ProjectDox
30% Complete & ChangeMark's Tools
Training Guide
2019

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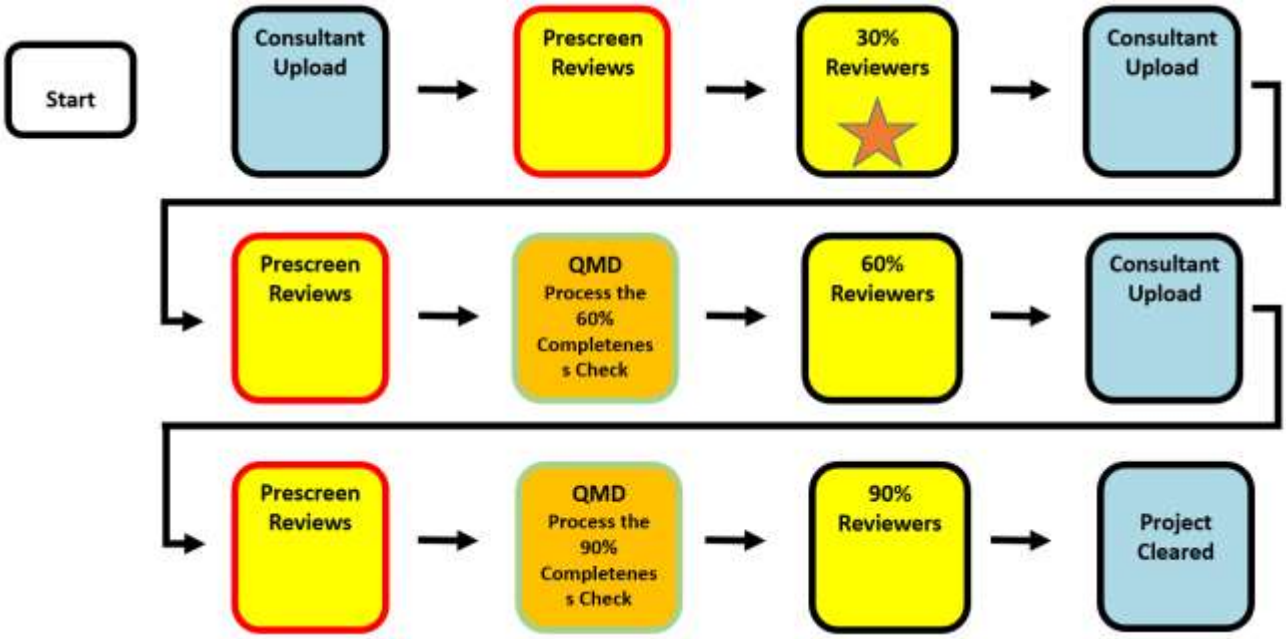
WHERE ARE WE?

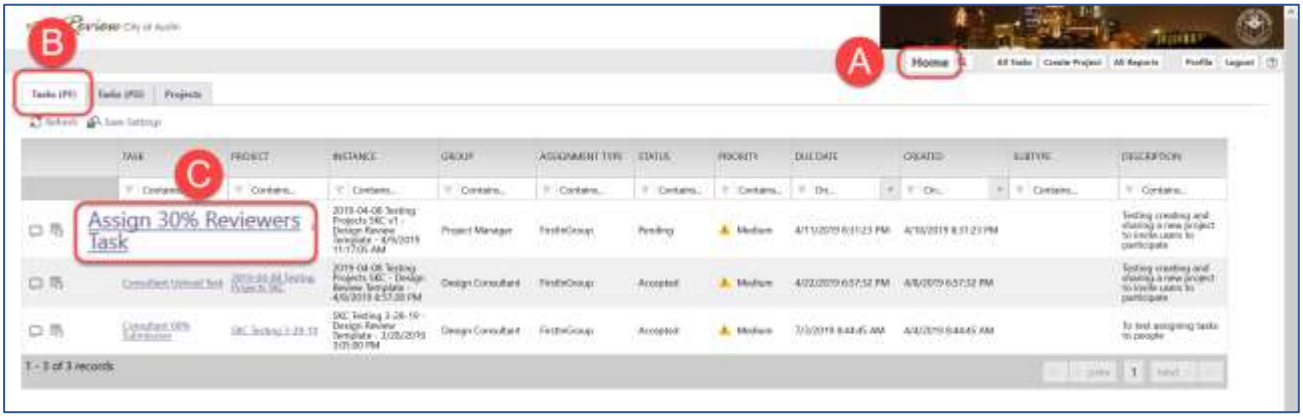
We continue through the ProjectDox process. We have reached the Assign the 30% Review.

We are here.



We have progressed from the Design Consultant Upload Documents to the Prescreen Review of the Consultant's documents. We continue to the Assign 30% Reviewers Task

ASSIGN 30% REVIEWERS TASK



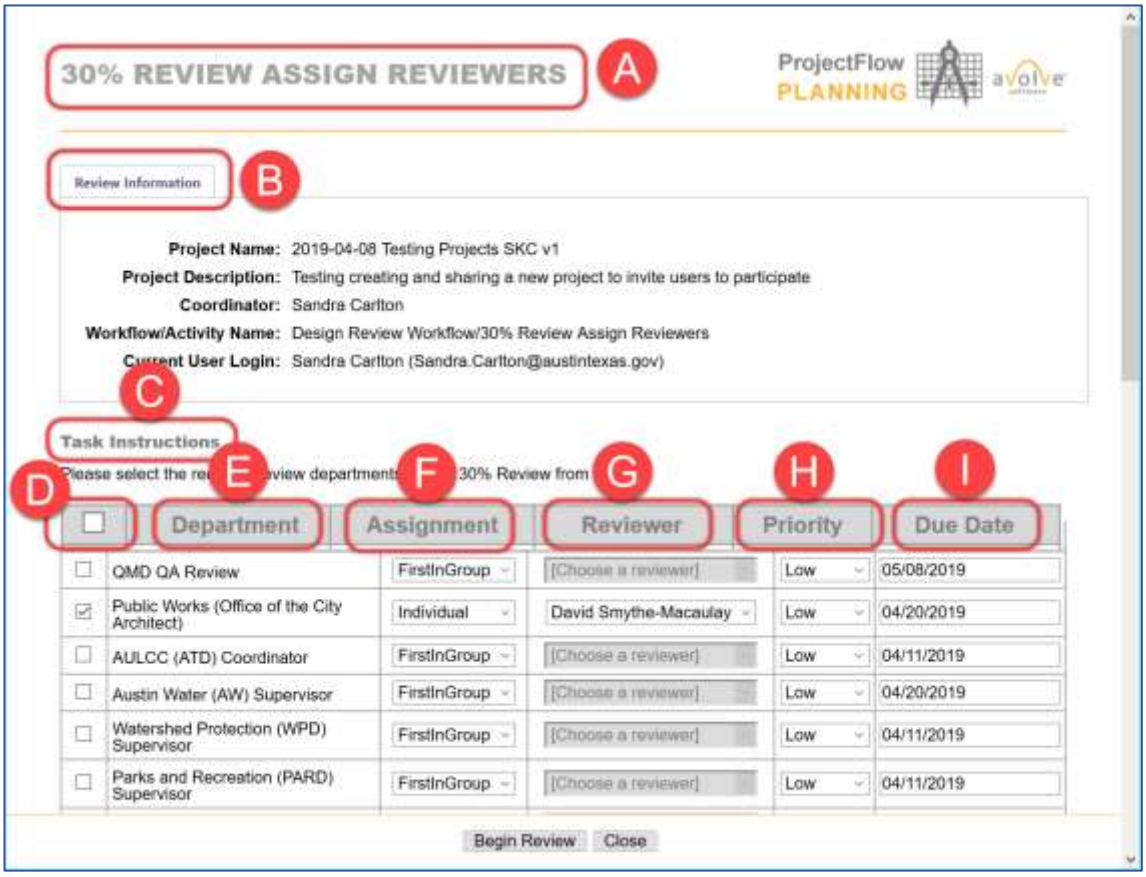
A. After login, **Home** displays
B. The **Tasks (PF)** tab
C. Select the **Assign 30% Reviewers Task**

Do you want to accept this task?

A. Select the **OK** button – once you accept this task, no one else may accept the task and you are responsible for completing the Assign 30% Reviewers Task

30% REVIEW ASSIGN REVIEWERS

The key word in 30% Review Assign Reviewer**S** is the "S". During the 30% review, other City departments review the ProjectDox simultaneously using the ProjectDox application. Each department has specific construction priorities that should be addressed in any construction in Austin, Texas from buildings to treatment plants to streets and bridges to individual homes. The Project Manager determines which City Departments will review the project.

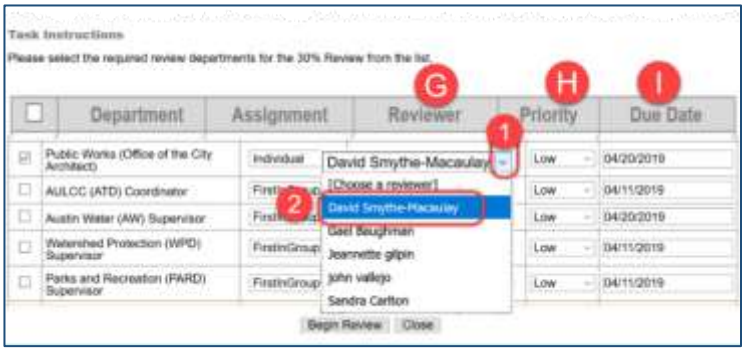


A. The **30% Assign Reviewers** dialogue page displays
B. The one tab **Review Information**
C. The **Task Instructions** - Please select the required review departments for the 30% Review from the list.
D. The Select **All Checkbox** using this checkbox would use every department listed on the **30% Assign Reviewers** dialogue page
E. Department – A check list of all the departments to choose to review
F. **Assignment** column has a dropdown menu that includes Individual, First in Group or All in Group. The Project manager determines which how to assign the project.

The City Departments may added during the Create Project process.

