

May 2021 Electronic Plan Review New Features in ProjectDox V9.1

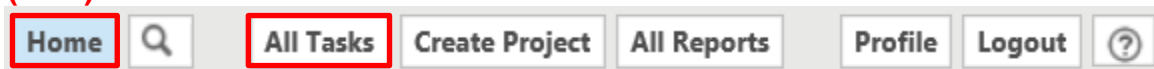
This document identifies new features established with upgrading to ProjectDox Version 9.1.

Navigation

New Main Navigation Buttons

- **Back, Forward** and **Refresh** buttons are now performed using the browser, mouse or shortcuts.
- **Home** button will take users to the Home page with Tasks and Projects tabs.
- **All Tasks** button will allow users to open a separate window to view a full page of all project tasks available.

(New)



(Old)



New Home Page

- **Projects** tab allows users to access projects previously worked on by clicking on the project link.

eplans

Tasks (PF) | Tasks (PD) | **Projects**

Recent Projects Refresh Save Settings

PROJECT	OPTIONS	DESCRIPTION	OWNER
▼ Contains...		▼ Contains...	
201500266		RESADDTN	EPlan_Support
201500486		SFD DEVEL TEST FOR TRAINING	EPlan_Support
201500492		SFD DEVEL TEST FOR TRAINING	EPlan_Support
201500493		SFD DEVEL TEST FOR TRAINING	EPlan_Support

- **Tasks (PD)** tab allows users to access the project home page or available task by clicking on the appropriate link. This tab is for projects created using the old ProjectDox workflow.



Project Name	Task	Attached To	Status	Priority	Due date
201500266	ApplicantUpload	Applicant	Pending		

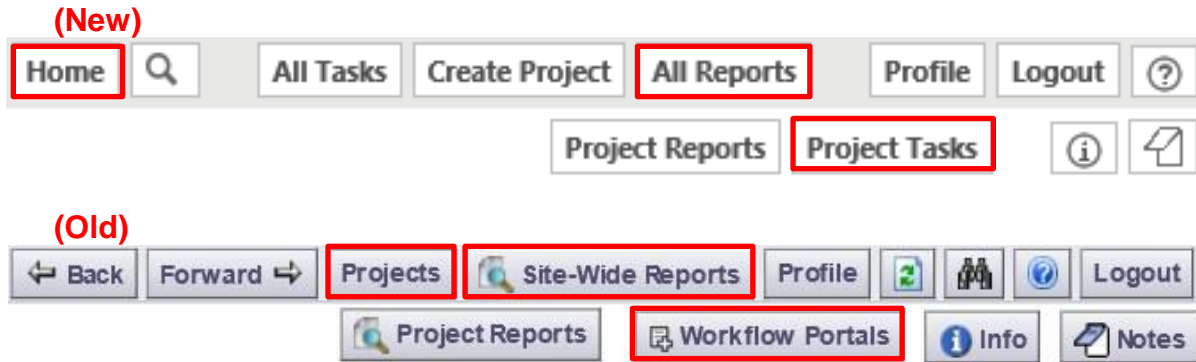
- **Tasks (PF)** tab allows users to access the project home page or available task by clicking on the appropriate link. This tab is for projects created using the new ProjectFlow workflow.



TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE
P-ZONING Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-ZONING	FirstInGroup
Exploratory Prescreen Task	20150096	20150096 - Land Dev - 4/15/2021 8:18:27 PM	Admin Coordinator	FirstInGroup
Upload and Submit Task	201500493	201500493 - Building - 4/15/2021 8:27:53 PM	Applicant	FirstInGroup
Exploratory Upload Task	20150093	20150093 - Land Dev - 4/15/2021 8:18:21 PM	Applicant	FirstInGroup
P-BLDG REV Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-BLDG REV	FirstInGroup
P-ENG RVW Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-ENG RVW	FirstInGroup

New Project Navigation Buttons

- **Home** button replaces the **Projects** button.
- **Project Tasks** button replaces the **Workflow Portals** button
- **All Reports** button replaces the **Site-Wide Reports** button



Grid View Configuration (Tasks and Projects Tab)

- New configurable grids allow users to move, hide, sort and filter items they want to view. The grid configuration can be saved to the users preference.

