



# ProjectDox New Features 8.1 - 8.3 End-User

City of Phoenix  
16 Sep 2014

Instructor: Wally Taylor



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## End-user Enhancements



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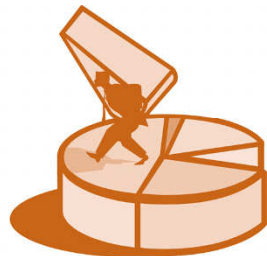
# Home page added Create Date column

Project	Options	Description	Owner	Status	Create date
<a href="#">SLC New Features 2014-06-05</a>	   	SLC New Features 2014-06-05	<a href="#">Wally Taylor</a>	[None]	5/15/2014 8:58:13 AM
<a href="#">Test Wally from Template</a>	   	test	<a href="#">Wally Taylor</a>	[None]	6/4/2014 10:25:18 AM
<a href="#">zTest Wally 01</a>	   	Test for New Features Training	<a href="#">Wally Taylor</a>	[None]	5/15/2014 8:58:13 AM



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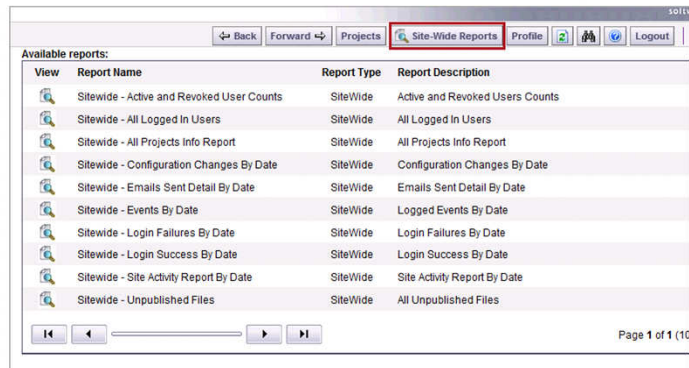
# Reports



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## Easy access to reports

- **Site-Wide Reports** button (requires permissions) on Home page or within project. Displays a list of available reports in the current window:

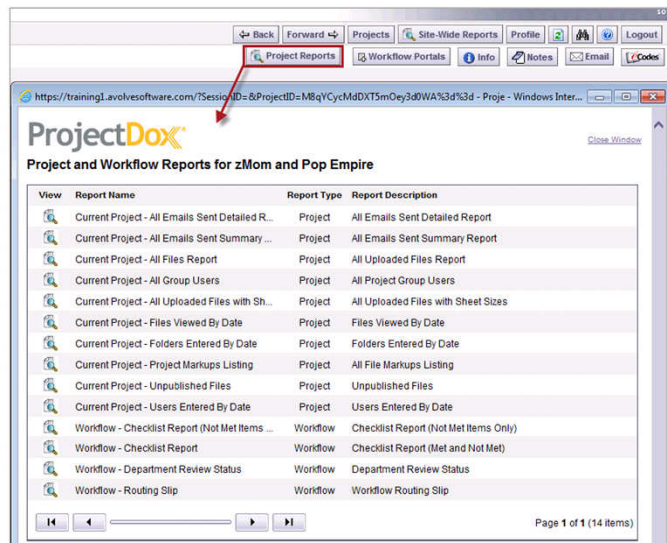


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## Easy access to reports

**Project Reports** button is available inside project. Clicking displays list of project reports in a new window:



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# Reports include date-range options

BeginDate: 8/1/2014    EndDate: 8/7/2014    View Report

of 1    100%    Find | Next    Select a format    Export

### ProjectDox

#### Sitewide - Login Failures By Date

Login Failures Between 8/1/2014 and 8/7/2014

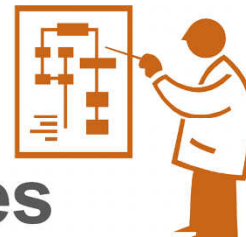
User	Reason	Date
user@domain.com	Invalid password	8/5/2014 11:30:47 AM
user@domain.com	Invalid password	8/5/2014 9:38:51 AM
user@domain.com	Invalid password	8/5/2014 9:03:43 AM
user@domain.com	Invalid password	8/5/2014 7:24:06 AM
user@domain.com	Invalid password	8/1/2014 11:56:10 AM
user@domain.com	Invalid email	8/1/2014 11:55:50 AM
user@domain.com	Invalid password	8/1/2014 11:55:38 AM



