Electronic Plan Solutions

UAT Quick Book

ProjectDox®

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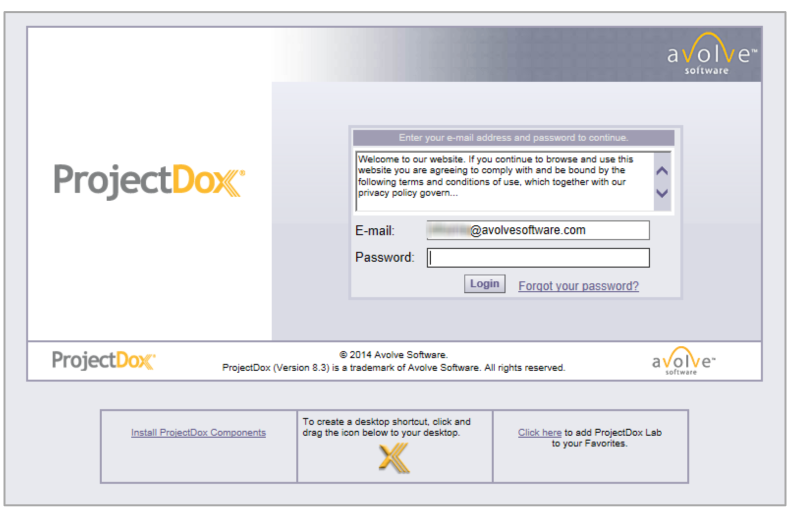
1 Logging In and User Profile

1) Use the link from invitation email, or URL provided by the instructor in your IE browser to navigate to the ProjectDox site login page:



2) Type or paste the temporary password into the Password Field and click “Login.” The password is case sensitive and must be entered exactly as it was provided to you.
3) Once you successfully log in, you will be taken to your User Profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself.
4) Click **Save**.

2 Navigating in ProjectDox

The *Home* page (as shown below) appears after completing your profile on your first login to ProjectDox, and appears immediately after future successful logins.

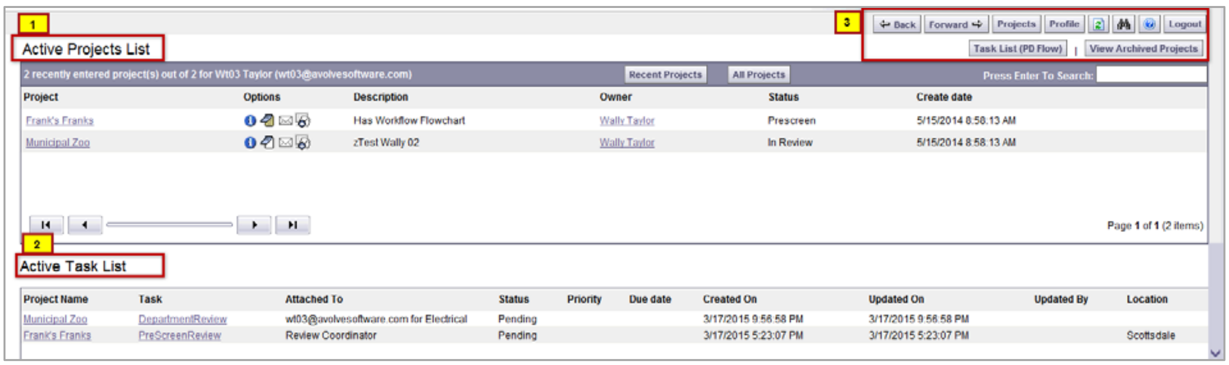


Figure 2-1. Home Page

The page displays:

1) A list of your active projects.
2) Below that, a list your workflow tasks.
3) Navigation and other controls are located in the upper right hand corner of the *Home* page as well as the other main pages in ProjectDox.

The *Active Projects List* displays information about the projects. The first column contains a list of project names, and each name is a link to the page for that project.

Your instructor will walk through some basic navigation with you.

3 Projects

Clicking on the link for a project moves to the page for that project; the screen shot below is an example:

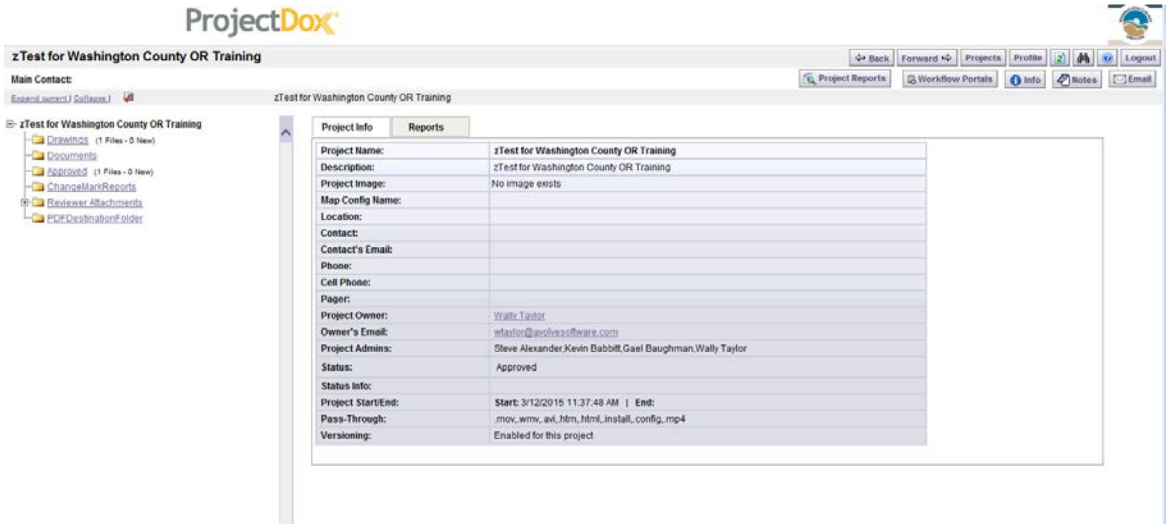


Figure 3-1. Project Page

A project contains and provides the structure for the following objects:

Folder: Similar to the familiar structure in various operating systems, a folder may contain individual files and sub-folders.