1. **Individual** – An individual receives an email, opens ProjectDox's Home page, reviews the Tasks (PF) tab, finds and accepts the Assign 30% Reviews Task is the responsible employee for that Task
2. **First in Group** – the Review Request is sent to a department and everyone in the specific group gets an email request. The first person that opens ProjectDox's Home page, reviews the Tasks (PF) tab, finds and accepts the Assign 30% Reviews Task is the responsible employee for that Task. The first in Group is the default
3. **All in Group** – Anyone in the group may accept the Assign 30% Reviews Task and once accepted the task does not display for other users to accept in the reviewing department; however, the department is responsible and not any specific employee

G. **Reviewer** – This column has a default of **Choose a Reviewer** until **Individual** is selected from the **Assignment** column. Once **Individual** is selected a dropdown menu displays in the Reviewer column

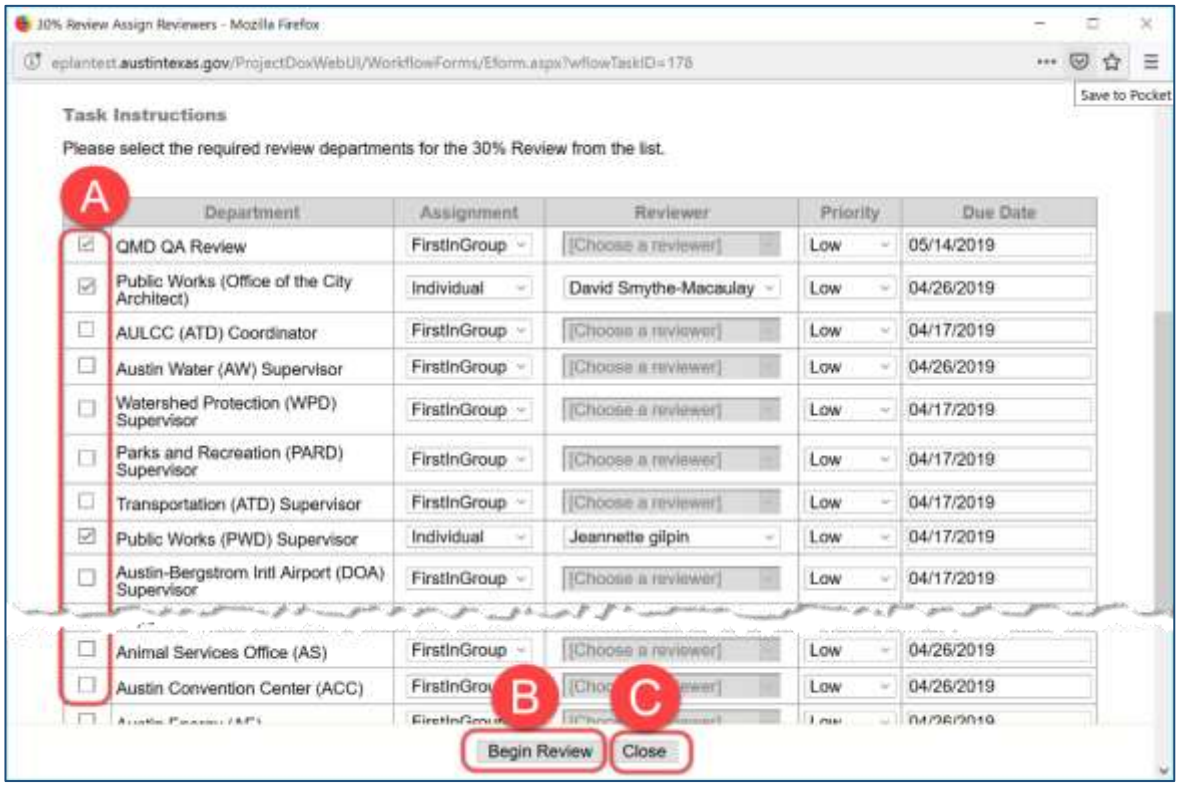


1. Select the dropdown **menu**
2. Select a **name** from the list this is for **Individuals** only

H. **Priority** – has a dropdown menu to select Low, Medium, or High

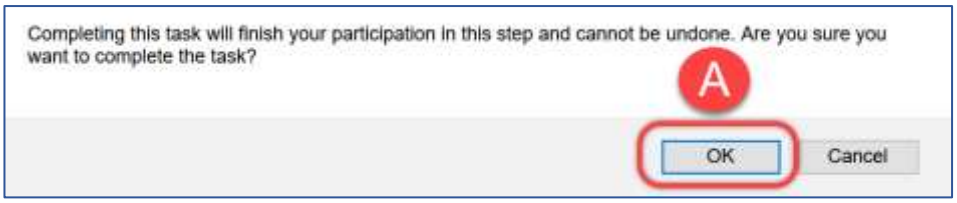
I. **Due Date** – Notice the Due Dates are different for each department, in our example, dates range from 4/11/2019 to 4/20/19

Begin Review



A. Ensure all the Departments needed in the **30% Review Assign Reviewers** are selected by the ☑
B. If you need more time to complete all the Departmental selections, select the **Close** button
C. Once completed Departmental selections, select the **Begin Review** button

Are you sure



A. Select the **OK** button

EMAIL FROM PROJECTDOX

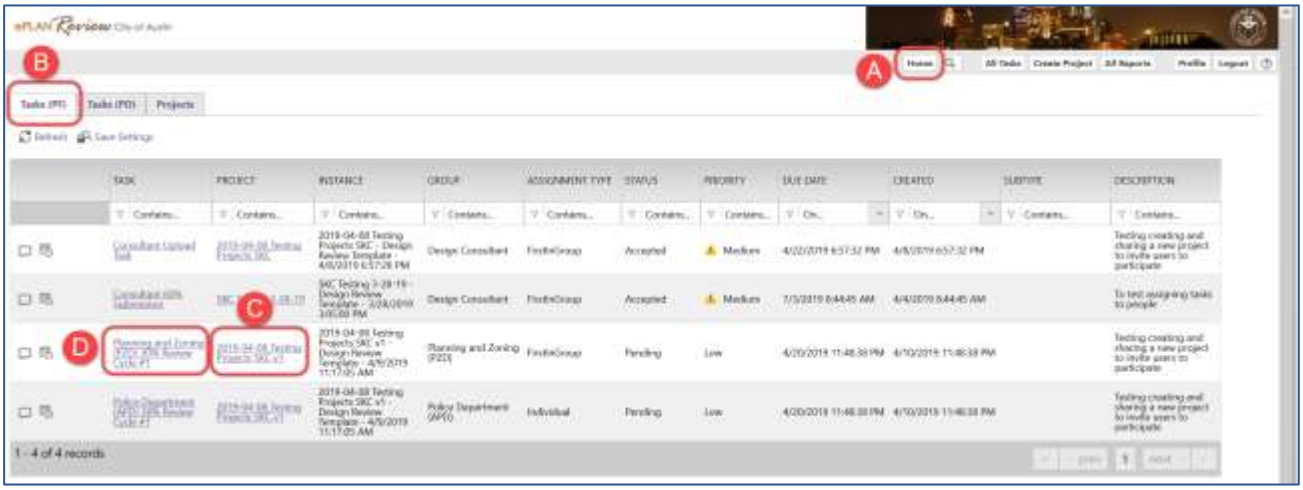
Emails were sent to the various city departments for the reviewers to inspect the consultant's documents and ensure all the documents meet required city codes.

The email invite includes:

A. **Your Login: and your email address** – this is your login or User ID to login to ProjectDox
B. Review the **Project Name**
C. Select **Login to ProjectDox**

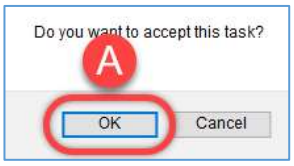
REVIEWING THE ASSIGNMENT FOR PLANNING AND ZONING EXAMPLE

Open the Tasks (PF) tab



A. Start in the **Home** page
B. Ensure the **Tasks (PF)** tab displays
C. Review the name of the project (if you desire, open the project to review everything before accepting, as in the example we are using 2019-04-08 Testing Projects SKC v1
D. Select the **Planning and Zoning (PZD) 30% Review Cycle #1** Task

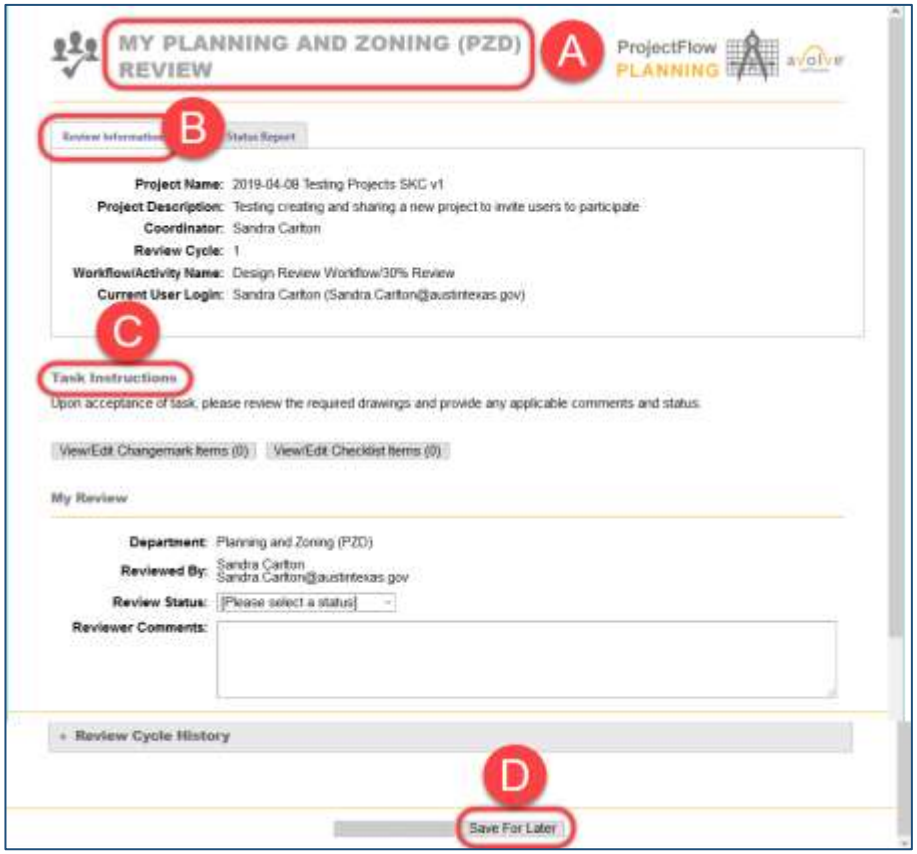
Are you sure?



A. **Do you want to accept this task?** Select the **OK** button – once the task is accepted, no other reviewers in specific city departments will view the Task in their ProjectDox application

THE MY PLANNING AND ZONING (PZD) REVIEW DIALOGUE PAGE

Ownership and responsibility are accepted by opening this task.

