

ProjectDox
90% Review
Training Guide
2019

2019 ProjectDox 90% Review Training Part 5

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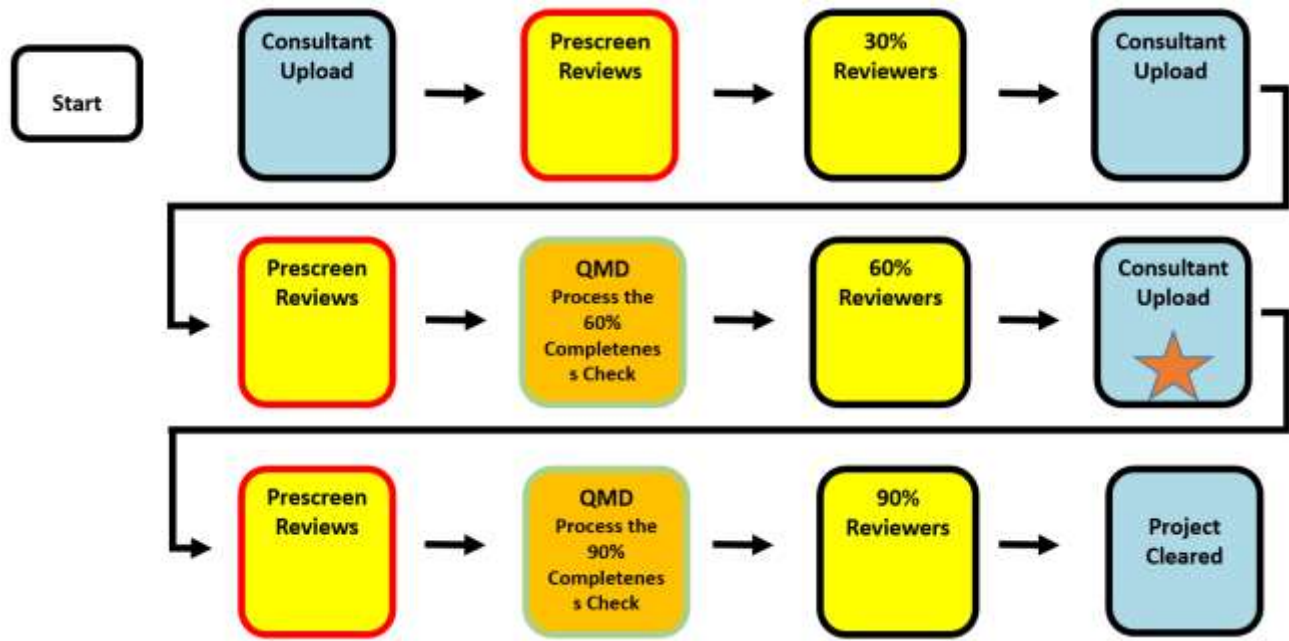
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Where are we?

