
ProjectDox

Introduction & Login

Training Guide

2019

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Introduction

What is ProjectDox?



ProjectDox is a web-based electronic plan and document workflow solution that allows citizens and City staff to initiate and complete the development plan submission, review and approval process on-line as opposed to a manual in-person, paper-based process. Giving the project team members the freedom to view, organize and collaborate as a community, facilitating communication and higher productivity.

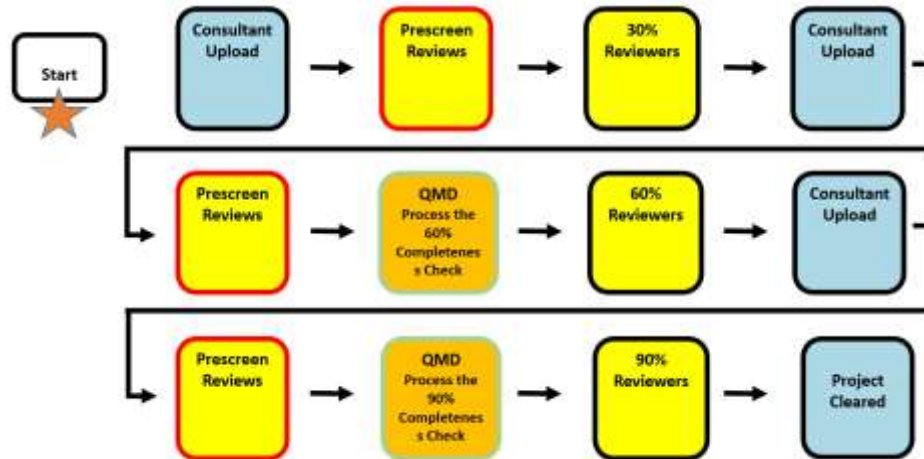
Unlike the old paper system, ProjectDox allows creating online, virtual project workspaces along with several cost and time saving efficiencies including:

- Uploading documents electronically from the convenience of city staff or applicants' offices, 24 hours 7 days a week
- Reviewing plans simultaneous by all disciplines
- Reviewing created mark-ups made directly on the virtual plans to provide direction and clarity as to any items which require correction
- Re-submitting corrected plans electronically
- Downloading approved documents or stamped plans once any applicable final fees are paid
- Providing detailed notes and comments to city staff, applicants, or inspectors
- Accessing e-copies of approved plans during construction or inspections

Where are we?

High level ProjectDox flow

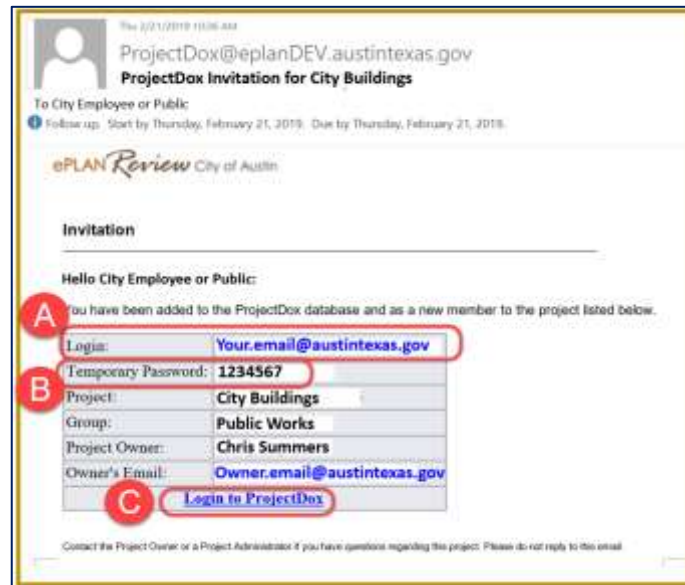
We are here ★



Logging in for the First Time

The first time you are invited to join a project in ProjectDox, you receive an **email notification**. This email contains a temporary password and a link to ProjectDox.

