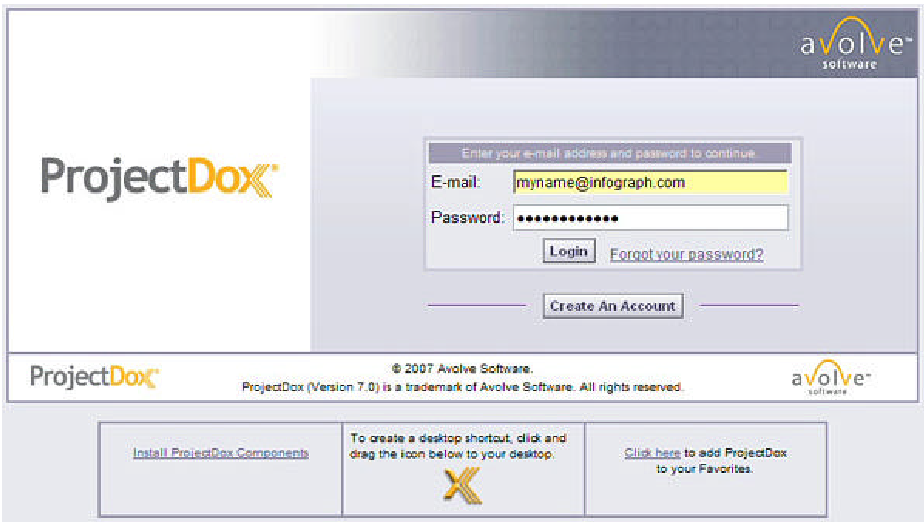
IV. User's Reference Guide

Logging in

When you have been invited to a project, you will receive an email containing your login information and information about the project, including a link to the project.

1. Click the Project Access link in your invitation email.

2. At the login screen, enter your email address and the temporary password provided in the Invite email into the login screen. If you have logged in at least once and forget your password, it can be resent to your email address by clicking *Forgot your password?* link.



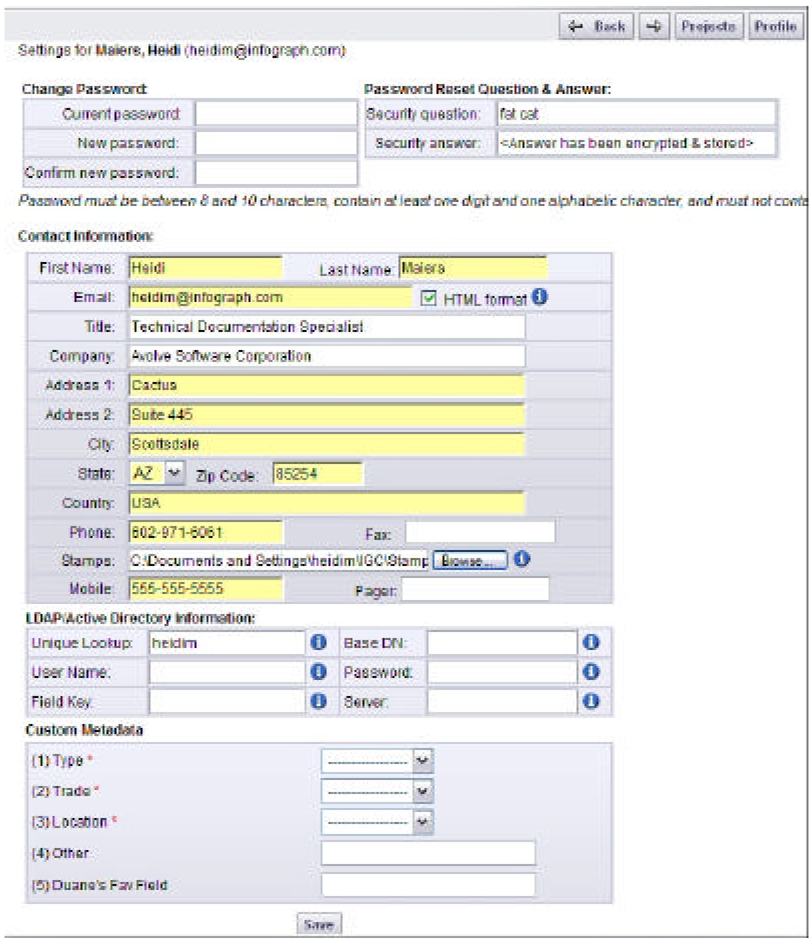
Notes:

