

ProjectDox New Features 8.3 to 9.1

End-user

PGC

Mara Fitter - Instructor

July 17, 2018



Overview

- Navigation – New Look, Same Feel
- Reports
- Viewer Updates
- HTML Enhancements
- Workflow
- Improved Applicant Experience

Navigation – New Look, Same Feel

New Home Page

The screenshot shows the ProjectDox software interface. At the top left is the ProjectDox logo. To the right of the logo is a navigation bar with a 'Home' button (highlighted with a yellow box), a search icon, and buttons for 'All Tasks' and 'Create Project'. Below the navigation bar are two tabs: 'Tasks' and 'Projects' (both highlighted with a yellow box). Underneath the tabs are buttons for 'Refresh', 'Save Settings', and a 'Quick Filter' section with buttons for 'Applicant Upload', 'PreScreen', 'Review', and 'Batch Stamp'. The main content area is a table with the following columns: OPTIONS, TASK, PROJECT, INSTANCE, GROUP, ASSIGNM..., STATUS, PRIORITY, and D. The table contains three rows of task data:

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNM...	STATUS	PRIORITY	D
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reassignment Test - PF_BIC_Building_LA - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Pending	⚠ Medium	
	Review Complete Task	BU-2018-PA Mara	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:45 AM	Review Coordinator	FirstInGroup	Pending	⚠ Medium	
	Applicant Upload Task	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 5/7/2018 9:39:25	Applicant	FirstInGroup	Accepted	⚠ Medium	

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9.X Separate tabs for Tasks, and Projects

New Home Page – Projects Tab

Home All Tasks Create Project All Reports Profile Logout

Tasks for ProjectFlow Tasks for ProjectDox Workflow **Projects**

All Projects Refresh Save Settings Recent Projects All Projects Archived Projects

Show 50 records

PROJECT	OPTIONS	DESCRIPTION	OWNER	STATUS	CREATE DATE
01-13-2017 12-43-PM - test simple project		Simple project description	Wally Taylor	Approved	1/13/2017 12:43:45 PM
01-13-2017 12-44-PM - test permit project		Permit project description	Wally Taylor	Approved	1/13/2017 12:46:22 PM
1192		test	Avolve Support	In Review	6/12/2017 9:51:29 PM
14505		test	Avolve Support	In Review	3/21/2018 1:49:23 AM
16359		test	Avolve Support	Prescreen	3/21/2018 1:32:30 AM
18043-10000-00226		18043-10000-00226-M18LA00023-FullCycle	Michal Zmijewski	Submitted for Screening	2/12/2018 7:10:54 AM
27149		test	Avolve Support	In Review	3/20/2018 11:52:49 PM
28429		test	Avolve Support	Prescreen	11/19/2017 11:26:33 PM

Tasks (PD) Tab - Dual Workflow Sites

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

Project Name	Task	Attached To	Status	Priority	Due date	Assigned On	Updated On	Updated By	Description
15RMS0026	ReviewQA	Review Coordinator	Pending			6/10/2015 11:52:41 AM	6/10/2015 11:52:41 AM		RELO - Expert Resou
15RMS0026 Copy1	ReviewQA	Review Coordinator	Pending			5/29/2015 3:51:10 PM	5/29/2015 3:51:10 PM		Training
zTESTBR001 Copy 2 for TRAINING	DepartmentReview	Review Coordinator	Accepted			5/28/2015 11:20:33 AM	5/29/2015 8:45:46 AM		.com Training
15M5031	DepartmentReview	.com for Permits	Accepted			5/6/2015 2:07:52 PM	6/1/2015 5:25:26 PM		.com MSU - Test P
15M5031	DepartmentReview	.com for Hydraulics	Accepted			5/6/2015 2:07:52 PM	6/1/2015 5:23:21 PM		.com MSU - Test P
15M5031	DepartmentReview	.com for Design Review	Accepted			5/6/2015 2:07:52 PM	5/6/2015 3:55:15 PM		.com MSU - Test P
15M5031-Training	DepartmentReview	.com for Civil - Corrosion	Accepted			5/6/2015 9:31:13 AM	5/6/2015 9:31:50 AM		.com training - SHOW TAS
ISG-Training only	BeginReview	Intake	Accepted			5/5/2015 11:08:35 PM	5/6/2015 9:25:06 AM		.com TRAINING ONLY, PLE
15M5031-Training	DepartmentReview	Permits	Accepted			5/5/2015 5:07:26 PM	5/5/2015 5:07:41 PM		.com training - SHOW TAS
15M5031-Training	DepartmentReview	Design Review	Accepted			5/5/2015 5:07:25 PM	5/5/2015 5:08:06 PM		.com training - SHOW TAS

Navigation: < << >> >

Page

Main Navigation Buttons - Old



Main Navigation Buttons - New

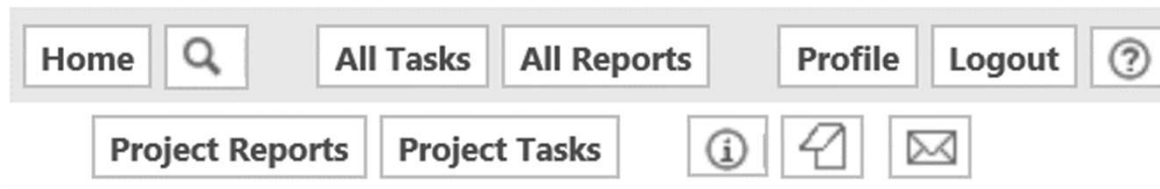


9.X Back, Forward, Refresh are now performed using browser or other controls. Home – to Home page with Tasks and Projects tabs.
All Tasks – New window with global task list.

In-project Navigation Buttons - Old



In-project Navigation Buttons - New



Name changes - Buttons:

Old Name	New Name
Projects	Home
Site-wide Reports	All Reports
Workflow Portals	Project Tasks

Navigation Shortcuts

Keyboard Combination	Action
Ctrl + plus (+) or Ctrl + minus (-)	Zoom in or zoom out
Ctrl + scroll wheel	Zoom in or out
Alt + Left arrow	Back
Alt + Right arrow	Forward
Alt + Tab	Task Switcher
F5	Refresh active window

Grid View Configuration

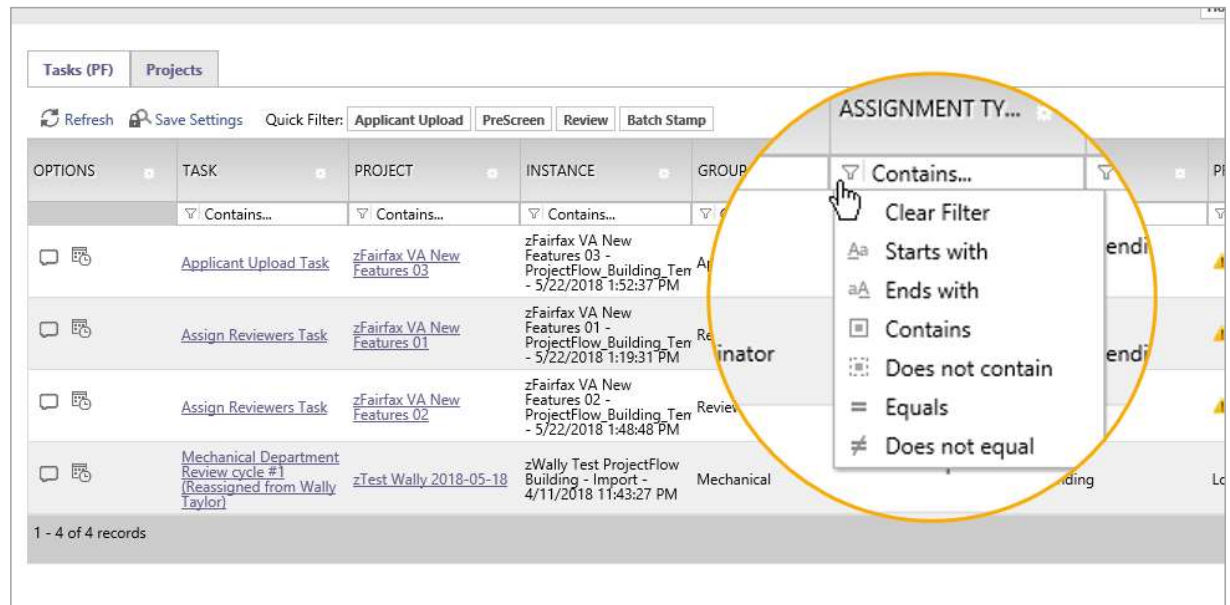
Tasks		Projects								
Refresh Save Settings										
OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	PRIORITY	STATUS	DUE DATE	CREATED	
	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	On...
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Medium	Pending			4/23/2018 1:18:24 PM
	Assign Reviewers Task	zMaWa.001	zMaWa.001 - PF_BIC_Building_LAB - 4/20/2018 4:54:07 PM	Review Coordinator	FirstInGroup	Medium	Accepted			4/24/2018 8:04:57 AM
	Review Complete Task	BU-2018-PA Mara	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:45 AM	Review Coordinator	FirstInGroup	Medium	Pending			4/25/2018 12:16:57 PM
	Mechanical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	Low	Pending	5/4/2018 11:51:00 AM		4/25/2018 12:02:22 PM
	Electrical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	Low	Pending	5/4/2018 11:51:00 AM		4/25/2018 12:02:22 PM
	Plumbing Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	Low	Pending	5/4/2018 11:51:00 AM		4/25/2018 12:02:22 PM
	Electrical Department Review cycle #1	Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Electrical	FirstInGroup	Low	Accepted			4/23/2018 3:27:22 PM
	Mechanical Department Review cycle #1	Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Mechanical	Individual	Low	Accepted			4/23/2018 3:27:22 PM

1 - 8 of 8 records

9.X New configurable Tasks and Projects grids. Users can move, hide, sort, and filter to display the items they wish to view. Grid layouts and configurations can be saved.

Column Filter

- Click filter icon and select criterion from dropdown.

