**	Access **Publication Space > Document Review** from the menu frame to open the dashboard. Click the **Document Review Report** button.



Action	Description
2. Click **reference ID**	Expand the section to see the issues relating to the document. Click the **DRI# hyperlink** to open the design review issue.



From here the standard actions to review and complete the DRI can be taken.

8 Glossary of Terms / Acronyms

Term / Acronym	Definition
DRI	Design Review Issue. A feature within iTWOcx to create issues using mark-up tools that can be tracked through to completion.
HSE	Health, Safety and Environmental.
iTWOcx	The collaborative construction project management system.
RIB	Vendor responsible for iTWOcx system.

Document Control

Version	Date	Prepared By	Reason for Update
V0.1	15/03/2022	Kylie Hall	Document Created
V1.0	01/08/2022	Kylie Hall	Published

Review / Sign Off

Name	Role	Review / Sign Off	Date