ProjectDox New Features 9.1 Applicants

Gainesville, FL

Avolve Representative Mara Fitter and City of Gainesville Presenters

2019-09-26

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Overview

- Getting Started and Login – Gainesville Representative
- Browsers and Component Installation
- Accepting a Task
- Initial Submission: Upload, Corrections, Checklist Viewer
- Navigation
- Resubmit, Changemarks
- Reports
- Download
- Optional: Project Discussion Board, Quick Review

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Getting Started

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All

Browsers and Components

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Browser Recommendations

- Viewing - HTML5 Viewer (Chrome, Edge, Firefox, Safari)
  - Good for navigation, eForms, and basic viewing
- Reviewing – ActiveX Viewer (Internet Explorer)
  - Requires ActiveX client component installation
  - Provides additional tools
  - Tools are reliable
  - Tools are robust

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ActiveX Components Installation

1. Disable UAC (reboot required to take effect)
2. Disable Pop-Up Blocker, or configure it to allow pop-ups from your ProjectDox site
3. Add your ProjectDox site URL as a trusted site
4. Navigate to your ProjectDox site login page and click link

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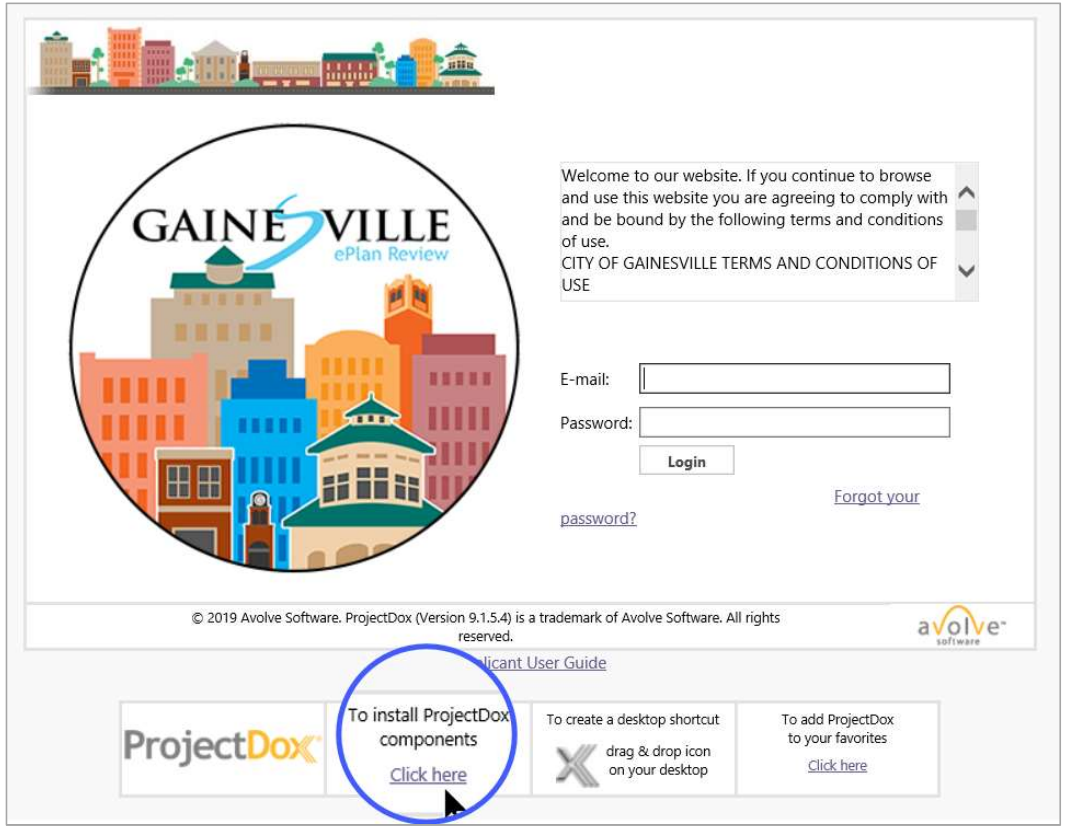
ActiveX Components Installation (Cont'd)



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Click to install and follow the prompts.

ActiveX Components Installation (Cont'd)

5. Verify components have correctly installed:
   - Open a file in the Viewer
6. Optional - Verify that a Windows non-admin user account is also able to view and upload files.
7. Once component installation has been verified, UAC can be returned to its original setting.
8. For details, see *ProjectDox System User Requirements 9*

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Preparations for Non-IE Browsers

- Disable Pop-Up Blocker, or configure it to allow pop-ups from your ProjectDox site
- Add your ProjectDox site URL as a trusted site
- For details, see *ProjectDox System User Requirements 9*

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The 3 “Must-do” Steps for Workflow Tasks

1. Accept the task
2. Perform the work
3. Complete the task

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Accepting a Task

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All

Email Invitation – First Time User

ProjectDox Invitation for zTraining TEST

DoNotReplyGVFL@avolvecloud.net
To Mara Fitter

If there are problems with how this message is displayed, click here to view it in a web browser.

GAINESVILLE ePlan Review

City of Gainesville ePlan Review

Hello Mf02 Applicant:

Welcome to the City of Gainesville's electronic plan review process. This Project invitation has been sent to you in response to your permit application. An Electronic Plan Review has been created to allow you to electronically upload your drawings, documents for permit plan review.
NOTE: If this is your first time using the ProjectDox application, disable your pop-up blocker. If you are an Internet Explorer user, on the login page, click on the "Install ProjectDox Components" link; this will install the Active X components on your computer which are necessary for the application to function properly.
To access your new permit project, follow this instructions below:

1. Very Important! - **Please review the APPLICANT USER HELP**
2. Click the Project Access link below
3. Enter your User Login (email address) and the temporary Password below
4. Click on the Project link on the "Active Projects" page
5. Click on the "Drawings" folder
6. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see APPLICANT USER HELP)
7. Click on the "Documents" folder
8. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see APPLICANT USER HELP)

TO COMPLETE YOUR SUBMISSION TO THE CITY YOU MUST PERFORM THE BELOW STEPS:

9. Once all plans/documents have been uploaded to the appropriate folder(s) while inside the project click on the "Workflow Portals" button.
10. Click the "ApplicantUpload" link under the task column.
11. Click "Ok" to accept the task.
12. An electronic form will display. Click on the "Upload Complete - Notify Jurisdiction" button to complete the submission of your plans and documents to the City of Gainesville.

Supported file types: DWG, DWF, DGN, PDF, Tiff, JPEG, DOC, DOCX

User Login:	mf02@avolvesoftware.com
Temporary Password	62482BC
Project Permit #:	zTraining TEST
Plan Check Coordinator:	Mara Fitter
Plan Check Coordinator's Email:	mfitter@avolvesoftware.com
Project Permit Access Link	

If you have any problems or questions, please contact the City of Gainesville. For Building Permits please contact 352-334-5050. For Planning please contact 352-334-5023.

Please do not reply to this email.

User Login:	mf02@avolvesoftware.com
Temporary Password	62482BC
Project Permit #:	zTraining TEST
Plan Check Coordinator:	Mara Fitter
Plan Check Coordinator's Email:	mfitter@avolvesoftware.com
Project Permit Access Link	

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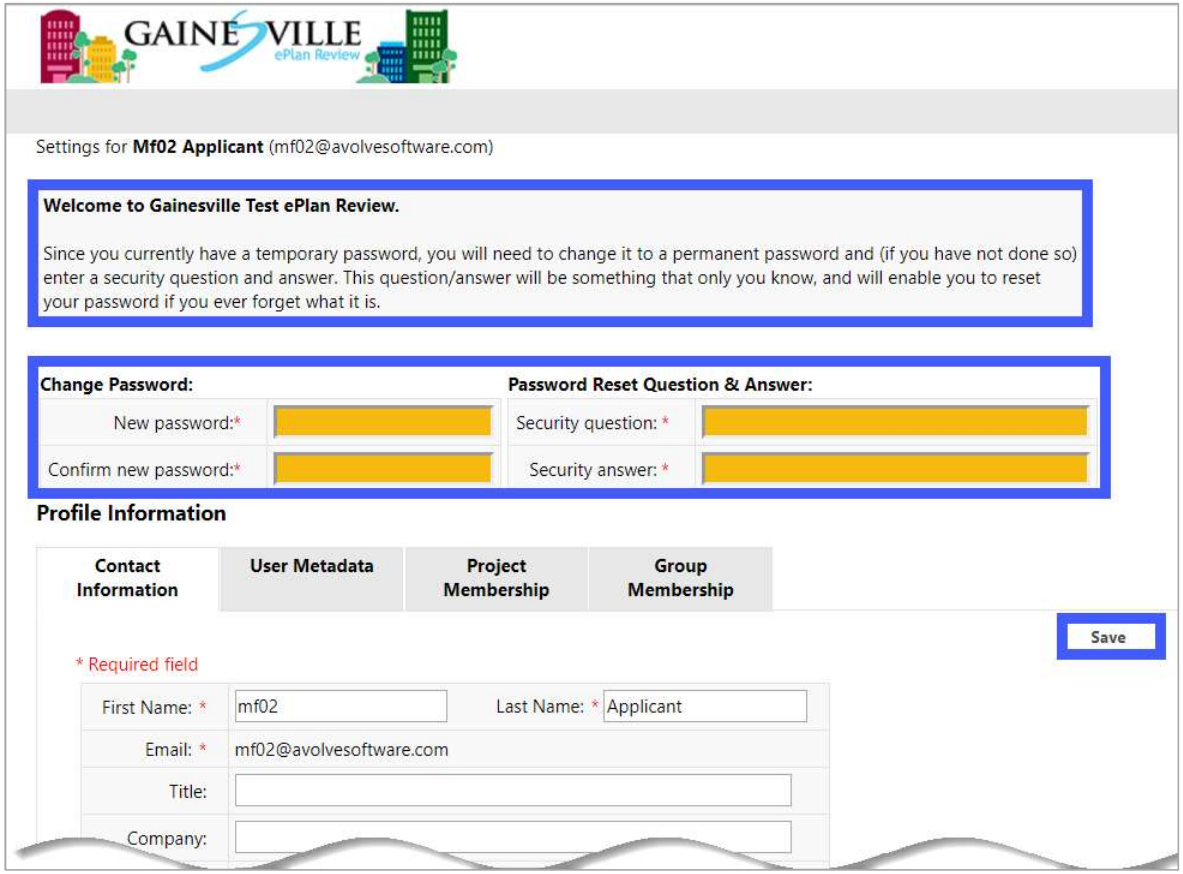
Contains username, temporary password and link to login to the site

First Time Login



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Fill in required field and Save.

Applicant Upload (Initial Submission)

ProjectDox Applicant Upload Task Assignment for zTraining TEST

D DoNotReplyGVFL@avolvecloud.net
To Mara Fitter

GAINESVILLE ePlan Review **Applicant Upload Task Assignment**

Attention mf02:

You have been assigned a task on Project: **zTraining TEST**

Please Login to ProjectDox to begin your task.

Project:	**zTraining TEST**
Task:	**Applicant Upload**
Project Access | **Login to ProjectDox**	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

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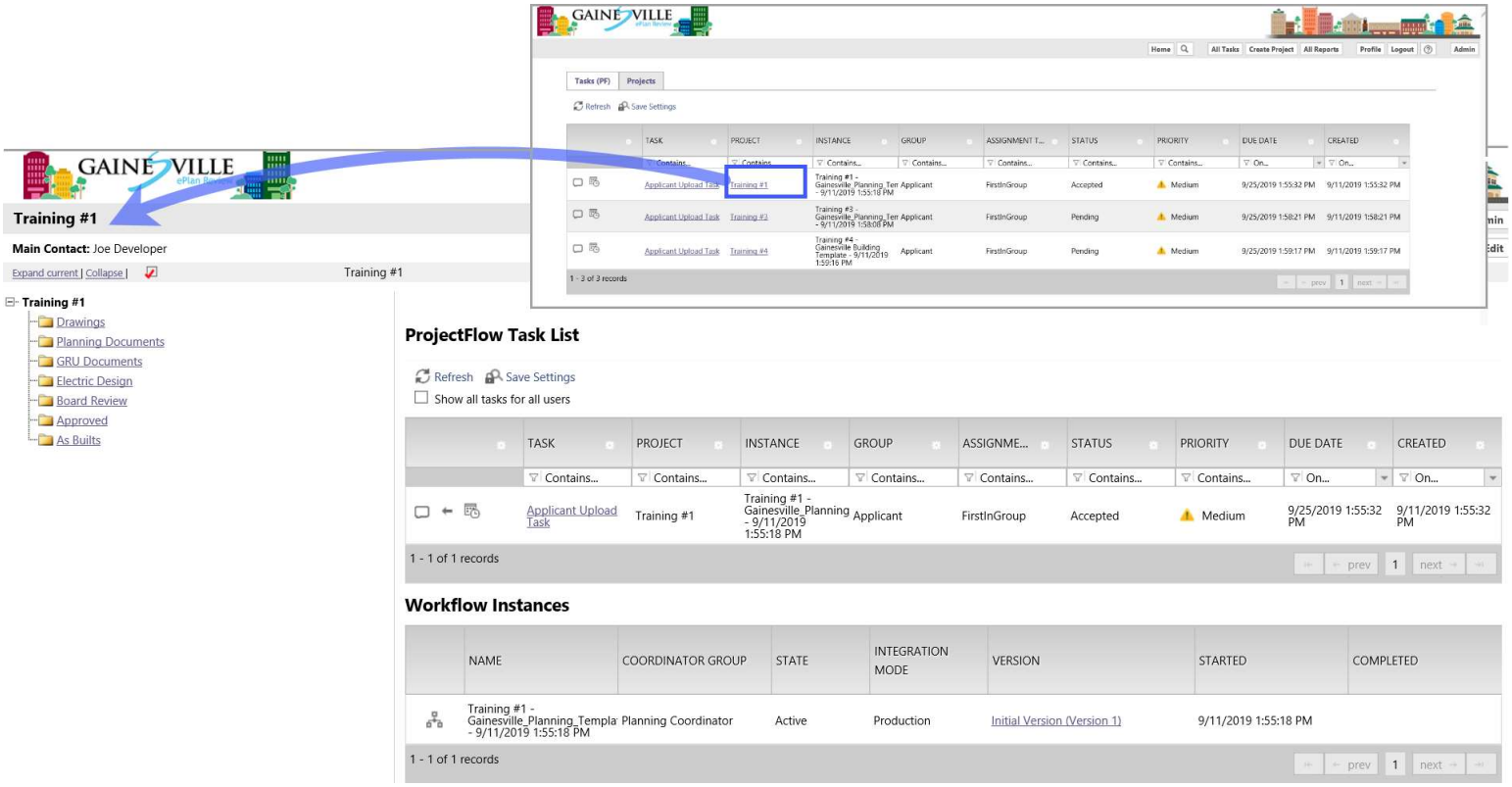
Enter Project from Task Tab