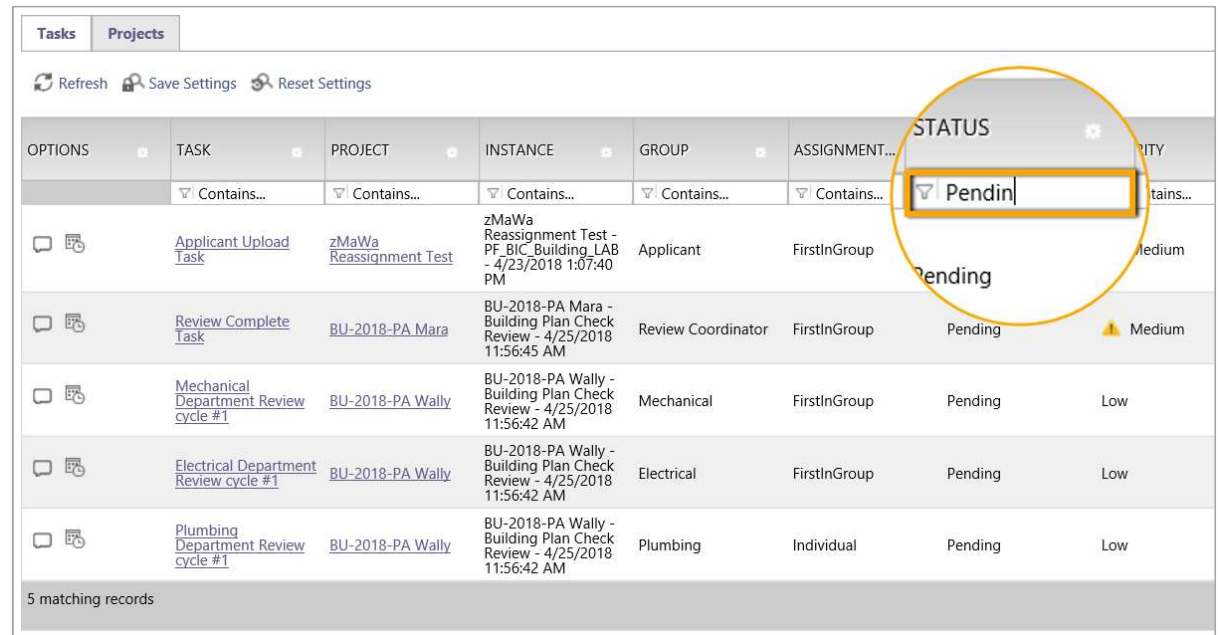


The screenshot displays a software interface with a table of tasks. The table has columns for OPTIONS, TASK, PROJECT, INSTANCE, and GROUP. A dropdown menu is open over the 'ASSIGNMENT TY...' column, showing various filtering criteria. The criteria include 'Contains...', 'Clear Filter', 'Starts with', 'Ends with', 'Contains', 'Does not contain', 'Equals', and 'Does not equal'. The table contains four records, and the status '1 - 4 of 4 records' is shown at the bottom.

OPTIONS	TASK	PROJECT	INSTANCE	GROUP
	Applicant Upload Task	zFairfax VA New Features 03	zFairfax VA New Features 03 - ProjectFlow_Building_Ten - 5/22/2018 1:52:37 PM	
	Assign Reviewers Task	zFairfax VA New Features 01	zFairfax VA New Features 01 - ProjectFlow_Building_Ten - 5/22/2018 1:19:31 PM	inator
	Assign Reviewers Task	zFairfax VA New Features 02	zFairfax VA New Features 02 - ProjectFlow_Building_Ten - 5/22/2018 1:48:48 PM	Review
	Mechanical Department Review cycle #1 (Reassigned from Wally Taylor)	zTest Wally 2018-05-18	zWally Test ProjectFlow Building - Import - 4/11/2018 11:43:27 PM	Mechanical

Column Filter

- Type string in field. Filtering occurs in real time.

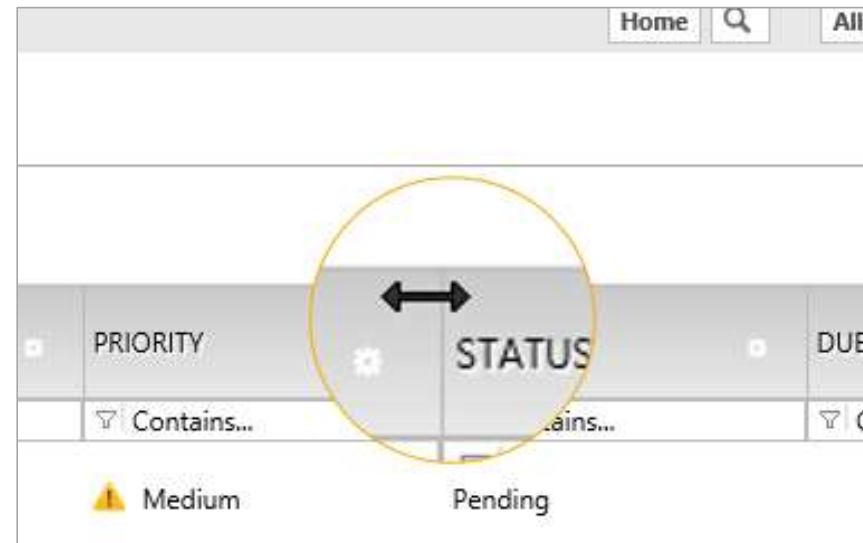


Options	Task	Project	Instance	Group	Assignment...	Status	Priority
	Contains...	Contains...	Contains...	Contains...	Contains...	<input type="text" value="Pending"/>	Contains...
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Pending	Medium
	Review Complete Task	BU-2018-PA Mara	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:45 AM	Review Coordinator	FirstInGroup	Pending	Medium
	Mechanical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	Pending	Low
	Electrical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	Pending	Low
	Plumbing Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	Pending	Low

5 matching records

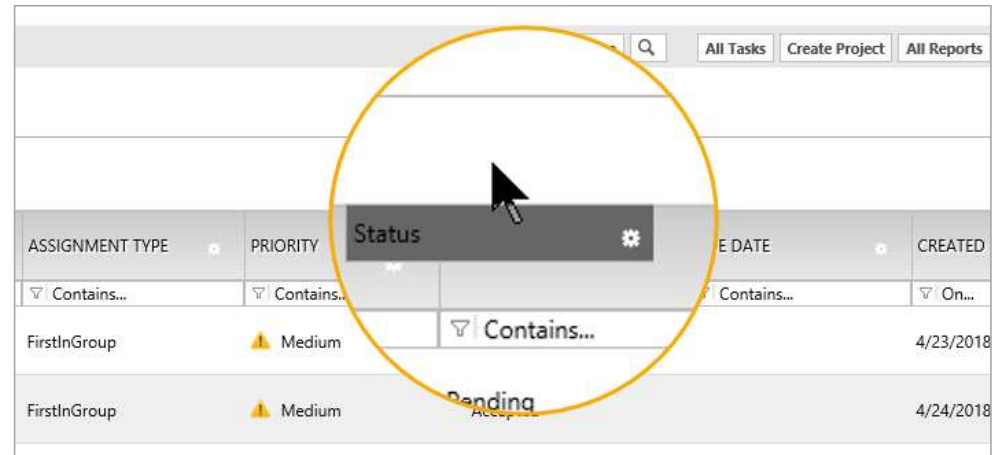
Column Width Control

- Click and drag on column border to adjust width.



Column Reorder

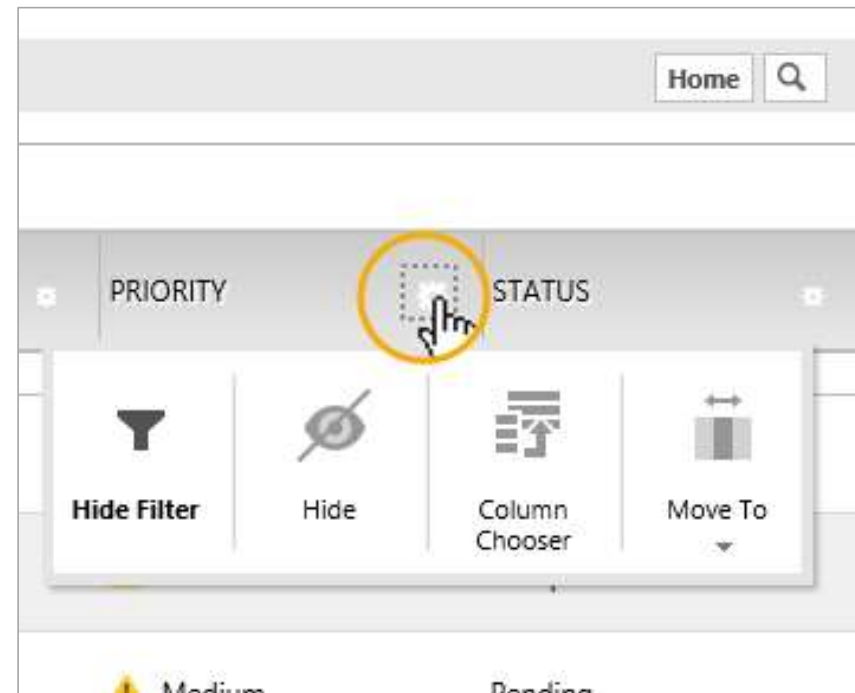
- Click and drag header to move column.