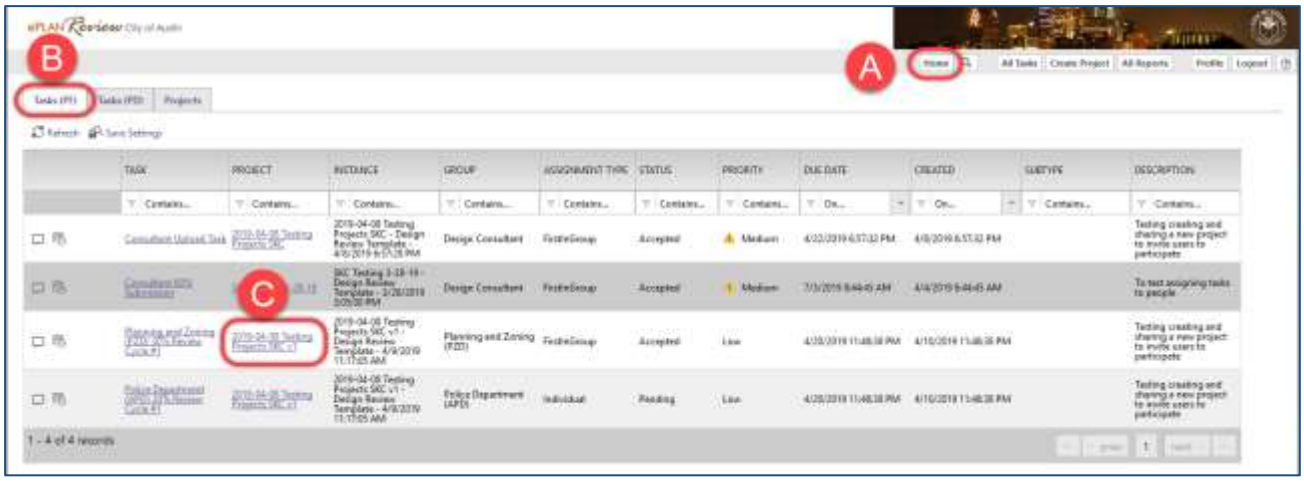


A. **My planning and Zoning (PZD) Review** dialogue page displays
B. **Review Information** tab displays
C. **Task Instructions** - Upon acceptance of task, please review the required drawings and provide any applicable comments and status
D. The Project example 2019-04-08 Testing Projects SKC v1 has all the documents to review, select **Save for Later** and go to **Home** page to select the Project

Successfully Saved

A. Select the **OK** button

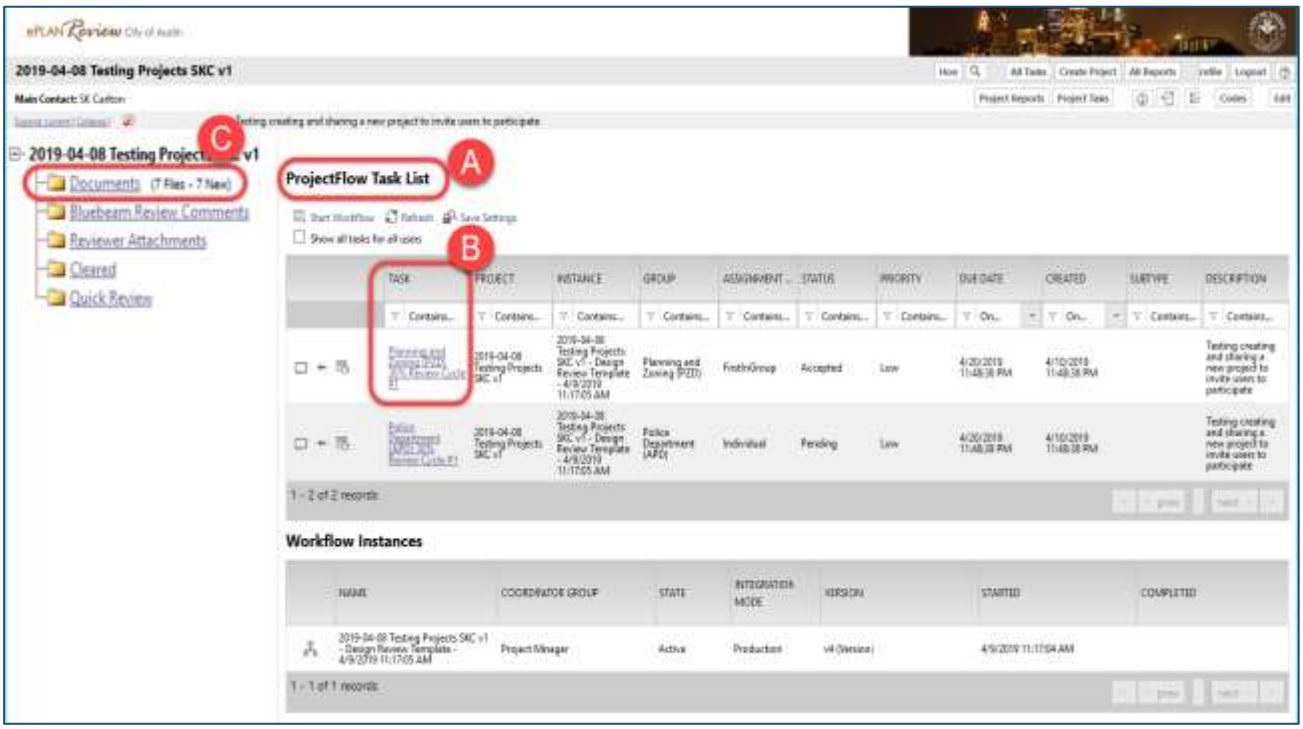
OPENING THE PROJECT



A. The **Home** page displays
B. The **Tasks (PF)** displays
C. Select the project 2019-04-08 Training Project SKC v1 to open (notice it is in the same line as the **Planning and Zoning (PZD) 30% Review** Cycle #1

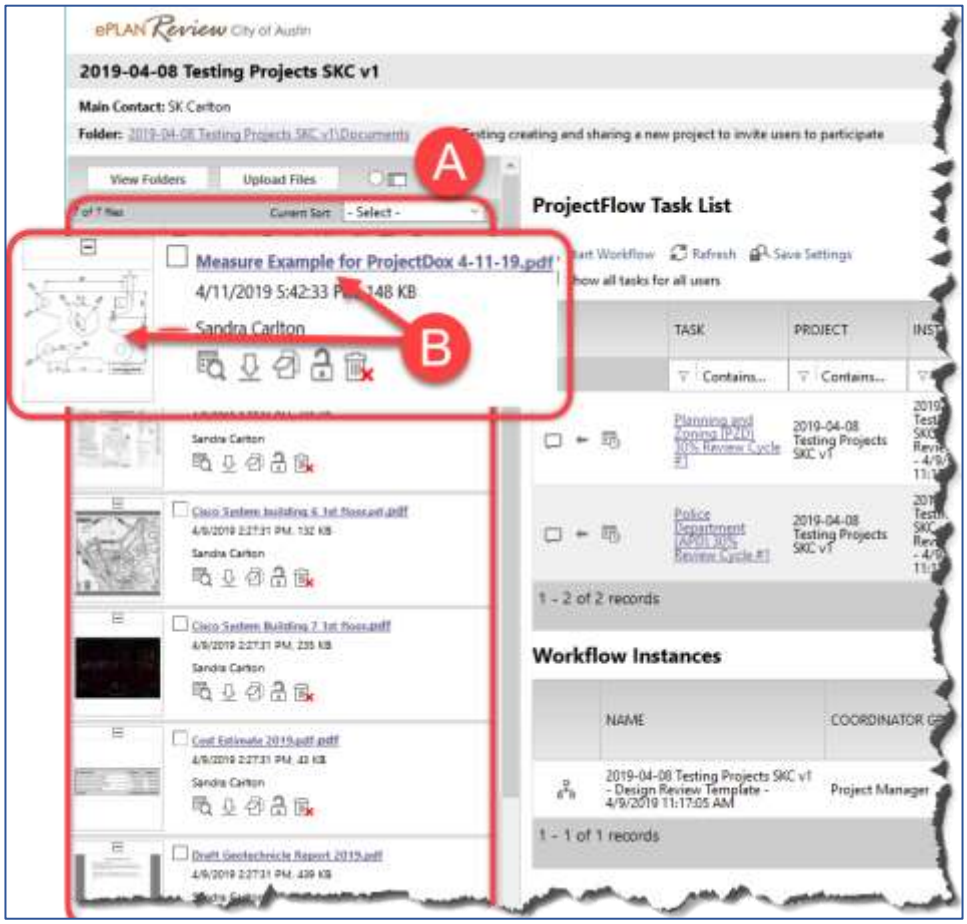
ProjectFlow Task List

Documents



A. **ProjectFlow Task List** displays
B. Notice the **Planning and Zoning (PZD) 30% Review Cycle** displays
C. Select **Documents** file, notice the **Document File (7 Files - 7 New)** this displays how many possible files need reviewing (New Files display for 3 days before displaying **0 New**)

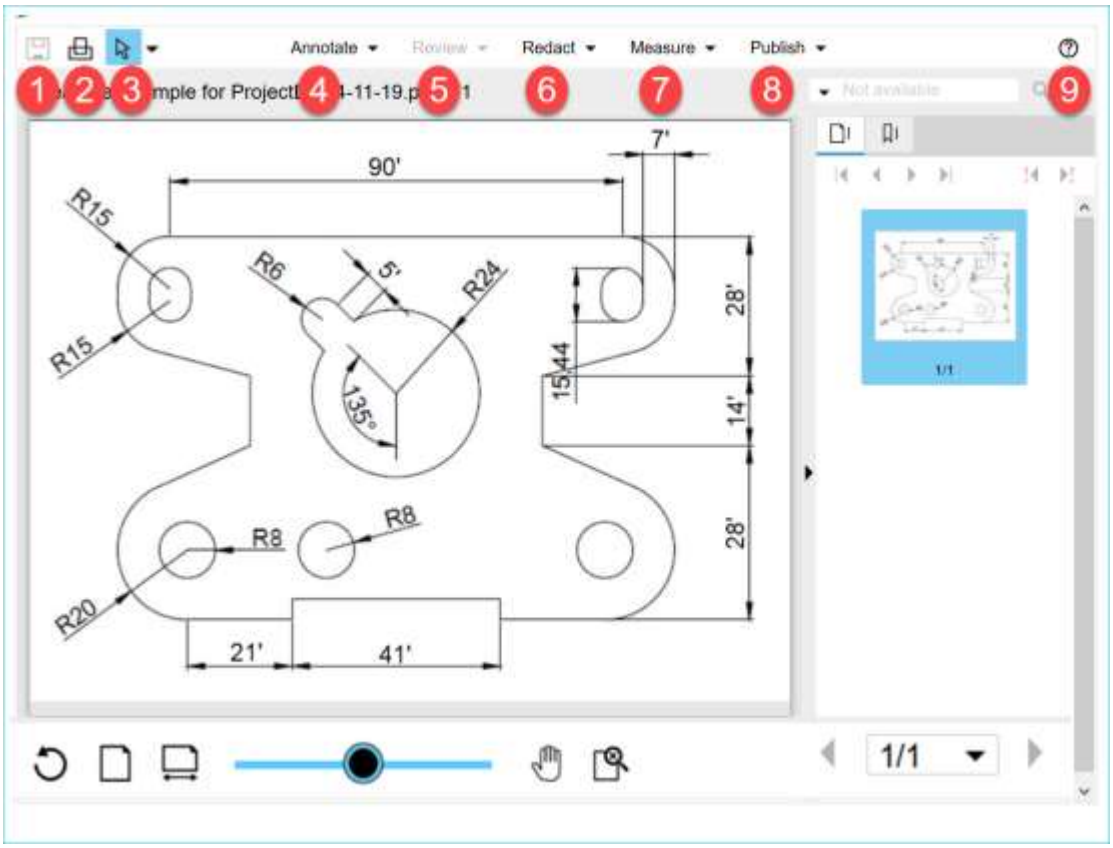
Reviewing Consultant's Images in Documents Folder



A. A list of submitted PDF documents display
B. Select the <u>underlined</u> **Measure Example for ProjectDox 4-11-19.pdf** or select the **document image**