File: The drawings, documents, and other file types included in the project at the time of creation, or by addition by applicant or reviewer.

User: A humanoid with an email address.

Project Group: An object containing users who will perform similar functions and have similar permissions. Some examples: Applicant, Plans Examiners, Electrical.

Permission:

The rights to perform an action. In ProjectDox, you may think of 4 levels of permissions:

- System Administrator. Universal permission across all projects and to configure and administer the site itself. Also to grant permissions to the other 3 levels.
- Project Administrator. Permission to configure and administer an individual project. Also to grant permissions to other users within the project.
- Special Permissions. Specific permissions related to user or folder management, reports, batch stamping, etc.
- End User. Permissions related to accomplishing routine tasks: viewing, uploading and downloading files, creating and viewing markups, etc.

4 Working with Files

Files are stored in project folders.

We'll practice with some basic activities with files (these will be useful later in completing workflow tasks):

Uploading

1) Navigate to the Drawings folder in the training project.
2) In the upper left hand corner, click **Upload Files**.
3) In the resulting dialog, click **Browse** (button is located near middle of the dialog box)
4) In the resulting "Open" windows, navigate to C:\Windows\Web\Wallpaper
5) Navigate to the subfolder and file assigned by the instructor
6) Click **Open**
7) When returned to the Upload Files dialog box, click **Upload**
8) When notified "Your files have been uploaded," close the dialog

Downloading

1) Still in the Drawings folder of the training project, locate the file you just uploaded in the list on the left – scrolling down as needed.
2) Click on the download control for the file
3) In the resulting dialog box, click the downward arrow, and select **Save as**.
4) In the resulting Save As dialog, on the left side, click to select Desktop.
5) Click **Save.**
6) Acknowledge message that the download has completed.

Viewing

1) Navigate to the Drawings folder in the training project.
2) In the upper left hand corner, click to select the radio button to "Set ProjectDox viewer in separate window."
3) From the list of files on the left side, click on the thumbnail or filename for FP-1.dwg.
4) A large view of the file will open in a separate window – this is the Viewer tool.

(Optional if time permits) Measuring

Practice exercise from *AU-MARK1 - Introduction Level – Marking up in ProjectDox*.

5 Introduction to Electronic Plan Review

Terminology

Workflow: A sequential and repeatable pattern of business activity to move work from start to finish. In ProjectDox the workflow could be the steps involved in the intake, review and approval of plans for commercial buildings.

EForm: An electronic version of a paper form; it provides the user interface to a workflow: communicating, formatting, and validating information about a process.

Task: An assignment related to a workflow process within ProjectDox.

Task List: A list of assignments.

Project Specific Task List: Displays the workflow assignment(s) for the logged on user for a specific project.

Global Task List: Displays a list of workflow assignments across all projects for the logged on user for that ProjectDox site.

First In Group: A method that assigns a workflow task to a department/group of people; the first person to respond/accept the task becomes responsible for its completion. This is a standard method.

Starting the Review Process

1) An application for a permit starts the overall process – this originates in the Permitting System.
2) Although manual project creation is possible, typically it happens programmatically: ProjectDox polls the Permitting System for the new permit application, and combines information received from the permitting system with elements from the project template to create a new project.
3) The workflow can be started automatically upon project creation, or manually by a member of a designated coordinating group.

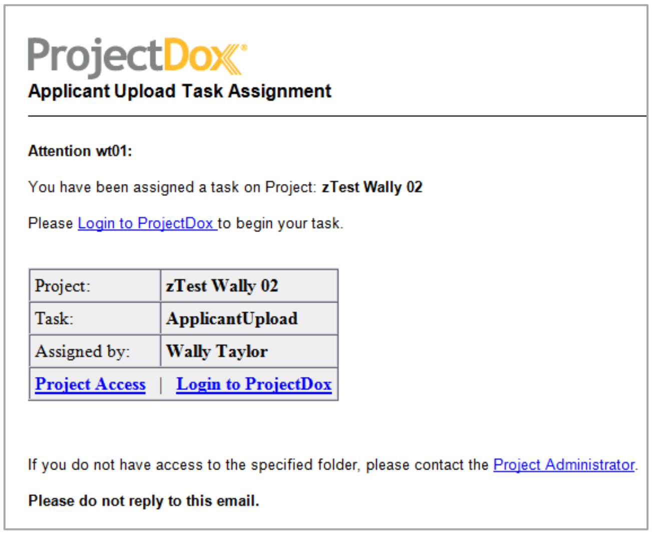
- The interface between the permitting system and ProjectDox is referred to as the "**Integration**."
- The **Project** contains the "objects" in the process.
- The **Workflow** provides and coordinates the "actions" for a project – moving it step by step through the approval process.
- **Interface Points** are the points where information is passed between ProjectDox and the Permitting System via the integration. **Starting a Workflow**

1) You must be a member of a project group with permissions to start a workflow.
2) On the Project page, click **Workflow Portals**.
3) The right pane on the page changes to display workflow related information.
4) In the **Start Workflows** section, click **Start Building Review**.
5) In the resulting dialog box, confirm to start the workflow.

6 “You have tasks” - Task Notification

Communicated by:

1) Email message



ProjectDox

Applicant Upload Task Assignment

Attention wt01:

You have been assigned a task on Project: **zTest Wally 02**

Please Login to ProjectDox to begin your task.

Project:	**zTest Wally 02**
Task:	**ApplicantUpload**
Assigned by:	**Wally Taylor**
Project Access	**Login to ProjectDox**

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

2) Displays in the Global task list (see Figure 2-1. Home Page)
3) Displays in the Project-specific task list, by clicking **Workflow Portals** (from inside the project).