ASSIGNMENT TYPE	PRIORITY	Status	DATE	CREATED
Contains...	Contains...	Contains...	Contains...	On...
FirstInGroup	Medium	Pending		4/23/2018
FirstInGroup	Medium	Accepted		4/24/2018

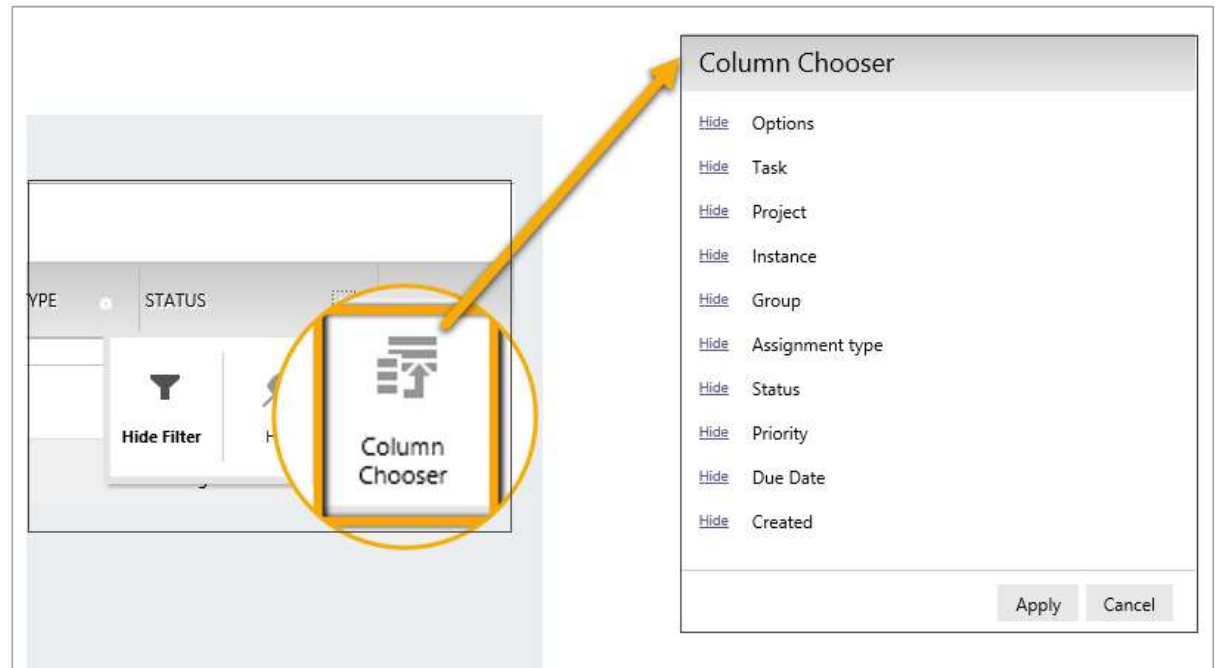
Column Control

- Click gear icon to access: Hide Filter, Hide, Column Chooser, and Move To.



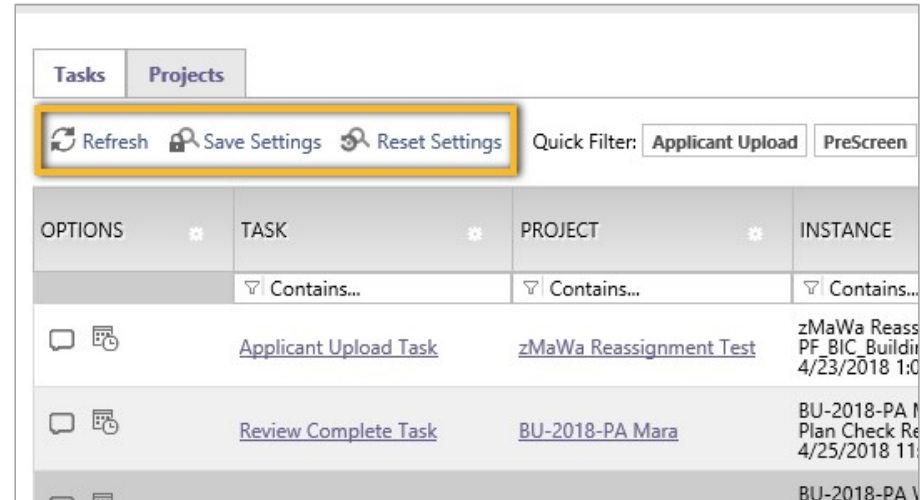
Column Chooser

- Easy show/hide columns control.



Save Settings

- Save settings is persistent.
- Reset settings button only appears if there have been changes.
- Reset restores default settings.
- Refresh to display the settings after resetting them.



Options	Task	Project	Instance
	Contains...	Contains...	Contains...
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reass PF_BIC_Buildin 4/23/2018 1:0
	Review Complete Task	BU-2018-PA Mara	BU-2018-PA M Plan Check Re 4/25/2018 11
			BU-2018-PA V

Quick Filter

ProjectDox
by Avolve Software

Tasks Projects

Refresh Save Settings Reset Settings Quick Filter Applicant Upload Prescreen Review Assign Reviewers Batch Stamp

OPTIONS	PRIORITY	TASK	PROJECT	GROUP	STATUS
	Contains...	Prescreen Review	Contains...	Contains...	Contains...
	Medium	Prescreen Review Task	DBS OTC Mech Review	Review Coordinator	Accepted
	Medium	Prescreen Review Task	DBS OTC Building Review	Review Coordinator	Accepted
	Medium	Prescreen Review Task	DBS 972017 123 Main St	Review Coordinator	Pending
	Medium	Prescreen Review Task	Miltier Business Park	Review Coordinator	Accepted

4 matching records

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9.X Likely to be used by Review Coordinators. Setup must be configured by System Admin.

Quick Filter

ProjectDox
by Avolve Software

Tasks Projects

Refresh Save Settings Reset Settings Quick Filter Applicant Upload Prescreen Review Assign Reviewers Batch Stamp

OPTIONS	PRIORITY	TASK	PROJECT	GROUP	STATUS
	Contains...	Prescreen Review	Contains...	Contains...	Contains...
	Medium	Prescreen Review Task	DBS OTC Mech Review	Review Coordinator	Accepted
	Medium	Prescreen Review Task	DBS OTC Building Review	Review Coordinator	Accepted
	Medium	Prescreen Review Task	DBS 972017 123 Main St	Review Coordinator	Pending
	Medium	Prescreen Review Task	Miltier Business Park	Review Coordinator	Accepted

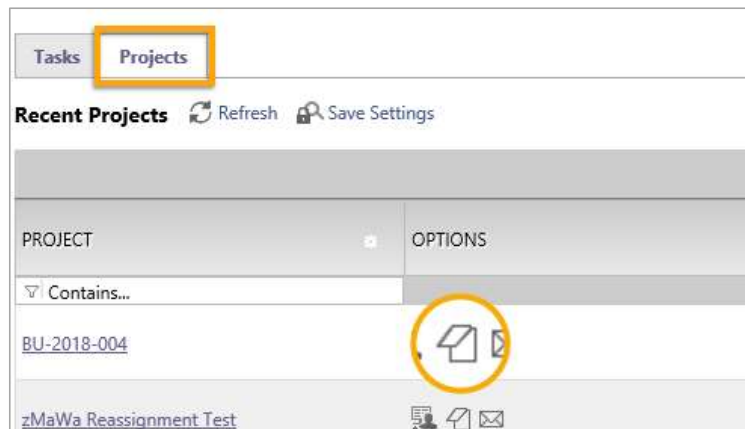
4 matching records

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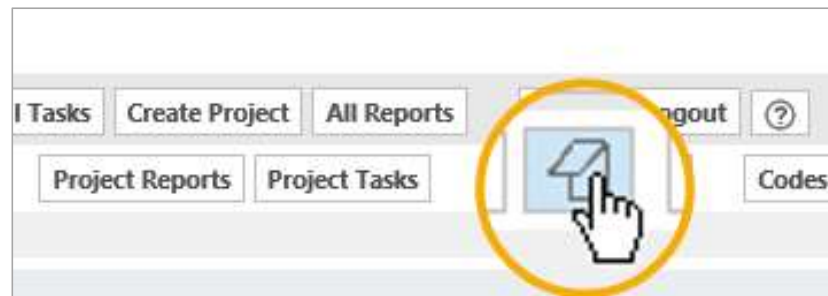
9.X Click button for quick filter. Click Refresh to clear filter.

Discussion Board – Project Level

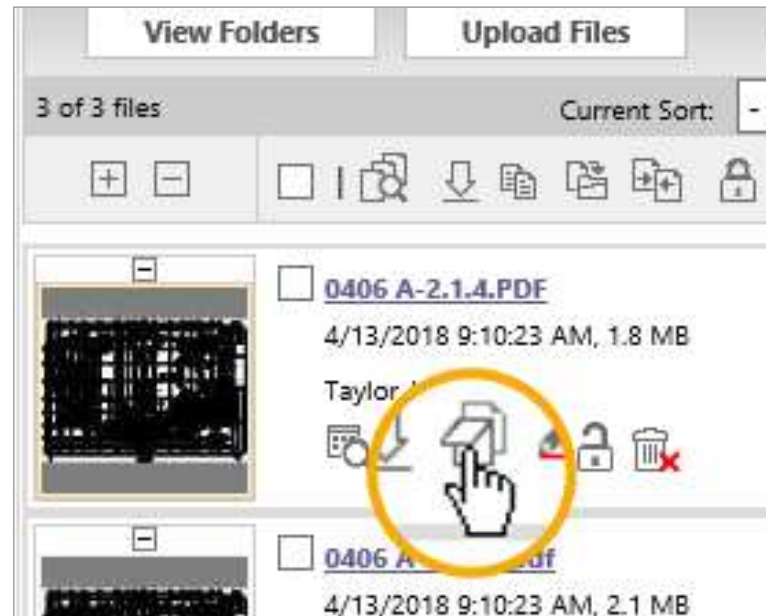
Access from Home page:



Access from inside the project:



Discussion Board – File Level



Discussion Board – Add Topic

Discussion Topics

Project: BU-2018-004

[Add Topic](#)

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

prev 1 next

Discussion Board – Create Topic

Discussion Topics

Project: BU-2018-004

1 2 Notification of Update or Availability
ProjectFlow

Topic: * Category: *

Comment:

3

4

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

prev 1 next

Discussion Board – Additional Actions

Discussion Topics

Project: BU-2018-004

Add Topic

Show 5 records

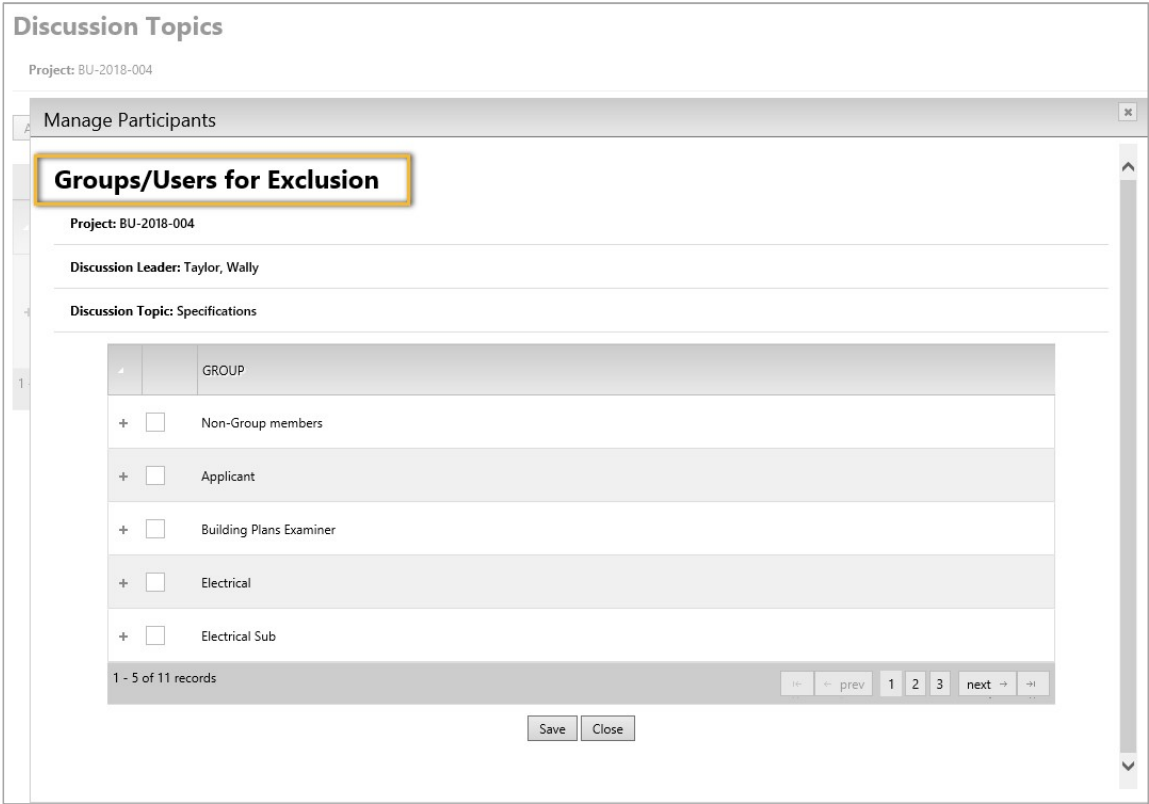
OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
Manage Participants + Close Topic Add Comment	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

1 - 1 of 1 records

← prev 1 next →

9.X Add Topic, Manage Participants, Close Topic, Add Comment to topic.

Discussion Board – Manage Participants



9.X Only topic owner (leader) can manage participants. Select groups or users to exclude them from the topic. Once excluded they cannot be selected to receive email for the topic.

Discussion Board – Email

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
<input type="button" value="Manage Participants"/> <input type="button" value="Close Topic"/>	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

COMMENTS	PARTICIPANT	COMPANY	DATE/TIME	OPTIONS
Who determines the applicable specs in this instance?	Wally Taylor	Avolve Software Corporation	5/29/2018 11:57:24 AM	<input type="button" value="Prepare Email"/>

Add Comment

9.X Any member of the discussion can add comments and optionally send as Email. A comment can be sent as a message at the time it is created, or thereafter.

Discussion Board – Other Actions

The screenshot displays a discussion board interface. At the top left is an "Add Topic" button. On the right, it says "Show 5 records". Below this is a table with columns: OPTIONS, DISCUSSION TOPIC, CATEGORY, LEADER, DISCUSSION STATUS, and DATE/TIME. A row is highlighted with a yellow circle around a "+" icon in the OPTIONS column. A yellow box highlights the expanded view below the table, which includes a "Comments" table, an "Add Comment" text area, and "Save" and "Save and Prepare Email" buttons.

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
+	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

COMMENTS	PARTICIPANT	COMPANY	DATE/TIME	OPTIONS
Who determines the applicable specs in this instance?	Wally Taylor	Avolve Software Corporation	5/29/2018 11:57:24 AM	Prepare Email
The city, because....	Wally Taylor	Avolve Software Corporation	5/29/2018 12:21:10 PM	Prepare Email

Add Comment

Save Save and Prepare Email

9.X Click + to expand view and add comments

Discussion Board – Closing Topic

The screenshot displays the 'Discussion Topics' interface for project 'BU-2018-004'. It includes an 'Add Topic' button and a table with columns for 'OPTIONS' and 'DISCUSSION TOPIC'. A 'Specifications' row is visible with buttons for 'Manage Participants', 'Close Topic', and 'Add Comment'. A modal dialog titled 'Message from webpage' is open, asking 'Are you sure you want to close the topic?' with 'OK' and 'Cancel' buttons.

9.X Only topic owner can close a topic. Once closed, a topic cannot be edited or re-opened.

Reports

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All

Reports – New SiteWide Reports

View	Report Name	Report Type	Report Description
	Management - Average Turnaround Time Report	SiteWide	View statistics of applicant and jurisdiction tasks for workflows completed within the date range.
	Management - Overdue Task Detail Report	SiteWide	Displays details on overdue tasks for the specified project template.
	Management - Task Statistics Report	SiteWide	Displays the completed tasks for the specified project template assigned within the date range.
	Management - Task Status Report Dashboard	SiteWide	Displays overdue and open tasks count per group in a chart.
	Management - Workload Report	SiteWide	Lists the accepted or pending workflow tasks for the specified project template and group.
	Sitewide - Active and Revoked User Counts	SiteWide	Active and Revoked Users Counts
	Sitewide - All Logged In Users	SiteWide	All Logged In Users
	Sitewide - All Projects Info Report	SiteWide	All Projects Info Report
	Sitewide - Configuration Changes By Date	SiteWide	Configuration Changes By Date
	Sitewide - Emails Sent Detail By Date	SiteWide	Emails Sent Detail By Date
	Sitewide - Events By Date	SiteWide	Logged Events By Date
	Sitewide - Login Failures By Date	SiteWide	Login Failures By Date
	Sitewide - Login Success By Date	SiteWide	Login Success By Date
	Sitewide - ProjectDox Configuration	SiteWide	Displays all the Admin configurations in the system.
	Sitewide - Site Activity Report By Date	SiteWide	Site Activity Report By Date
	Sitewide - Timesheet Logs	SiteWide	Displays a list of all timesheet values entered across all projects
	Sitewide - Unpublished Files	SiteWide	All Unpublished Files

Management - Average Turnaround Time Report

Project Template: ProjectDox Demo

Start & End Date: 2/1/2018 to 4/1/2018

Report Generated: 04/01/2018 10:48 AM

Project Template Name	Grouping	Task Name	Project Name	Group Name	User Name	Days	Task Count	
ProjectDox Demo	Applicant	Applicant Resubmit Task	Portland Demo	Applicant	Duane Green	1	1	
					Avg Days/Total Count	1	1	
					Avg Days/Total Count	1	1	
			Tracy Convention Center	Applicant	Duane Green	1	1	
					Avg Days/Total Count	1	1	
					Avg Days/Total Count	1	1	
		Applicant Upload Task	Portland Demo	Applicant	Duane Green	1	1	
						1	1	
						Avg Days/Total Count	1	2
						Avg Days/Total Count	1	2
Microsoft Azure Project	Applicant	Duane Green	1	1				

Management - Overdue Task Detail Report

Project Template Name: ProjectDox Demo
 Report Generated: 04/01/2018 10:41 AM

Group Name	User Name	Task Name	Project Name	Task Status	Task Assigned Date	Task Accepted Date	Task Due Date	Avg Overdue Days
Electrical	TF01 Demo User	Electrical Department Review Cycle #1 (Reassigned from TF01 Demo User)	Corp Offices - BPA-1342	Accepted	12/21/2017 9:59:59 AM	12/21/2017 10:02:07 AM	12/6/2017 11:14:00 AM	116.00
		Average Days						116.00
		Average Days						116.00
		Average Days						116.00
Structural	Duane Green	Structural Department Review cycle #1	San Diego Building Department	Accepted	3/23/2018 11:49:26 AM	3/23/2018 11:49:59 AM	3/23/2018 11:49:00 AM	9.00
		Average Days						9.00
		Average Days						9.00
		Average Days						9.00
Average Days								62.50

Management - Task Statistics Report

Project Template Name: BIC Building - Demo

Start & End Date: 2/1/2018 to 4/1/2018

Report Generated: 04/01/2018 10:56 AM

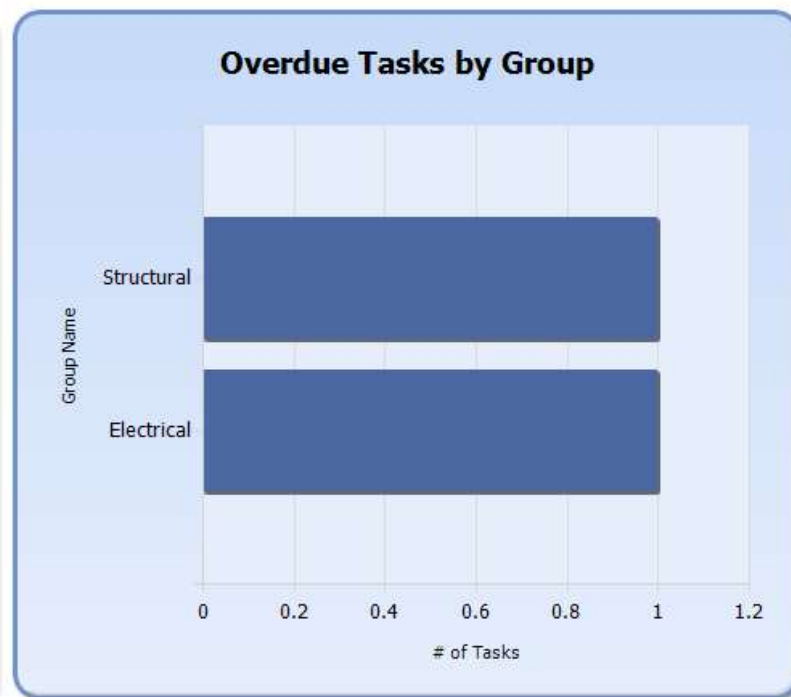
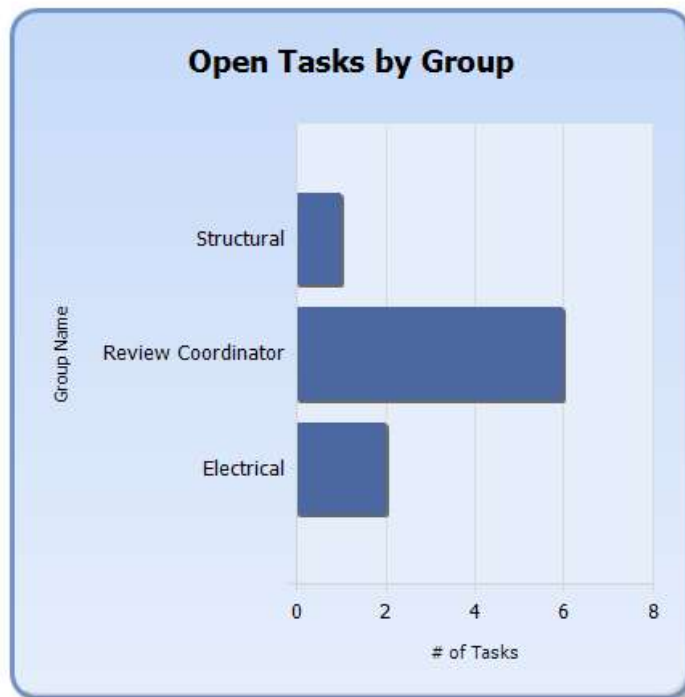
By Cycle