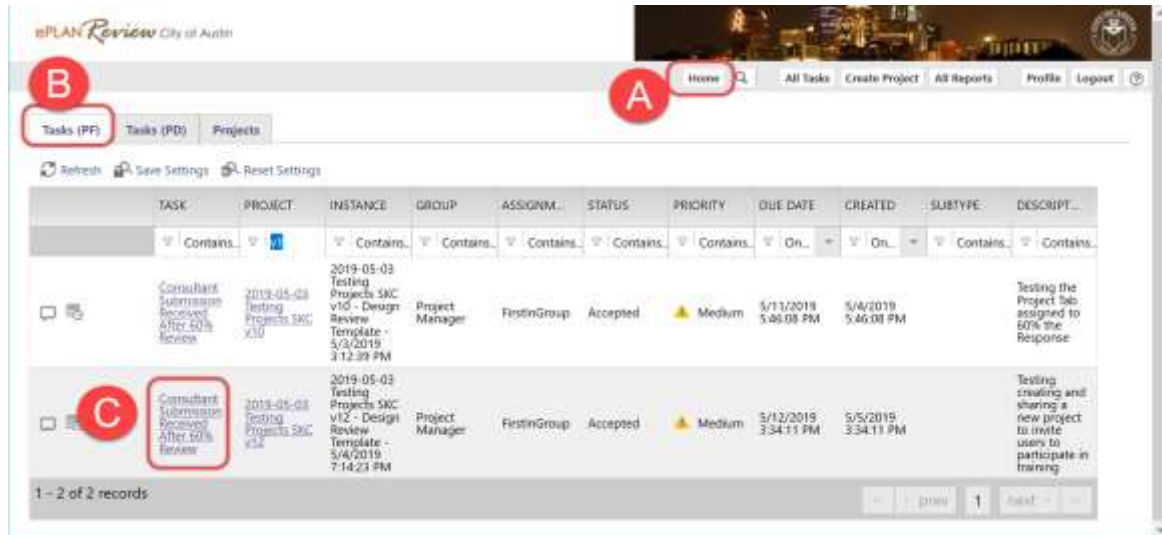
High level ProjectDox flow

We are here ★



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The Consultant Submission Received After 60% Review



- A. The **Home** page displays
- B. **Tasks (PF)**
- C. The Project Manager accepts the **Consultant Submission Received After 60% Review**

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Consultant Submission Received After 60% Review Form

CONSULTANT SUBMISSION RECEIVED AFTER 60% REVIEW

ProjectFlow PLANNING avolve

Review Information | Discussion Board | Review Status Report

Project Name: 2019-05-03 Testing Projects SKC v12
Project Description: Testing creating and sharing a new project to invite users to participate in training
Coordinator: Sandra Carlton
Review Cycle: 2
Workflow/Activity Name: Design Review Workflow/Consultant Submission Received After 60% Review
Current User Login: Sandra Carlton (Sandra.Carlton@austintexas.gov)

Task Instructions

Review the results from the Consultant Submission Process. Determine whether the Consultant submitted files for 90% submission, OR, submitted corrections for the next 60% Review.

- Select the **Review Status Report** tab above. Results from the 60% Review are listed.
- Select the **Discussion Board** tab above. Comments between the PM and Consultant are listed.
- If review results were **'Released to Next Phase'** and the Consultant has completed submission for 90%, choose the 'Approve for 90%' button to Send to QMD for 90% Completeness Check.
- If the review results includes **'Resubmit This Phase'** and the Consultant has submitted corrections for the next 60% Review, select the review groups below and choose the 'Begin New Cycle' button.
- If the Consultant's Submission needs corrections, choose the 'Return to Consultant' button.

[View/Edit Changemark Items \(2\)](#) | [View/Edit Checklist Items \(2\)](#)

Select	Department	Status	Assignment	Reviewer	Priority	Due Date
<input type="checkbox"/>	QMD QA Review		FirstInGroup	[Choose a reviewer]	Low	5/19/2019
<input checked="" type="checkbox"/>	Public Works (Office of the City Architect)	Sandra Carlton - Released to Next Phase - Review Cycle #2	Individual	Sandra Carlton	Low	5/19/2019
<input type="checkbox"/>	AULCC (ATD) Coordinator		FirstInGroup	[Choose a reviewer]	Low	5/6/2019
<input type="checkbox"/>	Austin Energy (ATD)		FirstInGroup	[Choose a reviewer]	Low	5/19/2019
<input type="checkbox"/>	Planning and Zoning (PZD)		FirstInGroup	[Choose a reviewer]	Low	5/19/2019
<input checked="" type="checkbox"/>	Police Department (APD)	Sandra Carlton - Released to Next Phase - Review Cycle #2	Individual	Sandra Carlton	Low	5/19/2019
<input type="checkbox"/>	Small and Minority Business Resources (SMBR)		FirstInGroup	[Choose a reviewer]	Low	5/19/2019

Coordinator Comments:
Good Job

Applicant Comments:

Begin New 60% Cycle | **Approve for 90%** | **Return to Consultant** | **Save For Later**