Accepting a Task

1) Click on the link for the task (not for the project) in the task list.
2) In the resulting dialog box, confirm you are accepting the task by clicking **OK**.

Completing a Task - eForm Basics

When you accept a task, the workflow will display an eForm (remember, an eForm is the way for you to interface with the workflow).

The example below shows how to complete a department review task – in this case, by approval. For now we are focused on the information provided by the system in the top section of the eForm (in the Review Information tab), and the section labeled "Department Review" in the lower part of the form:

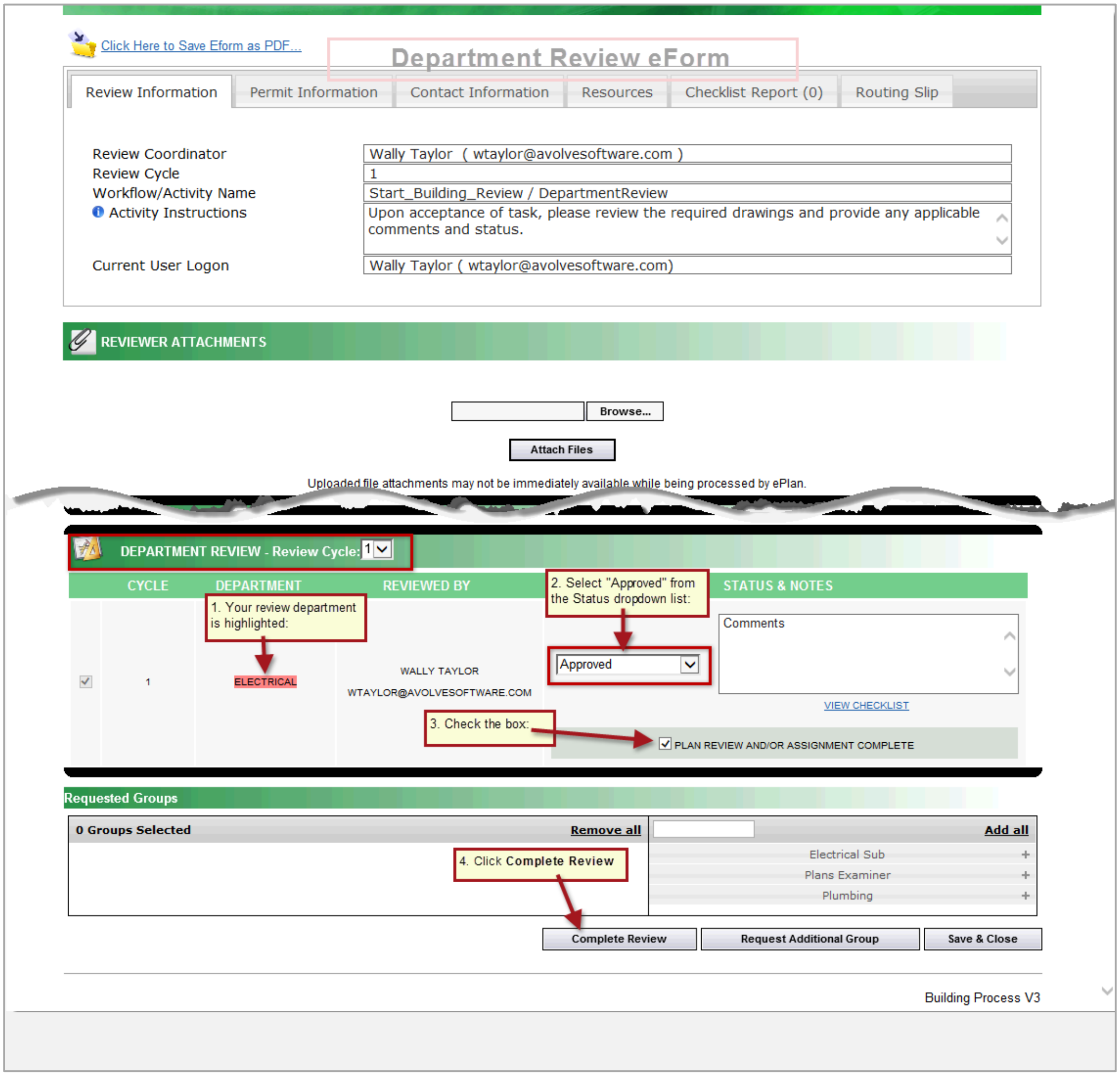


Figure 6-1. Department Review eForm - Approval

Clicking the **Save & Close** button at the bottom of an eForm window does NOT complete a task. It saves changes you have made in the window and closes it. Click the link in the task list to reopen when you are ready to resume work on the eForm.

Project Status Changes

As the Workflow moves through the various steps, the Project Status changes to reflect the progress: i.e. Prescreen, InReview, Resubmit Requested, Approved, Archived, etc.

Plan Review Interface Points

Several eForm data fields are populated by with information from the Permitting System.

Exercise

Approve Pre-Screen Review

1) Accept the PreScreenReview task by clicking on its link.
2) In the resulting dialog box, confirm you are accepting the task by clicking **OK**.
3) When the eForm for the task displays, at the bottom of the form (scroll down if needed), click **Approve**.
4) Acknowledge the resulting dialog box.

Approve Plan Review

1) Accept the DepartmentReview task by clicking on its link.
2) In the resulting dialog box, confirm you are accepting the task by clicking **OK**.
3) Follow the steps shown in Figure 6-1 to complete review (Approval).

7 Introduction to Batch Stamping

Demonstration.

8 Project Templates

Project templates can be thought of as a mold or model for creating a project – the configured characteristics (groups, users, folder structure, and permissions) in the template will be duplicated in the child project.