Project Template Name	Cycle	Group Name	User Name	Avg Days	Task Count	
BIC Building - Demo		Applicant	Mara Fitter			
			Avg Days/Total Count	1.00	3	
		Review Coordinator	Mara Fitter			
			Avg Days/Total Count	1.00	8	
			Avg Days/Total Count	1.00	11	
	1	Applicant	Mara Fitter		1.00	1
				Avg Days/Total Count	1.00	1
		Mechanical	Mara Fitter		1.00	1
				Avg Days/Total Count	1.00	1
		Plumbing	Wally Taylor			
			Mara Fitter		1.00	1
				Avg Days/Total Count	1.00	3
	Review Coordinator	Mara Fitter		1.00	3	
		Avg Days/Total Count	1.00	8		
	2	Plumbing	Wally Taylor		1.00	1
				Avg Days/Total Count	1.00	1
		Review Coordinator	Mara Fitter		1.00	1
			Avg Days/Total Count	1.00	1	
	Avg Days/Total Count	1.00	2			
	Avg Days/Total Count		1.00	21		

Management - Task Status Report Dashboard

Project Template Name: ProjectDox Demo

Report Generated: 04/01/2018 11:08 AM



Management - Workload Report






















Project Template Name: ProjectDox Demo

Group(s): Applicant, Electrical, Structural

Report Generated: 04/01/2018 11:11 AM

Days Outstanding	Task Due Date	Review Cycle	Project Name	Project Description	Group Name	Task Status	Date Created	Date Updated	User Name	Task Name	Project Template Name
186			zWally Building Test 01	Test	Applicant	Pending	9/28/2017 9:34:13 AM	9/28/2017 9:34:13 AM		Applicant Upload Task	ProjectDox Demo
174			Test Juan	Please don't delete this project	Applicant	Pending	10/10/2017 3:25:13 PM	10/10/2017 3:25:13 PM		Applicant Upload Task	ProjectDox Demo
137			Benedict Builders	Whisper Rock	Applicant	Pending	11/16/2017 10:55:29 AM	11/16/2017 10:55:29 AM		Applicant Upload Task	ProjectDox Demo
111			Green Builders	Subdivision A	Applicant	Pending	12/12/2017 12:06:28 PM	12/12/2017 12:06:28 PM		Applicant Upload Task	ProjectDox Demo
6			BPA-1	LAB 032618-1	Applicant	Pending	3/27/2018 3:17:11 PM	3/27/2018 3:17:11 PM		Applicant Upload Task	ProjectDox Demo
6			BPA-7	LAB 032718-3Amendments	Applicant	Pending	3/27/2018 3:33:40 PM	3/27/2018 3:33:40 PM		Applicant Upload Task	ProjectDox Demo
13			Portland Demo	Demonstration of ProjectDox 9	Applicant	Accepted	3/20/2018 2:58:23 PM	3/20/2018 2:59:01 PM	Duane Green	Applicant Upload Task	ProjectDox Demo
83		2	Corp HQ Remodel	Remodel Project	Electrical	Accepted	1/9/2018 3:02:28 PM	1/9/2018 3:05:39 PM	Duane Green	Electrical Department Review Cycle #2	ProjectDox Demo

Reports – New Project Reports

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report	Project	Discussion Board Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - ChangemarksOLD	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist items for a workflow.
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displays the status of all reviews for a workflow.
	ProjectFlow - Discussion Board Plan Review Report	Workflow	Discussion Board Plan Review Report
	ProjectFlow - Parallel Review - Department Review Status	Workflow	Displays the status of all reviews for each of the sub-workflows in a parallel review.
	ProjectFlow - Parallel Review - Workflow Routing Slip	Workflow	Displays the sequential route of all tasks for each of the sub-workflows in the parallel review.
	ProjectFlow - Review Details Report	Workflow	Lists the review comments, checklist and changemark details for a workflow instance review cycles.
	ProjectFlow - Timesheet Logs	Workflow	Displays a list of all timesheet values entered in a specific project
	ProjectFlow - Workflow Routing Slip	Workflow	The Workflow Routing Slip Report displays the sequential route of all tasks for the workflow.

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9.X Shaded reports are new

Viewer Updates

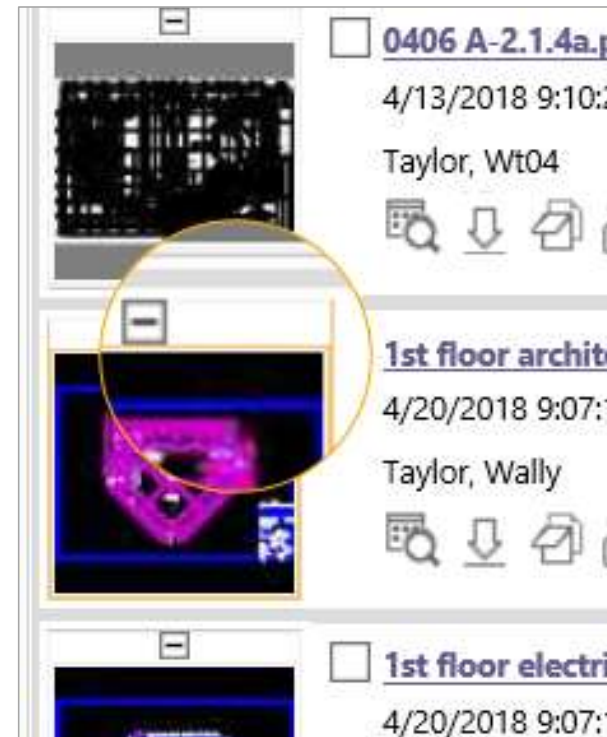
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All

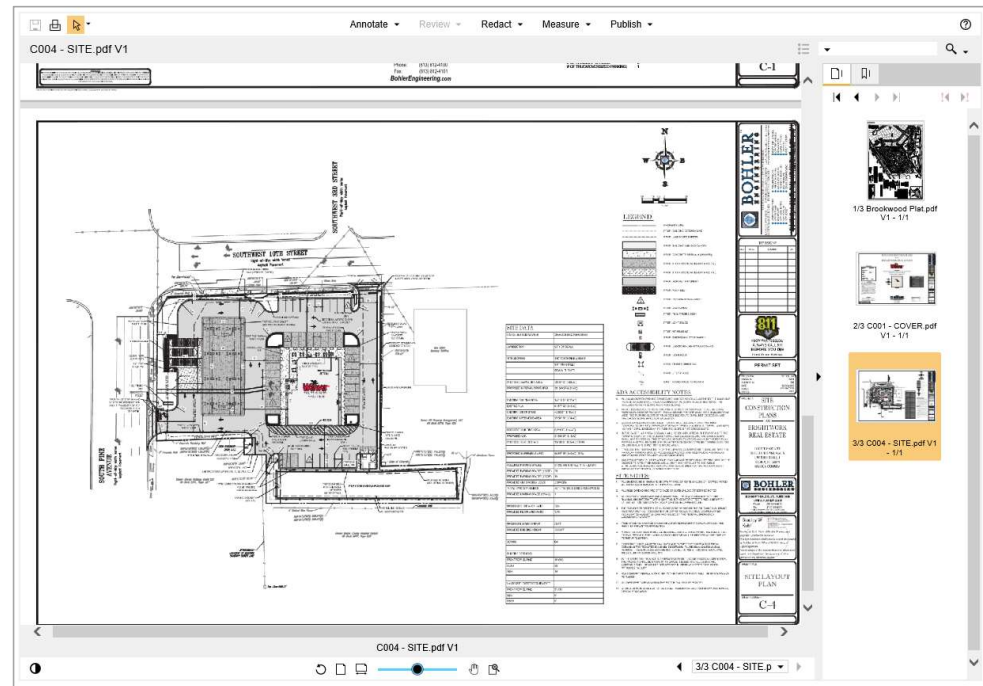
Viewer Updates - ActiveX

- When a file is open in the Viewer, the thumbnail in the file list is highlighted on the top edge.