eplans

Tasks (PF) | Tasks (PD) | **Projects**

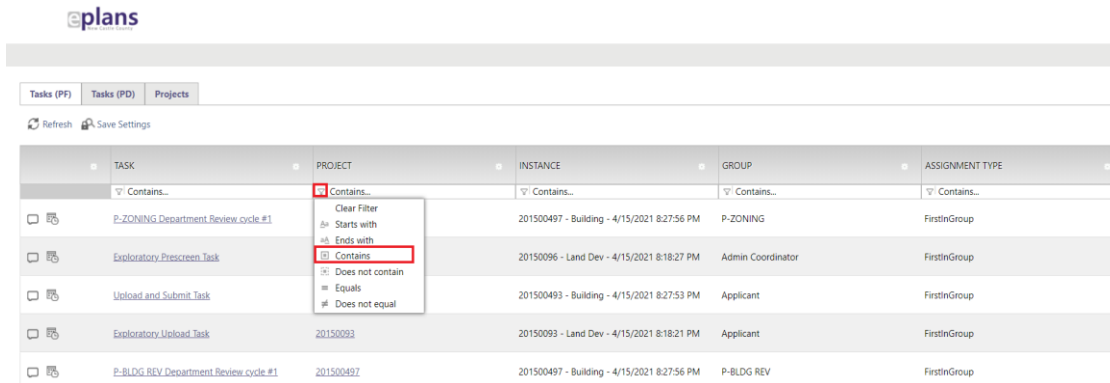
Refresh Save Settings

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE
P-ZONING Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-ZONING	FirstInGroup
Exploratory.Prescreen.Task	20150096	20150096 - Land Dev - 4/15/2021 8:18:27 PM	Admin Coordinator	FirstInGroup
Upload.and.Submit.Task	201500493	201500493 - Building - 4/15/2021 8:27:53 PM	Applicant	FirstInGroup
Exploratory.Upload.Task	20150093	20150093 - Land Dev - 4/15/2021 8:18:21 PM	Applicant	FirstInGroup
P-BLDG REV Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-BLDG REV	FirstInGroup
P-ENG RVW Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-ENG RVW	FirstInGroup
P-FIREMSHL Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-FIREMSHL	FirstInGroup
ENV ASSESS Department Review cycle #2	20150099	20150099 - Land Dev - 4/15/2021 8:18:31 PM	ENV ASSESS	FirstInGroup
HIST EXPLR Department Review cycle #2	20150099	20150099 - Land Dev - 4/15/2021 8:18:31 PM	HIST EXPLR	FirstInGroup

1 - 9 of 9 records

Column Filter

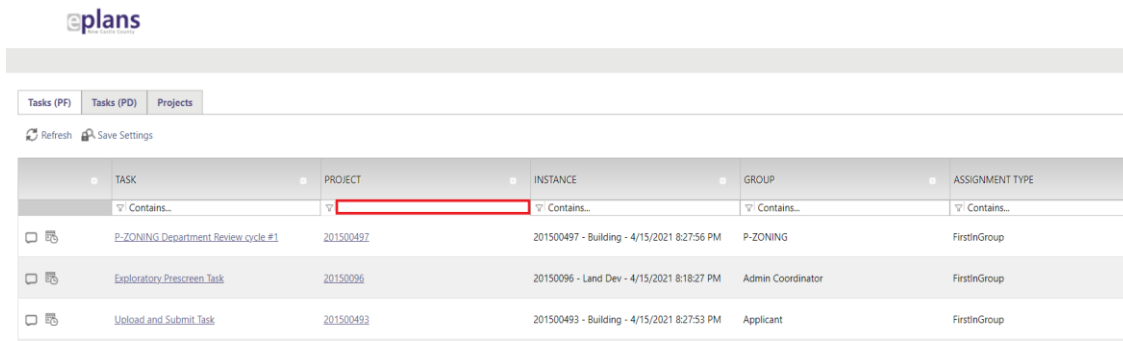
- Click the filter icon and choose one of the options from the dropdown.



The screenshot shows the eplans interface with a table. The table has columns: TASK, PROJECT, INSTANCE, GROUP, and ASSIGNMENT TYPE. A dropdown menu is open over the PROJECT column, showing filter options: Clear Filter, Starts with, Ends with, Contains (highlighted with a red box), Does not contain, Equals, and Does not equal. The table data includes rows for P-ZONING Department Review cycle #1, Exploratory Prescreen Task, Upload and Submit Task, Exploratory Upload Task, and P-BLDG REV Department Review cycle #1.