- ProjectDox uses pop-up windows (browser windows with no toolbars). If you login but no ProjectDox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to disable pop-up blocking for the ProjectDox site (pop-up blockers allow you to disable pop-up blocking for specified sites).

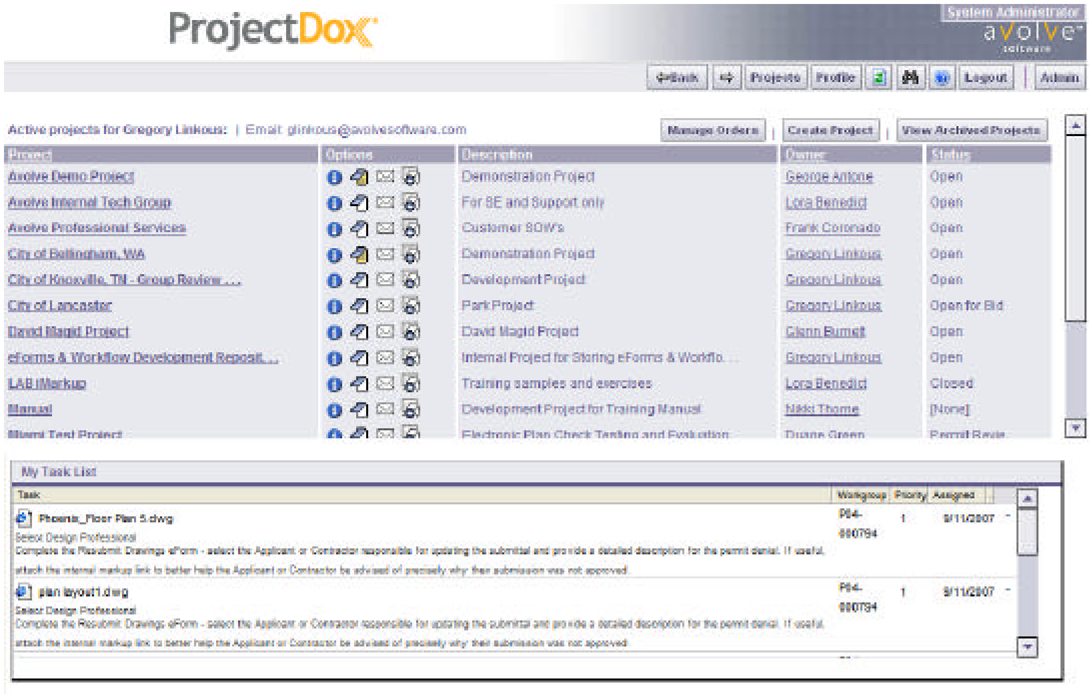
- The login page now has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ProjectDox ActiveX controls. Click the **Install ProjectDox Components** link. Alternatively, the network administrator can distribute the MSI via any method already in place.

3. If this is the first time you have accessed the ProjectDox site, the user *Profile* screen displays. You can change your password and enter your user information (required fields display with colored highlight). Passwords are encrypted and you are prompted for a question and answer password hint. You can access this screen again at any time by clicking the **Profile** button in the main ProjectDox button bar. Click **Save** when you are finished.

   For the 'Stamps' path, browse to the directory where your Brava StampImages folder has been defined. This can be any directory on a local or shared network path. Select any stamp (jpg or png file) in the directory to set the default folder location for use with the Brava Viewer "Insert Raster Image" markup tool.



4. When you have successfully logged into ProjectDox, the **Projects** screen will display. Any projects for which you have access will display in this list. Any outstanding tasks that require your action are displayed in the Task List area below the project list (with the Workflow option only).