ProjectDox Invitation



- A. Check your email address, it is your user id or **Login**
- B. Notice and remember or copy the **Temporary Password**
- C. Select the **Login to ProjectDox** link

ProjectDox Login Displays

ProjectDox Login

The screenshot shows the ProjectDox login interface. At the top, there is a banner image of a city at night. Below the banner, the text 'ePLAN Review City of Australia' is displayed. To the right of this, there is a welcome message: 'Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use, which together with our privacy policy govern...' followed by a placeholder '[Jack11 text, etc.]'. Below the welcome message, there are two input fields: 'E-mail:' and 'Password:'. A red box labeled 'B' encompasses both input fields. A red box labeled 'C' encompasses the 'Password:' field. Below the 'Password:' field, there is a 'Login' button. A red box labeled 'E' encompasses the 'Login' button. To the right of the 'Login' button, there is a link 'Forgot your password?'. At the bottom of the page, there is a footer with the text '© 2019 Avolve Software. ProjectDox (version 6.1.3.4) is a trademark of Avolve Software. All rights reserved.' and the 'avolve' logo. A red box labeled 'D' encompasses a button that says 'To add ProjectDox to your favorites Click here'.

- A. **ePlan** Displays
- B. Your email should display in the **E-mail:** field
- C. Type or paste the **Temporary Password** into the **Password** Field
- D. To add ProjectDox to your favorites, [Click here](#)
- E. Select **Login**.

Login First Time User

After selecting Login with the provided password, a default **Profile** screen displays

ePLAN Review City of Austin

Account for Sandra Carlton (Sandra.Carlton@austintexas.gov)

A Password: **B** Current password: **C** New password: **D** Password Reset Question & Answer: Security question: What year did you retire? Security answer: <Answer has been encrypted>

E Profile Information: **F** Contact Information: **G** Save

* Required field

First Name: Sandra Last Name: Carlton

Email: Sandra.Carlton@austintexas.gov

Title: Technical Trainer

Company: City of Austin, Texas Public Works

Address Ref. File #:

Address 2:

City: Austin, Texas

State/Province: TX Postal Code: 78641

Phone: 5129239149 Fax:

Mobile: ESB EMI:

Stamps:

Language: en

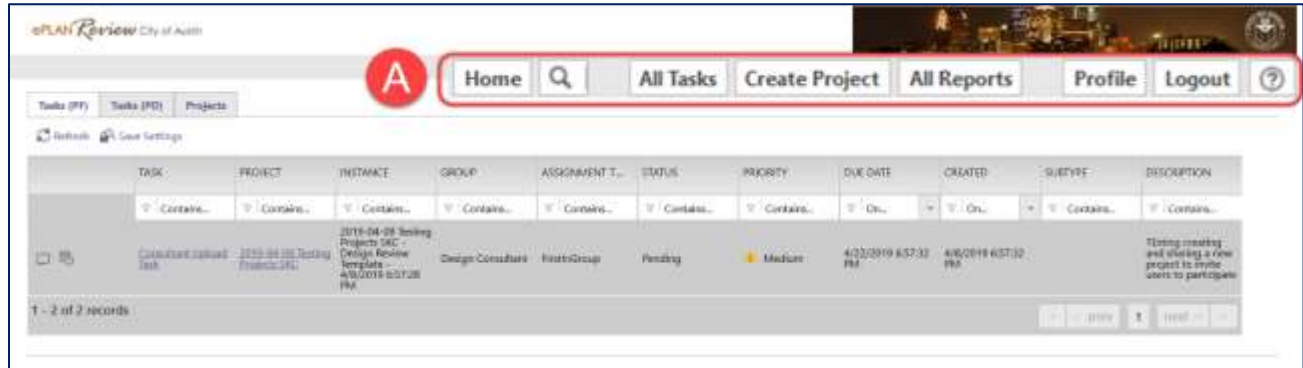
- A. Enter the **Current** provided **Password**
- B. Enter a **New password**, the password must be between 8-12 characters with at least 1 upper case letter, 1 lower case letter, and 1 number. Special characters are not allowed.
- C. Enter the same **New password** in **Confirm new password**
- D. Enter a **Security question** and the **Security answer** to be used with **Forgot Password**
- E. Notice, **Contact Information** tab
- F. Enter your information in each field (feel free to leave blanks if do not know the information)
- G. Select the **Save** button

The Tasks (PF) Display

After saving your profile information, the **ePlan Review** homepage displays with a list of tasks associated to your ePlan access as a project manager, project administrator, design consultant, or reviewer.