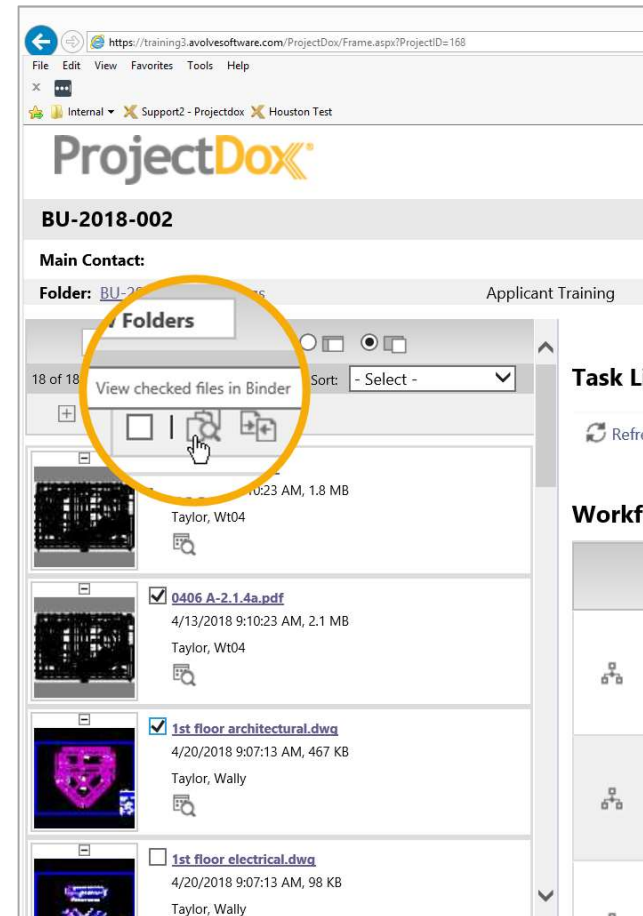
Binder

- Reviewer can open multiple files in Binder.



Binder

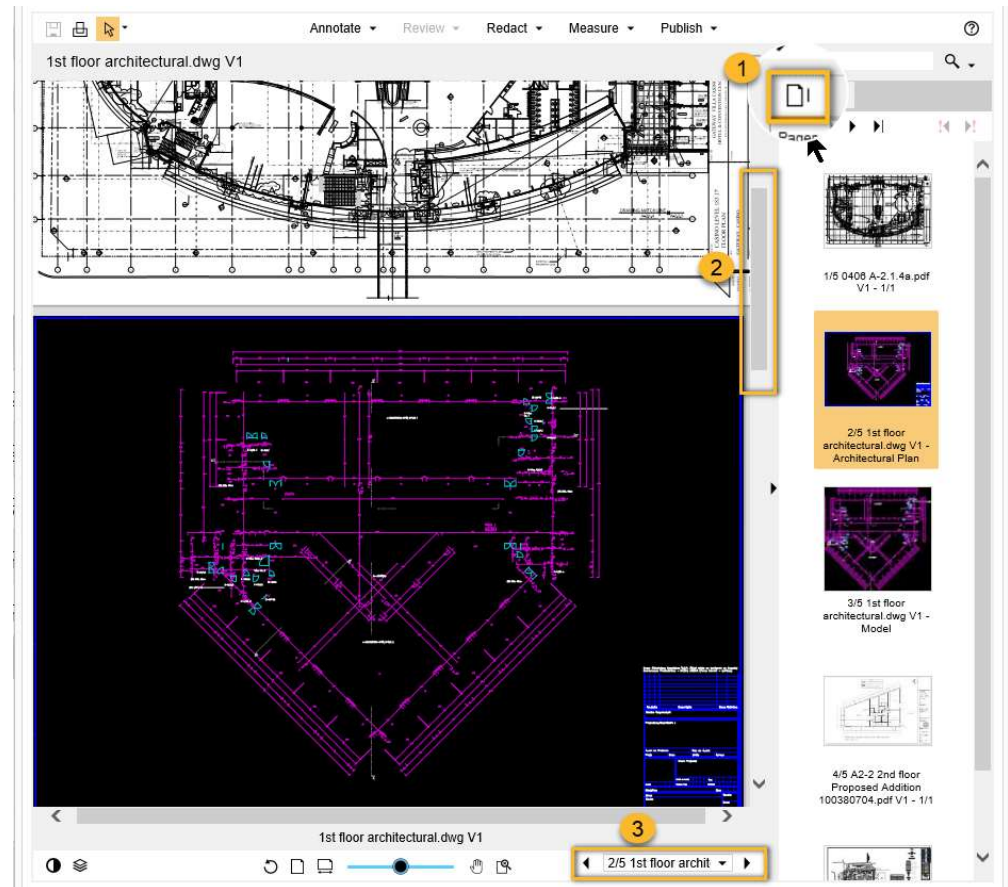
1. Click checkboxes to select files.
2. Click View checked files in Binder.



Binder

You can navigate between files by 3 methods:

1. Pages tab (task pane).
2. Scroll bar.
3. Page controls.

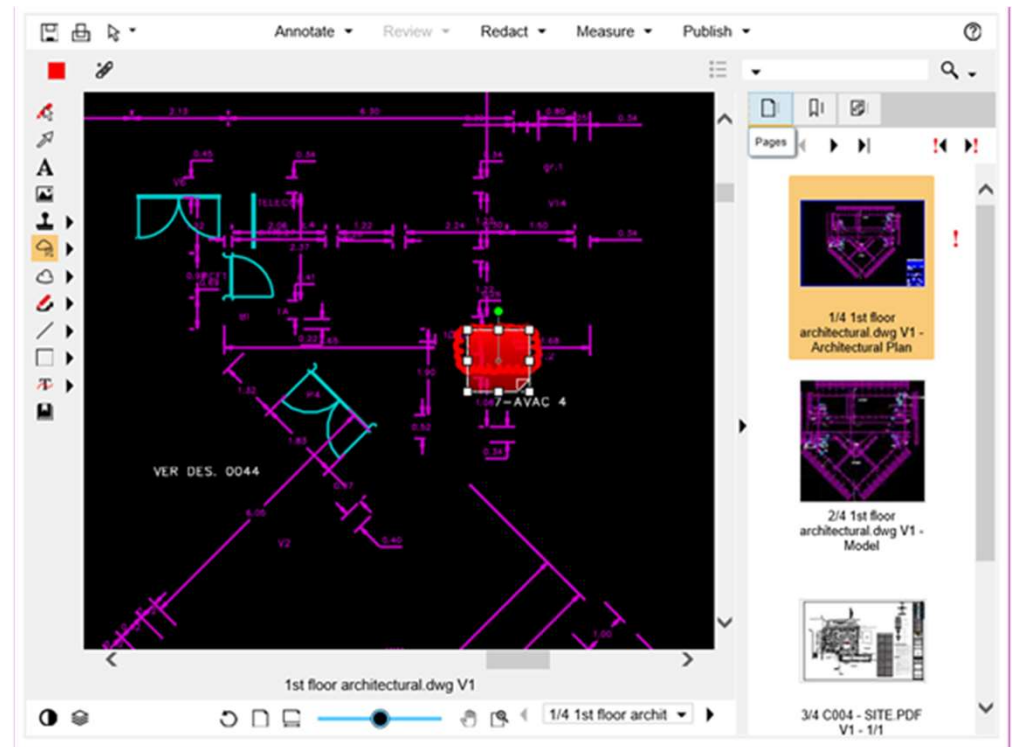


Binder

- When you zoom in one file, the zoom setting remains as you navigate to another file.
- CAD files will display both Model space and Layout layers when present.

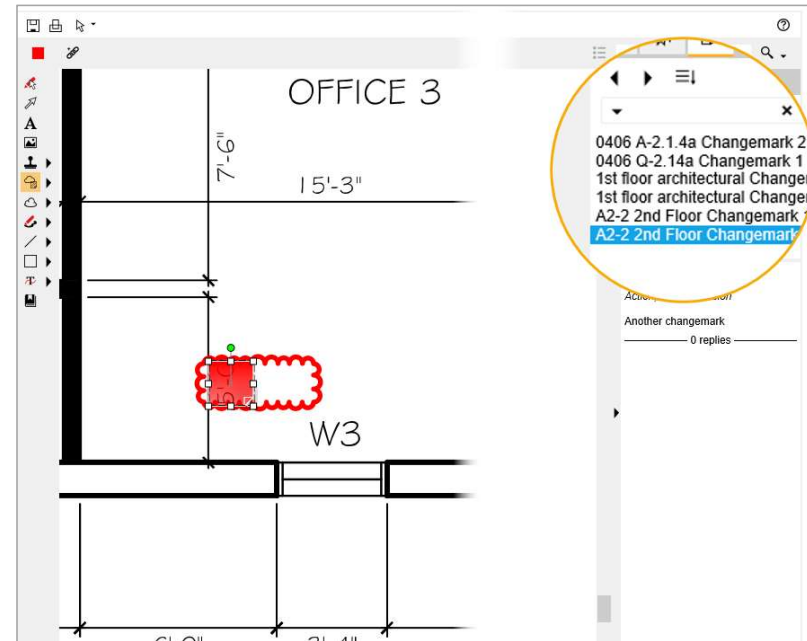
Binder – Marking Up

- Put a markup entity (at least a placeholder) in every file in the Binder view.
- DON'T save until every file has a markup in it.
- Remove placeholder once “real” markup has been made.



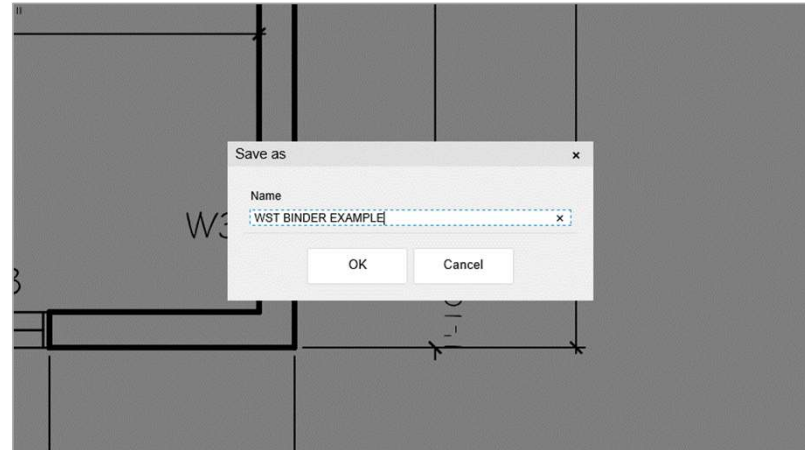
Binder – Marking Up

With changemark tab selected, the task pane shows a combined list of all changemarks made in the binder.