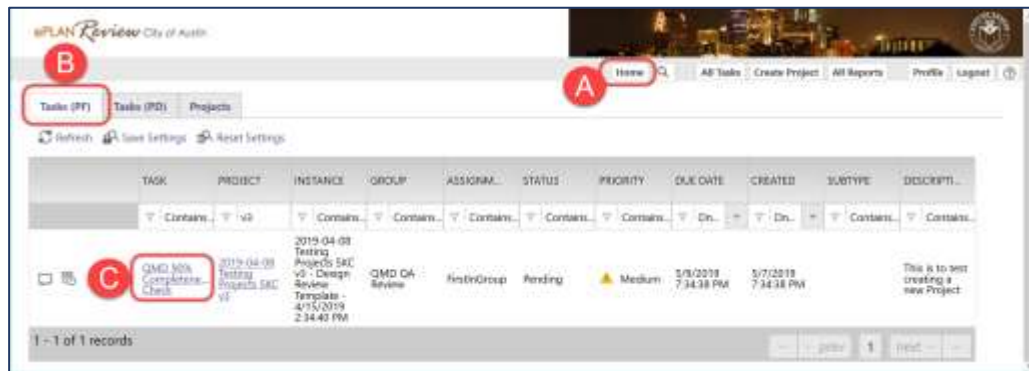
- A. The **Consultant Submission Received After 60% Review** form displays
- B. **Review Information** tab
- C. Notice the **Task Instructions** - Review the results from the Consultant Submission Process. Determine whether the Consultant submitted files for 90% submission, OR, submitted corrections for the next 60% Review.
 1. **Select the Review Status Report** tab above. Results from the 60% Review are listed.
 2. **Select the Discussion Board** tab above. Comments between the PM and Consultant are listed.
 3. **If review results were 'Released to Next Phase' and the Consultant has completed submission for 90%**, choose the 'Approve for 90%' button to Send to QMD for 90% Completeness Check.

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4. If the review results includes 'Resubmit This Phase' and the Consultant has submitted corrections for the next 60% Review, select the review groups below and choose the 'Begin New 60% Cycle' button.
 5. If the Consultant's Submission needs corrections, choose the 'Return to Consultant' button.
- D. Displays Status of all previous reviews
1. Public Works (Office of the City Architect)
 2. Police Department
- E. Button options
1. **Begin New 60% Cycle** – Sending the project back for a second review
 2. **Approve for 90%** - Consultants submitted all required documents for a 60% review
 3. **Return to the Consultant** – The project needs reworking and with required or specific changes
 4. **Save For Later** – Allows Project Managers to save any changes made in the eForm task and complete the task at a later time
 5. Select the **Approve for 90%**

QMD Process

QMD 90% Completeness Check



- A. Home
- B. Tasks (PF)
- C. Accepts the QMD 90% Completeness Check task

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Review QMD 90% Completeness Check Form

The screenshot shows a web interface for a 'QMD 90% COMPLETENESS CHECK'. It features several sections: 'Review Information' (Project Name, Description, Coordinator, Review Cycle, WorkflowActivity Name, Current User Login), 'Task Instructions' (instructions for the consultant), 'View/Edit Checklist Items (0)', 'Discussion Comments' (Add Comment, Comment text, Save/Cancel buttons), a table of discussion comments, and 'Complete' and 'Save For Later' buttons at the bottom.

- A. Review **QMD 90% Completeness Check form** displays
- B. **Review Information** tab
- C. **Task Instructions** - the Design Consultant has submitted plans for **90% Review**. Please perform a Completeness Check for 90% Submission. Update the Discussion Board with any issues to communicate with the PM.
- D. The **View/Edit Checklist Items (0)** button is usually not needed by the 90% Review because of the reviews and the consultant's complying with requests
- E. Add a discussion comment
- F. Select the **Complete** button

Review QMD CC Results

The screenshot shows a table of QMD CC Results in the ProjectDox interface. The table has columns for Task, PROJECT, NAME, Assign, ASSIGNM., SIMPL, PRIORITY, DUE DATE, START DATE, and COMMENTS. Two rows are visible, both with a priority of 'Medium'.