The tabs represent

- A. Tasks (PF) or Tasks (PF is ProjectFlow for Public Works)
- B. Tasks (PD) or Tasks (ProjectDox for DSD)



Introduction to Tasks (PF) Layout

Main Tool Bar (A)

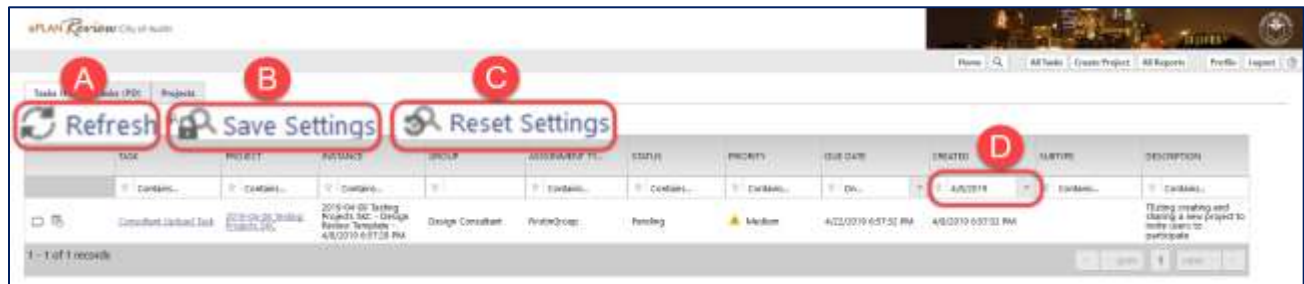
The primary navigation buttons displays at the top of each page throughout the ProjectDox site to use.



1. **Home button** – use to return to the first login page
2. **Search button** – A dialogue box displays for a File search for specific words or an address/location search
3. **All Tasks button** – displays all tasks in an individual page
4. **Create Project** – May not display on the Home page unless you have permission to Create Project(s)
5. **All Reports button** – the Project Manager is able to choose reports available for the user to view about the current task
6. **Profile button** – your profile page used to change your password
7. **Logout button** – please use to close ProjectDox
8. **Help Icon** – select the help icon to find information about ePlan Review

Task Navigation

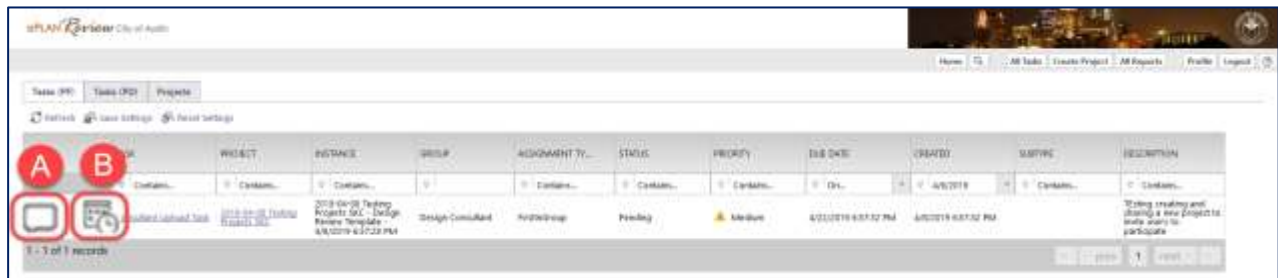
The buttons display below the Tasks tabs of ProjectDox



- A. **Refresh** Icon **Refresh** - this icon refreshes the page (Use often to view latest information)
- B. **Save Settings** icon – **Save Settings** if changes are made to the page, such as a changing column positions, select this icon to save the setting changes
- C. **Reset Settings** icon – **Reset Settings** this button displays indicating that the settings have been changed and can be reset back to original
- D. Use of a Filter icon as in the example of displaying a date causes the Reset Settings icon to display