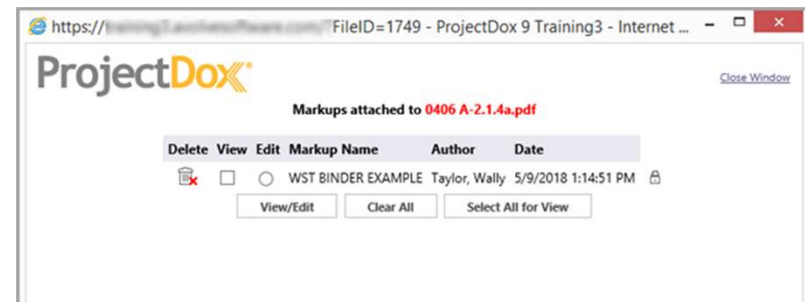
Binder – Marking Up

- Save with one name.



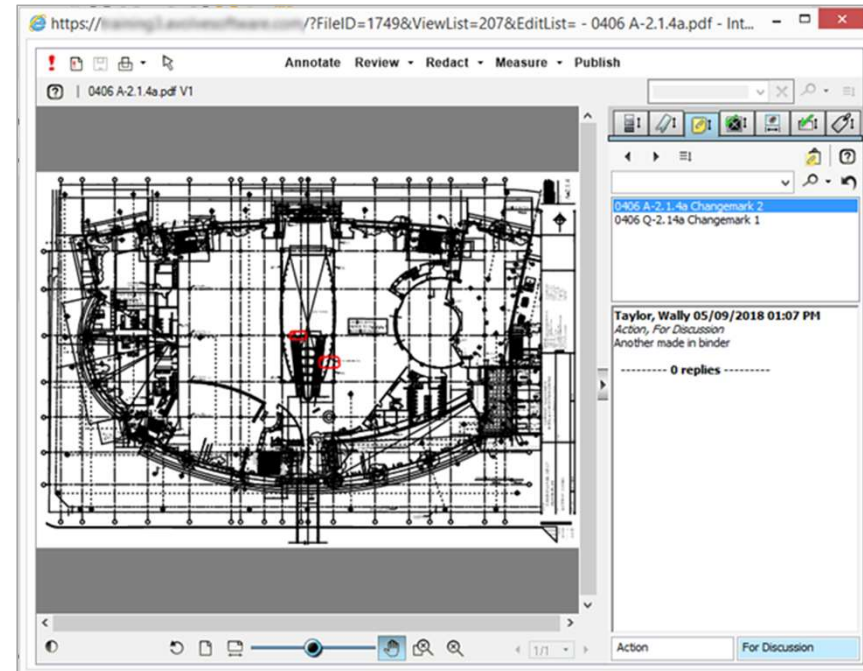
Binder – Marking Up

- System parses markups to a separate markup layer for each file.
- You can verify this without closing the Binder.



Binder – Marking Up

- The contents of each markup are only those associated with that file.



Binder – Marking Up

- While still in Binder view you can continue to add, change, or delete entities in the various files.
- Click the save icon as desired. NOTE: You must still have at least one markup in each file. With a "real" markup in a file, the placeholder can be removed.
- When you have finished the review, save again, and close the Binder window.
- Once Binder window is closed, you cannot reopen the same binder for marking up.

HTML5 Enhancements

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HTML Features Matrix

Features	ActiveX	HTML Desktop	HTML Tablet
View	X	X	X
Find	X	X	X
Annotate	X	X	X
Publishing	X	X	pdf only
Compare	X	X	
Measure	X	X	
Takeoff	X		
PDF Bookmark	X	X	
Print	X	X	
Doc Merge	X		X

9.X HTML client has reduced subset of Viewer features, as shown. HTML has no text compare tool.

HTML Features Matrix – Platform Support

Platform	ActiveX	HTML Desktop	HTML Tablet
PC	X	X	
MAC		X	
Browser	X	X	
iPad/Android Tablet			X

HTML Features Matrix - Annotation

Annotation Features	ActiveX	HTML Desktop	HTML Tablet
Arrow Pointer	X	X	X
Changemark	X	X	X
Changemark Discussion	X	X	X
Changemark Arrow	X	X	
Changemark Cloud	X	X	
Changemark Highlight	X	X	
Changemark Text Highlight	X	X	
Changemark Strikethrough	X	X	
Crosscut	X	X	X
Ellipse	X	X	X
Highlight	X	X	X
Insert Image	X	X	X
Line	X	X	X
Polygon	X	X	X
Sketch	X	X	X
Polyline	X	X	X
Rectangle	X	X	X

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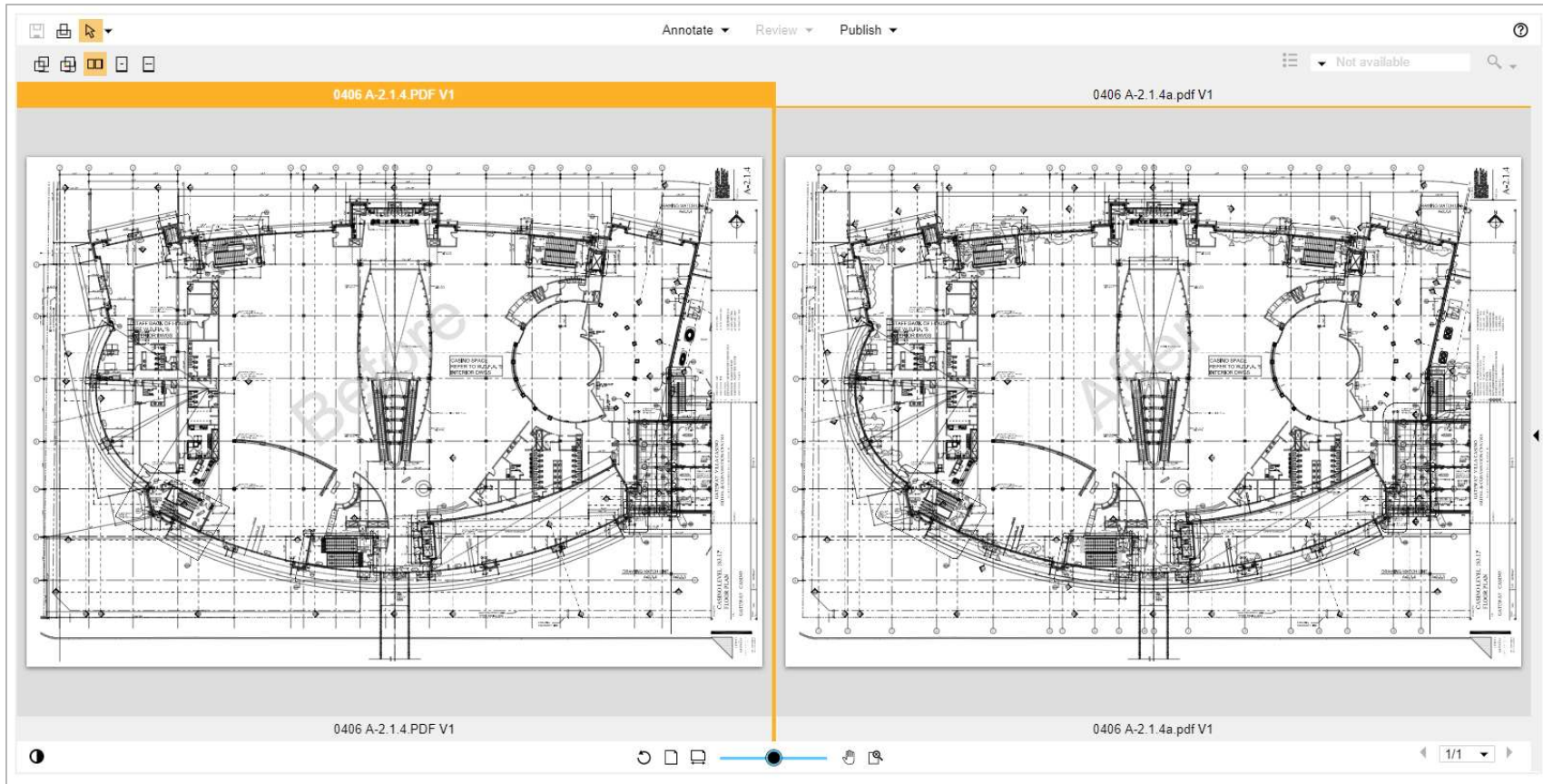
HTML Features Matrix - Annotation

Annotation Features	ActiveX	HTML Desktop	HTML Tablet
Text	X	X	
Round Rectangle	X	X	
Scratch Out	X	X	
Stamps	X	X	
Edit Text Markups	X	X	
Cloud	X	X	X
Polycloud	X		
Arc	X		
Consolidate Markups	X	X	
Burn in Markups	X	X	to PDF
Electronic Signature	X	X	
CAD Symbol	X	X	
Checkview	X	X	
Bookmark	X	X	
Export to Word		X	