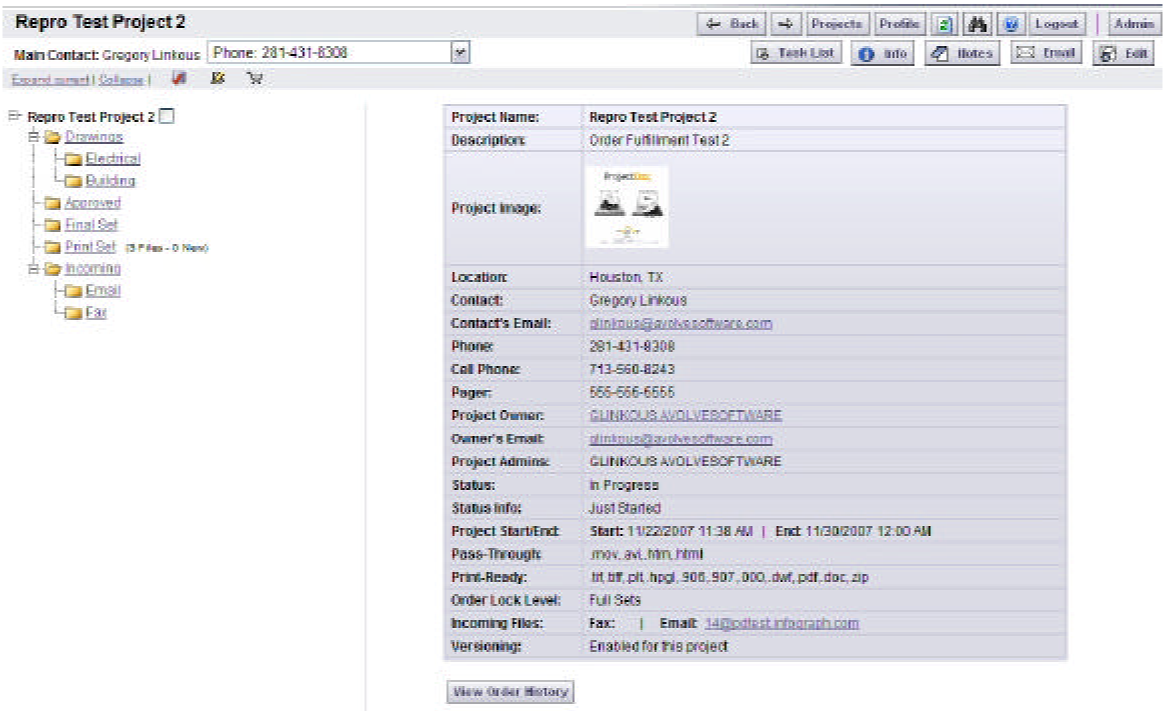


In this screen you can access project files, view project information, view topics and notes associated with a project, send TeamMail to other members of the project, view the project status and project owner.

Note: The edit project icon is available only if you have Manage Users and/or Manage Folders permissions, the 'Create Project' button will only display if you have Project Creation Rights (PCR), you won't see the 'View Archived Projects' button unless you are a SA, and the 'Manage Orders' button is available only with Manage Orders permission.