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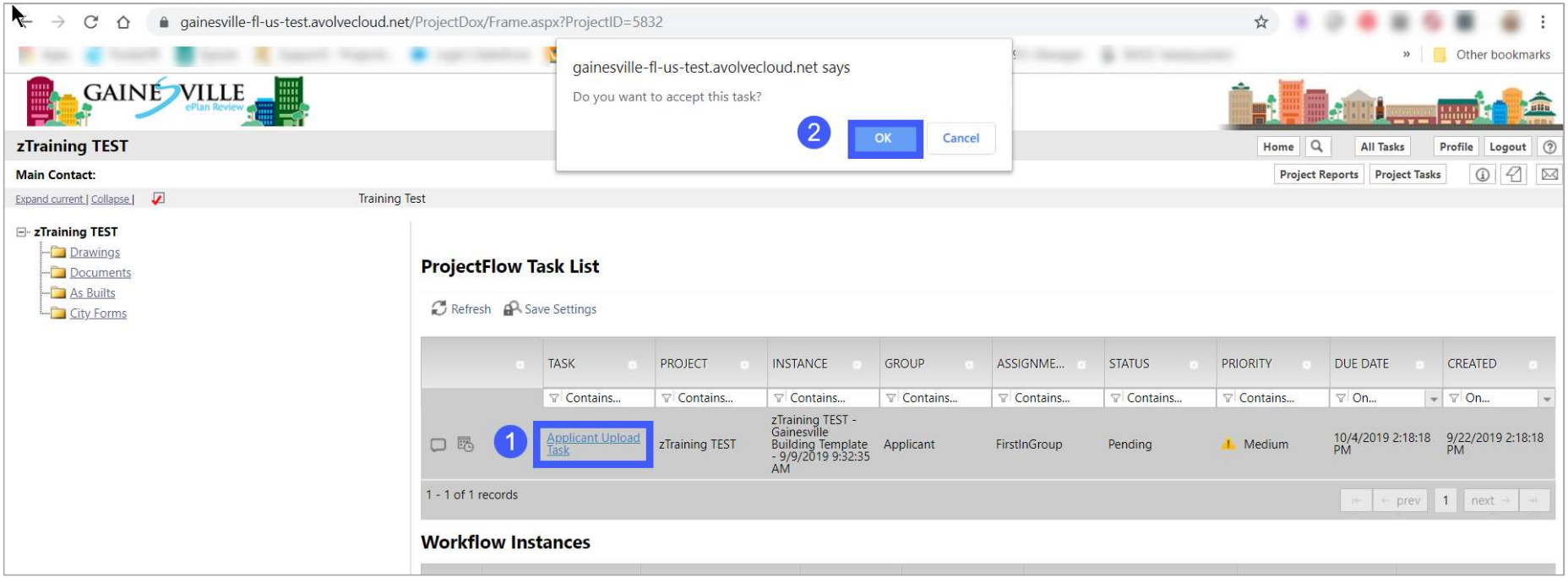
Click Task Link/OK to Accept



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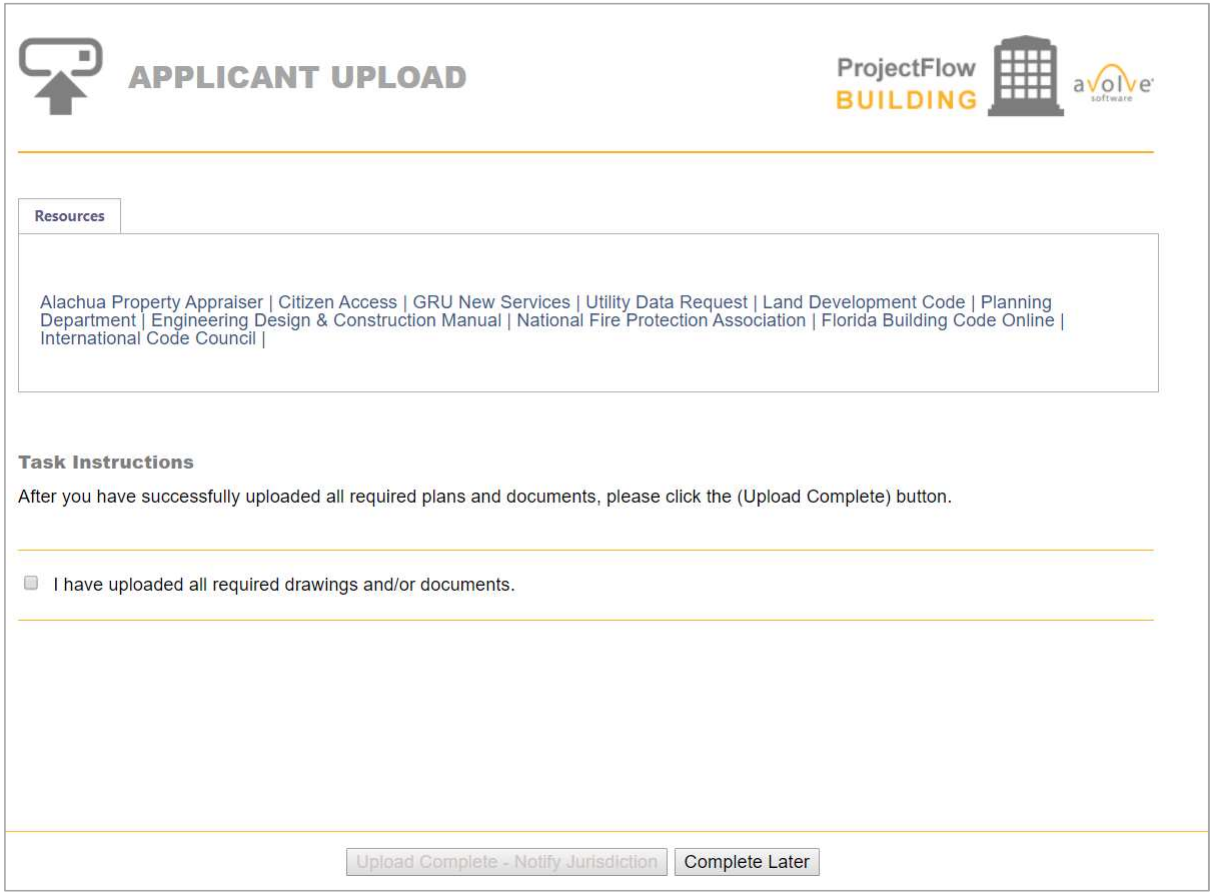
These actions accept the task (remember, that is #1 of the Must Do's) and will open the eForm.

eForm for Applicant Upload



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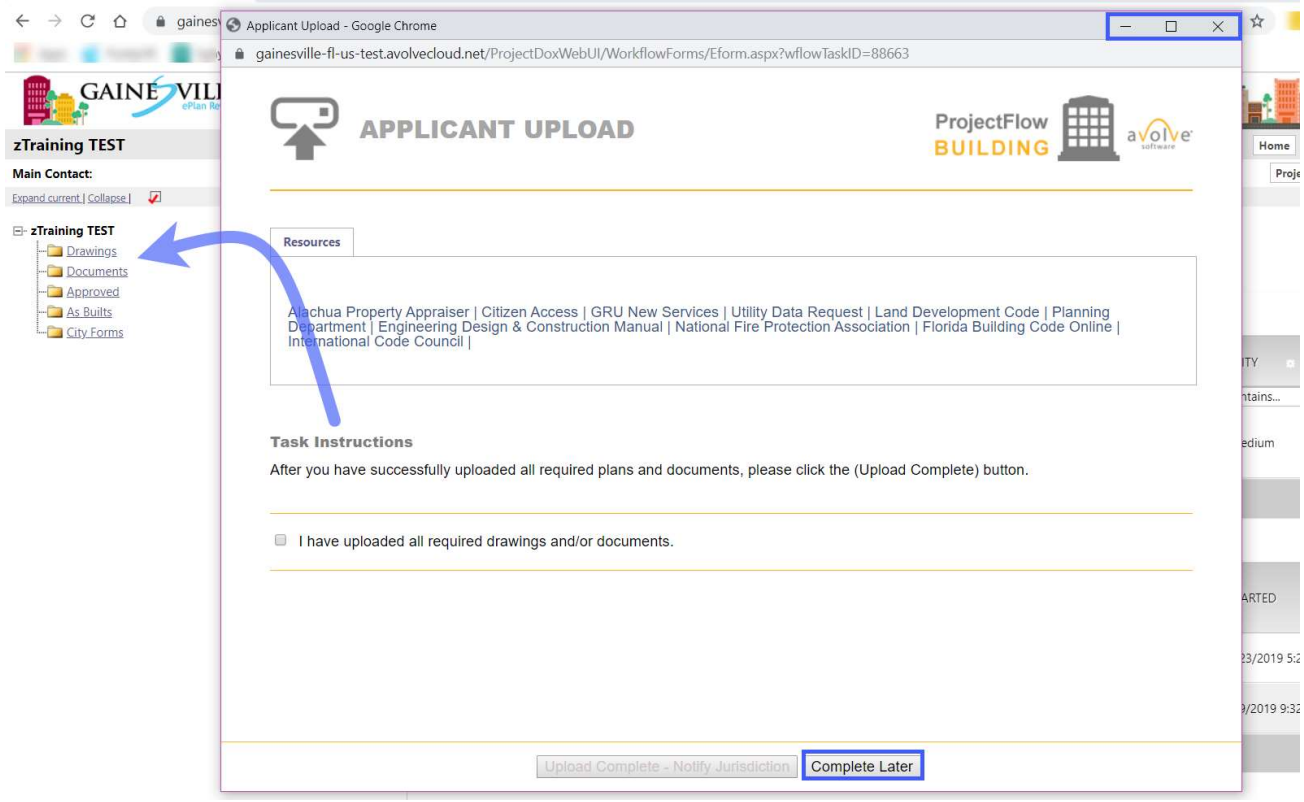
Now starts the work – Must Do #2.

Navigate to Project Folders



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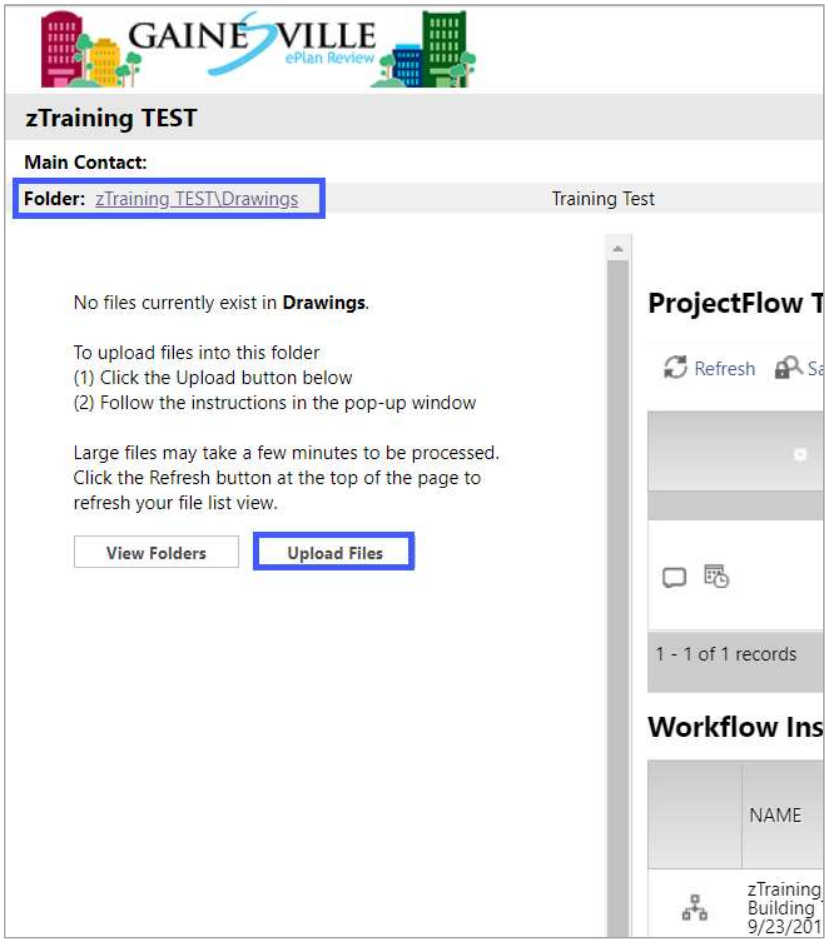
Close or minimize the Eform
Open the desired folder by clicking on it

Open Folder and Select Files to Upload



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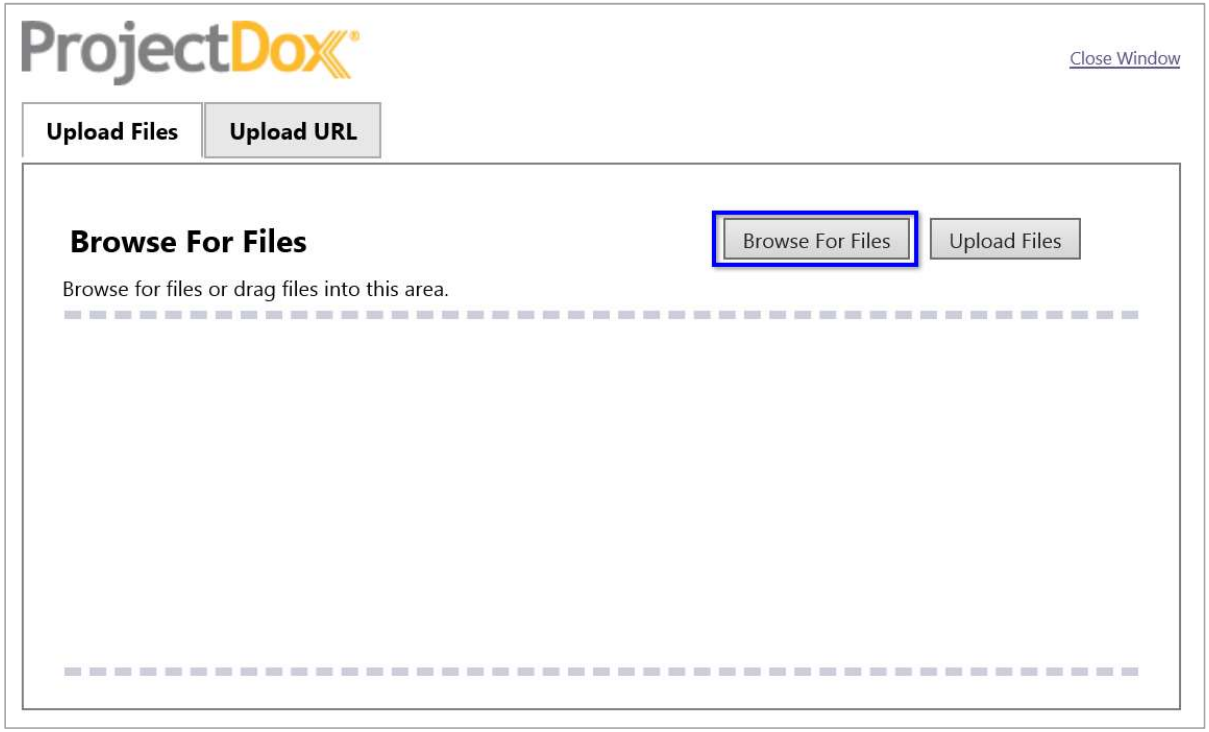
Browse



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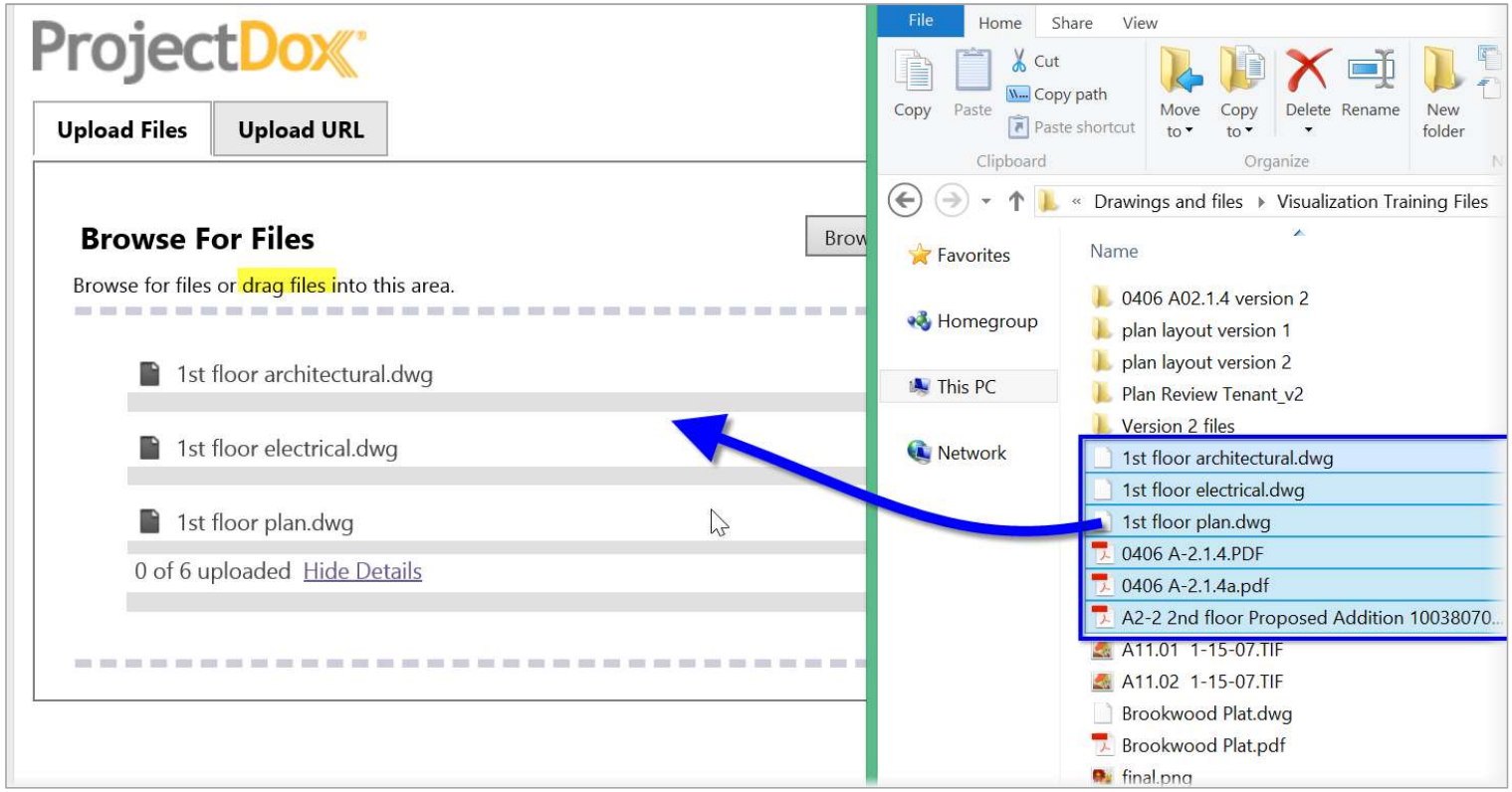
Explorer window will appear.