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE
P-ZONING Department Review cycle #1		201500497 - Building - 4/15/2021 8:27:56 PM	P-ZONING	FirstInGroup
Exploratory Prescreen Task		20150096 - Land Dev - 4/15/2021 8:18:27 PM	Admin Coordinator	FirstInGroup
Upload and Submit Task		201500493 - Building - 4/15/2021 8:27:53 PM	Applicant	FirstInGroup
Exploratory Upload Task	20150093	20150093 - Land Dev - 4/15/2021 8:18:21 PM	Applicant	FirstInGroup
P-BLDG REV Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-BLDG REV	FirstInGroup

- Type in key word to filter in real time.



The screenshot shows the eplans interface with the same table as above. A red box highlights the filter input field in the PROJECT column, which is currently empty.

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE
P-ZONING Department Review cycle #1		201500497 - Building - 4/15/2021 8:27:56 PM	P-ZONING	FirstInGroup
Exploratory Prescreen Task	20150096	20150096 - Land Dev - 4/15/2021 8:18:27 PM	Admin Coordinator	FirstInGroup
Upload and Submit Task	201500493	201500493 - Building - 4/15/2021 8:27:53 PM	Applicant	FirstInGroup

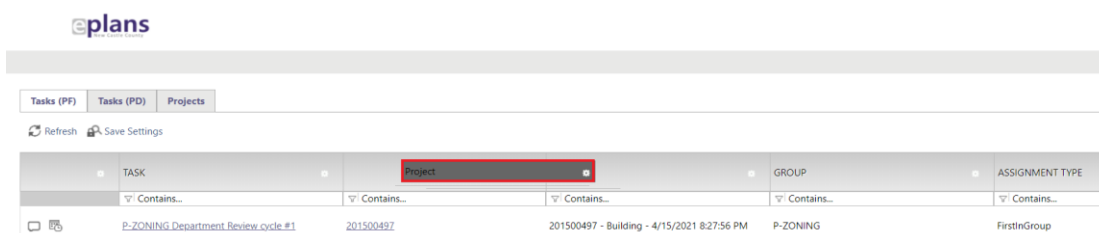
Column Width Control

- Click and drag on the column border to adjust the column width.



Column Reorder

- Click and drag the header to move the column.

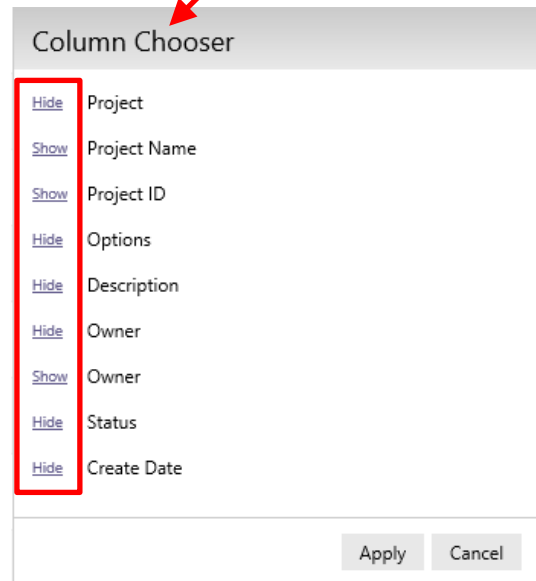
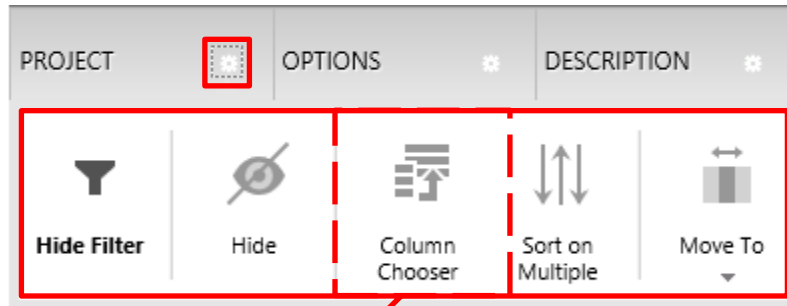


The screenshot shows the eplans interface with the same table as above. The PROJECT column header is highlighted in red, indicating it is being moved.

TASK	Project	GROUP	ASSIGNMENT TYPE	
P-ZONING Department Review cycle #1	201500497	201500497 - Building - 4/15/2021 8:27:56 PM	P-ZONING	FirstInGroup

Column Control

- Click the gear icon to access the Hide Filter, Hide, Column Chooser and Move To options.
- The **Column Chooser** option allows users to **Show** or **Hide** columns.



Save Settings

- **Refresh** link updates the data in the grid.
- **Save Setting** link saves the configured grid settings.
- **Reset Settings** link restores the grid to default settings and will only appear if changes have been made to the grid.