User Screens

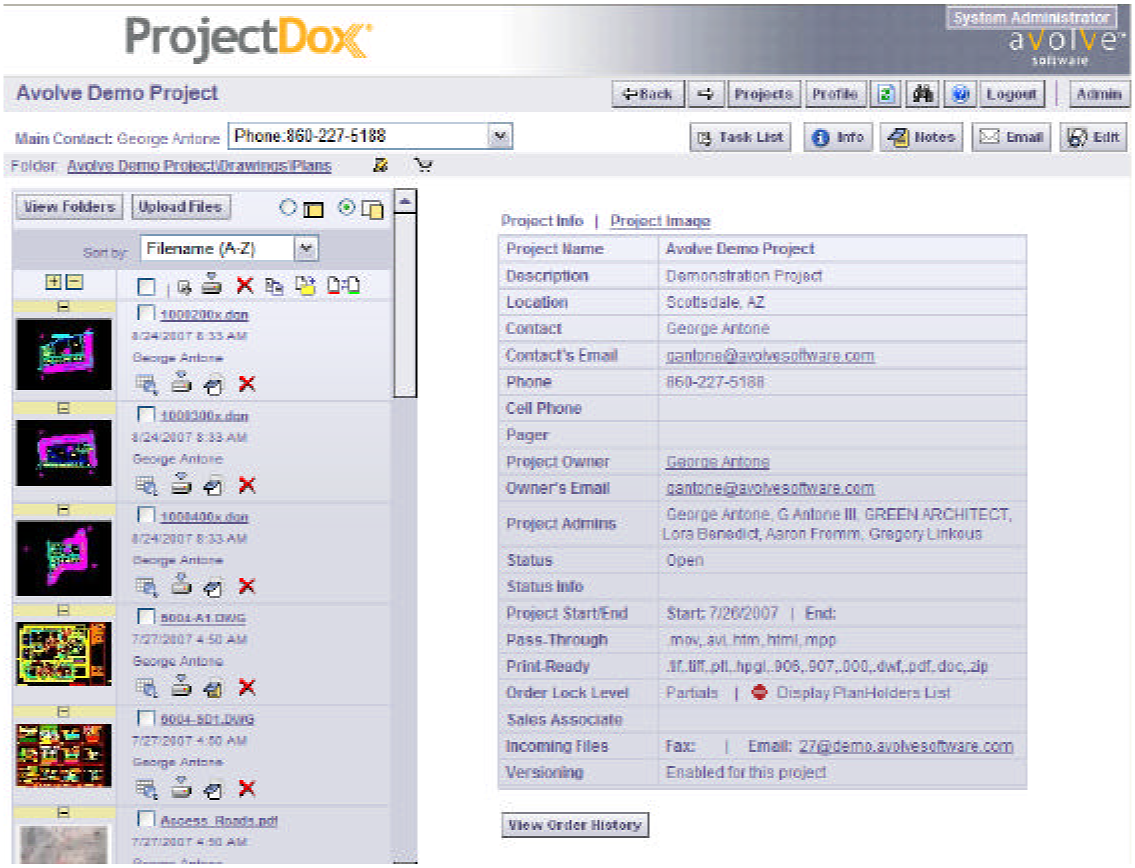
Select a project from the Active Projects list. You will first see the Project information screen, showing any folders you have access to and the overall project information.



Project Administrators (and users if permitted) can add files and folders to the main project folder. Following each folder name are numbers indicating how many files currently exist in the folder and how many of those files are considered to be new. The System Administrator can determine how many days old a file can be to be considered new.

1. Select a folder containing files (you may need to expand parent folders to find a folder with files). The folder list is replaced by thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons display. These icons are discussed under *Working with Files*.

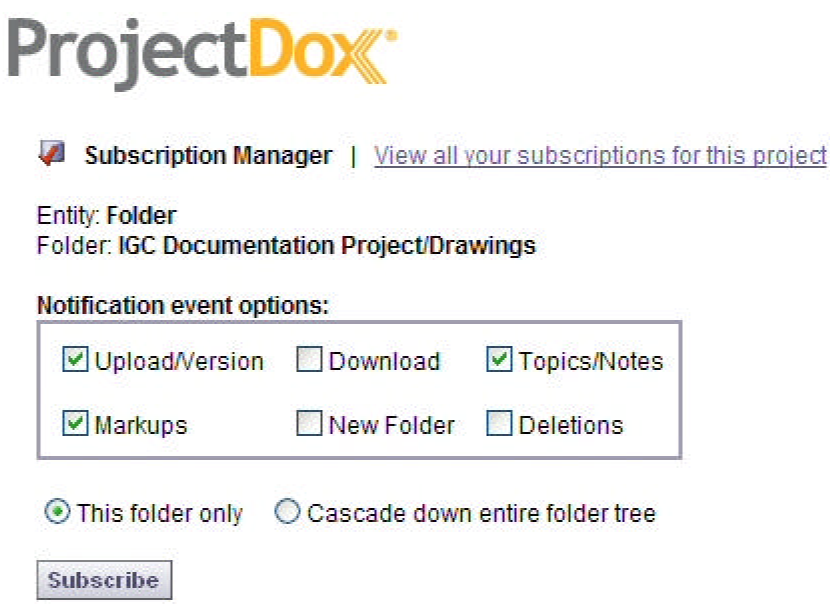
2. To return to the folder view, click the **View Folders** button.