Demonstration – Create a Project, Add Applicant

Exercise – Intake Rejection

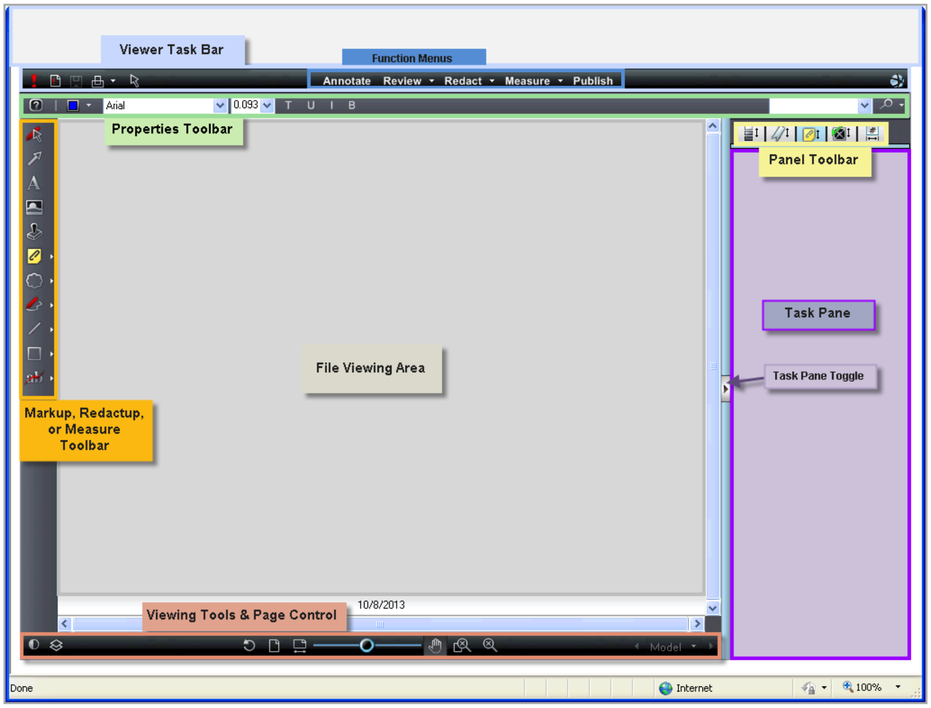
Reject Pre-Screen Review

(Use the same steps as previously.)

Accept the task for your assigned department review

This time you will follow the rejection path (Send Letter).

9 Viewing Basics



Viewer Task Bar: Location of controls for opening, saving, printing markup and related files. Also contains the Function Menus: Annotate, Review, Redact, Measure/TakeOff, and Publish.

Properties Toolbar: Controls in this bar will display and modify properties for the currently selected tool, function, or object.

Panel Toolbar/Task Pane: Also multifunction depending on the currently active tool, i.e. displays list of changemarks in current markup layer.

File Viewing Area: Self-explanatory

Markup, Redactup, or Measure/Takeoff Toolbar: Displays tools for the currently selected function. In the screenshot, the Markup toolbar is displayed.

Viewing Tools and Page Controls: Location for zoom, background color, layer, page and related controls.

For additional information and exercises related to the Viewer, see *AU-MARK1 - Introduction Level – Marking up in ProjectDox*. A copy is located in the training project in the Training Materials folder.

10 How to Create Markups

Markups allow you to annotate a file without altering the file itself. All markup entities are saved in a markup file, which is associated and overlaid on the drawing. The drawing itself remains unchanged. A new layer is automatically created for each saved markup file. Other users may be granted permission to view the author's markups, but cannot edit them. In this exercise, you will add several markups to the file regarding a wheel chair access issue. At the end of this exercise, your markup should look similar to Figure 10-2.

1) Open the file **plan layout1.dwg** in the ProjectDox Viewer tool by clicking the thumbnail image or the hyperlink in ProjectDox.

2) Click Annotate to open the markup toolbar on the left side of the screen.

3) Click the **Zoom Window** tool to get a close up of the area highlighted in blue in the following screen shot.

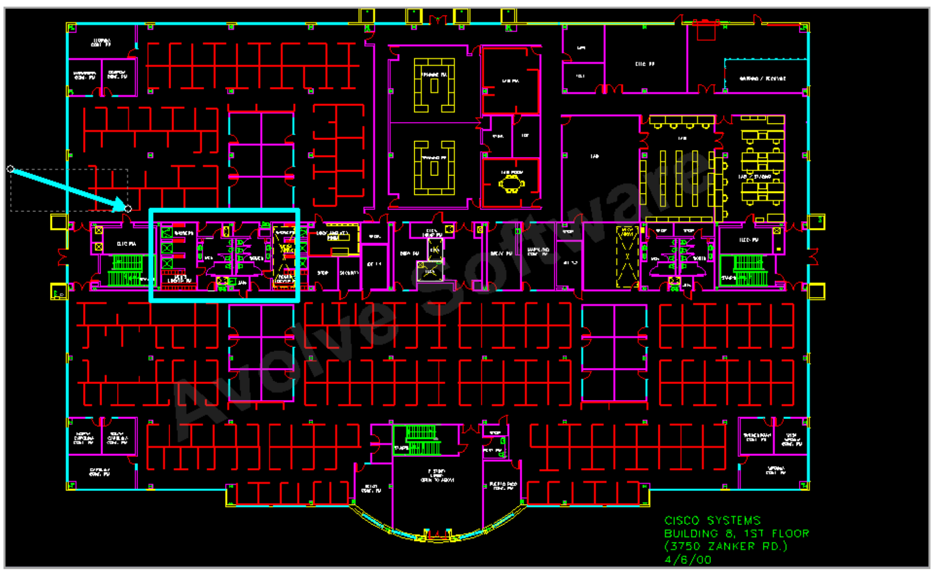


Figure 10-1. Plan Layout1.dwg Area to Zoom

4) Add an Oval/Circle as seen in Figure 10-2. by locating the **Rectangle** tool and clicking the arrow to display the additional tools. . Click the oval/circle tool.