The PDF Document opens in a Separate Window

Task Tools

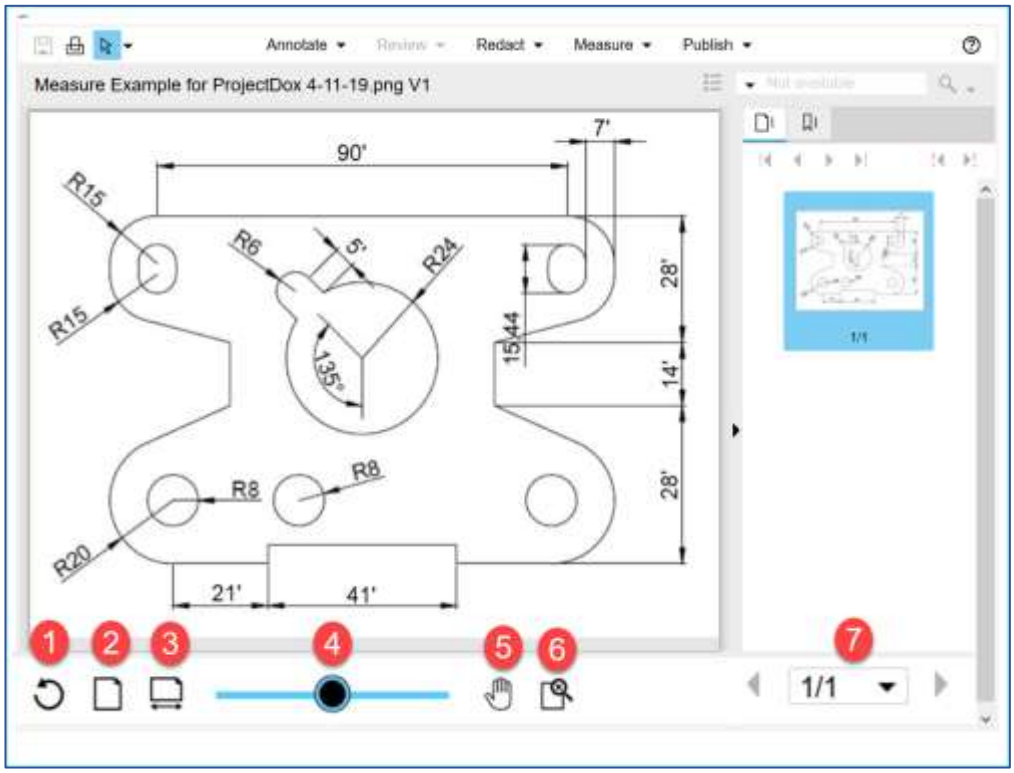


1. **Save** icon is not available until the ChangeMark has been created
2. **Printer** icon has a popup dialogue box with options and a print button
3. A toggle icon A **Select Tool** and A **Select Region**. The **Select Tool** assist with viewing any markup attributes (mouse over reveals attribute information (such as author, timestamp), view tooltips, sign signature elements, and launch hyperlinks contained in any hyperlinked markup entities. The **Select Region** tool selects by dragging a selection box around a region of text to copy. The selection box can include as little as one letter, or as much as all of the text contained in the page.
4. **Annotate** the location of **ChangeMarks** and a dropdown menu including
    a. **New markups**
    b. **Open markup…**
    c. **Save markups**
    d. **Save markups as…**
    e. **Close markups**
    f. **Consolidate markups**
    g. **Stamp templates**
5. Review **ChangeMarks** created and completed, this icon allows reviewing the **ChangeMarks**
6. **Redact** - allow users if System Administrator and license allows and enables this feature that a markup file containing redaction entities (rectangular solid covers to mark an area for redaction) to be published with the file as a redacted document. Redactions are used to conceal sensitive information

for legal, financial, privacy, and security reasons, for example. Measure provides a method of calibrating, measuring, and capturing data for a variety of measurement types.

7. **Measure** There are various measurement tools available for drawing and image files through the Measure option
    a. **Calibrate**
    b. **Settings**
8. **Publish** allows images to be published either in a PDF for distribution
9. **Help** the image page has its own Help document to explained all the different options available

Viewing Tools

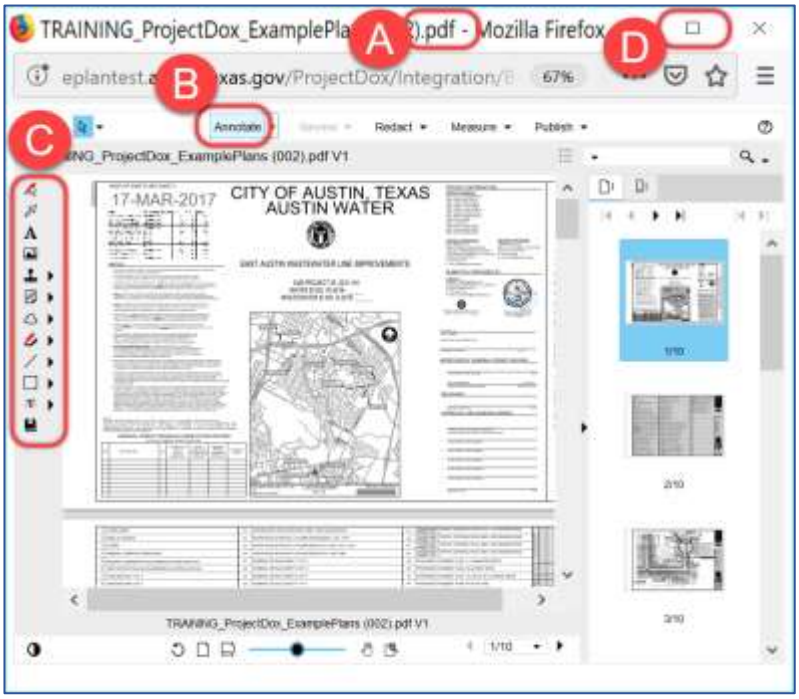


Let's examine the document's **Tool Bar**

1. **Rotate**, if the image is not in the correct viewing prospective, use the rotate icon
2. **Fit All** returns the document bask to original size
3. **Fit Width** return the document only as wide as original document
4. **Zoom** allows to zoom the whole document in or out
5. **Panning** the hand icon allows moving around the document image to view other parts of the document
6. **Zoom** a second page zoom allows selecting a specific section of the document image to magnify the section for reviewing
7. **Number of documents** displaying to the right of the window – each document has a checkbox to selected, allows opening and viewing multiple images by scrolling through and selecting images for reviewing

CHANGEMARKS TOOLS

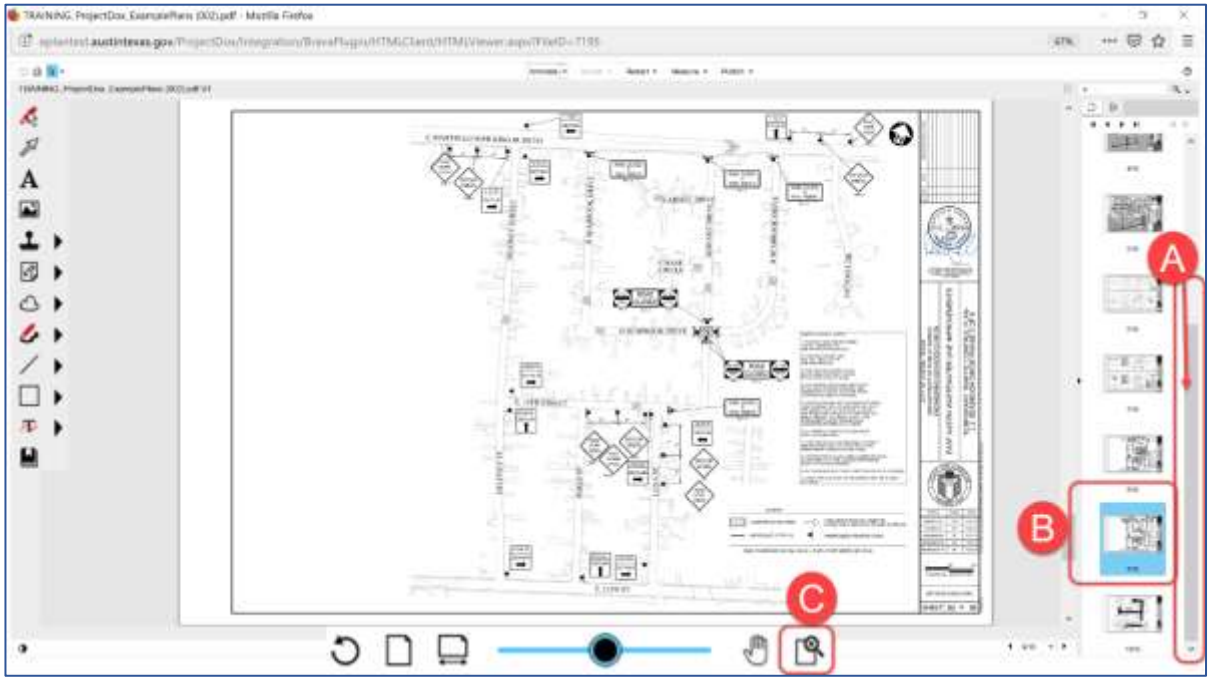
During the project review, many different departments are able to add ChangeMarks simultaneously to ensure the project meets the city's building codes and completing the review timely.



A. Notice, we displayed a **PDF** image
B. Select **Annotate**
C. The **Annotate ChangeMark's** toolbar displays to the left
D. Since the image displays in its own window, select the **Magify** icon for a full screen view of the image

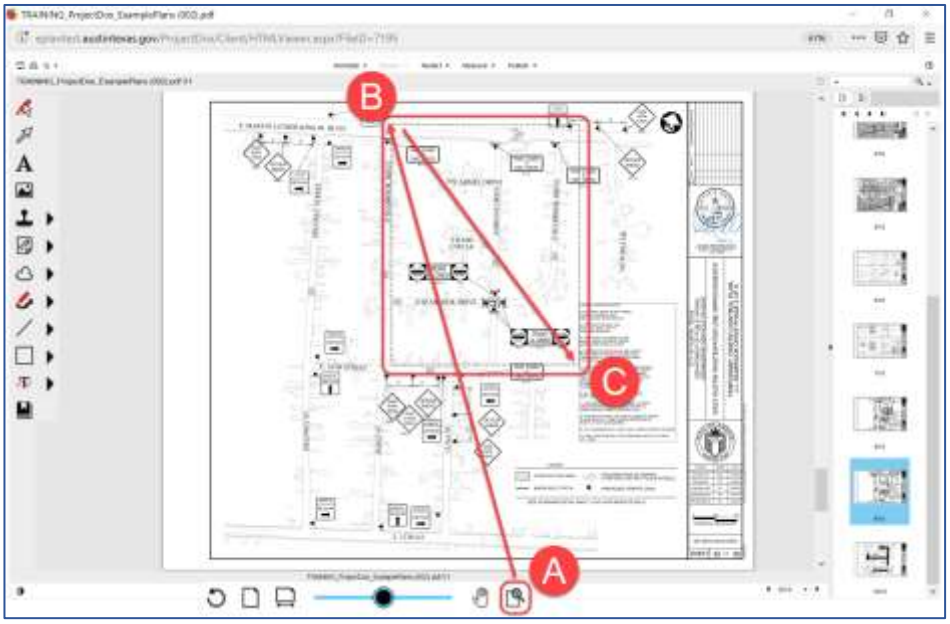
1. Select tool
2. Arrow - add an arrow on the image
3. Text – add text or words to the image
4. Image tool – Add a picture to the image
5. Stamp (currently, we are not using Stamps
6. ChangeMarks (adds a ChangeMark dialogue box See menu items below)
7. Cloud tool – Add an individual cloud or highlight to the image
8. Sketch tool – use to add a line shape or polygon marks to the image
9. Line tool – use to create a line, a polyline, "X" mark or scratch-out
10. Rectangle tool – use to draw a rectangle, rounded rectangle, polygon, or ellipse
11. A Strikeout tool
12. Create custom bookmark tool