Task	PROJECT	NAME	Assign	ASSIGNM.	SIMPL	PRIORITY	DUE DATE	START DATE	COMMENTS
Review QMD CC Results	2019-04-08 Testing Projects SKC v3	Project Manager	Project Manager	Project Manager	Project Manager	Medium	8/20/19 6:23:42 PM	8/1/2019 6:30:41 PM	To test creating a new Project.
Review QMD CC Results	SAC Testing 2019-04-08 Testing Projects SKC v3	Project Manager	Project Manager	Project Manager	Project Manager	Medium	8/20/19 6:47:17 AM	8/1/2019 6:47:17 AM	To test creating tasks in a project.

- A. Home
- B. Tasks (PF)
- C. Accept Review QMD CC Results

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Review QMD Result Form

REVIEW QMD RESULTS (A)

Review Information (B)

Project Name: 2019-04-08 Testing Projects SRCC v3
 Project Description: This is to test creating a new Project
 Coordinator: Sandra Carlton
 Review Cycle: 2
 Workflow/Activity Name: Design Review Workflow/Review QMD Results
 Current User Login: Sandra Carlton (Sandra.Carlton@astiridamas.gov)

Task Instructions (C)

Please review the discussion board and checklists for any issues found with the QMD 90% Completeness Check review. If there are outstanding items from the review, start an Ad Hoc review with the Consultant to obtain missing items.

View/Edit Checklist Items (1) (D)

Discussion Comments (E)

Comments: Review is going well [Save] [Cancel]

DISCUSSION COMMENT	USERNAME	DATE/TIME
No Checked Items display from the 90% QMD review	Sandra Carlton	5/1/2019 1:05:03 PM

1 - 1 of 1 records

Complete (F) **Save For Later**

- A. The Review **QMD Result Form** displays
- B. Notice the **Review Information** tab
- C. **Task Instructions** - Please review the **discussion board** and **checklists** for any issues found with the **QMD 90% Completeness Check** review. Select the **View/Edit Checklist Items** button or select the **View Status Report** for items results
- D. The **View/Edit Checklist Items (0)** button is usually not needed by the 90% Review because of the reviews and the consultant's complying with requests
- E. **Add Comments** for the project manager
- F. Select the **Complete** button or **Save For Later** review button

Assign 90% Reviewers Task

wPLAN Review City of Astoria

Home (A) | All Tasks | Create Project | All Reports | Profile | Logout

Task (PF) (B) | Tasks (PF) | Projects

TASK	PROJECT	INSTANCE	GROUP	ASSIGNED	STATUS	PRIORITY	DUE DATE	CREATED	SUBTYPE	DESCRIP.
Police Department 2019-04-08 Testing Projects SRCC v3 - Design Review - Replace 4/29/2019 11:03:20 AM	2019-04-08 Testing Projects SRCC v3 - Design Review - Replace 4/29/2019 11:03:20 AM	2019-04-08 Testing Projects SRCC v3 - Design Review - Replace 4/29/2019 11:03:20 AM	Police Department (AFTS)	Individual	Accepted	High	5/5/2019 4:14:47 PM	5/1/2019 4:13:47 PM		Testing the Create Project button and consistency from reviewers
Assign 90% Reviewers Task	2019-05-03 Testing Projects SRCC v3	2019-05-03 Testing Projects SRCC v3 - Design Review - Replace 5/1/2019 7:56:22 PM	Project Manager	Project Group	Pending	Medium	5/5/2019 5:00:09 PM	5/1/2019 5:00:09 PM		Testing creating and saving a new project to view users to participate in training

Assign 90% Reviewers Task (C)

- A. **Home**
- B. **Task (PF)**
- C. Accept the **Assign 90% Reviewers Task**

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Assign 90% Reviewers Task Form

ASSIGN 90% REVIEWERS TASK

Review Information | Review Status Report

Project Name: 2019-05-03 Testing Projects SKC v12
Project Description: Testing creating and sharing a new project to invite users to participate in training
Coordinator: Sandra Carlton
Review Cycle: 2
Workflow/Activity Name: Design Review Workflow/Assign 90% Reviewers Task
Current User Login: Sandra Carlton (Sandra.Carlton@austintexas.gov)

Task Instructions
 Please select the required review departments for the 90% Review from the list.