Or Drag and Drop



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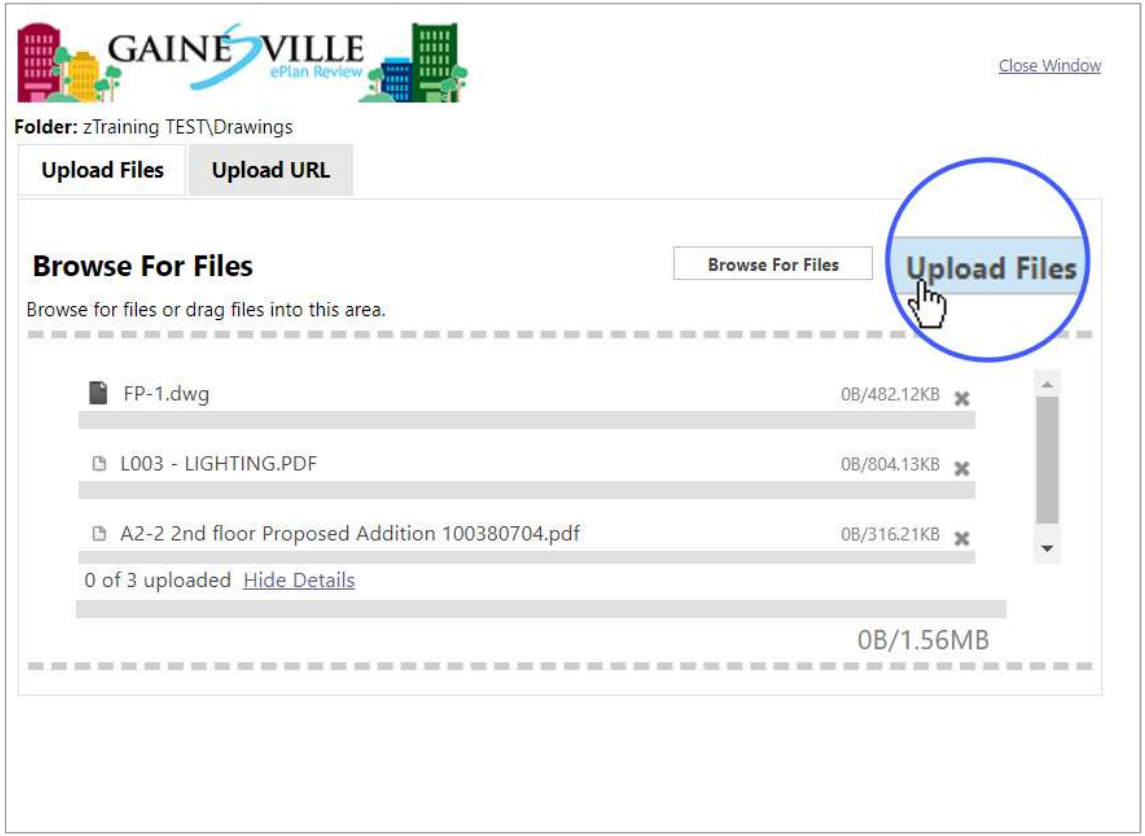
Upload Files



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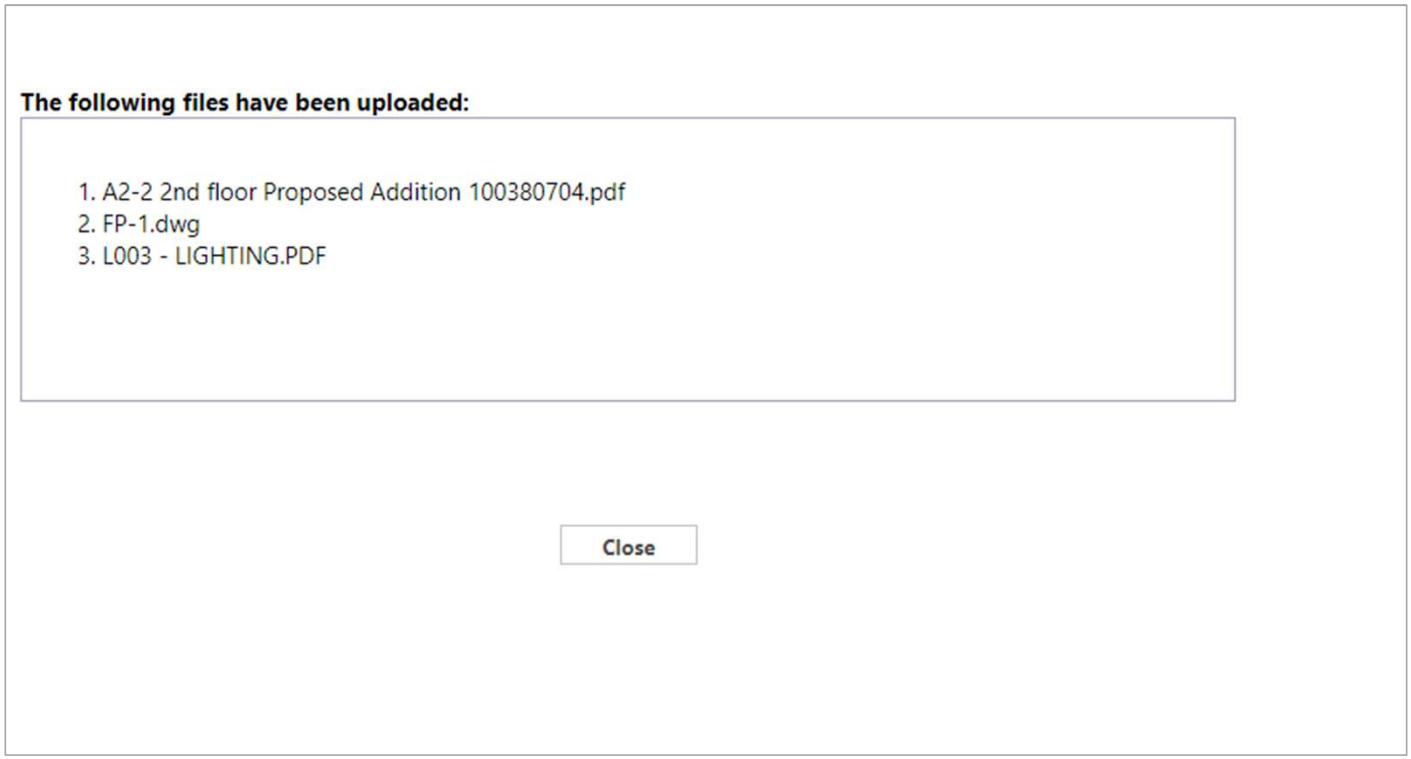
Confirmation Dialog



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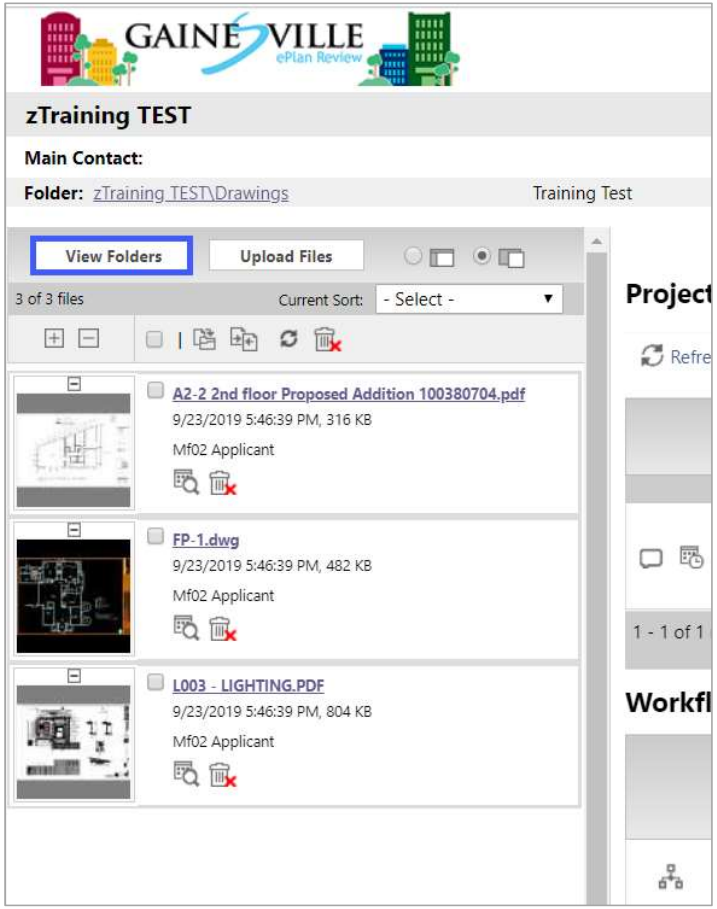
Click Close.

Click View Folders for Other Uploads



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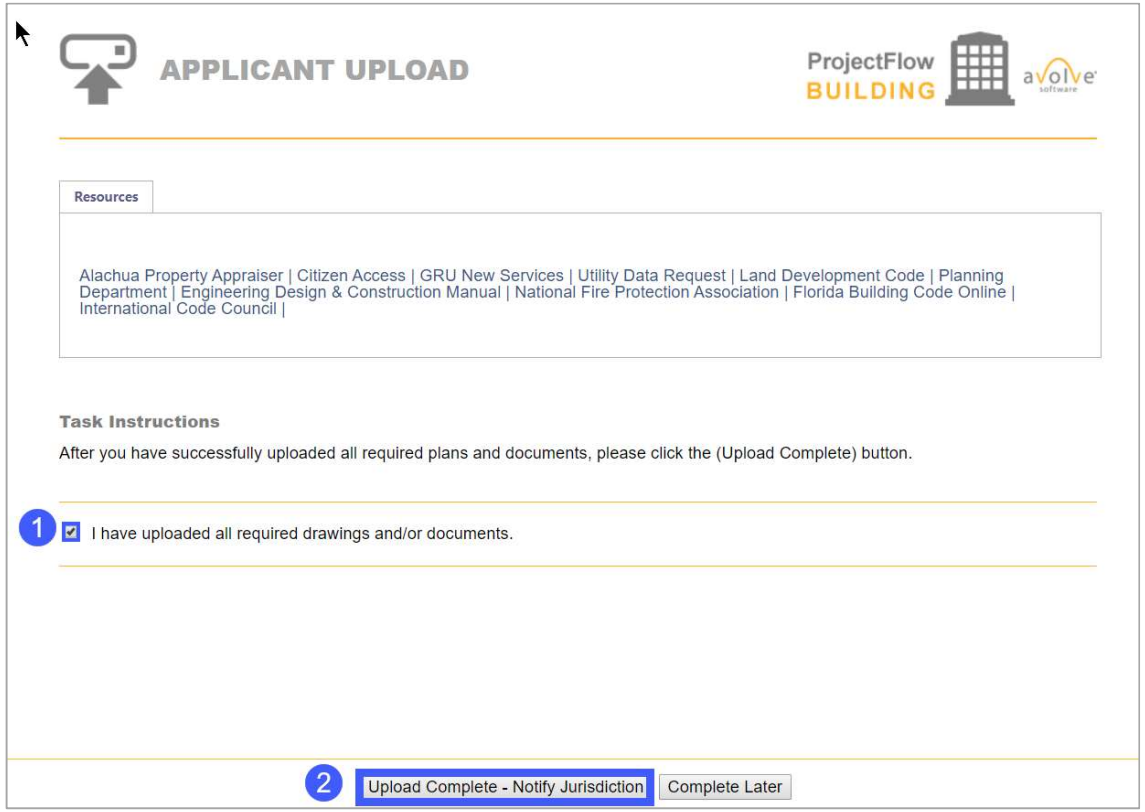
Repeat process for uploads to other folders.

Indicate Task is Complete



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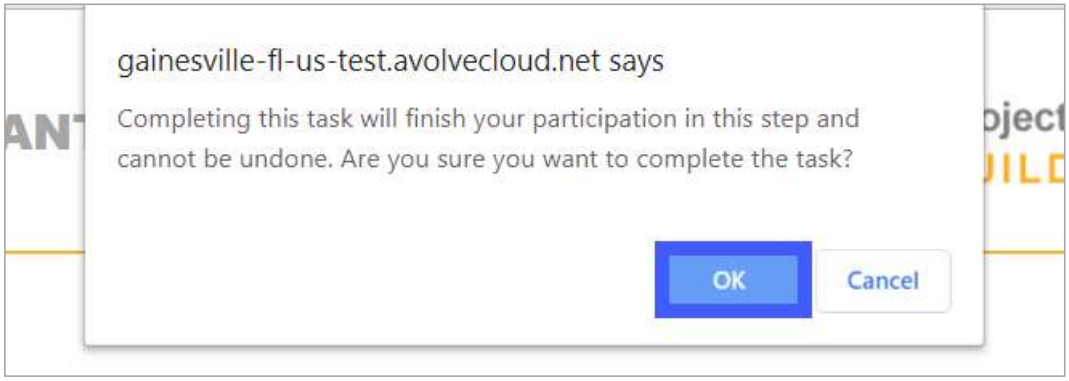
Must Do #3 - complete the task. Follow the steps above.