Add a ChangeMark



A. The entire screen is filled with the image, **scroll down**
B. Select the **9/10 image**, notice this project document has multiply images
C. Select the window **Zoom** icon to draw around the area on the image to magnify

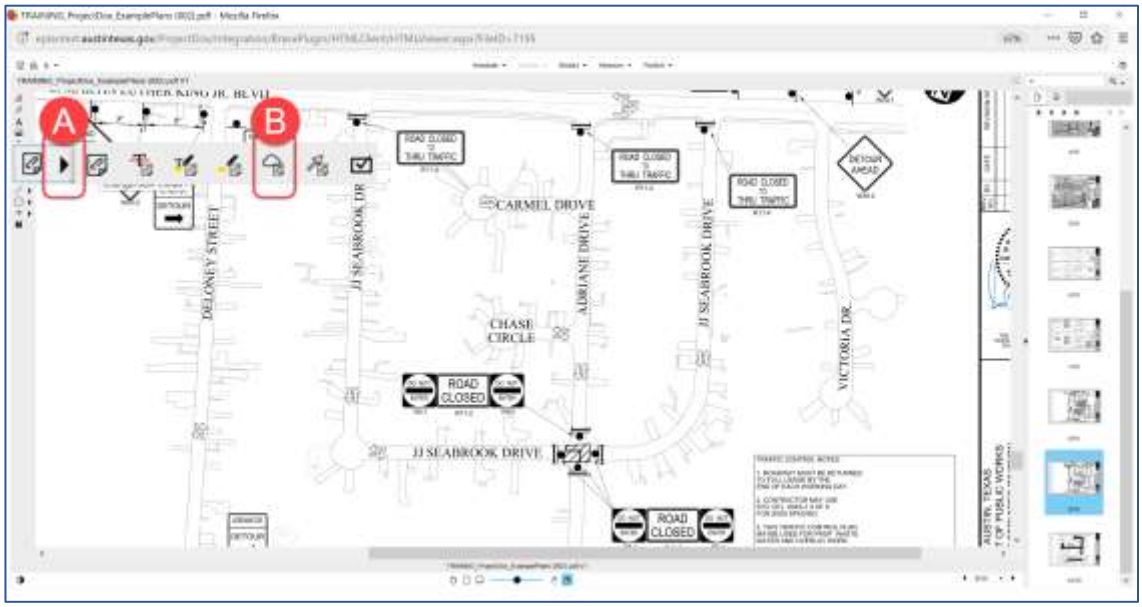
Choosing the magnify area



A. Selecting the window **Zoom** tool,
B. Using the mouse select the top left of the magnify area
C. Drag down to the lower right
D. Select the ChangeMark menu

Using the ChangeMark tools

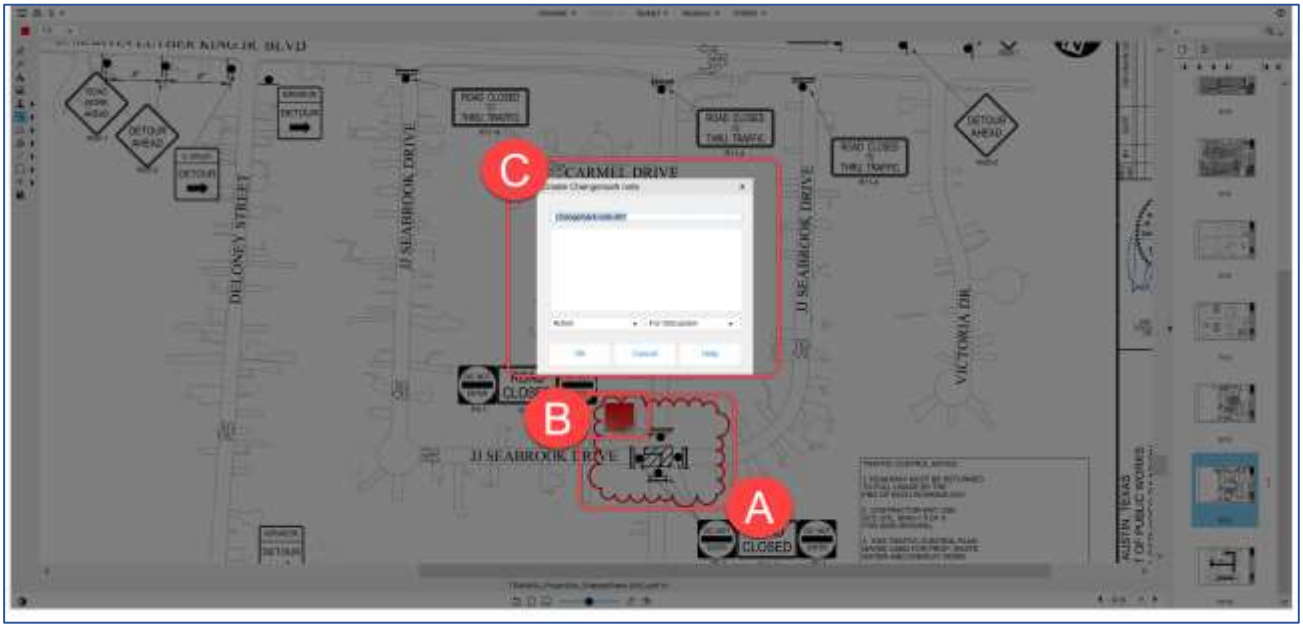
A. **ChangeMark** – Selecting this tool causes a ChangeMark box to display and a ChangeMark dialogue box displays
B. **ChargeMark menu icon** – this opens the all the ChangeMark tools
C. **ChangeMark** – A second ChangeMark box to display and a ChangeMark dialogue box displays
D. **ChargeMark Text Strikethrough** – allows a line to go through words on the image and a ChangeMark dialogue box displays
E. **ChangeMark Text Highlight** – allows hightlighting text in the image and a ChangeMark dialogue box displays
F. **ChangeMark Hightlights** – allows hightlighting and a ChangeMark dialogue box displays
G. **ChangeMark Cloud** – creates a cloud design and a ChangeMark dialogue box displays displays inside the cloud design
H. **ChangeMark Arrow** – creates an arrow to point out a specific area and a ChangeMark dialogue box displays with the arrow
I. **Checkview** – creates a rectangle with a dialogue box to enter Check View Notes and instructions



A. Select the **ChangeMark Menu** tool

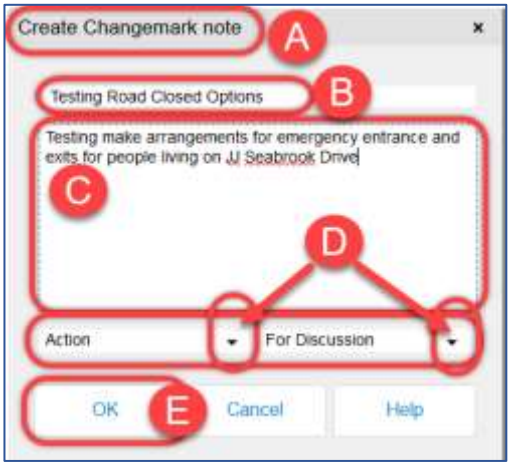
B. Select the **ChangeMark** Cloud, notice the **ChangeMark** cloud tool has a page icon with a paperclip

Marking the ChangeMark area



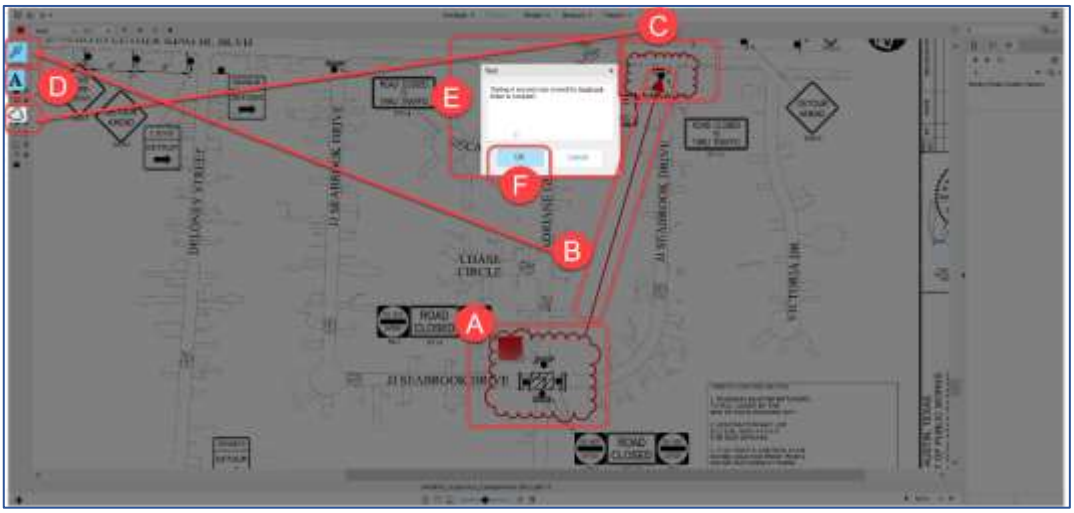
A. Using your mouse select and draw the cloud over the area to comment
B. Notice a ChangeMark box displays
C. Notice a ChangeMark dialogue box displays

Comments on ChangeMark Dialogue Box



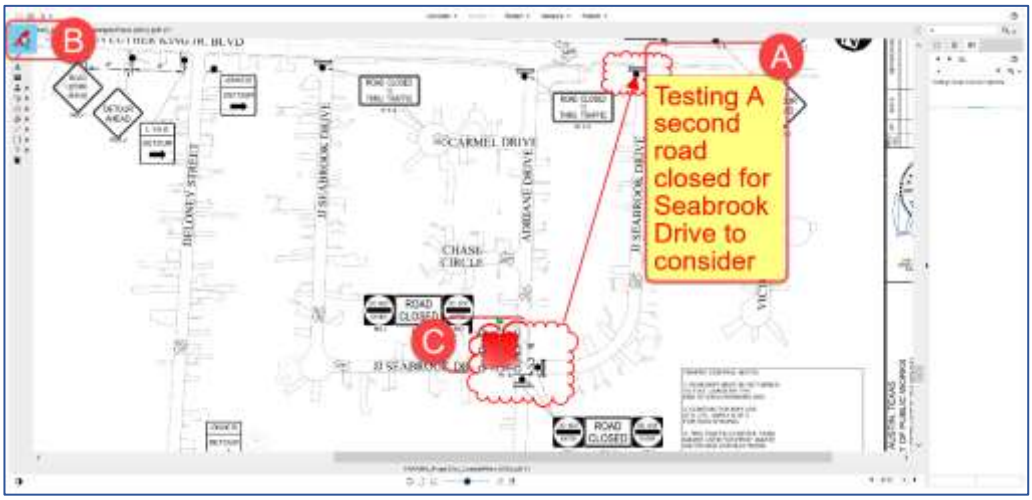
A. **Create ChangeMark note** dialogue box displays
B. Enter **Subject** of **ChangeMark** in the example Testing Road Closed Options
C. Enter **Description** of **ChangeMark** issue or comment
D. Using the dropdown menus, select an option that applies
E. Select the **OK** button