Department	Assignment	Reviewer	Priority	Due Date
<input type="checkbox"/> QMD QA Review	FirstInGroup	[Choose a reviewer]	Low	05/19/2019
<input checked="" type="checkbox"/> Public Works (Office of the City Architect)	Individual	Sandra Carlton	Low	05/19/2019
<input type="checkbox"/> AULCC (ATD) Coordinator	FirstInGroup	[Choose a reviewer]	Low	05/06/2019
<input type="checkbox"/> Austin Water (AW) Supervisor	FirstInGroup	[Choose a reviewer]	Low	05/19/2019
<input type="checkbox"/> Neighborhood Housing Community Dev (NHCD)	FirstInGroup	[Choose a reviewer]	Low	05/19/2019
<input type="checkbox"/> Planning and Zoning (PZD)	FirstInGroup	[Choose a reviewer]	Low	05/19/2019
<input checked="" type="checkbox"/> Police Department (APD)	Individual	Sandra Carlton	High	05/19/2019
<input type="checkbox"/> Small and Minority Business Resources (SMBR)	FirstInGroup	[Choose a reviewer]	Low	05/19/2019

Begin Review | **Save For Later**

- The **Assign 90% Reviewers Task** displays
- Notice the **Review Information** tab
- Task Instructions** - Please select the required review departments for the 90% Review from the list.
- In the example we selected the **Public Works (Office of the City Architect)** and the **Police Department (PD)**; however, the selection of departments in the 90% Review depends on the Project Manager and knowledge of requirements
- Select the **Begin Review** button to start reviews or **Save For Later** button to save any changes and complete the task at later time

Police Department (APD) 90% Review Cycle #3

iPLAN Review City of Austin

Tasks (PF) | Tasks (PD) | Projects

TASK	PROJECT	INSTANCE	GROUP	ASSIGNM.	STATUS	PRIORITY	DUE DATE	CREATED	SUBTYPE	DESCRPT.
<input type="checkbox"/> Police Department (APD) 90% Review Cycle #3	2019-04-08 Testing Projects SKC v7 - Design Review Template - 4/23/2019 11:23:20 AM	2019-04-08 Testing Projects SKC v7 - Design Review Template - 4/23/2019 11:23:20 AM	Police Department (APD)	Individual	Accepted	High	5/5/2019 4:15:47 PM	5/4/2019 4:15:47 PM		Testing the Create Project Button and corrections form reviewers
<input type="checkbox"/> Police Department (APD) 90% Review Cycle #3	2019-05-03 Testing Projects SKC v12	2019-05-03 Testing Projects SKC v12 - Design Review Template - 5/4/2019 5:14:23 PM	Police Department (APD)	Individual	Pending	High	5/19/2019 5:18:11 PM	5/5/2019 5:18:11 PM		Testing creating and sharing a new project to invite users to participate in training

- Home
- Tasks (PF)
- Accept the **Police Department (APD) 90% Review Cycle #3**

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Police Department (APD) Review Form

- A. **My Police Department (APD) Review** Form displays
- B. Notice **Review Information** tab information
- C. **Task Instructions** - Upon acceptance of task, please review the required drawings and provide any applicable comments and status.
- D. **My Review** – reviewed by the Police Department and related information
- E. Select the **Review Status** to ensure it is correct, **Release to next phase or Resubmit** for this phase
- F. Select **Review Complete** button to complete the review task or **Save For Later** button to save any changes and complete the task at a later date