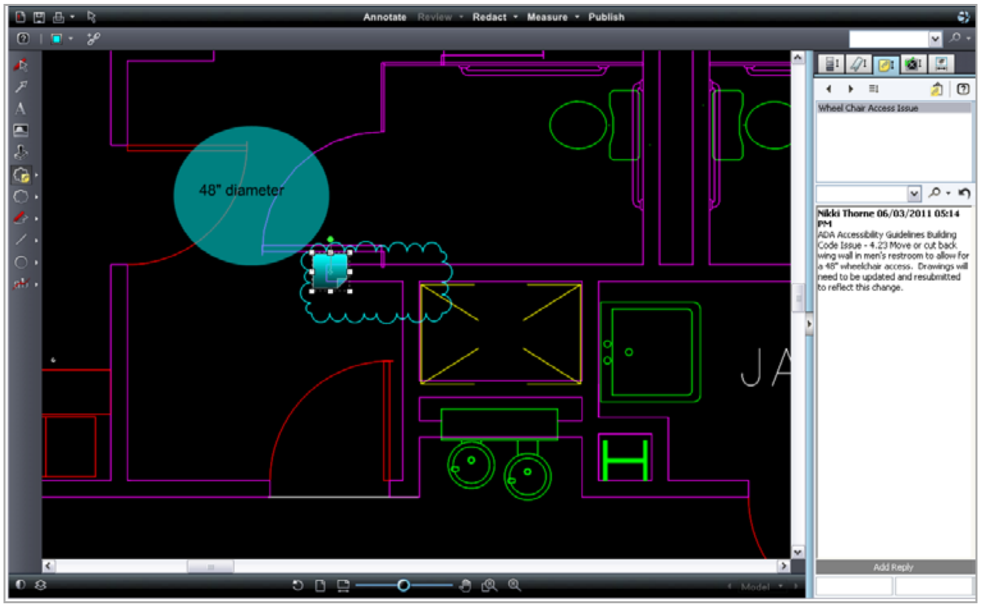
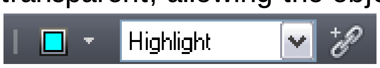


Figure 10-2. Wheel Chair Access Issue

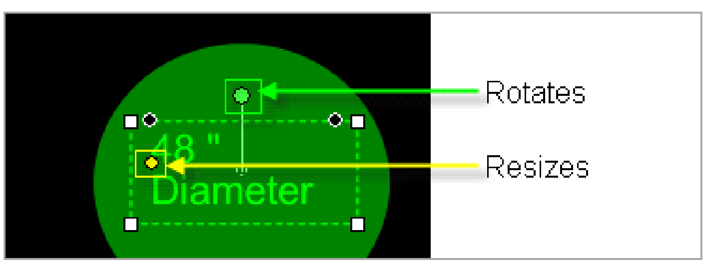
5) To change the color of the markup, locate the **Properties** toolbar 

in the upper left hand corner of the window, click the color tool  and select a color from the displayed palette.

6) Choose "Highlight" from dropdown list in the **Properties** toolbar to make the markup transparent, allowing the objects behind the markup to be seen.



7) Add the text **48" Diameter** to the circle by clicking the Text  icon and creating a box in the center of the circle as seen below. (See How to Resize and Move for more info)



8) Add a Changemark and cloud to the file (as seen in Figure 10-2.) by clicking the arrow to the right of the Changemark icon, and selecting the Changemark cloud icon.

a) Click the left mouse button and hold as you place the cursor (cursor is replica of the icon selected) on the start point for the cloud location.

Drag the mouse to create the cloud around the desired object and release.

9) The Changemark dialog box will display. Add the following text:

b) Name the Changemark "Wheel Chair Access Issue".

In the subject area add the following text: ADA Accessibility Guidelines Building Code Issue - 4.23 Move or cut back wing wall in men's restroom to allow for a 48" wheelchair access. Drawings will need to be updated and resubmitted to reflect this change.

Click **Ok** to close the Changemark.

10) Click the **Save Markup** icon and enter a unique markup name.

11) Exit the drawing file by clicking the ***Red X*** in the upper right corner, or by clicking the **Save Markup** Icon and **Close**.

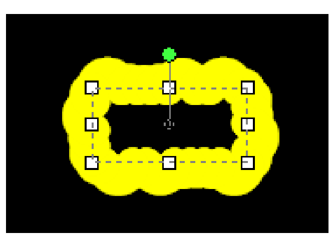
12) Return to the folder view in ProjectDox, refresh the folder panel (right click in the panel and click refresh), and note the additional icon for **plan layout1.dwg**.

11 How to Move and Resize Markups

13) To move an existing markup, first click the **Select Markup** icon .

14) Locate the desired markup and click on it.

- The markup is selected and editable when the image is outlined with the dotted area as seen below. The cursor will display four directional arrows in this mode.



15) To move the markup image, left-click the image (not on the square endpoints or midpoints), drag it to the desired location, and release the mouse button to set the markup in the new location

16) A markup can be resized after placement (if it is still selected), or later by clicking on the **Select Markup**  icon and then clicking on the markup.The markup itself will display several features for resizing or rotating it. Examples of each are shown below.

17) Black Left to Right Resize Circles

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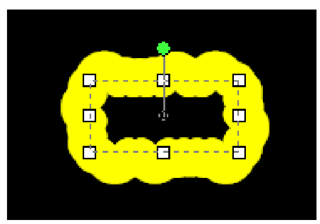
Select either black circle to resize the markup left to right.

c) Left click and hold the mouse button for either circles found on both ends of the markup dragging forward or backward until the desired length is achieved.

Release the left mouse button to set the markup.

The black resize dots are available on specific markups such as arrows, and text boxes.