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HTML Viewer – File Compare

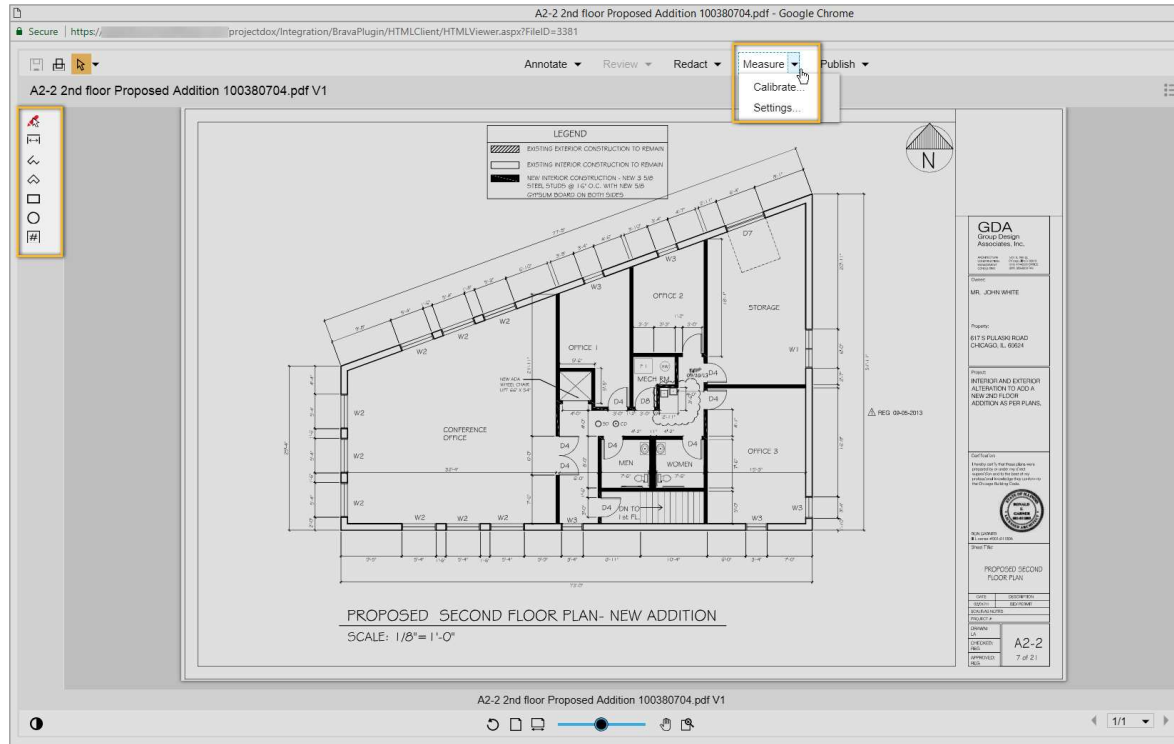


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9.X New interface – look is more like ActiveX.

HTML5 Measuring



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9.X The Brava HTML5 viewer is now updated to include measurement tools.

WorkFlow

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ProjectFlow – Dynamic Flowchart

Task List


Refresh Save Settings

Show all tasks for all users

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGN
	Contains...	Contains...	Contains...	Contains...	Cor
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reassignment Test - PF_BIC_Building_L - 4/23/2018 1:07:40 PM	Applicant	FirstInC

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE	VERSION
 zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Review Coordinator	Active	Version #1 (V

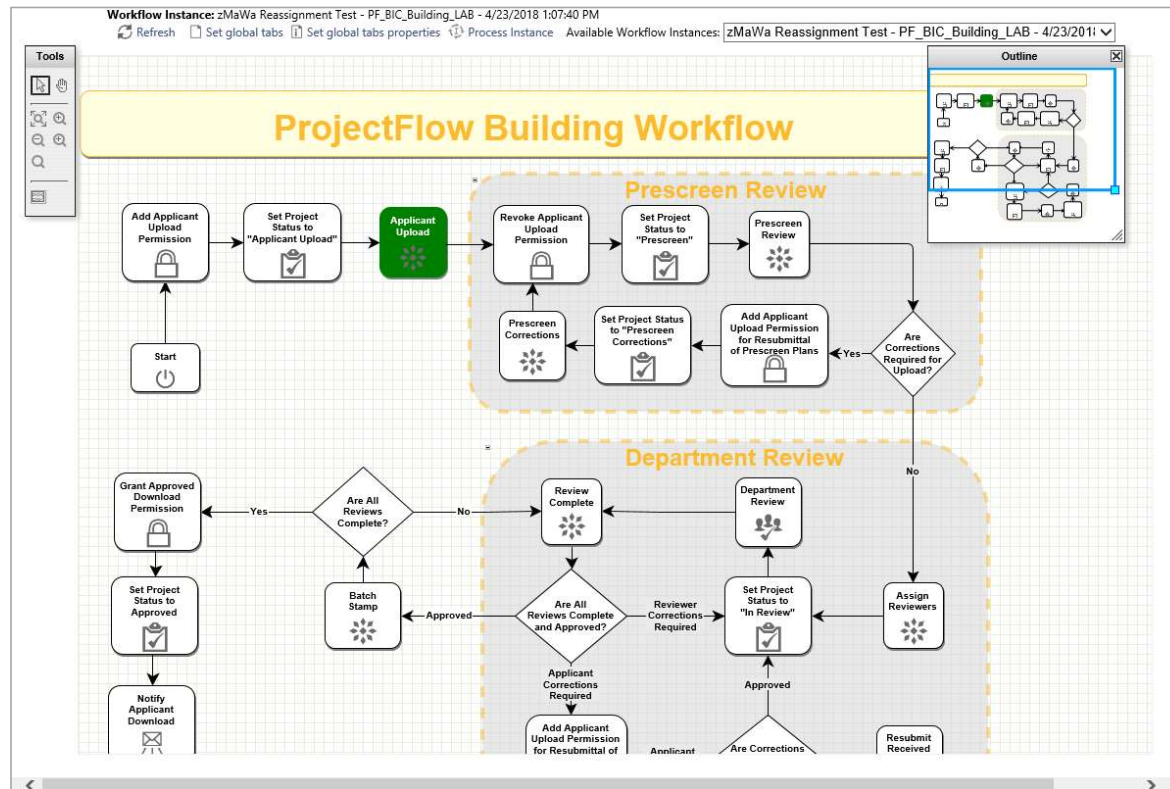
1 - 1 of 1 records

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8.6 and later (ProjectFlow). Click to open Workflow Designer.

ProjectFlow – Dynamic Flowchart



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8.6 and later. Workflow Designer displays flowchart of workflow instance. Active step highlighted.

Improved Applicant Experience





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New Applicant User Experience



Supports Portal Integrations

Allows applicant portal users to complete their plan review activities without having to log directly into ProjectDox.

-  Applicant Upload
-  Project Review Status
-  Corrections / Revisions
-  Approval Download

New Applicant User Experience

APPLICANT UPLOAD

ProjectFlow BUILDING  

Task Instructions

Select appropriate destination folder then select files to upload to selected folder. Repeat until all required submission files are uploaded.

TO START REVIEW PROCESS: Please select "Upload Complete - Notify Jurisdiction" enabled by first selecting checkbox "Upload Task Complete". (bottom of page)

Project: BU-2018-002

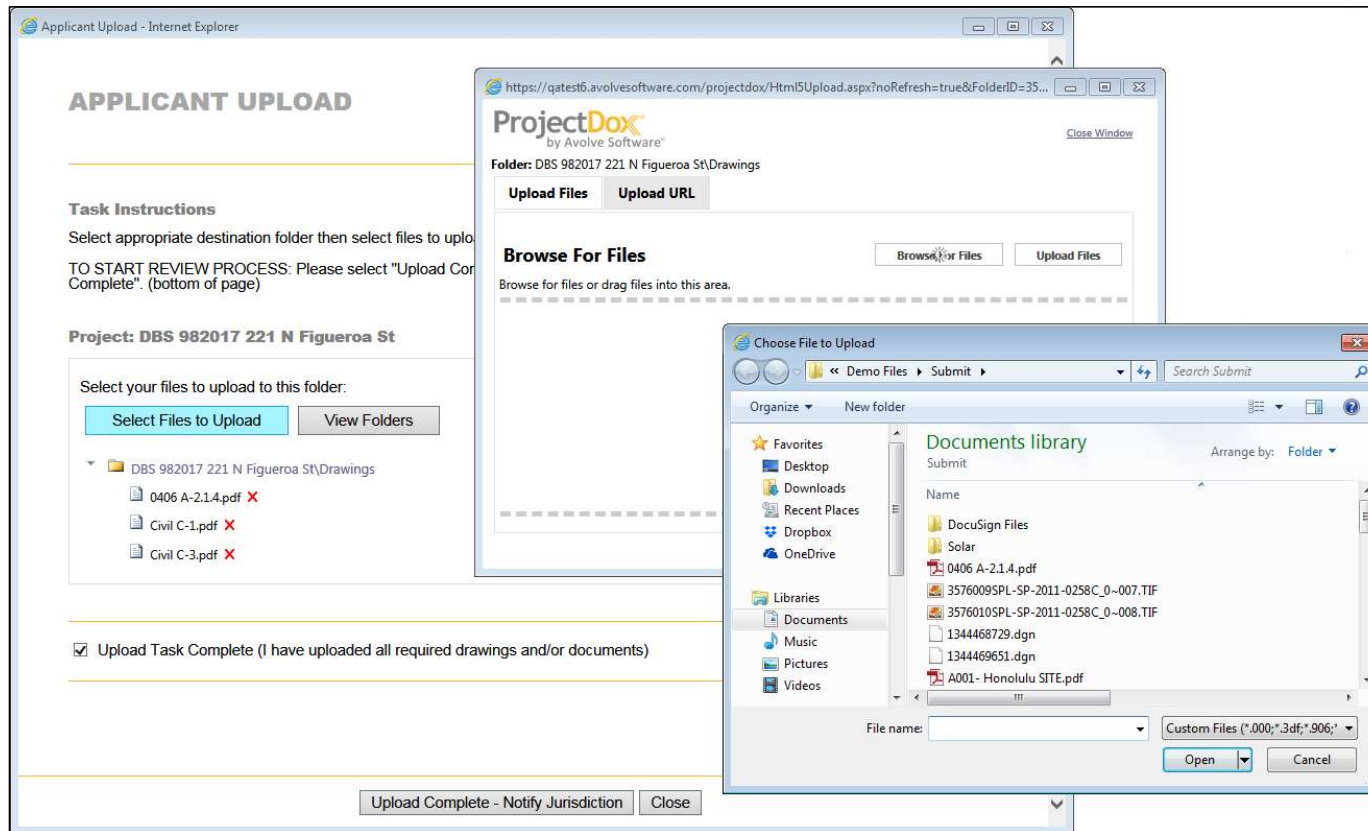
Select destination folder for files:

- BU-2018-002
 - Drawings
 - Documents

Upload Task Complete (I have uploaded all required drawings and/or documents)

9.X Applicant can upload files directly from the eForm in a single step. The system provides email confirmation of uploads and task completions. Jurisdictions can edit this confirmation email to add “next steps” notification to the applicant.

New Applicant User Experience



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In Summary

- Navigation - New Look, Same Feel
- Reports
- Viewer Updates
- HTML Enhancements
- Workflow
- Improved Applicant Experience

Thank you for attending.