Task's Icons

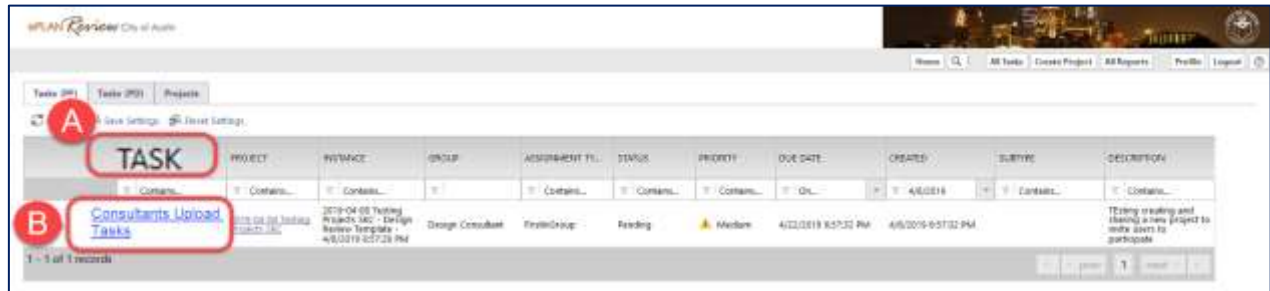
Each task has two icons displaying to the left of the task



- A. **View Task Notes** – If the project manager has specific instructions with a task the instructions display here
- B. Use this tool to add an appointment to your **Outlook calendar**

Opening the Project

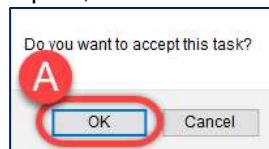
On the **Tasks** column on the Home page, select the link under the **Task** column to open and view the project



- A. Notice the first column is **Task**
- B. Select the first task, **Consultants Upload Tasks**

Do you want to accept this task? Dialogue box displays

- A. Select the OK button to accept the Task and continue
- Once the Task is accepted, the selector is now responsible for ensuring the task is completed



Browser Error Message – Site Prevented From Opening Popup Window

Firefox



- A. **Firefox Prevent this site from opening a pop-up window** may display
- B. Select the **Options** button (in Firefox or

A message box displays



- A. Select **Allow pop-ups for eplan.austintexas.gov** and the Task's popup displays

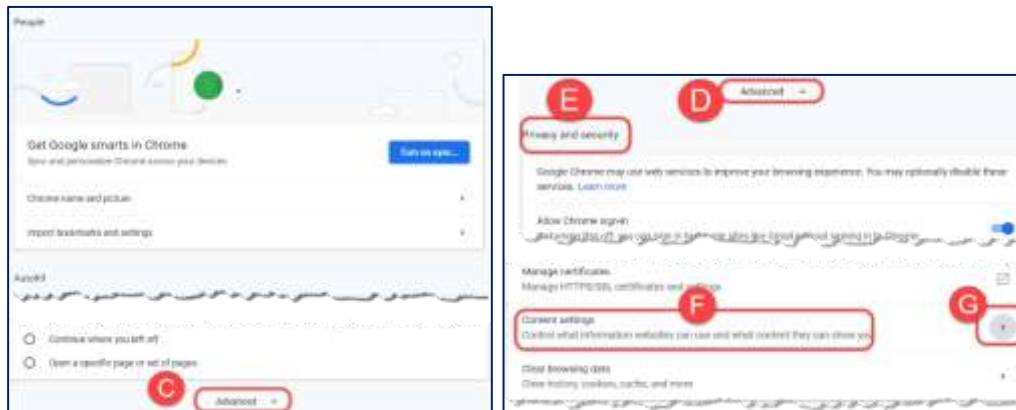
Chrome (If the Task will not display or popup)