Confirm



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Navigation

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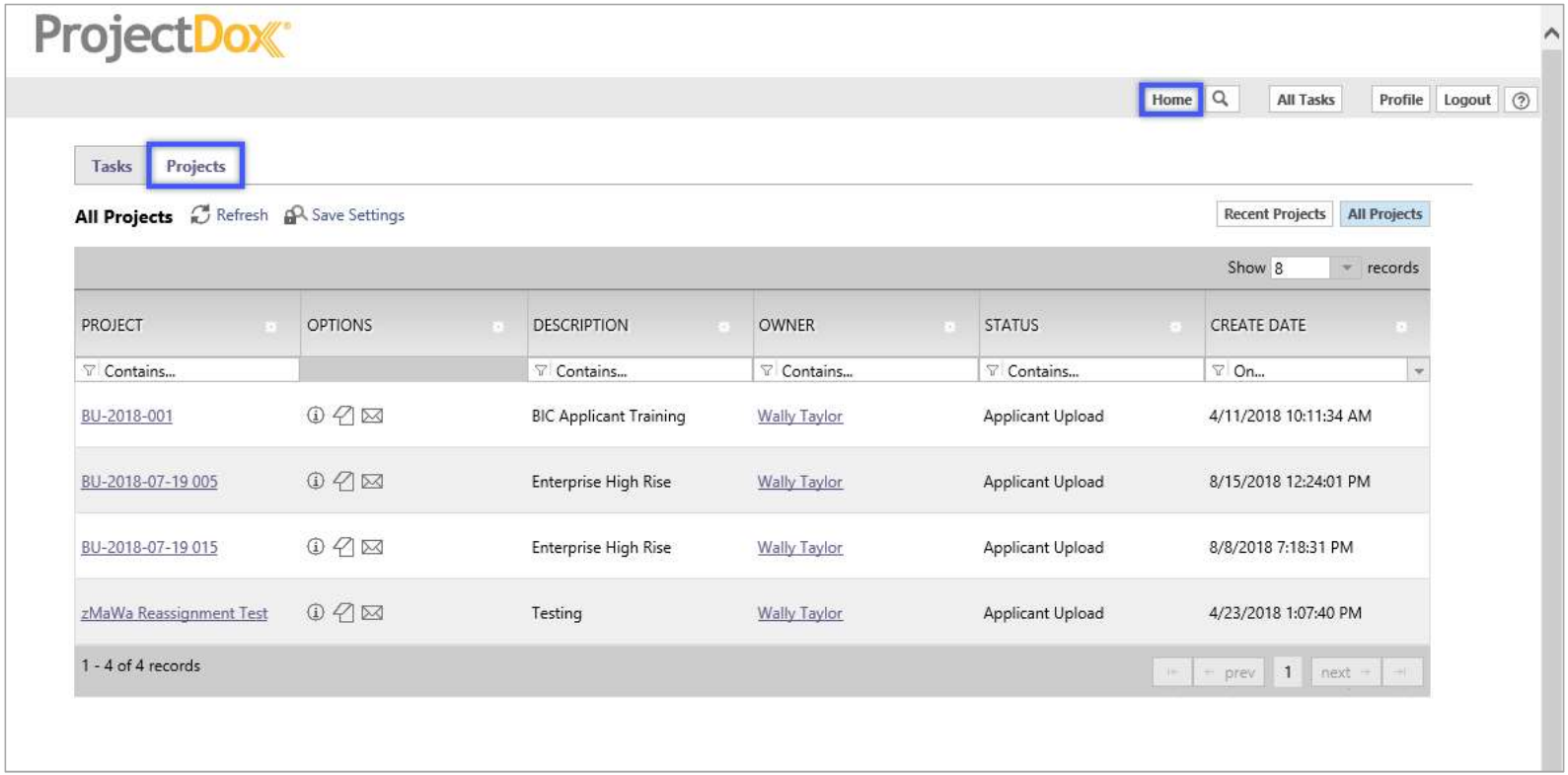
All

New Home Page – Projects Tab



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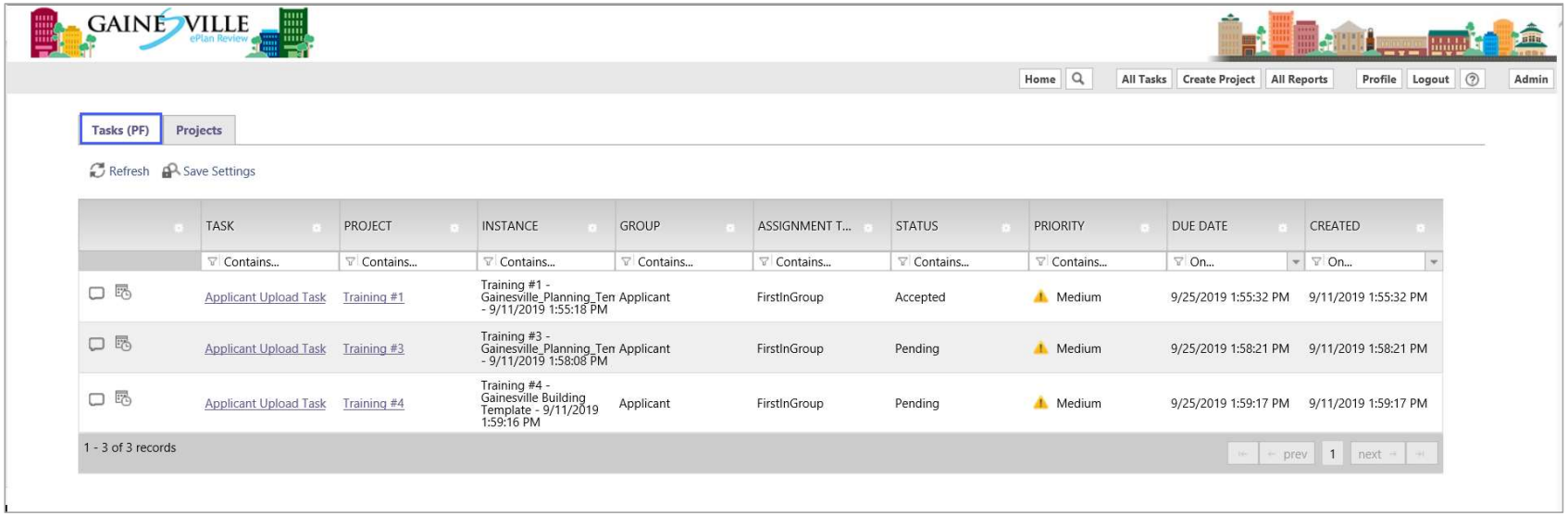
New Home Page – Tasks Tab



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Main Navigation Buttons - Old

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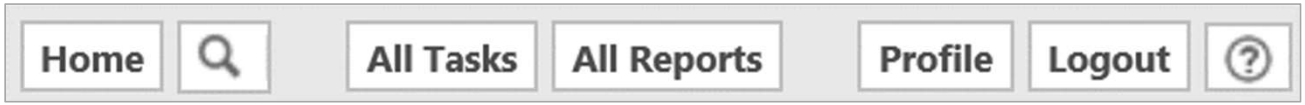
9.x

Main Navigation Buttons - New



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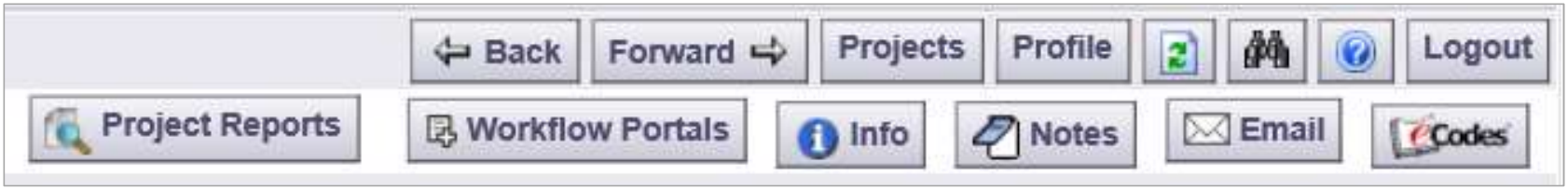
9.X Back, Forward, Refresh are now performed using browser or other controls. Home – to Home page with Tasks and Projects tabs.
All Tasks – New window with global task list.

In-project Navigation Buttons - Old



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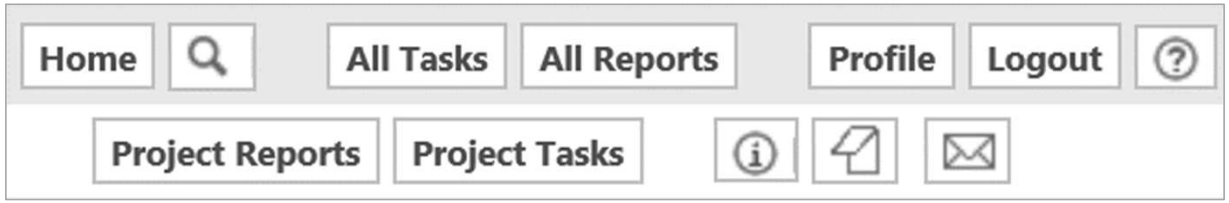
9.x

In-project Navigation Buttons - New



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9.x

Name changes - Buttons:

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

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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

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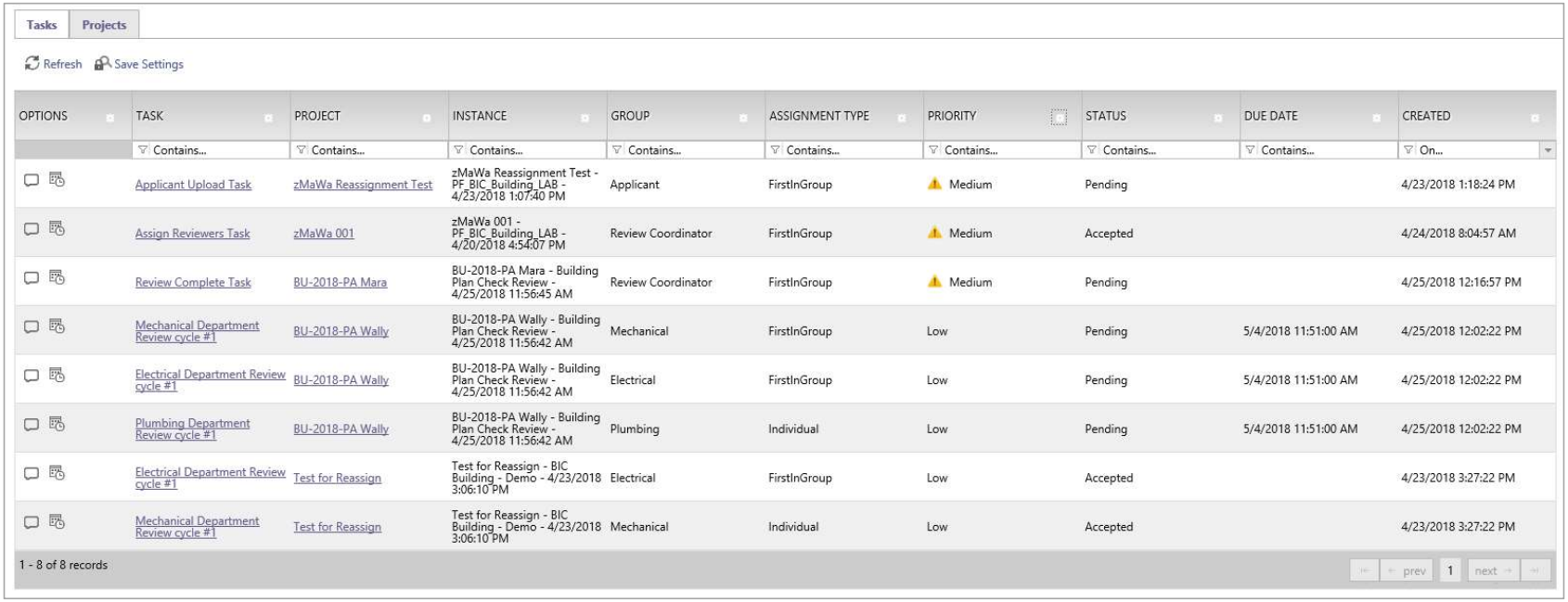
9.x The shortcuts are not new; listed here for convenience.

Grid View Configuration



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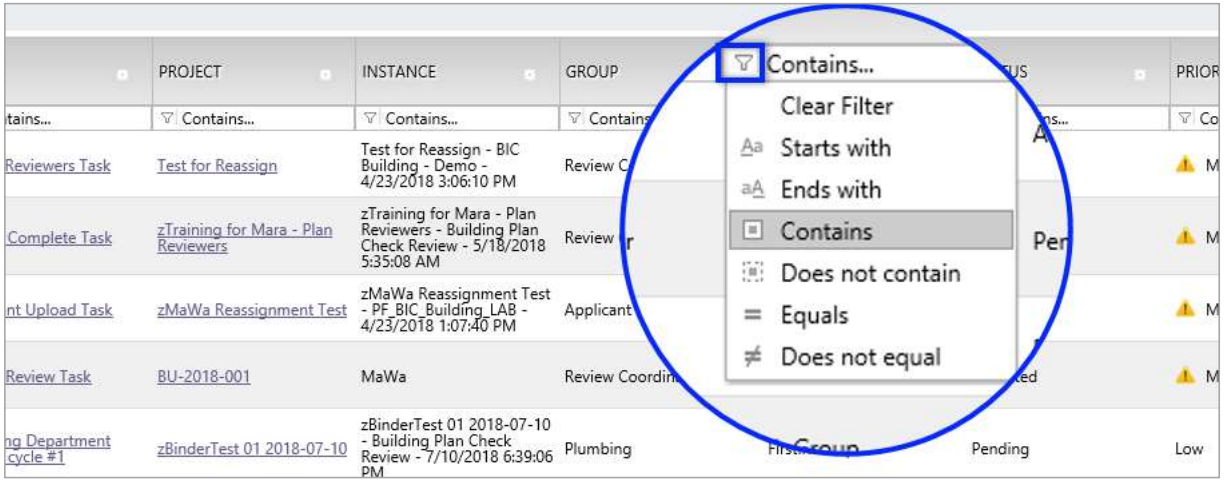
9.X New configurable Tasks and Projects grids. Users can move, hide, sort, and filter to display the items they wish to view. Grid layouts and configurations can be saved.

Column Filter

- Click filter icon and select criterion from dropdown.



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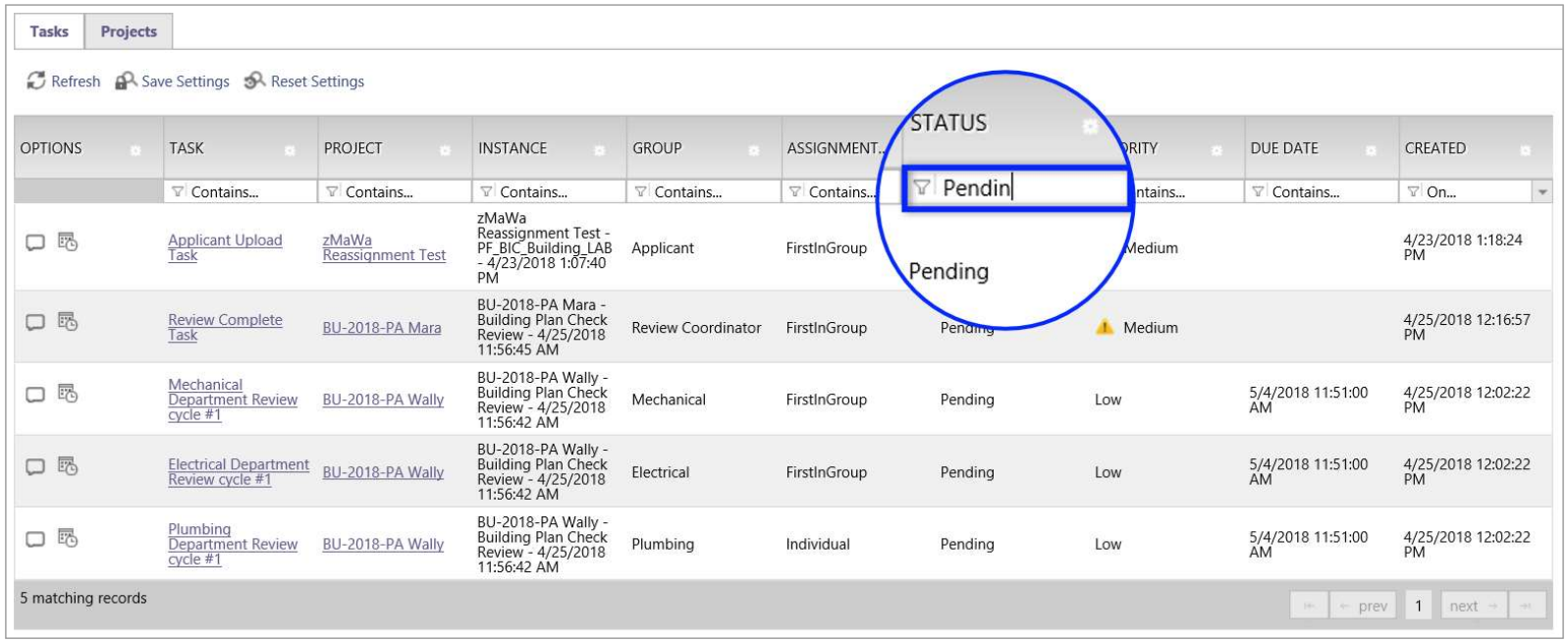
9.x

Column Filter

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



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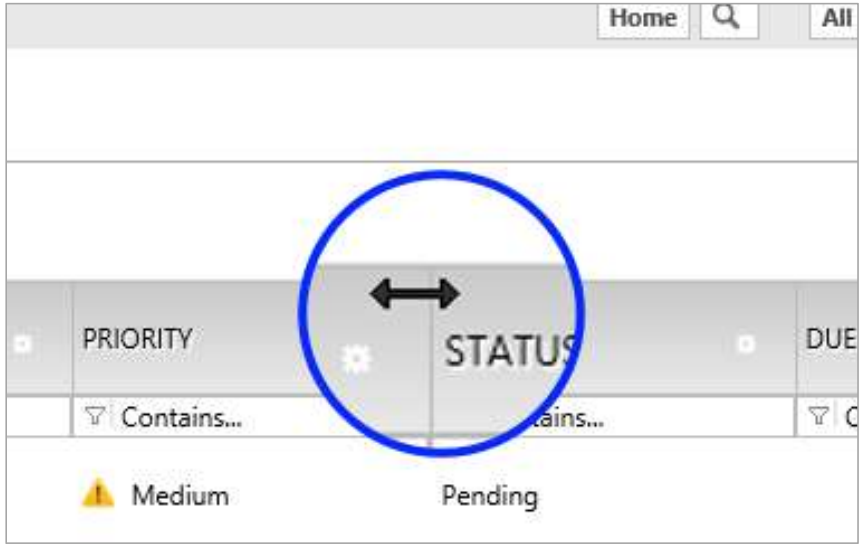
9.X

Column Width Control

- Click and drag on column border to adjust width.