Additional comments to the image



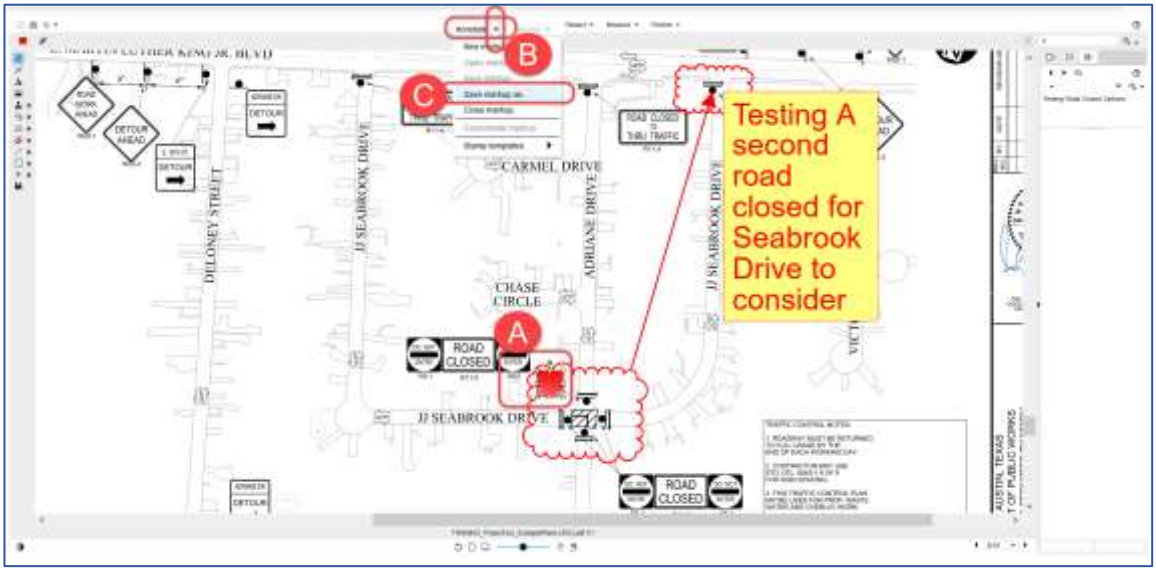
A. The first ChangeMark displays
B. Using the **Arrow** tool, draw a line from the first ChangeMark to the second road closed
C. Using the **Cloud** tool draw a cloud around the second road closed
D. Select the **Text** tool and a dialogue box displays
E. Enter text about the second road closed
F. Select the **Ok** button on the text dialogue box

Saving the Markup File



A. Notice the Text entered displays on the image
B. Select the **Select** tool
C. Select the **ChangeMark** and the ChangeMark box is highlighted

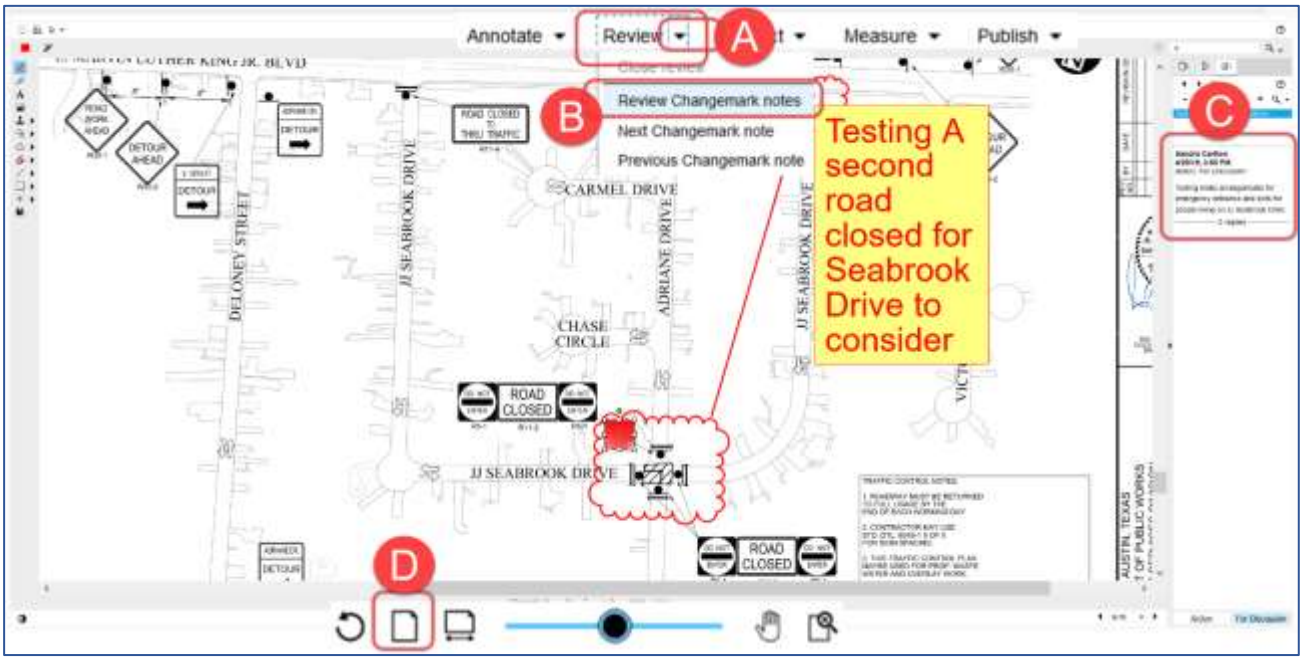
Saving as



A. The **ChangeMark** is still highlighted
B. Select the dropdown menu of **Annotate**
C. Select the **Save Markup As**

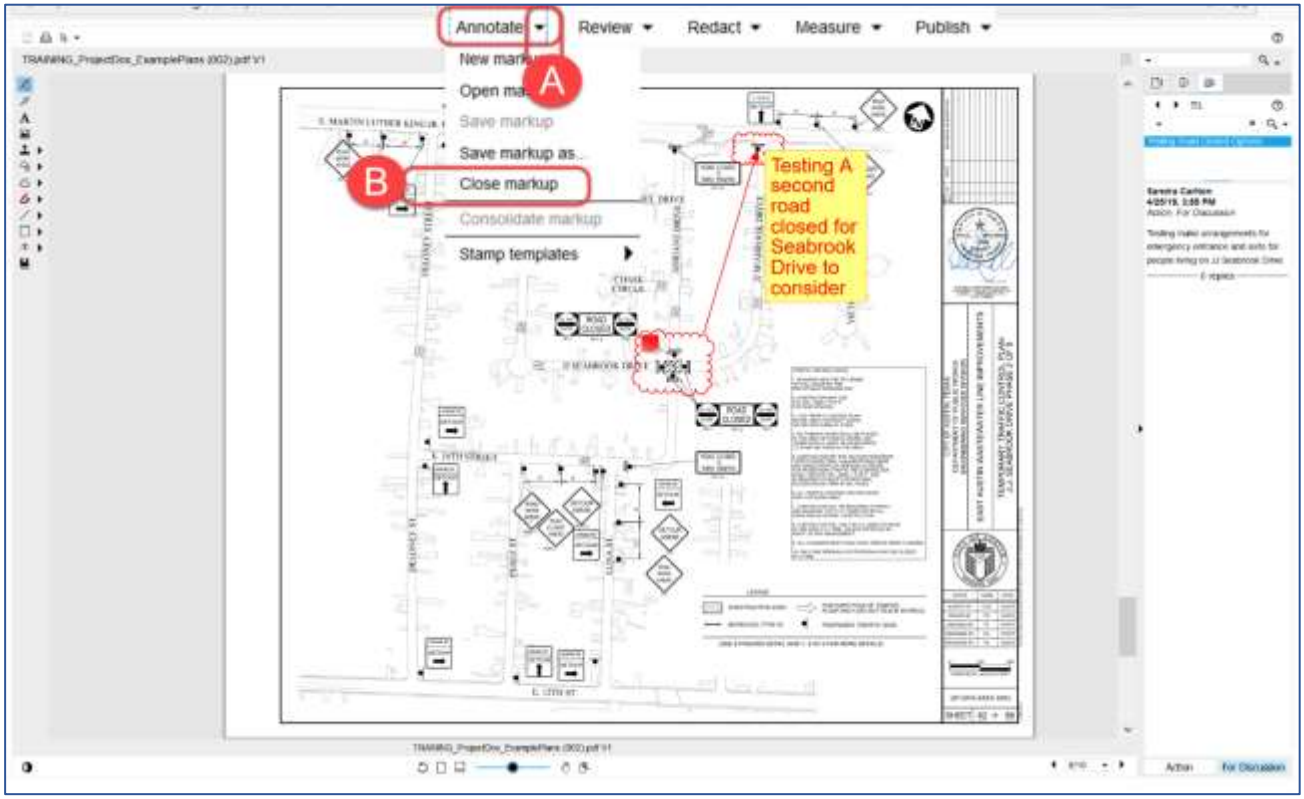
A. A **Save as** dialogue box displays
B. Note, **Name must be unique**
C. Enter your **initials**
D. Select the **OK** button

Review a ChangeMark



A. Select the **Review's** dropdown menu
B. Select the Review ChangeMark Notes
C. ChangeMark **Notes** displays at the right of the screen
D. Select the **Fit All** tool