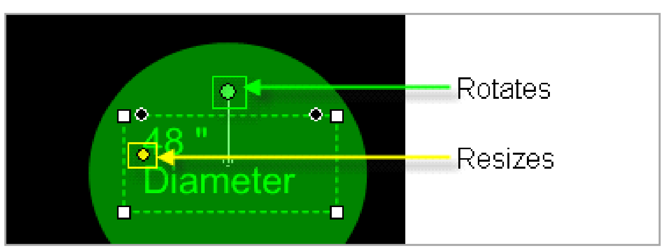
18) Green Rotation Circle



d) Left click green circle on a markup and drag the mouse clockwise or counterclockwise to rotate the markup.

Release the left mouse button to set the markup.

19) Yellow Resize Diamond



e) Left click and hold the mouse button on the yellow diamond of a markup.

Drag the mouse up to enlarge the markup, or down to shrink the markup.

Release the left mouse button to set the markup.

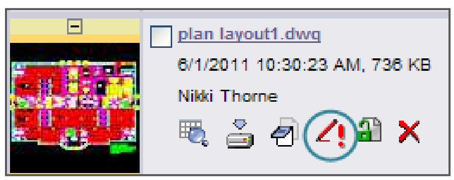
13 How to Delete Markups

You can delete one or more selected markups by using the Delete key, or by right-clicking and selecting delete from the menu pane. This exercise describes the first method:

1) Click the **Select Markup** Icon 
2) Select one or more markups to be deleted.
3) Press the **Delete** key on your keyboard to delete the selected markup entities.

14 How to Review Existing Markup Layers in ProjectDox

1) To open an existing markup from the file view click the Markups  icon on the **plan layout1.dwg** file to view the markups



2) Click the **View** checkbox next to your markup(s) and click the **View/Edit button.**
3) The Viewer tool will display a navigation pane to the right listing any Changemarks on the file.
   - The **Review Changemark Navigation** pane only displays when at least one Changemark Note is applied to the file.
   - Click "Wheel Chair Access Issue".

15 How to Edit an Existing Markup Layer

This exercise will demonstrate how to edit a markup layer that has been previously saved and closed. A file can be edited and saved using the Save Markup icon as often as required without having to close the file. Once the file is closed, access to edit the file to edit is through the Markup Layers Panel in the file view of ProjectDox:

20) Click the Markup  icon
21) Click the "Edit" radio button and click the "View/Edit" button
22) Select the Wheel Chair Access Issue from the navigation pane
23) Click the **Select Markup**  icon to enable the feature.

24) Double click the "Wheel Chair Access Issue" Changemark Note.

25) Add the following text:

    Reference attached web link for more building code information regarding wheelchair access to public restrooms.

26) Click Ok

27) Click the **Hyperlink** icon from the **Properties** toolbar.

28) Enter the below URL into the dialog box and click the Ok button.

    http://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/ada-standards/chapter-4-accessible-routes

29) Click the Save Markup icon to save your changes.

You can add hyperlinks to any markup by using the **Select Markup** icon and clicking the **Hyperlink** icon.

16 Adding Markups

In this exercise, you will continue to practice creating markups on the plan layout1.dwg file. In this example, a door has been improperly placed and needs to be relocated. You will be adding a changemark arrow, with the result looking like Figure 16-2.

30) Open the file **plan layout1.dwg** in the Viewer tool by clicking the thumbnail image or the hyperlink in ProjectDox.

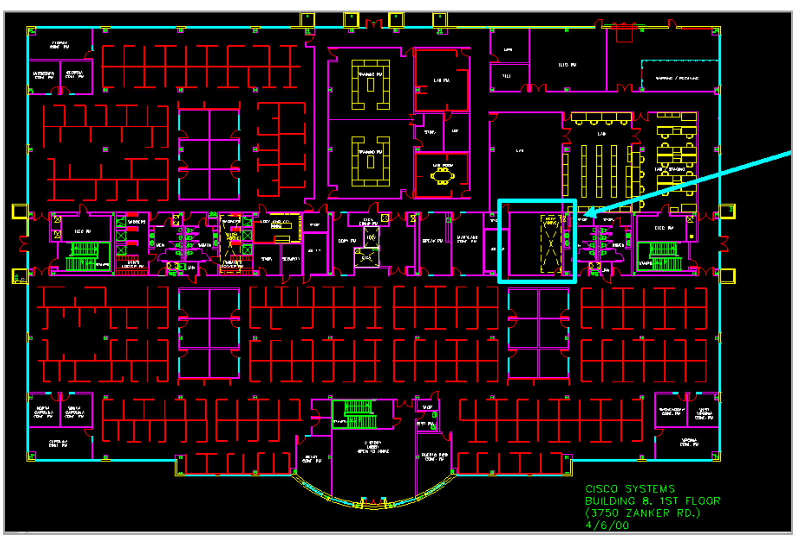


Figure 16-1. Plan Layout1.dwg Door Clearance Area

31) Use the "***Zoom Window***" to magnify the highlighted area in blue in Figure 16-1.

32) Click  and then the combination **Changemark Arrow** feature from the Markup toolbar to apply a markup as seen in Figure 16-2. .

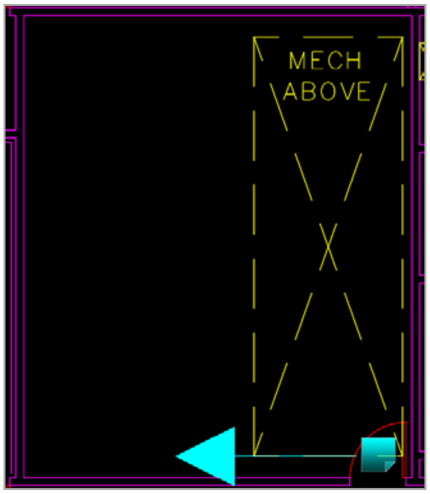


Figure 16-2. Door Clearance Changemark

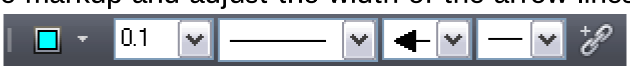
33) Place the cursor at the selection point (the arrowhead is created first), left click and drag across the file to create the arrow.