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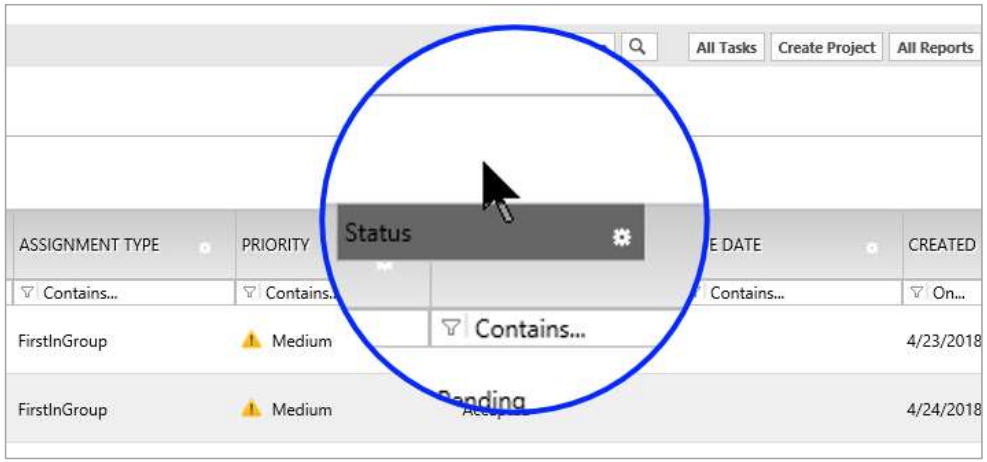
9.x

Column Reorder

- Click and drag header to move column.



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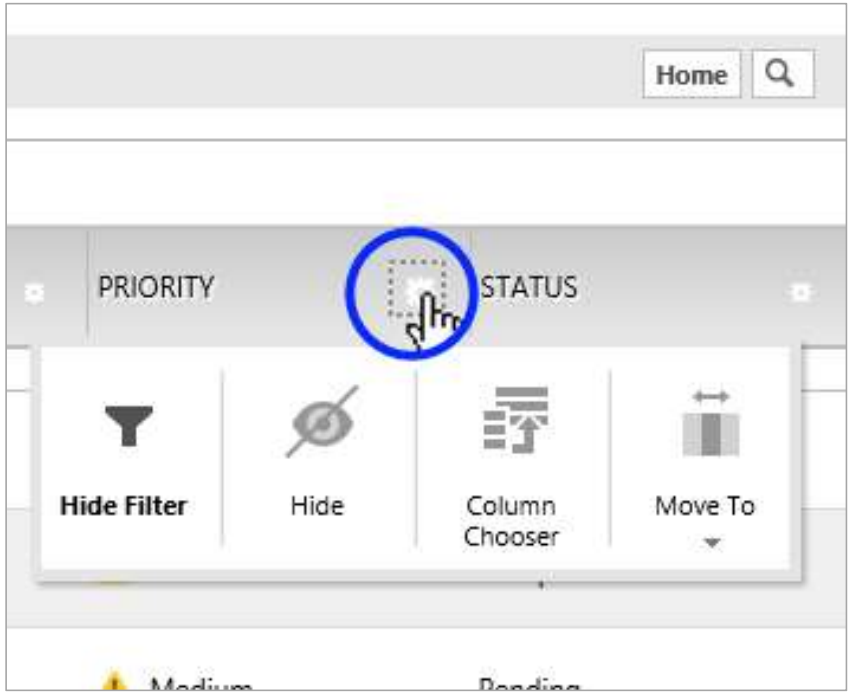
9.x

Column Control

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



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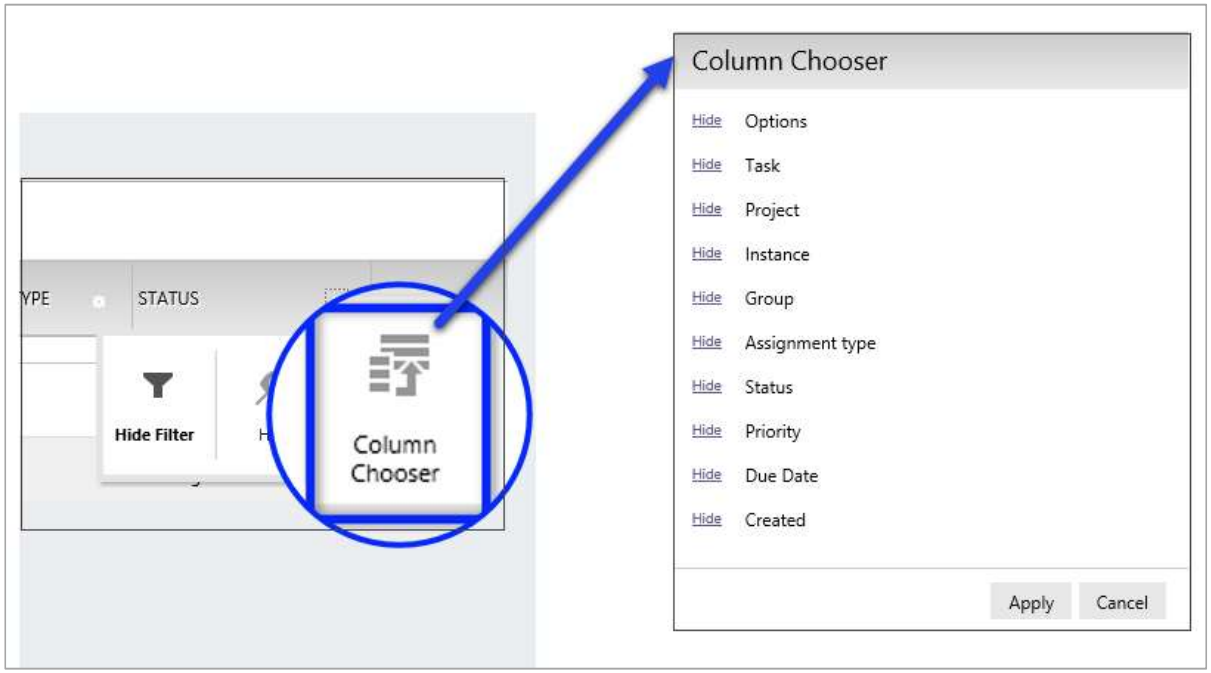
9.x

Column Chooser

- Easy show/hide columns control.



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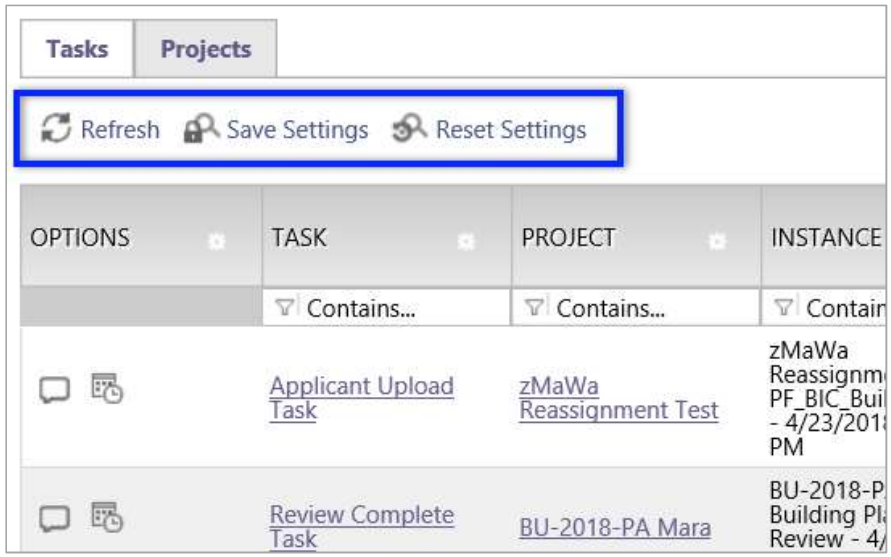
9.x

Save Settings

- Refresh updates the data in the grid.
- Save settings is persistent.
- Reset settings button only appears if there have been changes.
- Reset restores default settings.



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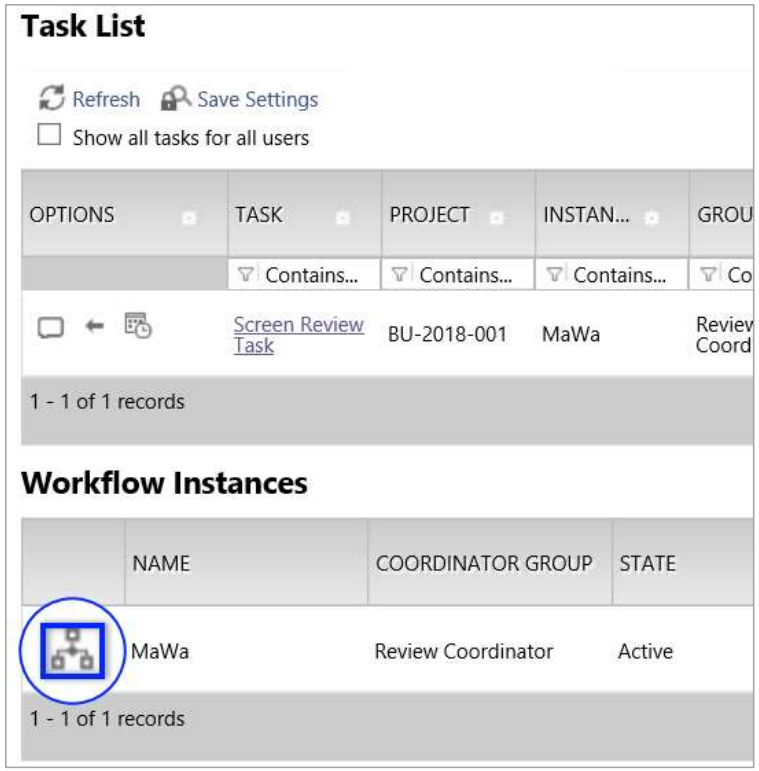
9.X All column settings are saved except number of records to display

ProjectFlow – Workflow Designer



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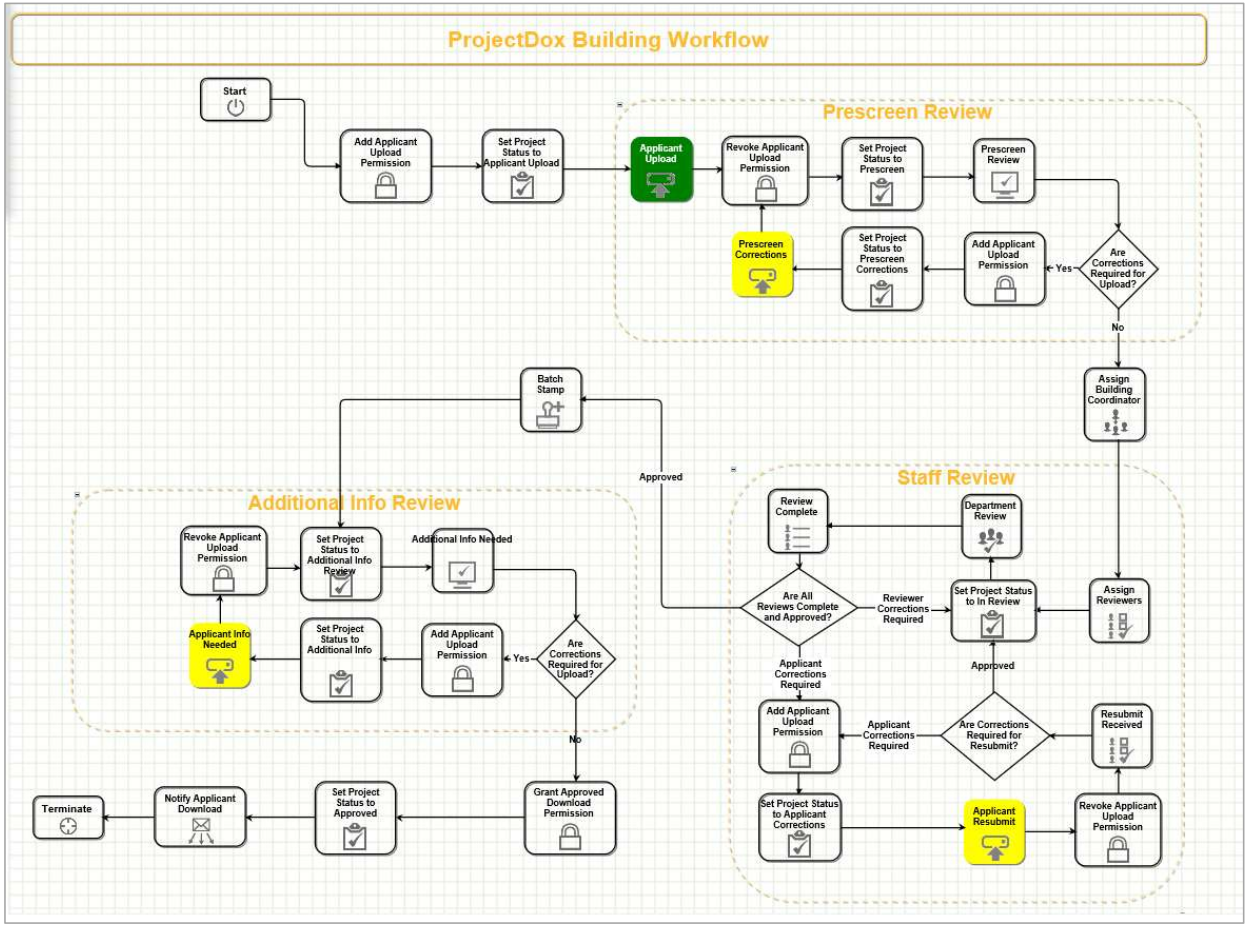
8.6 and later (ProjectFlow). Click to open Workflow Designer.

ProjectFlow – Workflow Designer



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A dynamic flowchart of workflow is displayed with the active step highlighted. Applicant steps are colored yellow for demonstration purposes only. Green step is the current active step in the workflow.