Close a ChangeMark

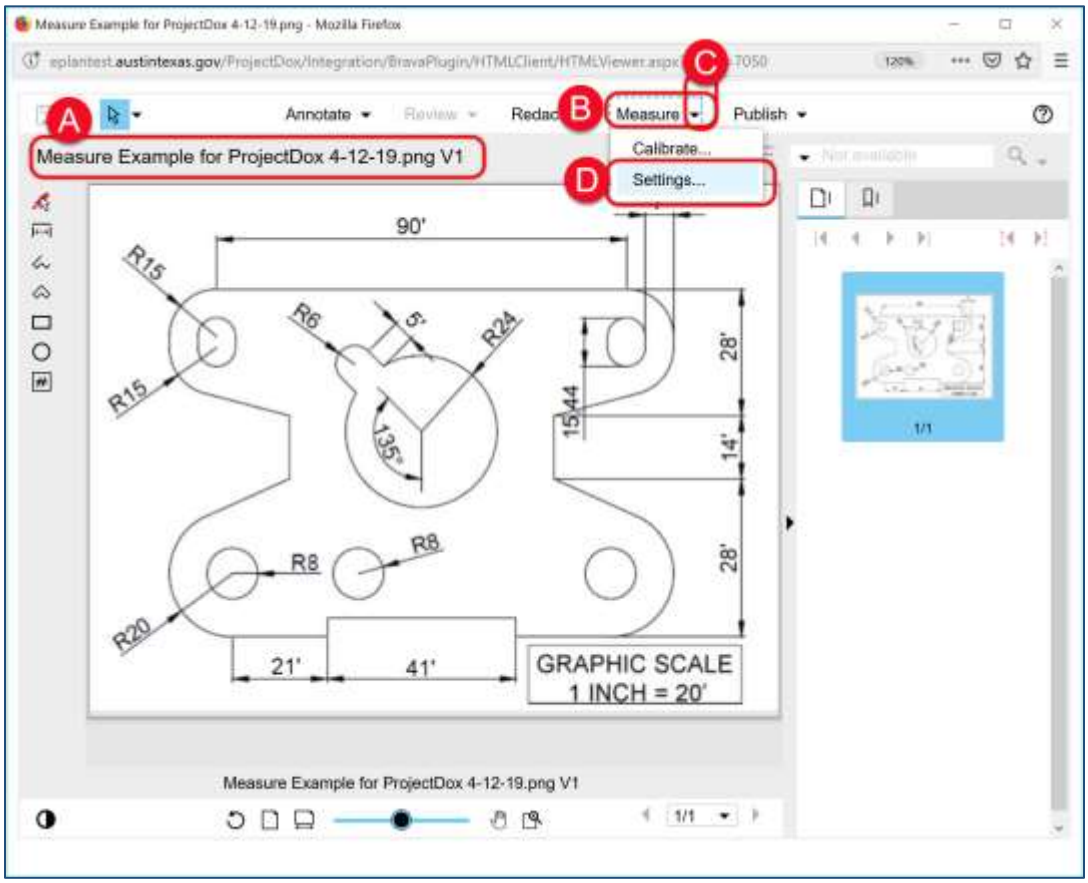


A. Select the **Annotate** dropdown menu
B. Select **Close markup**

Ready to continue

MEASURING USING SETTINGS

Opening example Measure Example ProjectDox 4-12-19 V1.pdf



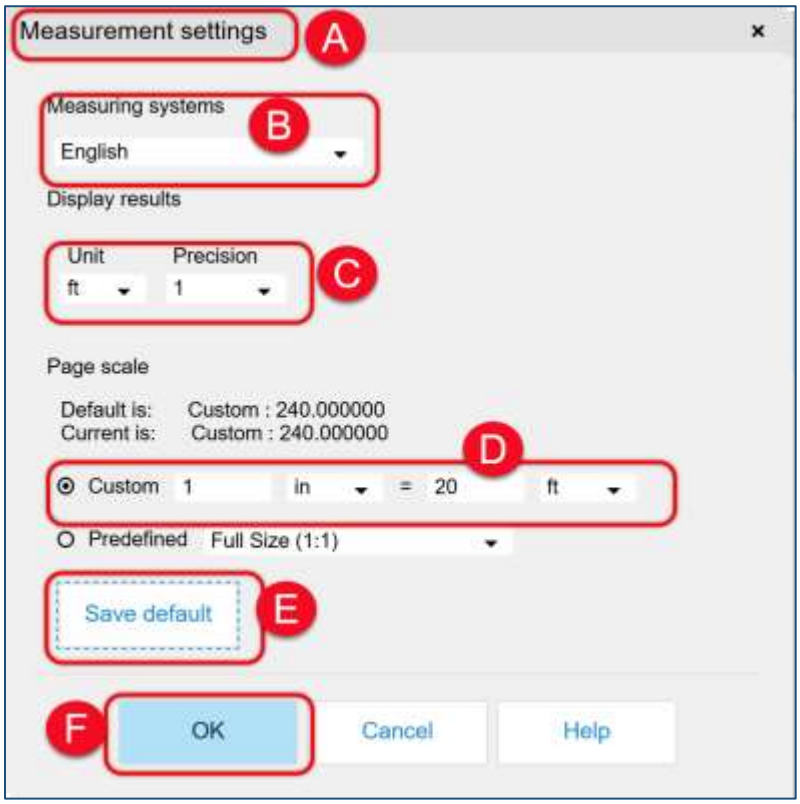
A. The Measure Example ProjectDox 4-12-19 V1.pdf displays
B. Select Measure and Measure toolbar displays

1. Select Tool
2. Measure a line tool
3. Measure a Polyline
4. Measure a Polygon
5. Measure a Rectangle
6. Measure a circle
7. Measure a count

C. Select the **Measure** dropdown menu
D. Select **Settings**

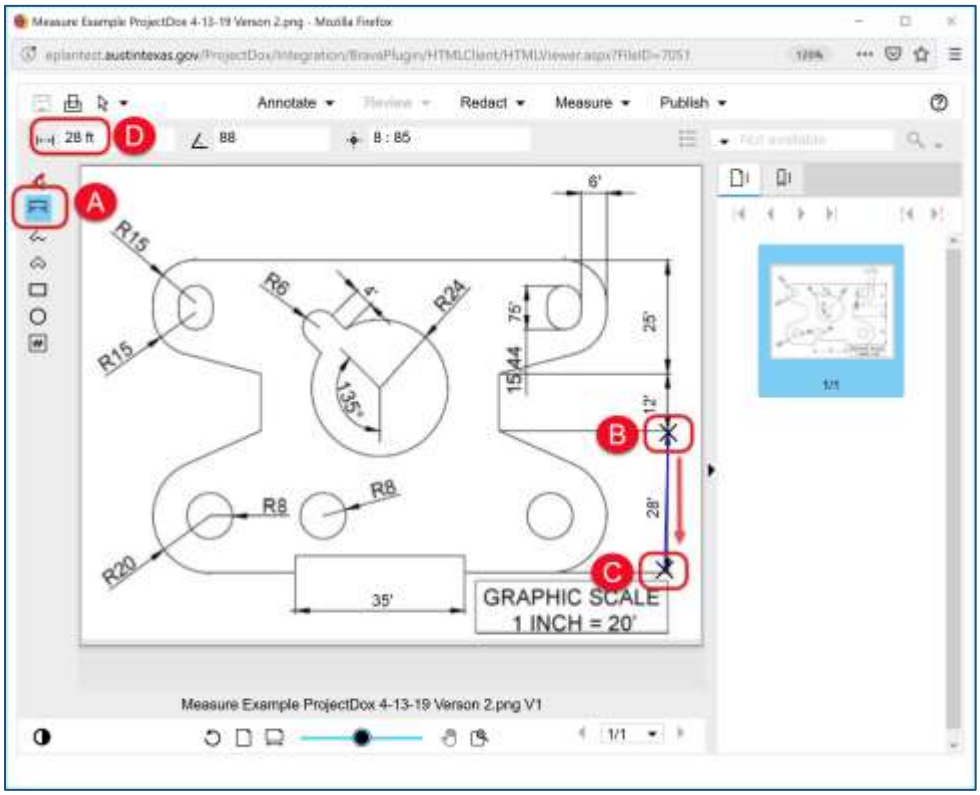
Open Settings

The project measures in English, displays in feet, a custom scale of 1 inch equals 20 feet. When custom or predefined scale in **Measurement Settings** is provided, makes it possible to eliminate calibrating



A. **Measurement Settings** dialogue box displays
B. **Measuring System** is English
C. **Display results** is in feet, other options available
D. The provided **Custom** scale of 1 inch equals 20 feet
E. **Save Default** for measuring
F. Select the **OK** button

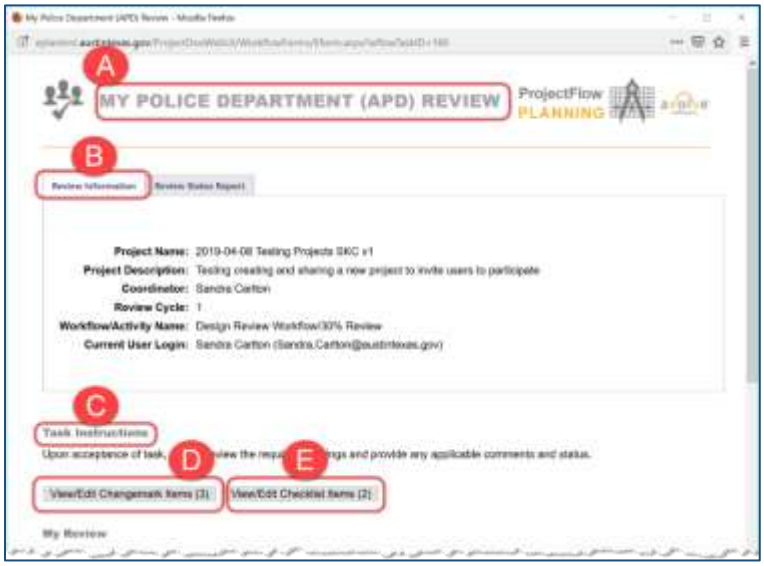
Measuring



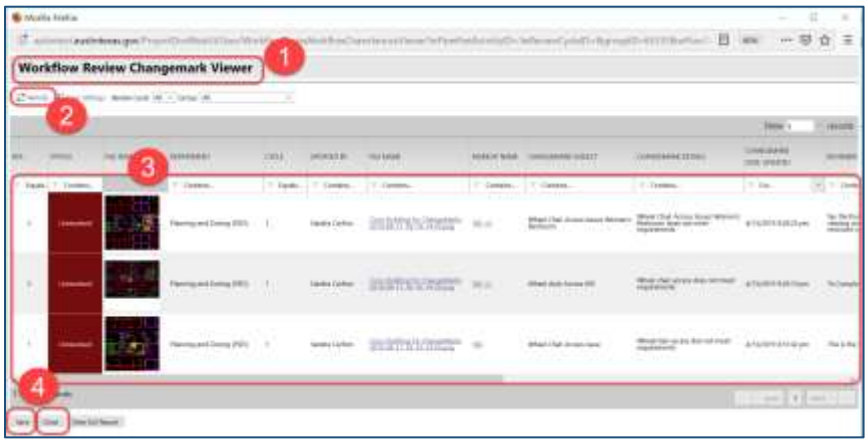
A. Select the **Measure Line** tool
B. Select the top line at B
C. Holding the **Left button** on the mouse drag down to C and release mouse button
D. The line measures **28ft** the same as on the image