34) Releasing the mouse button will set the arrow and display the Changemark Note.

35) Type into the Changemark Note:

- Title = "Door Relocation Issue".
- Body of Note = Check mechanical equipment above to make sure there is no conflict with the door opening into this room. Relocate the door to clear mechanical above. Resubmit drawing if changes are required.
- Click the **Ok** button to close the Changemark.

36) To edit the arrow placement, size, color etc. click the **Select Markup** Icon  and click the arrow markup.

37) Select the color of the markup and adjust the width of the arrow lines using the **Properties** toolbar. 

38) Click the **Save Markup**  icon.

- The markup layer should retain the original naming convention provided. If prompted to enter a new markup name when closing the file you have not properly edited the existing markup layer.

39) Exit the drawing file by clicking the ***Red X***  in the upper right corner.

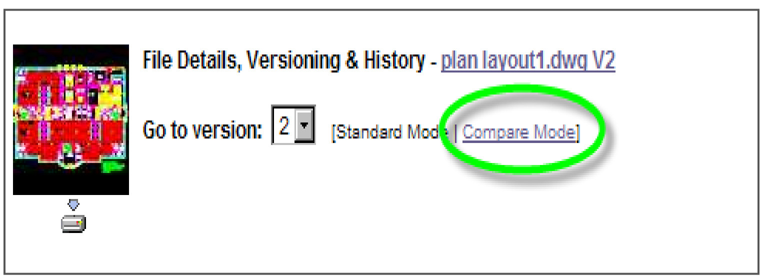
Any number of markups can be added to a single markup layer.

How to Compare File Versions

ProjectDox allows you to perform a graphical comparison of two file versions or two files in the same folder using the Compare tool. The ***Compare toolbar*** appears at bottom of viewing window.

The toolbar contains several controls for different viewing options. The number of controls displayed may vary with the option chosen. In this exercise, you will upload another version of the **plan layout1.dwg** file and perform a compare of the two versions.

1) Select the **History**  icon for the **plan layout1.dwg v2** file.
2) Select Compare Mode



3) Select *Version 1* and *Version 2* checkboxes and click the **Compare** button.
4) The selected files will display in ***Side-by-Side*** view.
5) Use the **Compare** toolbar to view the file in the following modes:
   a) Overlay
   b) Overlay Compare and use of Transparency Slider
   c) Side by Side

   Additions – indicated in green

   Deletions – indicated in red

   Unchanged – indicated by gray

17 How to Compare Markup File Versions

The compare file version opens overlaid on the open file. The open file displays in red (deleted geometry), and the compare file displays in green (added geometry). Geometry that has not changed (common between both revisions) is gray. Use the Transparency slider to change transparency for clearer visibility of the file differences - right to dim red (deleted) and left to dim (added) green areas.

1) Open two files in Compare Mode and click the **Open File (only**) icon.
2) Click **Review** and select a markup layer from the M**arkup Open for Review** dialog.
3) The ***Changemark Review Window*** will appear to the right, if not already present. Click "*Wheel Chair Access Issue*".
4) Click **Side-by-Side** .
5) From the **Compare** Toolbar, click **Overlay Differences** . Use the Transparency Slider to view the original markup and deletions versus additions to the file.

18 How to Compare Text Files

1) Select the History icon for the **Plan Review Tenant Build Out.v2** file.
2) Select Compare Mode
3) Select *Version 1* and *Version 2* checkboxes and click **Compare**.
4) Select **Text Mode** . The display will be similar to Figure 18-1.

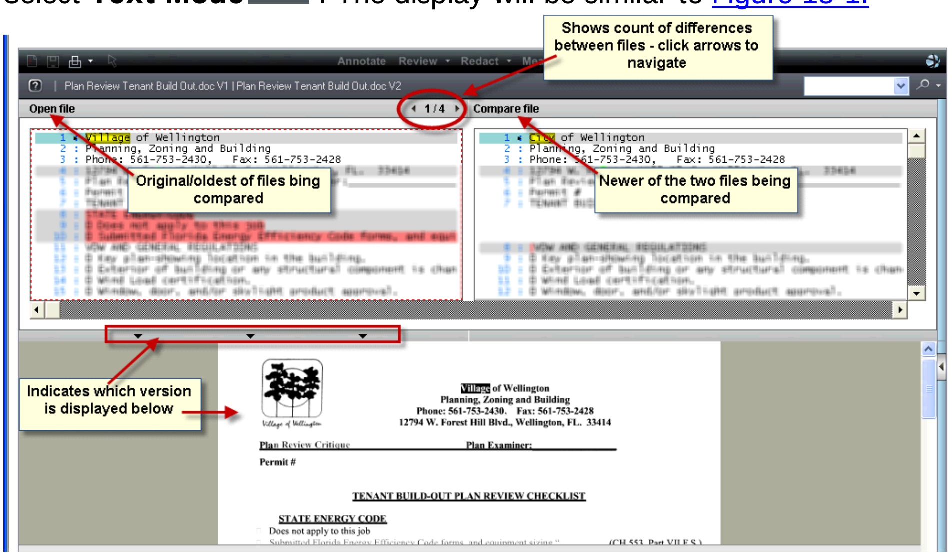


Figure 18-1. Text Compare Tool

5) Differences will be displayed as:
   a) Yellow = change in text between the two documents
   b) Red = deletion made from the open document
   c) Green = addition made to the compare document
   d) No changes between the documents will display a message

19 How to Compare Separate Files

ProjectDox allows for the selection of two file versions with different names in the thumbnails list to be opened and compared. This can be done with single or multi-page files.

The Viewer tool does not allow two pages of the same multi-page file to be compared against each other. Comparing pages from a multi-page file would require another set of drawing files to be uploaded under a different name.