Prescreen Corrections

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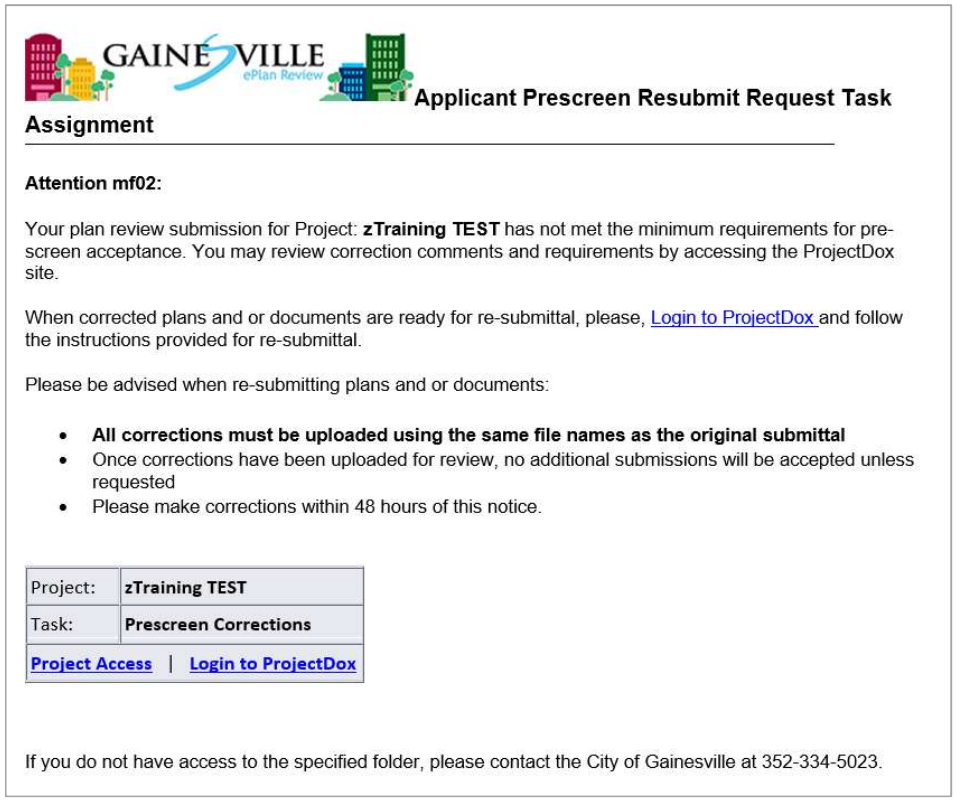
Prescreen Resubmit – Correction Request



GAINESVILLE ePlan Review

Applicant Prescreen Resubmit Request Task Assignment

Attention mf02:

Your plan review submission for Project: **zTraining TEST** has not met the minimum requirements for pre-screen acceptance. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and or documents are ready for re-submittal, please, Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and or documents:

- **All corrections must be uploaded using the same file names as the original submittal**
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 48 hours of this notice.

Project:	**zTraining TEST**
Task:	**Prescreen Corrections**
Project Access | **Login to ProjectDox**	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

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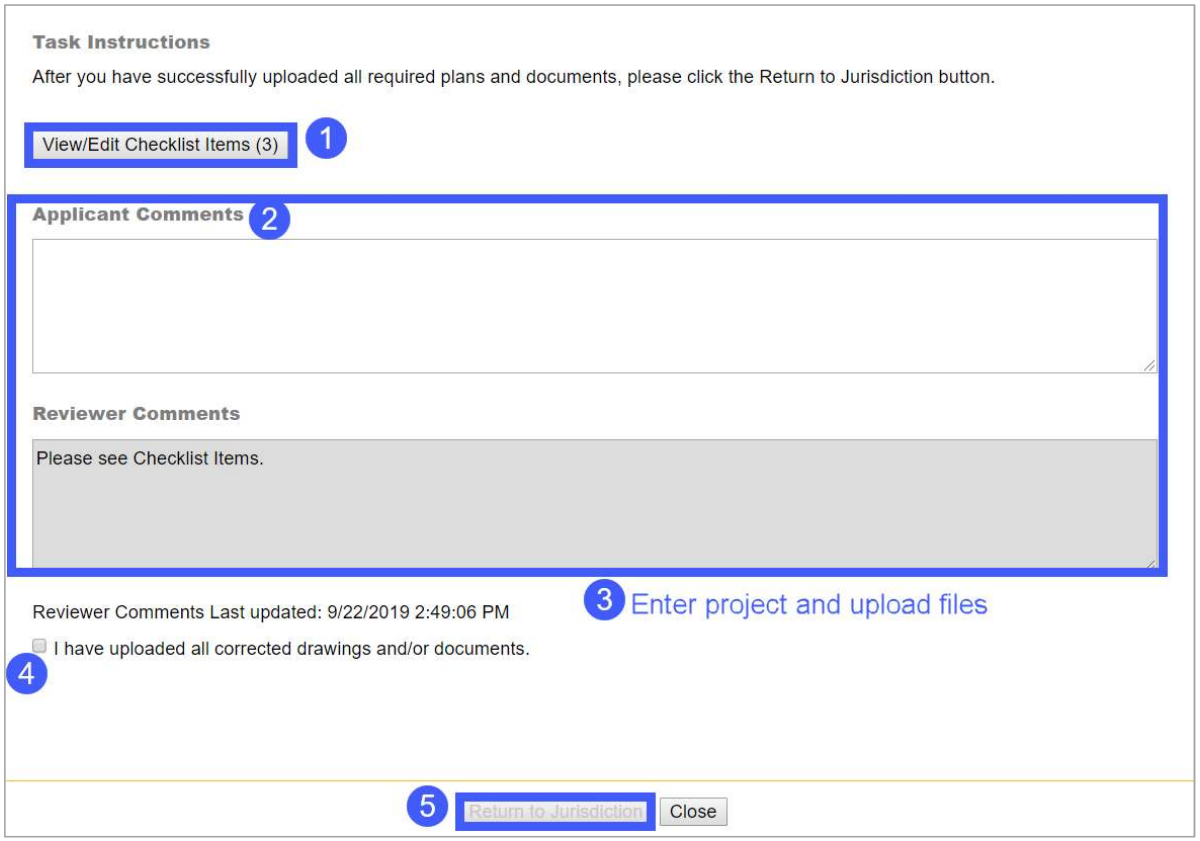
Prescreen Corrections (beginning)



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1. Checklist Viewer; 2. Read discussion comments; 3. Reply to Discussion; 4. Upload files (to be continued)

ProjectFlow – Checklist Viewer

Workflow Review Checklist Item Viewer

Refresh

Selected Checklist Items for All Review Cycles

Review Cycle: All ▾ Save Settings

Show 50 records

REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS	DATE UPDATED
Equals...	Contains...	Contains...	Contains...	Equals...	Contains...	Contains...	Contains...	Contains...
1	Building Permit	Building Intake	Submission Review		FILE NAME – files names must clearly identify the drawings or documents consistent with the city's published requirements – see the City Forms folder in your project for specific requirements. The file names must be consistent with the Sheet Index.			9/22/2019 2:48:36 PM
2	Building Permit	Building Intake	Submission Review		ORIENTATION – all drawings and documents must be uploaded in an orientation that does not require rotating for viewing or printing.			9/22/2019 2:48:36 PM
3	Building Permit	Building Intake	Submission Review		SINGLE DRAWINGS – drawings must be uploaded as a single drawing per each file. Multiple drawings in a single file cannot be accepted.			9/22/2019 2:48:36 PM

1 - 3 of 3 records

prev 1 next

Save Close View Full Report

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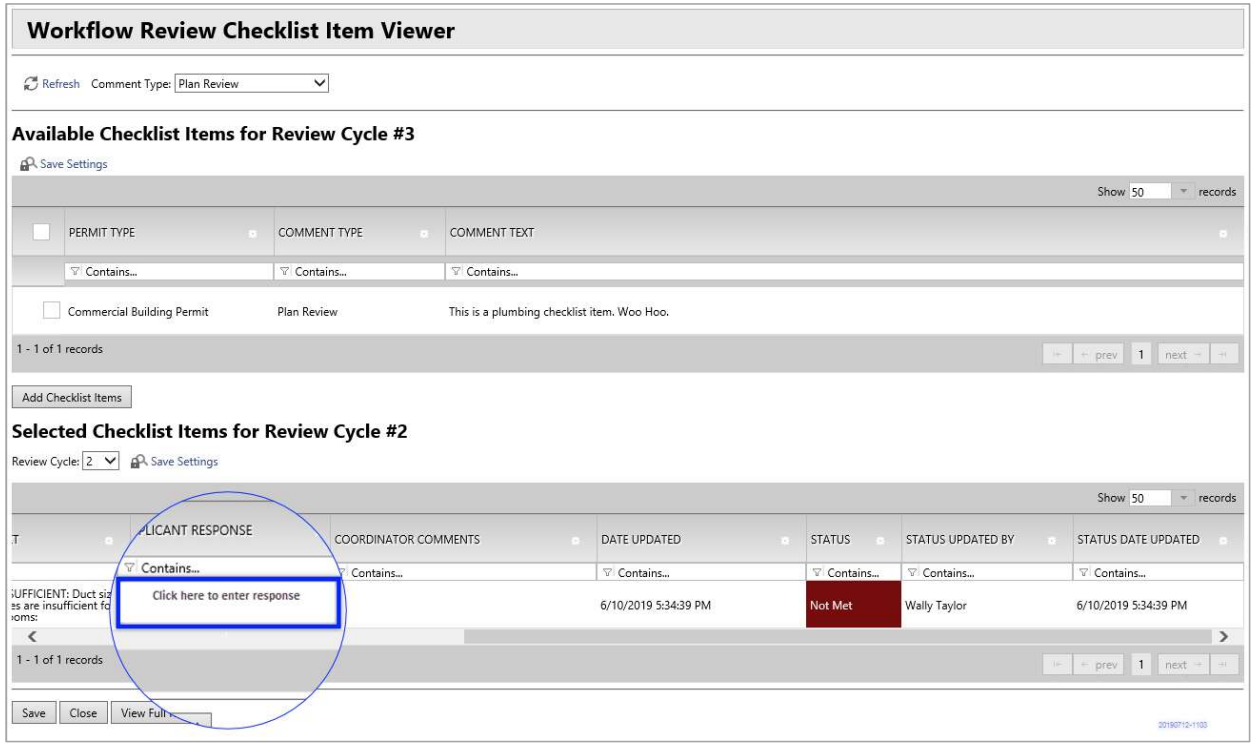
ProjectFlow – Checklist Viewer (cont'd)



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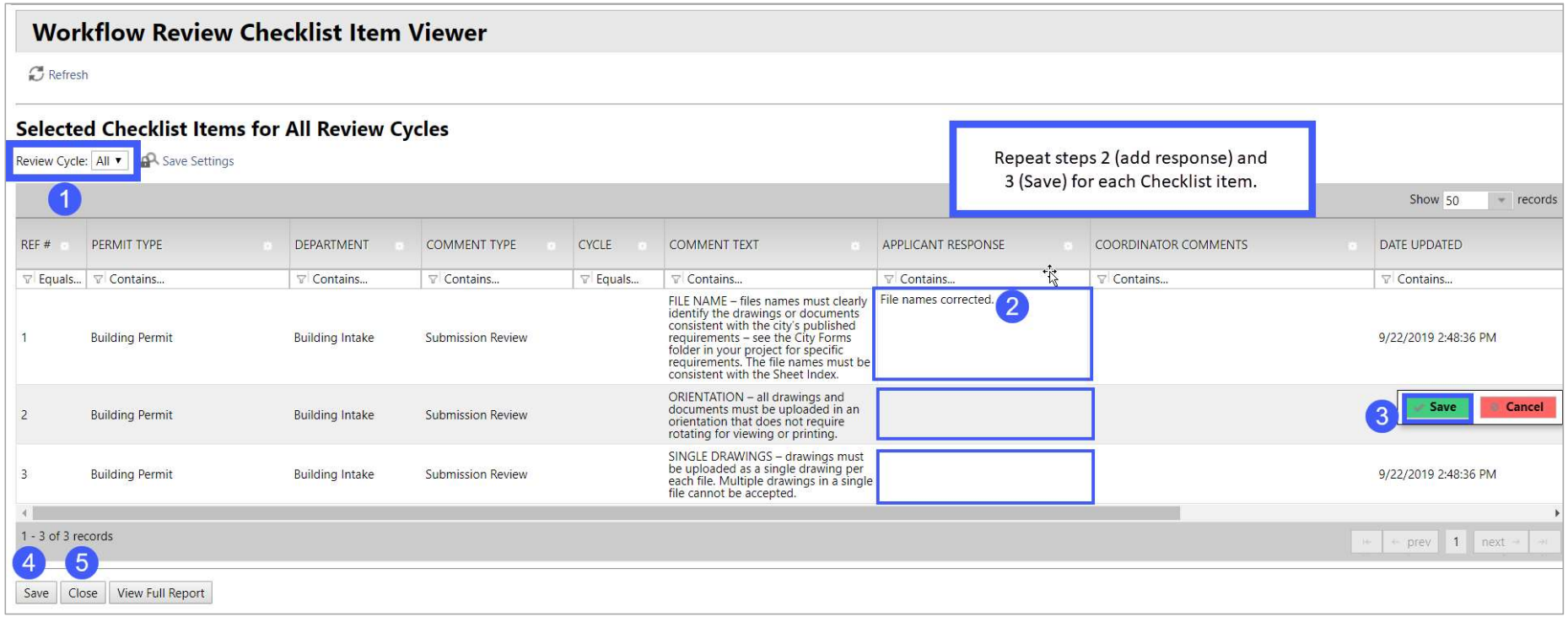
The rest of the columns. Respond to each checklist item here.

Complete Responses to Checklist Items



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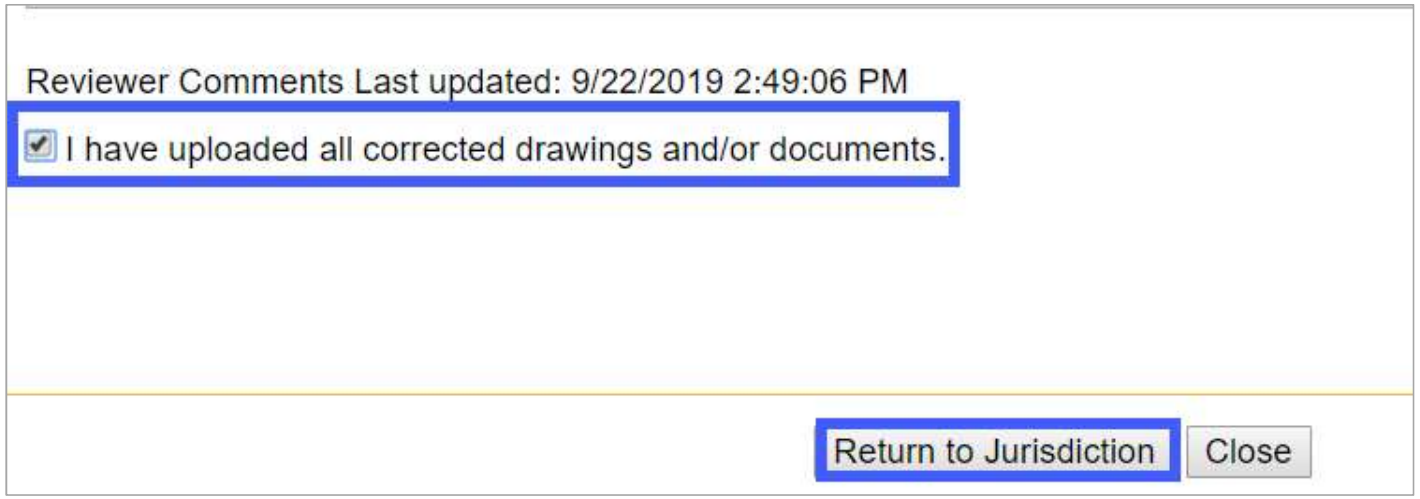
Prescreen Corrections (cont'd)



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Must Do #3

Applicant Resubmit
(after review)

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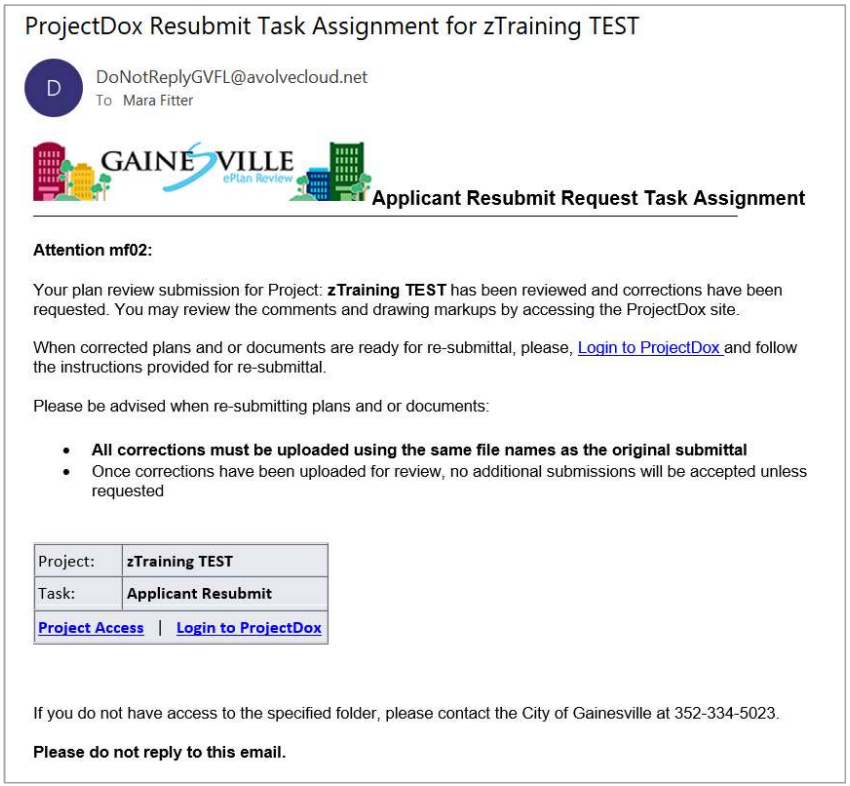
Applicant Resubmit – Email Notification



ProjectDox Resubmit Task Assignment for zTraining TEST

D DoNotReplyGVFL@avolvecloud.net
To Mara Fitter

GAINESVILLE ePlan Review

Applicant Resubmit Request Task Assignment

Attention mf02:

Your plan review submission for Project: **zTraining TEST** has been reviewed and corrections have been requested. You may review the comments and drawing markups by accessing the ProjectDox site.