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# Workflow Features

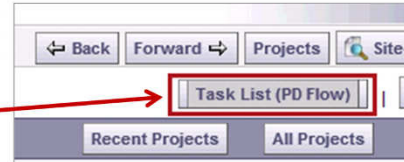


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## Full-page viewing of Workflow Tasks from the Home page

Click on **Task List (PD Flow)** to display global list of workflow tasks in new window



Browser window showing a table of workflow tasks. The table has columns: Project Name, Task, Attached To, Status, Created On, Updated On, and Updated By.

Project Name	Task	Attached To	Status	Created On	Updated On	Updated By
<a href="#">Test Wally from Template</a>	<a href="#">DepartmentReview</a>	Review Coordinator	Pending	6/4/2014 8:49:09 PM	6/4/2014 8:49:09 PM	
<a href="#">zTest Wally 01</a>	<a href="#">PreScreenReview</a>	Review Coordinator	Pending	6/4/2014 8:53:17 PM	6/4/2014 8:53:17 PM	
<a href="#">zTest Wally 01</a>	<a href="#">ApplicantUpload</a>	Applicant	Complete	6/4/2014 8:52:55 PM	6/4/2014 8:53:17 PM	@avolvesoftware.com
<a href="#">Test Wally from Template</a>	<a href="#">ApplicantUpload</a>	Applicant	Complete	6/4/2014 8:47:31 PM	6/4/2014 8:48:05 PM	@avolvesoftware.com
<a href="#">Test Wally from Template</a>	<a href="#">PreScreenReview</a>	Review Coordinator	Complete	6/4/2014 8:48:05 PM	6/4/2014 8:48:28 PM	@avolvesoftware.com
<a href="#">Test Wally from Template</a>	<a href="#">BeginReview</a>	Review Coordinator	Complete	6/4/2014 8:48:28 PM	6/4/2014 8:49:09 PM	@avolvesoftware.com



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## Project Specific Task List Updates

- Selection of the Start Workflows link will cause the screen to refresh and display two new selections: Priority and Due date

**Start Workflows:**

[Start Building Review](#) Priority:  Due date:  [Start](#)



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## Project Specific Task List Updates

- Priority: A visual indicator with a dropdown selection of 1-10; it contains no additional functionality. Will display on both global and project specific task lists.
- Due Date: The date the entire project is due. If the date is exceeded it will highlight the task in red on the task list.
  - The system treats the workflow as overdue at 12:00am on due date.
  - User can select a Due Date that has already passed.



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## Hyperlink to workflow chart

- An Admin configures the link, which displays for the end users in the Status row of Project Info:

A screenshot of the avolve software interface. On the left is a file tree for "zTest Wally 01" with folders like Drawings, Documents, Approved, ChangeMarkReports, Reviewer Attachments, and PDFDestinationFolder. On the right is the "Project Info" tab, which contains a form with fields for Project Name, Description, Project Image, Map Config Name, Location, Contact, Contact's Email, Phone, Cell Phone, Pager, Project Owner, Owner's Email, Project Admins, Status, Status Info, and Project Start/End. The "Status" field is set to "In Review" and has a red-bordered hyperlink "Workflow Definition" next to it.