It may be best if you check the Chrome popup before continuing



- A. Click the **Chrome** menu on the browser toolbar
- B. Select **Settings**

Chrome menu

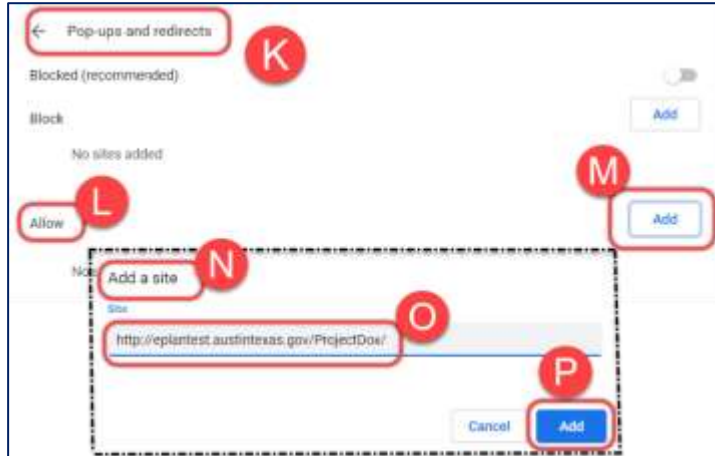


- C. Scroll down the dialogue box and Select **Advanced**
- D. **Advance** Section
- E. **Privacy and Security** section,
- F. Notice, **Content Settings**
- G. Select the **Content settings** icon to the right.



- H. In **Content settings**
- I. Find **Pop-ups and redirects Blocked**
- J. Select the **icon** to the right

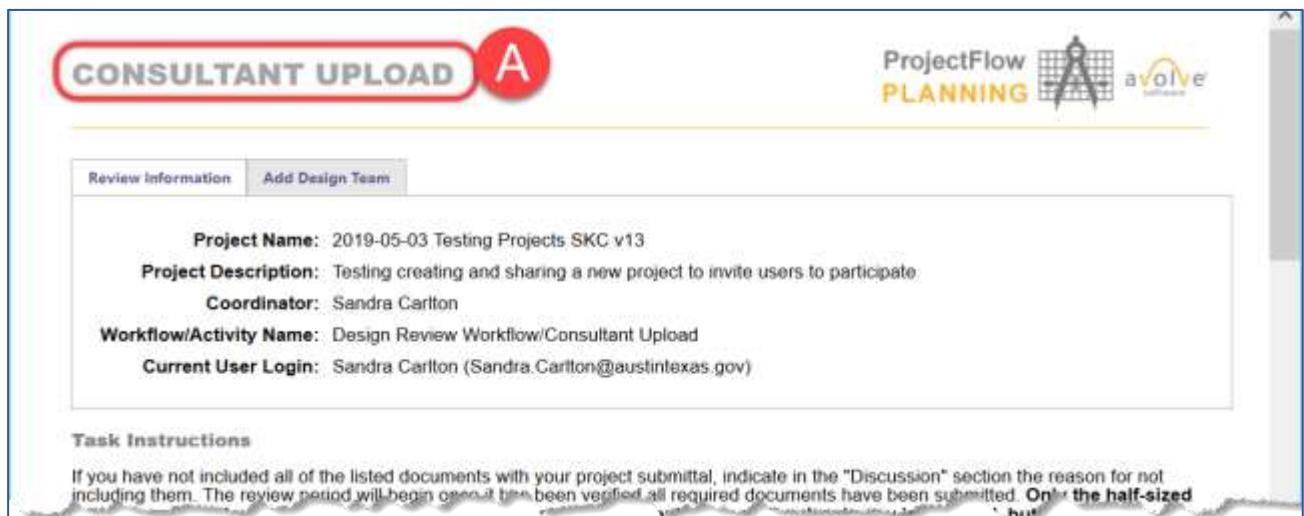
Pop-ups and Redirects



- K. **Pop-ups and redirects** displays
- L. Notice, **Allow**
- M. Select the **Add** button
- N. Under **Add a site**
- O. Copying and pasting *http://eplantest.austintexas.gov/ProjectDox/* for *ePlan* under Site for pop-ups to display for ePlan website
- P. Select **Add**