When corrected plans and or documents are ready for re-submittal, please, Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and or documents:

- **All corrections must be uploaded using the same file names as the original submittal**
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Project:	**zTraining TEST**
Task:	**Applicant Resubmit**
Project Access | **Login to ProjectDox**	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

Please do not reply to this email.

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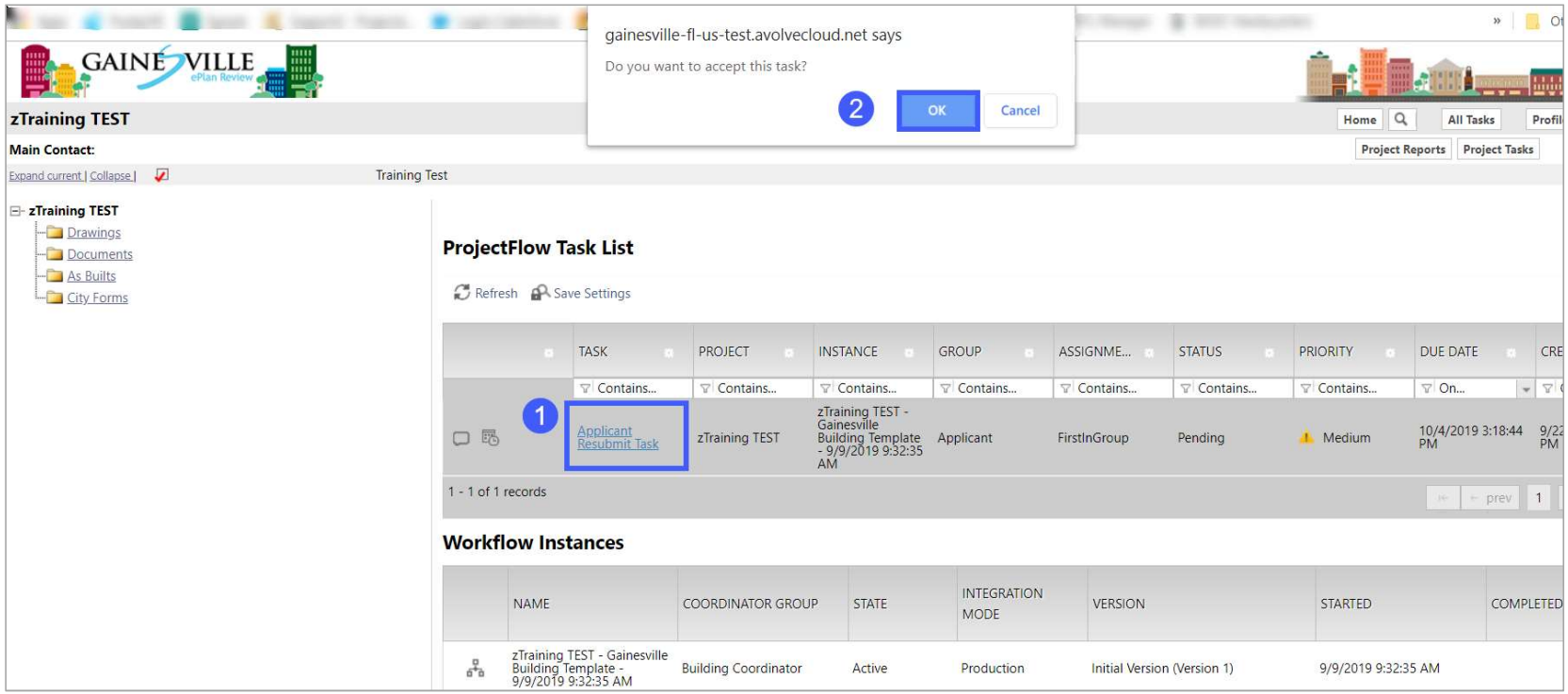
Use the link

Accept the Task



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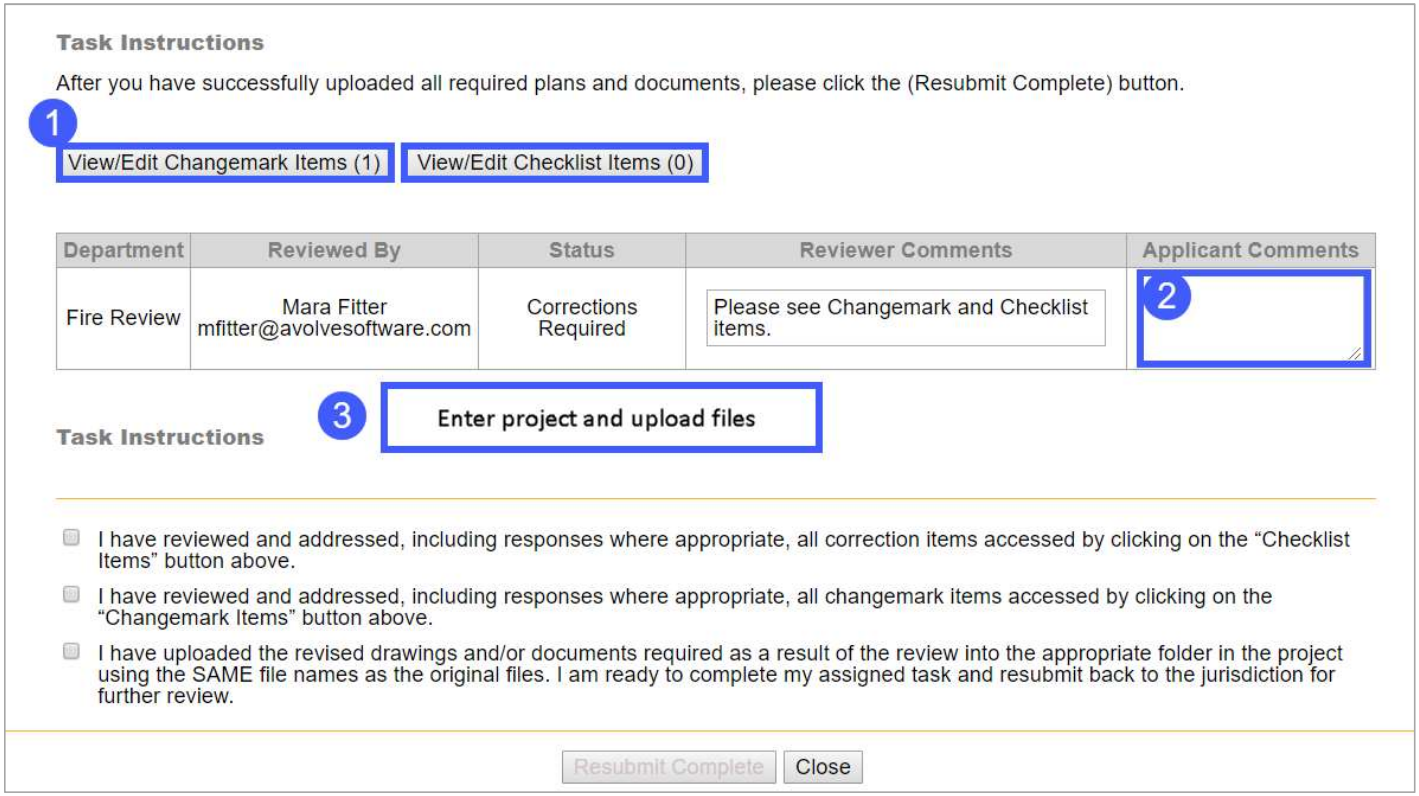
Applicant Resubmit eForm



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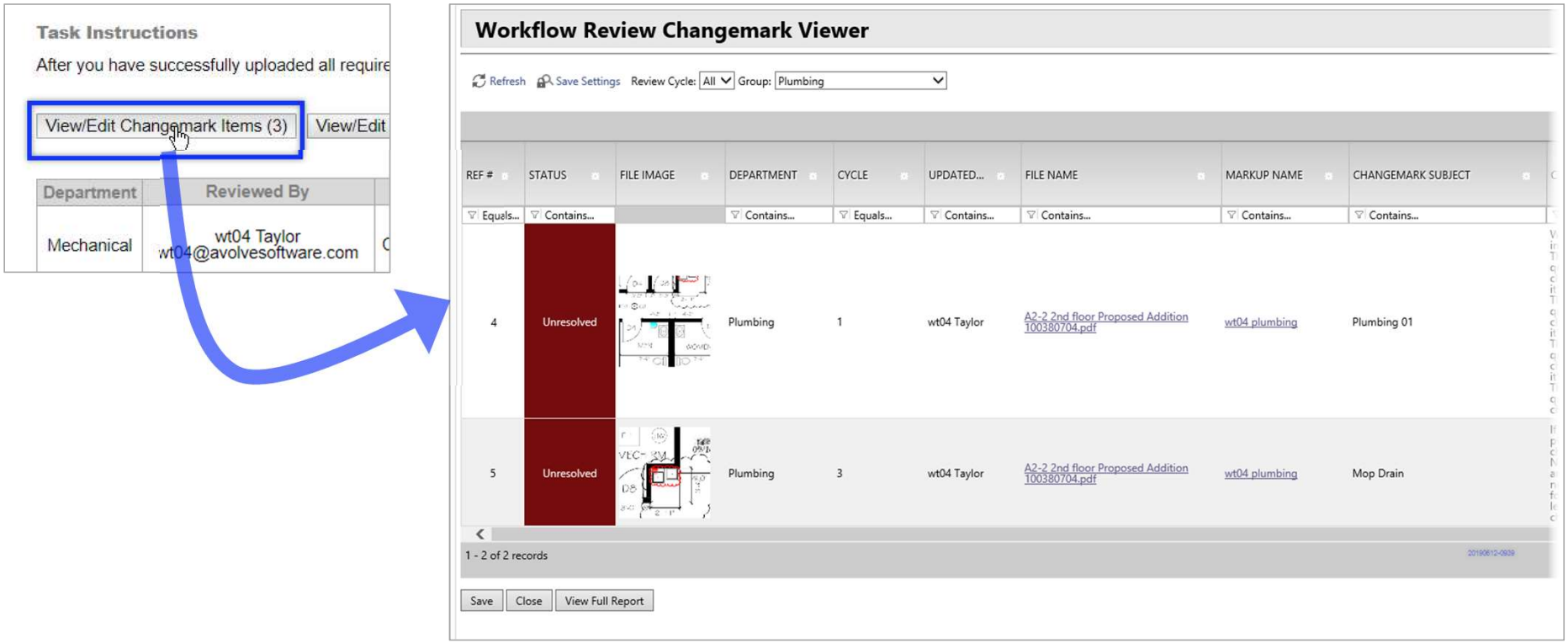
ProjectFlow – Changemark Viewer



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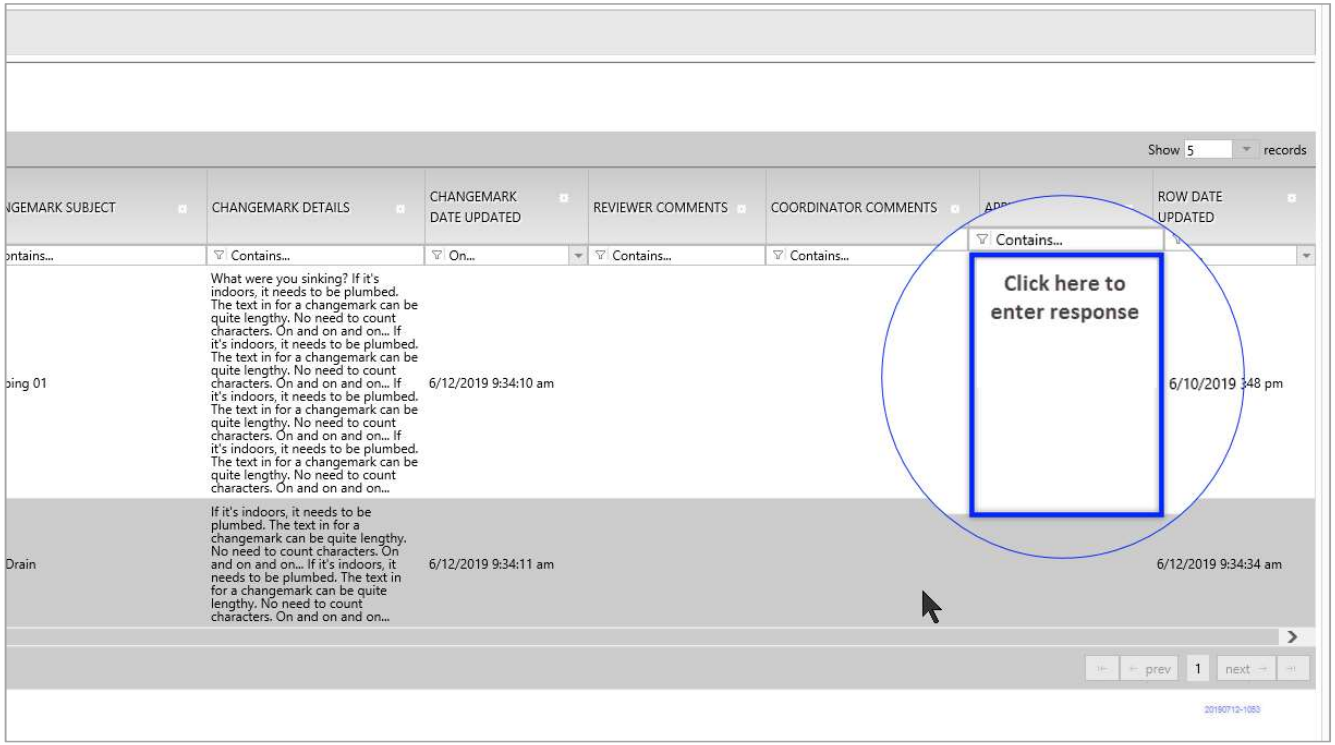
Displays dropdowns for selecting Review Cycle and Group; Columns and links. Changemarks can be viewed from here.