Review Complete Task 90% Review

TASK	PROJECT	INSTANCE	GROUP	ASSIGNM...	STATUS	PRIORITY	DUE DATE	CREATED	SUBTYPE	DESCRIP...
Consultant (AutoCAD) Released After 50% Review	2019-05-03 Testing Projects SKC v12	2019-05-03 Testing Projects SKC v12 - Design Review Template - 5/3/2019 3:12:39 PM	Project Manager	FastInGroup	Accepted	Medium	3/11/2019 3:46:08 PM	5/8/2019 3:46:08 PM	Contains	Testing the Project Tab assigned to 80% the Response
Review Complete Task 90% Review	2019-05-03 Testing Projects SKC v12	2019-05-03 Testing Projects SKC v12 - Design Review Template - 5/4/2019 7:16:33 PM	Project Manager	FastInGroup	Pending	Medium	5/12/2019 6:06:04 PM	5/5/2019 6:06:04 PM	Contains	Testing creating and sharing a new project to invite users to participate in training

- A. **Home**
- B. **Tasks (PF)**
- C. Accept the **Review Complete Task 90% Review**

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Review Complete Task 90% Review Form

REVIEW COMPLETE TASK - 90% REVIEW

Review Information

Project Name: 2019-05-03 Testing Projects SKC v12
Project Description: Testing creating and sharing a new project to invite users to participate in training.
Coordinator: Sandra Carlton
Review Cycle: 3
Workflow/Activity Name: Design Review Workflow/Review Complete Task - 90% Review
Current User Login: Sandra Carlton (Sandra.Carlton@austintexas.gov)

Task Instructions

Review the results from the 90% Review Process.

- If ALL review results were 'Released to Next Phase', the project is complete/ready for Cleared. Select the 'Move to Cleared' button.
- If review results includes 'Resubmit This Phase', the Consultant should submit 90% corrections. Update the Discussion Board with comments to the Consultant on results.
 - Select the 'Corrections Required - Return to Applicant' button.
- If the Reviewer needs to make Corrections to their Review, select the Group and choose the 'Assign Internal Corrections' button.

Assign	Correction	Department	Reviewed By	Status	Is Complete	Reviewer Comments	Send Back To
<input type="checkbox"/>	Edit Comments	Public Works (Office of the City Architect)	Sandra Carlton Sandra.Carlton@austintexas.gov	Released to Next Phase	Yes	Completed the ChangeMarks and Checklist	Reviewer
<input type="checkbox"/>	Edit Comments	Police Department (APD)	Sandra Carlton Sandra.Carlton@austintexas.gov	Released to Next Phase	Yes	Discussed the ChangeMarks and consultant has meet the request No Checklist items	Reviewer

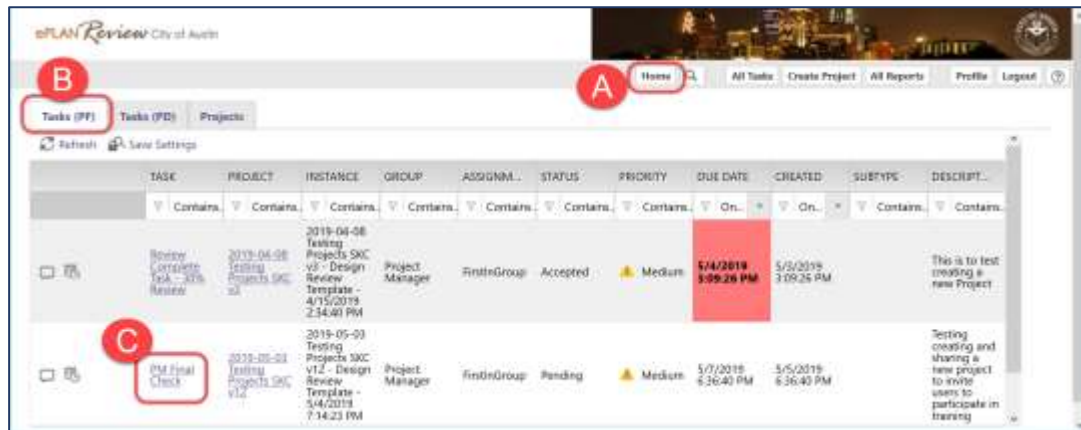
Discussion Comments

[Add Comment](#)