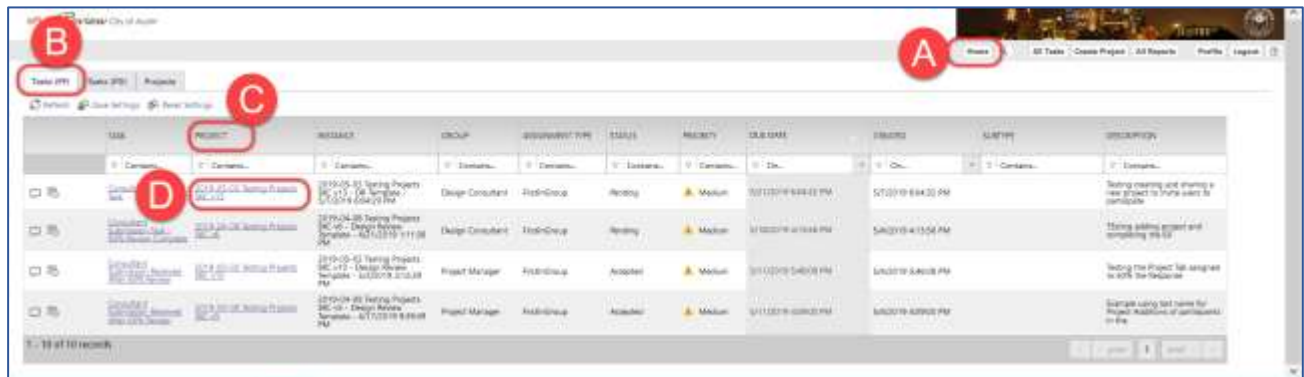
Popups for ProjectDox should now display

A dialogue box displays



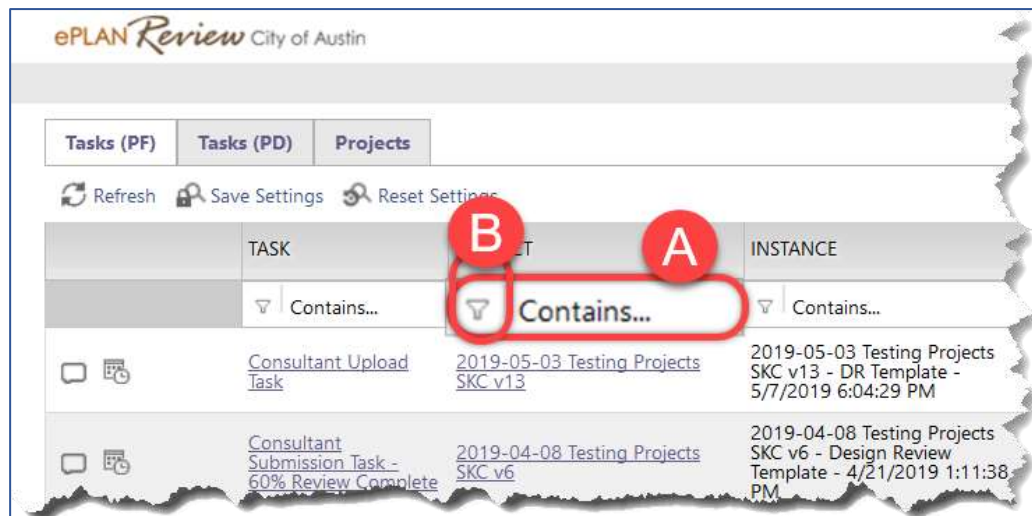
- A. This dialogue box is the Consultant Upload documents to be discussed later

Let's Open a Project



- Select the **Home** button to ensure you are on the **Home** page
- Notice, the **Tasks (PF)** tab displays
- Notice, the **PROJECT** column
- Select a **Project** in the PROJECT column, in our example we selected 2019 -05-03 Testing Projects SKC v13

Contains... The ProjectDox Filtering Columns



- ProjectDox has a filtering system **Contains...**
- Notice the filter icon 

Finding a Specific Project

In the Contain Field enter specific characters related to finding a specific project. We will look for a project with “v8” in its PROJECT title