ProjectFlow – Changemark Viewer (cont'd)



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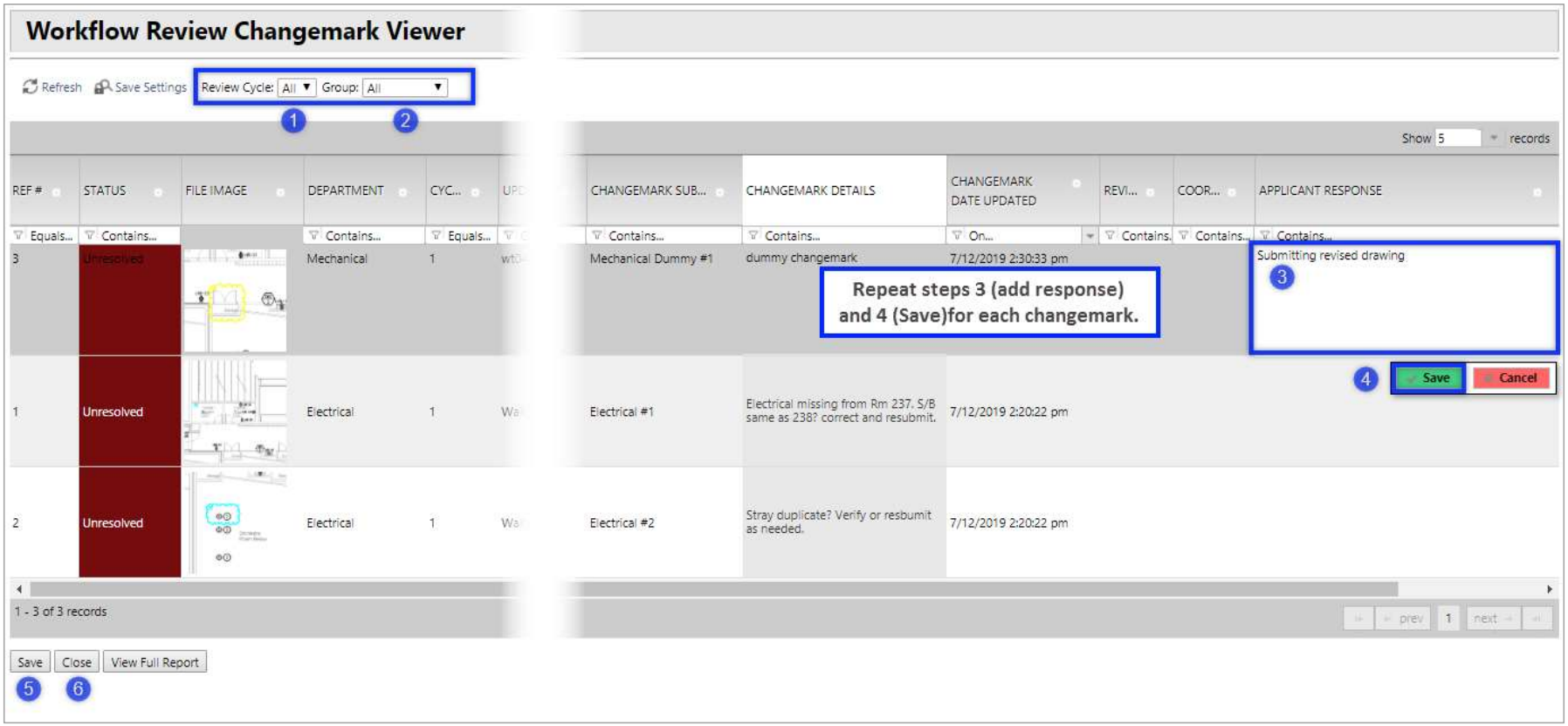
The rest of the columns. Enter your response to each changemark here.

Complete Responses to Changemarks



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Upload (revised) files

- Process is same as for original submission: you upload in the project folders

- Remember - file names for revisions ***must*** be the same as the originals

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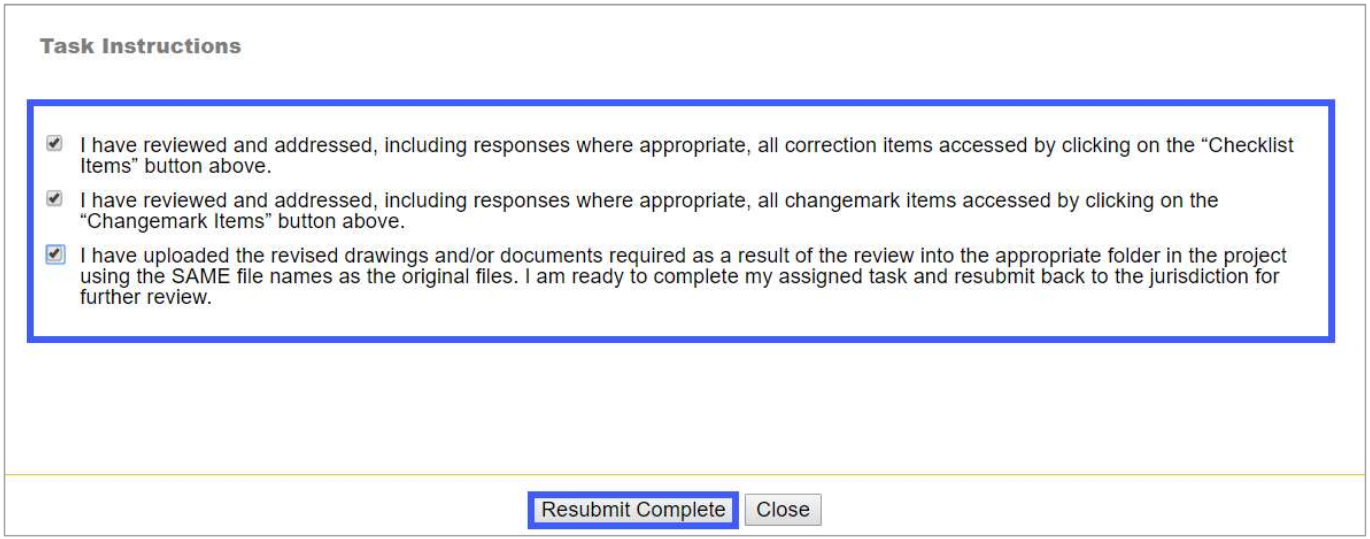
Complete the Resubmit Step



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Must Do #3

Reports

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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 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 - 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...	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...
	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 w...
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	ProjectFlow - Review Details Report	Workflow	Lists the review comments, checklist and changemark details for a workflow instance...

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9.X Highlighted reports are recent additions

Reports

- Customer specific material – Likely reports may include:
  - ProjectFlow – Changemarks
  - ProjectFlow – Checklist Items
  - ProjectFlow – Workflow Routing Slip
  - ProjectFlow – Department Review Status
  - ProjectFlow – Review Details Report

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Download

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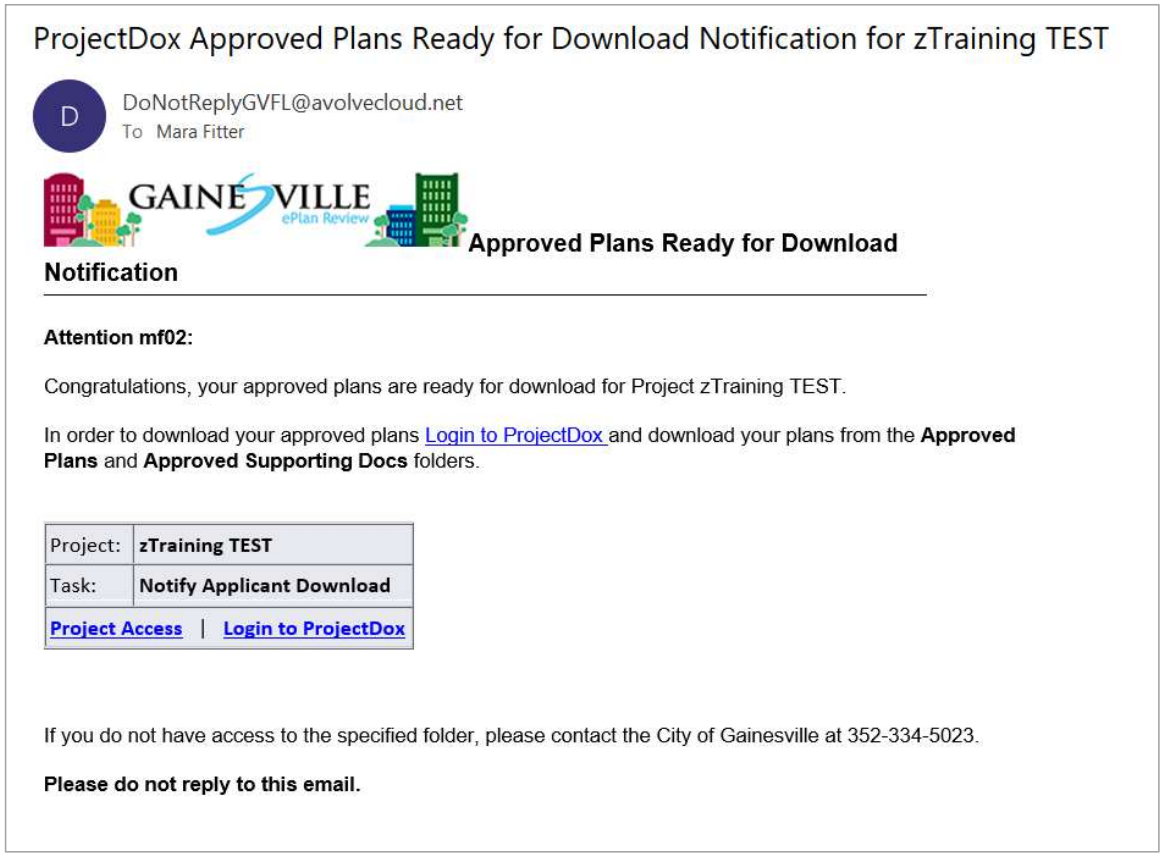
Download Email Notification



ProjectDox Approved Plans Ready for Download Notification for zTraining TEST

D DoNotReplyGVFL@avolvecloud.net
To Mara Fitter

GAINESVILLE ePlan Review

Approved Plans Ready for Download Notification

Attention mf02:

Congratulations, your approved plans are ready for download for Project zTraining TEST.

In order to download your approved plans Login to ProjectDox and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

Project:	**zTraining TEST**
Task:	**Notify Applicant Download**
Project Access | **Login to ProjectDox**	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

Please do not reply to this email.

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Click **Project Access**. There is no workflow task to perform, so the link takes you to the project.

Access Project to Download Approved Files

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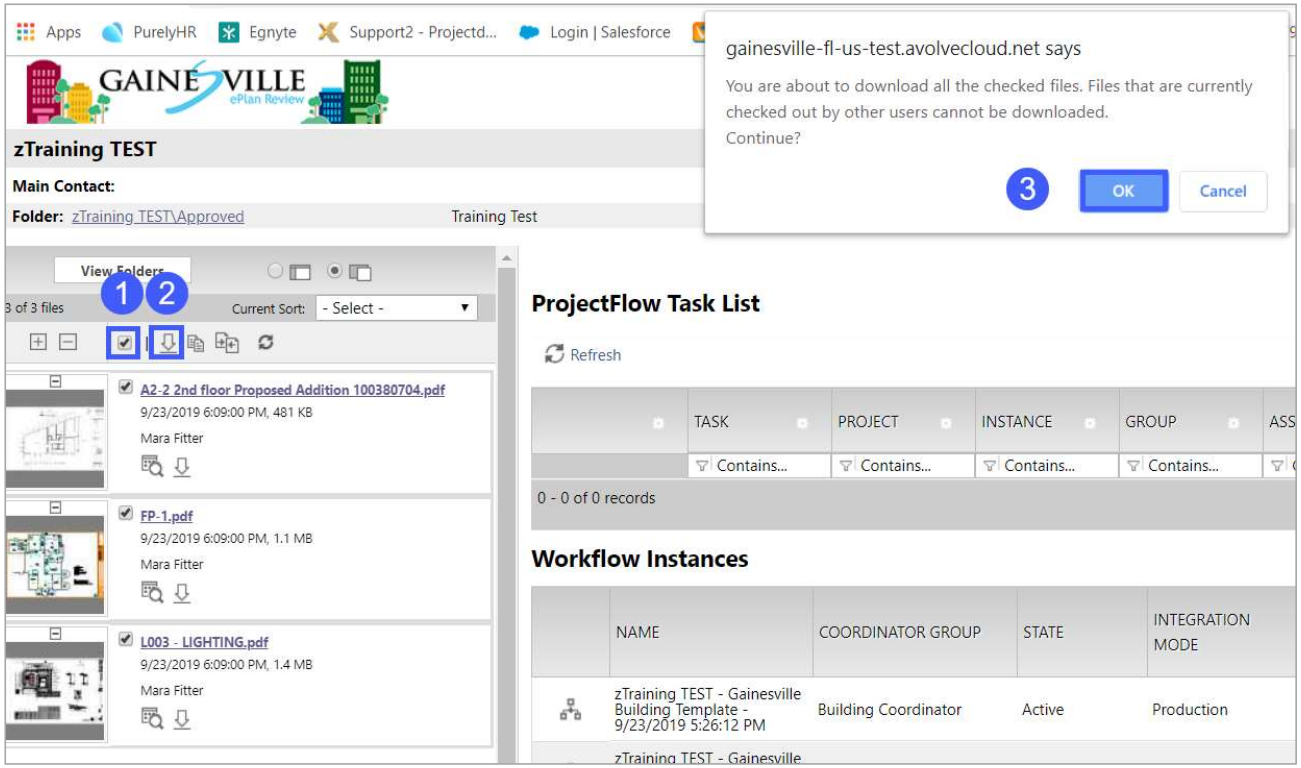
Download

1. Click to select all files in the folder
2. Click to download files
3. Confirm dialog



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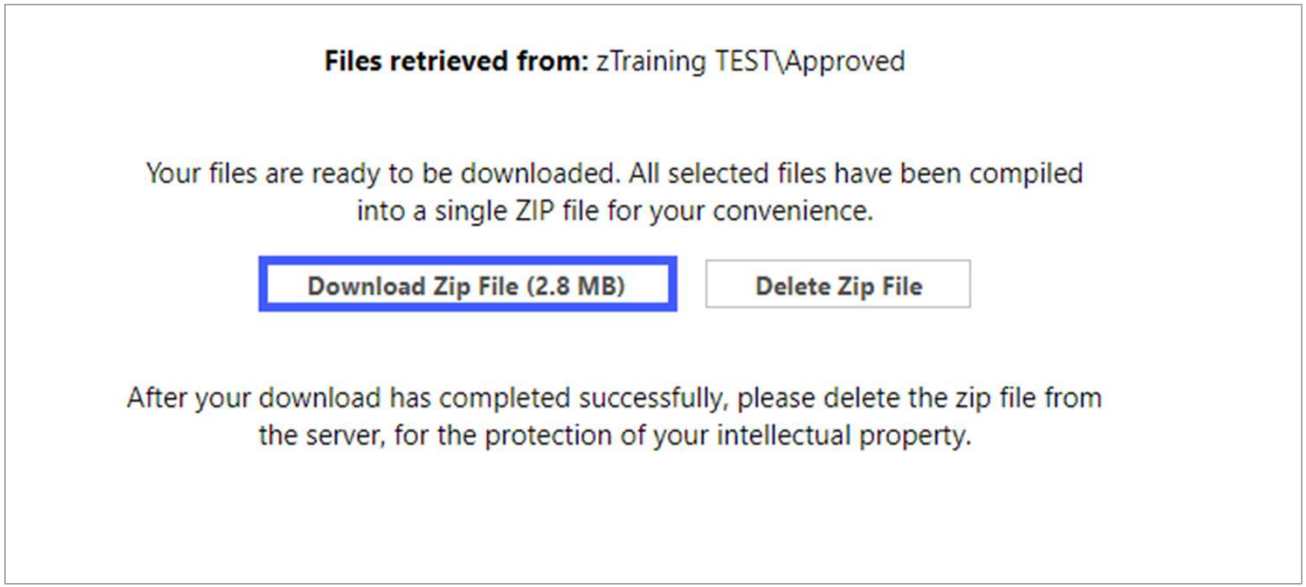
Download



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Click to download and follow prompts (standard Windows download steps). You're DONE!

Questions?

Thank you for attending.

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Optional