Buttons: Corrections Required - Return to Applicant, Move to Cleared, Assign Internal Corrections, Save For Later

- A. **Review Complete Task 90% Review Form** – This is sent to the Project Manager for review
- B. **Review Information tab**
- C. **Task Instructions** - Review the results from the 90% Review Process.
- If ALL review results were 'Released to Next Phase', the project is complete/ready for Cleared. Select the 'Move to Cleared' button.
 - If review results includes 'Resubmit This Phase', the Consultant should submit 90% corrections. Update the Discussion Board with comments to the Consultant on results.
 - Select the 'Corrections Required - Return to Applicant' button.
 - If the Reviewer needs to make Corrections to their Review, select the Group and choose the 'Assign Internal Corrections' button.
- D. If the Reviewer needs to make Corrections to their Review, select the Group and choose the 'Assign Internal Corrections' button.
- E. Button Options
1. **Corrections Required – Return to Applicant** returning to the consultant for last minute corrections
 2. **Select the Move to Cleared button**- the project is complete/ready for solicitation or permitting
 3. **Assign Internal Corrections** – if checkmarks are used in part D, this button displays
 4. **Save For Later**

PM Final Check



- A. Home
- B. Tasks (PF)
- C. Accept the **PM Final Check**

PM Final Check Form

PM FINAL CHECK

Project Name: 2019-05-03 Testing Projects SKC v12
Project Description: Testing creating and sharing a new project to invite users to participate in training
Coordinator: Sandra Carlton
Review Cycle: 3
Workflow/Activity Name: Design Review Workflow/PM Final Check
Current User Login: Sandra Carlton (Sandra.Carlton@austintexas.gov)

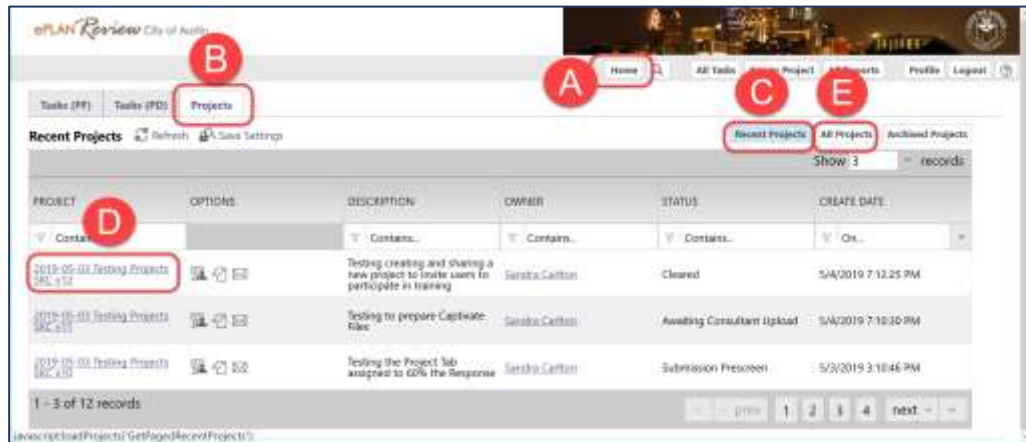
Task Instructions
Please do your final check in the system before notifying others of a Cleared Project

Complete Close

- A. The **PM Final Check** form displays – Project Manager perform the final check before clearing the Project
- B. **Review Information** tab
- C. Notice the **Task Instructions** - **Please do your final check in the system before notifying others of a Cleared Project**
- D. Select the **Complete** button

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What Happens to the Project



- A. **Home**
- B. **Projects** button
- C. Select **Recent Projects** button – where the project will display for 30 days
- D. Select **All Project** button to view all projects that you are a member
- E. The **Project** used for the example displays