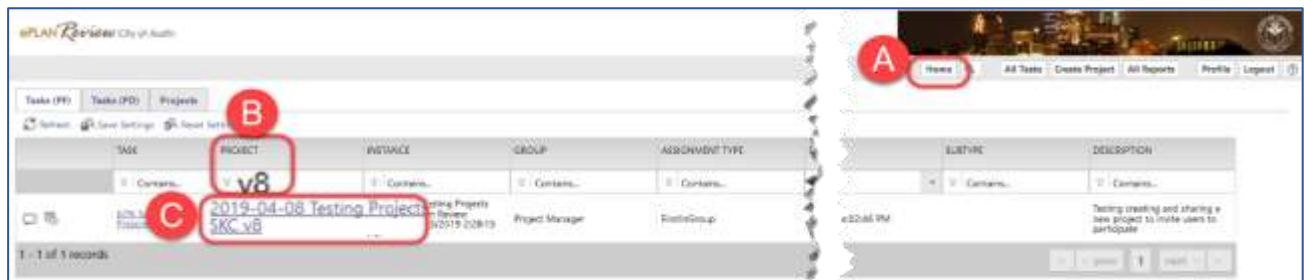


Pause



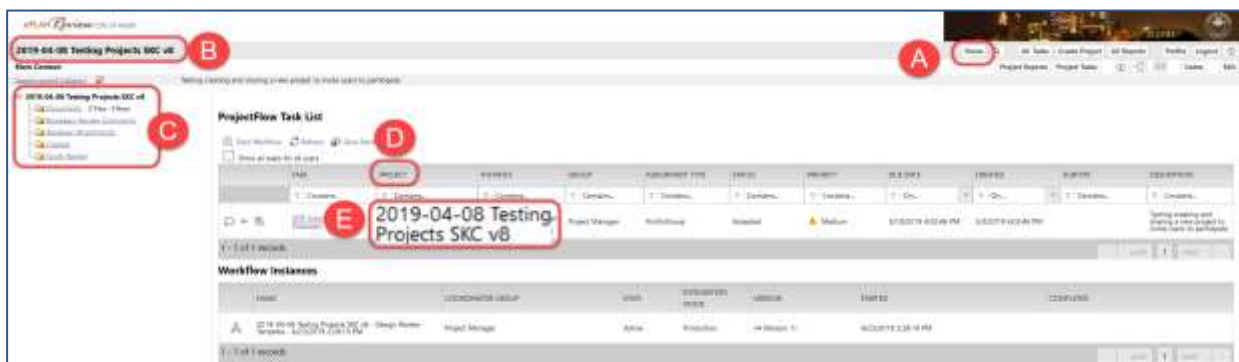
- In the PROJECT column Contains... field enter a “v”
- Pause, and enter an “8” beside the “v”

A Project title with a v8 Displays



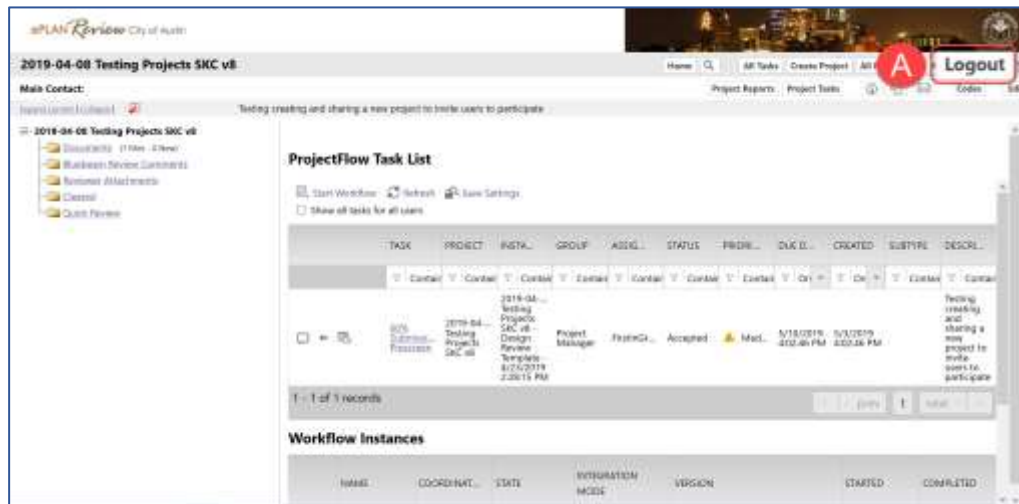
- We are in the **Home** page
- PROJECT** column **Contains...** has a “v8” in the field
- Select the Project title is 2019-04-08Testing Projects SKC **v8**

The Selected Project



- The **Home** page
- The selected **Project** displays
- Data Files** filled with data and images about the Project from all contributors
- PROJECT** column
- Project** title

Logout of ProjectDox



A. Select the Logout button

Return to the Login page