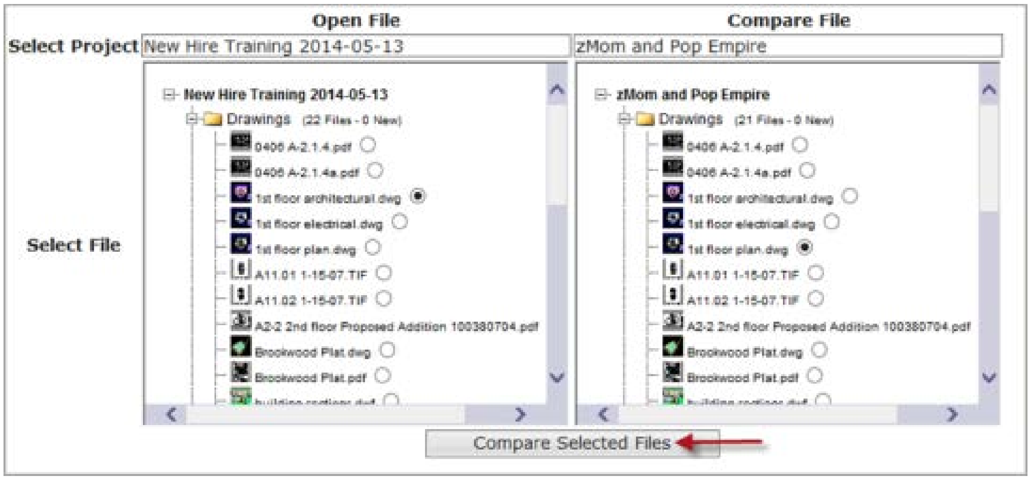
Below, you will compare two PDF files and use the various tools available in Compare Mode.

1) Select the **0406 A-2.1.4a.pdf** and **0406 A-2.1.4.pdf** from the thumbnail list and select the **Compare** icon.
2) ProjectDox launches in **Compare mode**, with **Side by Side** as the default view.
3) Experiment with the other features in the **Compare** toolbar including **Overlay, Overlay Compare, Additions, Deletions** and **Unchanged** to see their effect on the files.

20 Global File Compare

This feature, located in the Resources tab of the eForm, gives users the ability to compare two files from different projects and folder locations.

4) In the eForm, click **Resources** tab.
5) Locate **Plan Review Global File Compare**
6) Click in Select Project field for Open File; type at least first 3 letters of project, then select from the displayed list. Repeat for Compare File.



4) Click **Compare Selected Files**

Continue Exercise: Approve Plan Review

Follow the same steps as previously to accept task, and complete review – this time you will approve.

Continue Exercise: Batch Stamp

1) Click the folder name to access the project's file view page.

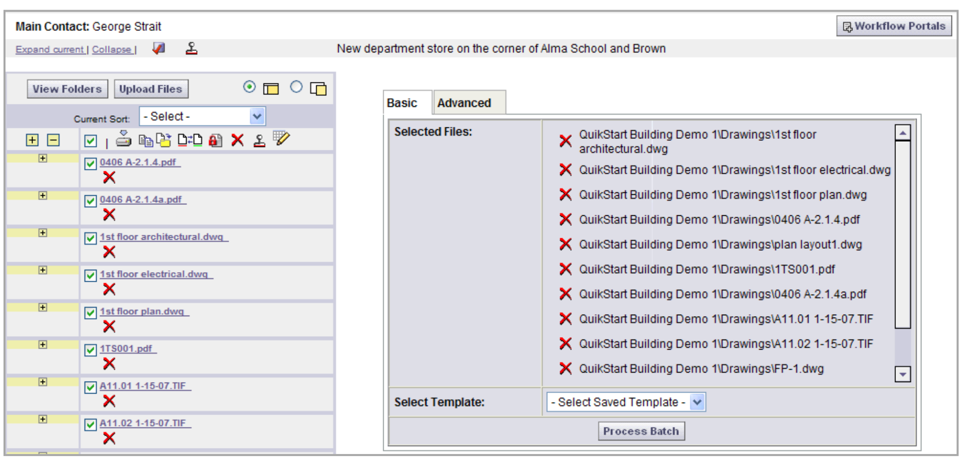


Figure 20-1. Batch Stamping

2) Click the thumbnail image check boxes to select the files you want to batch stamp.

3) Select the batch stamp files icon . The Batch Stamp options page appears in the right frame of ProjectDox with the files staged for stamping in the **Selected Files** window.

4) From the *Basic* tab, select a template from the dropdown.

5) Click the **Process Batch** button to start the stamping process. Follow Prompts.

21 Reports

The Reports feature in ProjectDox uses Microsoft's SQL Server Reporting Services (SSRS), and comes with 24+ standard reports:

The reports are organized as:

Type	Access	Notes
Sitewide Reports	Users with Reports permission	Scope is across site. Two subgroups: Administrative: Viewable only by System Admins Sitewide: Viewable by all users with Reports permissions
Project Reports	All users in project. Access may be restricted by the administrator.	Scope is limited to selected project. Two subgroups: Project and Workflow

Access Sitewide Reports

1) You must have Reports permission to access sitewide reports.
2) On the Home page, click **Sitewide Reports**.
3) In the resulting window, click on the icon (not on the name) for a report to view it.

Access Project Reports

1) Navigate to the project for which you want information.
2) Click either the **Project Reports** button, or **Reports** tab.
3) In the resulting window, click on the icon (not on the name) for a report to view it.

For more information about Reports, see *ProjectDox Standard Reports* in the Training Materials folder of the training project. The document provides the name, description, and a sample screenshot for each standard report.

22 (Optional) Document Management

Demonstrations by Instructor:

Project Archive/Unarchive

Project Export/Import

23 Additional Topics

- Search feature
- Online help – for ProjectDox, and for the Viewer
- Reload
- Best practices for Batch Stamping
- Communications within ProjectDox

Exercise

- ½ Reject Review & ½ Approve Review

Task Assignment Features

- Reassign
- Reaccept
- Request Additional Group
- Reviewer Corrections