Project Info		Reports
Project Name:	zTest Wally 01	
Description:	Test for New Features Training	
Project Image:	No image exists	
Map Config Name:		
Location:		
Contact:		
Contact's Email:		
Phone:		
Cell Phone:		
Pager:		
Project Owner:	Wally Taylor	
Owner's Email:	wtaylor@avolvesoftware.com	
Project Admins:	Administrator Temp,Wally Taylor,W01 Taylor	
Status:	In Review	<a href="#">Workflow Definition</a>
Status Info:		
Project Start/End:	Start: 5/15/2014 8:58:13 AM   End:	

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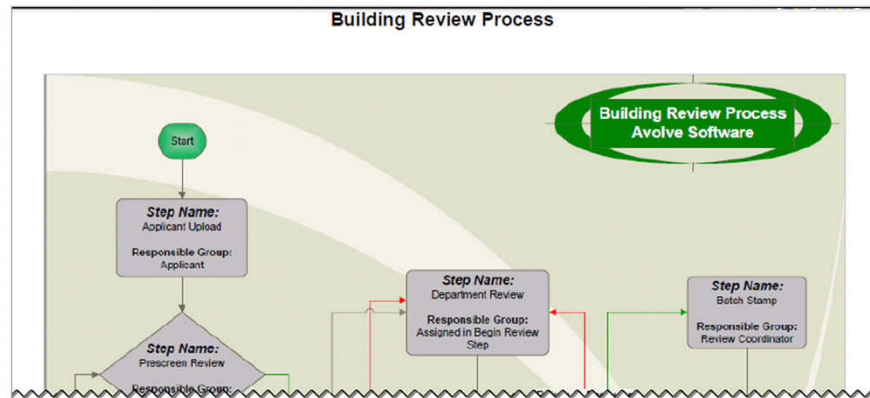
If the URL is not configured, no link will show.



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## Hyperlink to workflow chart

- Click on the link to display the flow chart:

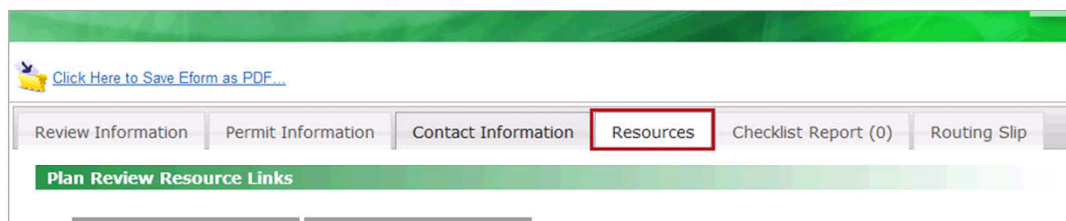


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## eForm – Global File Compare

- This feature, located in the Resources tab, gives users the ability to compare two files from different projects and folder locations

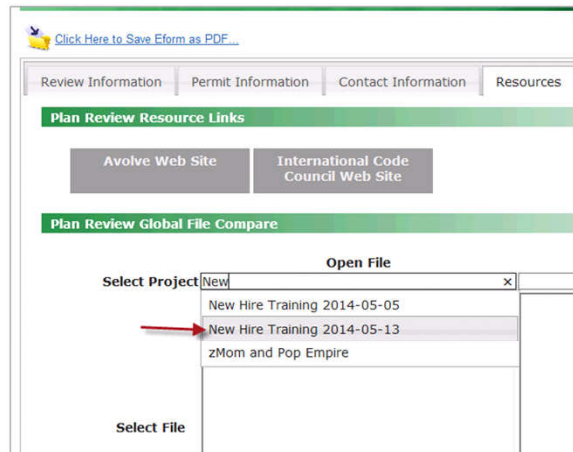


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# eForm – Global File Compare

- In Select Project field, type at least first 3 letters of project, then select from the displayed list. Process is same for Open File and for Compare File

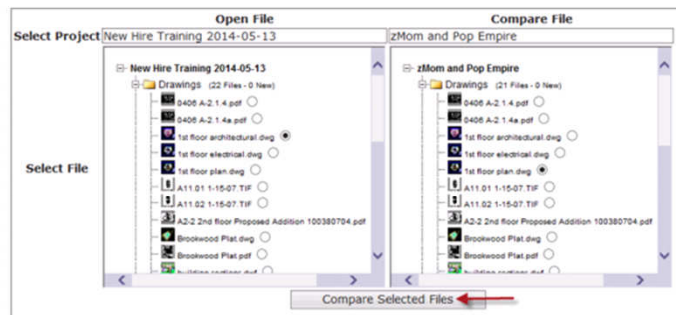


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# eForm – Global File Compare