COMPLETING THE 30% REVIEW

A review by the Police Department

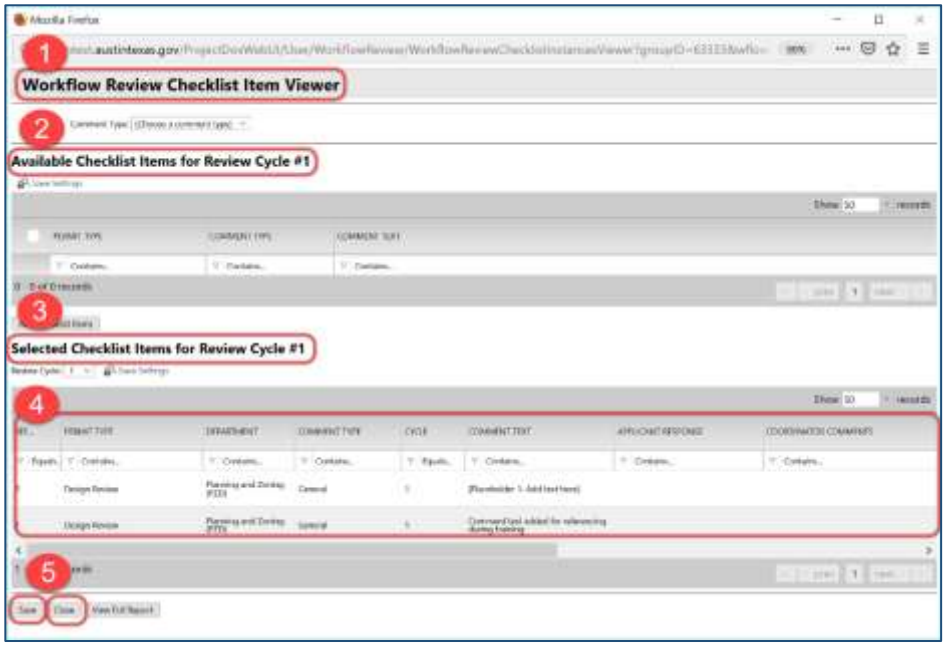


A. **My Police Department (APD) Review** page displays
B. Select the **Review Information** tab
C. **Task Instructions** - Upon acceptance of task, please review the required drawings and provide any applicable comments and status.
D. Select the **View/Edit ChangeMark** button (Annotate includes ChangeMarks and other tools on images based on the Design Consultants' uploaded project images)



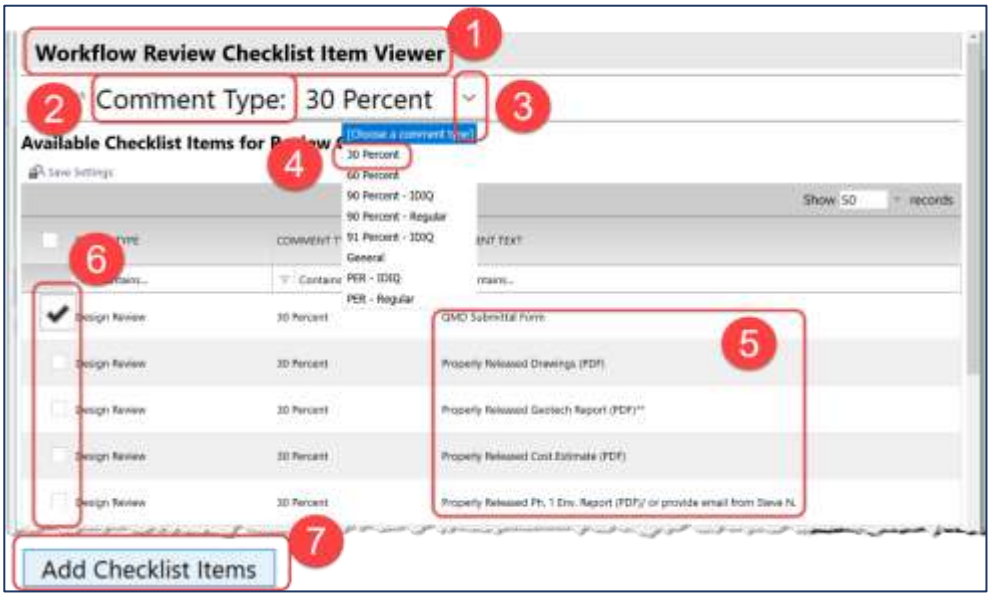
1. The **Workflow Review ChangeMark Viewer** displays
2. Select the **Refresh** icon
3. Review the **Changemarks** and **comments**
4. Depending on the review of comments or adding or no comments select the **Save** or **Close** buttons

E. Select the View/Edit Checklist Items button and the WorkFlow Review Checklist Item Viewer displays comment type of a checklist items used filtering the checklist items. The Checklist has no other purpose other than to allow additional filtering on the checklist item manager.



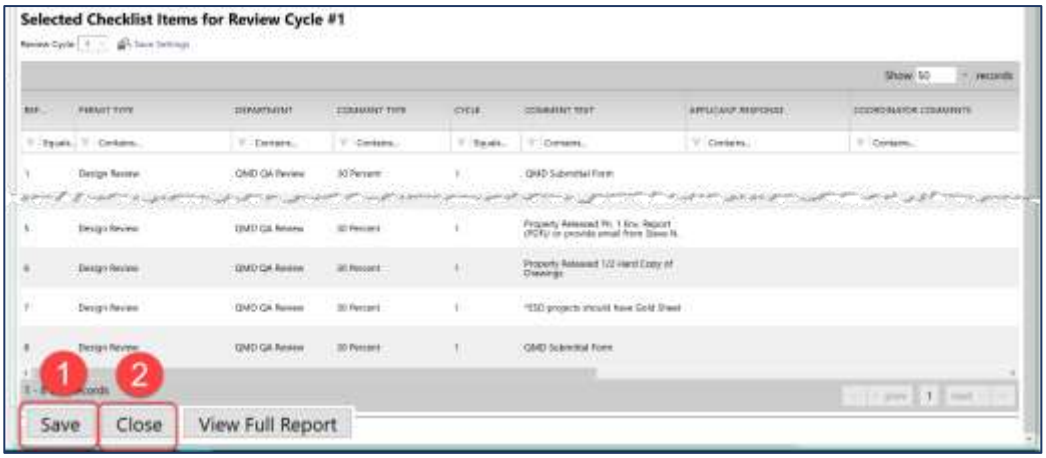
1. The **Workflow Checklist Item Viewer** displays
2. **Available Checklist Items for Review Cycle #1** displays with no checklist comments include specific checklist items that are required because of the project
3. Select **Checklist Items for Review Cycle#1** displays items that may be selected that apply to all projects and the city has created items to select and provide general comments about a project checklist items
4. Review the Selected checklist item comments
5. Based on the Police participation in **ChangeMarks** and **Checklist** either use the **Save** button to save the comments or **Close** button to close the page

View Available Checklists Items for Review Cycle #1



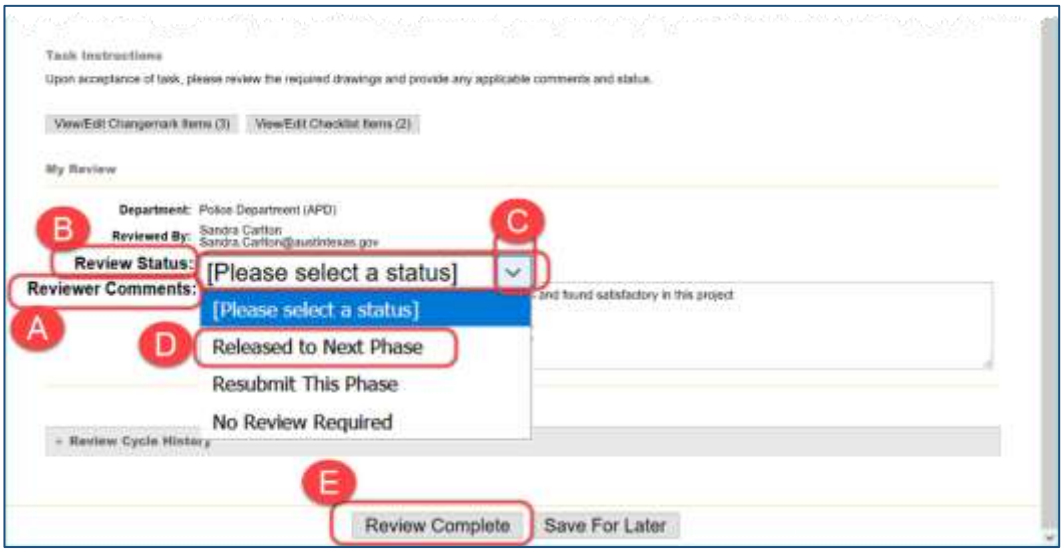
1. The **Workflow Review Checklist Item Viewer** page displays
2. Notice **Comment Type**
3. Select the dropdown menu
4. Select **30 Percent**
5. A list of items from the Design Consultant displays that are required during for reviewing in the 30% Review
6. Select any **Checklist Items** that should be added to the Checklist for review
7. Select **Add Checklist Items** to add the selected Checklist Items

Save the Checklist Items



1. Select **Save** button at the bottom of the page
2. Select the **Close** button at the bottom of the page

Finishing the review by the Police Department

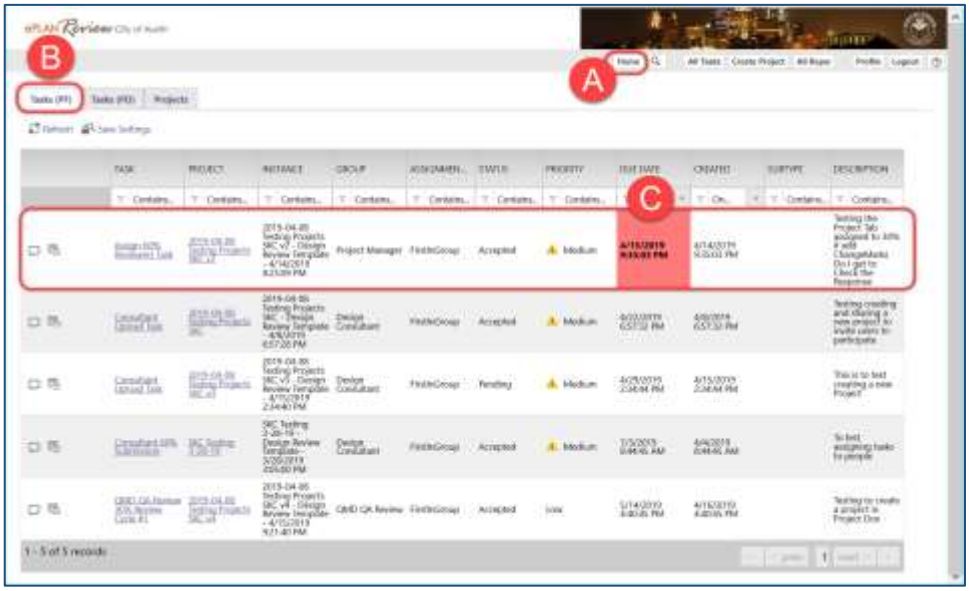


A. Add **Reviewer Comments**
B. Notice, **Review Status**:
C. Select the **[Please select a status]** dropdown menu
D. Select **Release to Next Phase**
E. The **Review Complete** words display on the **Review Complete** button, select the **Review Complete** button

Are you sure

A. Completing this task will finish your participation in this step and cannot be undone. Are you sure you want to complete the task?
B. Select the **OK** button

COMPLETED A 30% REVIEW



A. Returned to the Home page
B. The **Tasks (PF)** displays with Assign 60% Reviewers option
C. Tip – if a task is overdue, a red square are round the date displays