- Navigate in each project/folder to the files to be compared. Click **Compare Selected Files**



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## eForm – Global File Compare

- Viewer tool displays the files in the default compare mode. Applicable viewing controls are available:



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## eForm – Changemarks

CHANGEMARKS - Review Cycle: 1

Filter Changemarks by Keyword:  [SEARCH](#) [SHOW ALL](#)

[Click Here to Load Changemarks...](#)

[Click Here to Publish Changemarks to PDF...](#)

Resolved	Status	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
<a href="#">Yes</a>   <a href="#">No</a>	No		1	Mechanical	plan layout1.dwg	<a href="#">WS1 0505 1704</a>	Wheelchair access issue	ADA Requirements .....	<input type="text"/>
<a href="#">Yes</a>   <a href="#">No</a>	No		1	Mechanical	plan layout1.dwg	<a href="#">WS1 0505 1704</a>	Overhead clearance and doorway	Check and move	<input type="text"/>

Show My Changemarks

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Select Changemarks from any specific cycle

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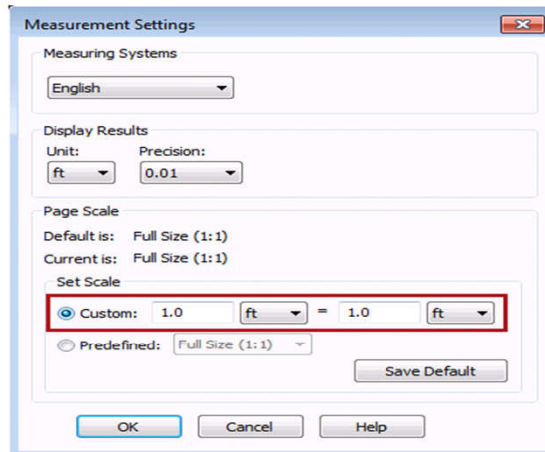
# Viewer Updates

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## Viewer - Custom scale for measurement

The **Measurement Settings** tool can be used to set a Custom scale



Measurement Settings

Measuring Systems  
English

Display Results  
Unit: ft Precision: 0.01

Page Scale  
Default is: Full Size (1:1)  
Current is: Full Size (1:1)

Set Scale  
 Custom: 1.0 ft = 1.0 ft  
 Predefined: Full Size (1:1)

Save Default

OK Cancel Help

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## Viewer - Custom scale for measurement

- A custom scale set applies to the current file.
- Each file can have a different custom scale.
- To set the default to use for all sessions, choose your Scale factor from the Predefined drop down or enter a Custom scale and click **Save as Default**. It is then applied to all pages of the document, all documents within a session, and across session until it is changed.
- The default value can be overridden per page.
- If calibration has been performed, then the Predefined option is selected and the drop down box displays "Calibrated".



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## Viewer Measurement Update

- DWG measurement tool fixed – manual calibration is no longer required for files that have the measurements built into the file.

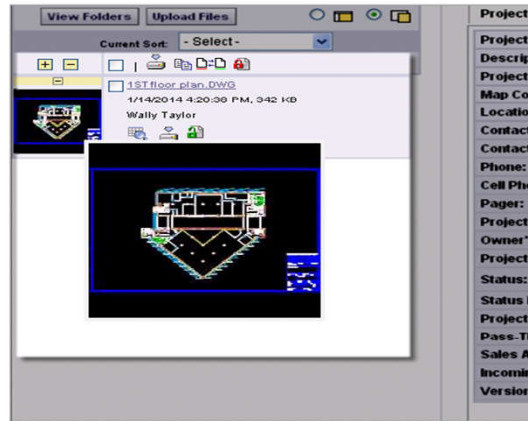


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## Thumbnail Enhancement

- Mouse over thumbnail to see larger version without having to open the file



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Dependent on feature being set to "On"

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## HTML5 replaces Flash for non-IE browsers

- The HTML5 viewing capability allows for faster and more flexible viewing of electronic plans and resolves issues with load balance architecture.
- With HTML5 viewing, iPad users can also open ProjectDox in their browser.
- Requires no additional installation of components or software



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# HTML Viewer

HTML viewing provides flexibility, but has limitations:

- Reduced Annotation Tools
- Limited Viewing Tools
- Inability to perform File Compare
- Inability to perform File Version Compare



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## Thumbnails toggle for HTML viewing

- For the HTML viewer, System Admin can turn on or off the thumbnail display in the Task Pane in Brava.
- Turning off speeds the performance in opening/viewing multi-page files in HTML.
- ActiveX multi-page thumbnails remain on.

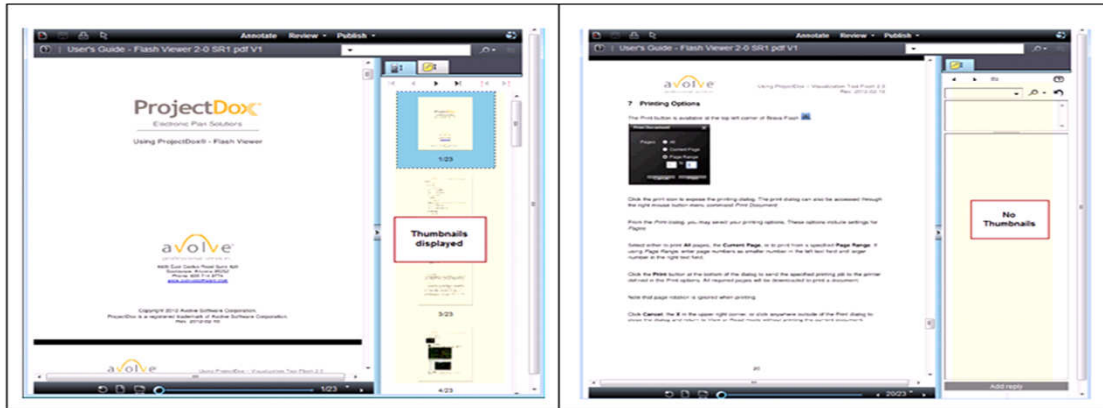


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# HTML Thumbnail toggle



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# Additional Features



All

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## GIStream™

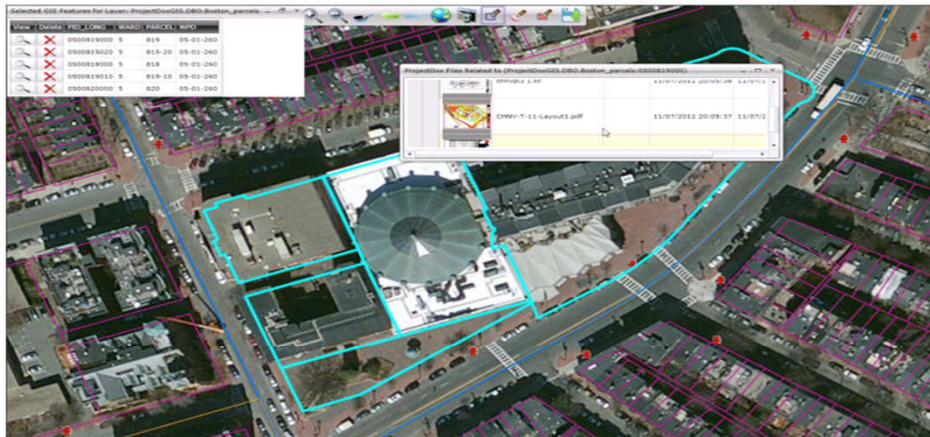
- GIStream associates GIS features, map and layer information contained in ArcGIS databases with ProjectDox project information, allowing users to access ArcGIS data and associated project information directly from both ProjectDox and the GIStream Viewer



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## GIStream™



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# Performance Enhancements

- Improved response for HTML5 publishing and viewing
- Database tuning. Improved response for:
  - Projects query
  - Stamp templates
  - Viewing projects folders and files



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**Thank you for attending.**

**Your feedback is important to us please fill out our survey on this New Features Course located at**

**<https://surveymonkey.com/s/AvolveUniversity>**



Optional

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