Notification Manager

You can subscribe to individual project folders through the Subscription Manager. Access this through the Notification icon following each folder. If you do not see the icon for each folder, click the Show Notification icon next to the Expand | Collapse links at the top of the folder pane.

1. Click the Notification icon for the folder you wish to subscribe. The Subscription Manager screen displays. To receive notification emails for the entire projects, select the Notification icon for the top folder and make sure you check the option to Cascade down entire folder tree from the Subscription Manager window.



2. Choose your Notification Event preferences. You will receive an email notification each time a selected event occurs for each folder or directory tree you subscribed to.
3. Select the *Cascade down entire folder tree* radio button to subscribe to all subfolders of the current folder.

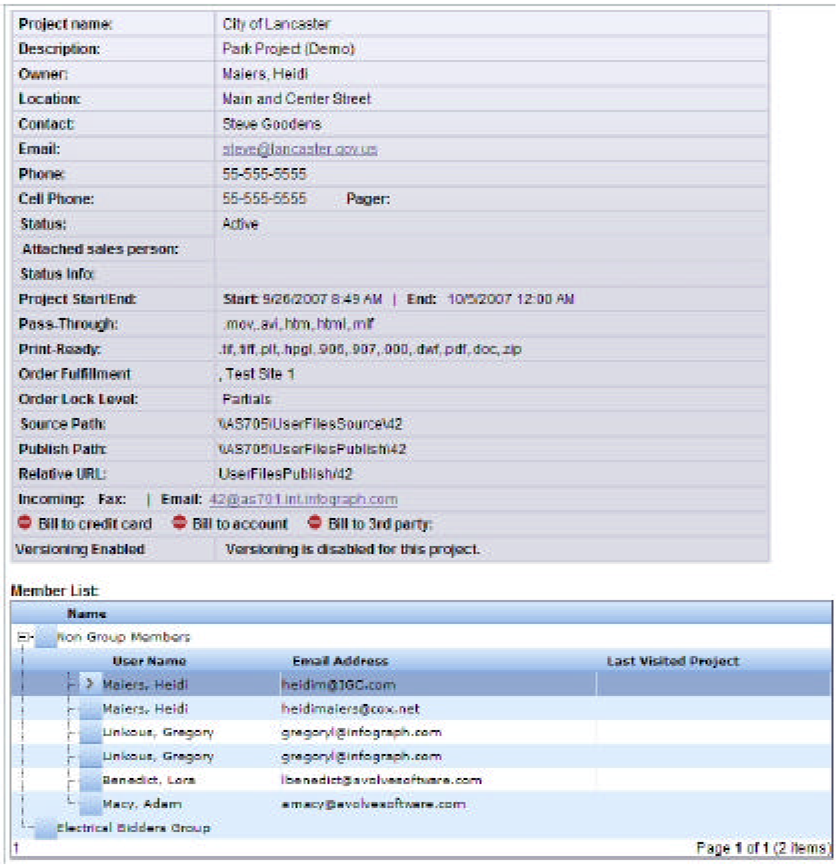
4. Click the **Subscribe** button. Notice that an Update button now appears and Subscribe changes to Unsubscribe.

   The Notification icon changes color when notification has been assigned. If notification cascades on a folder level, a plus sign displays on the icon (shown below). If notification was inherited from a folder up the hierarchy, then a minus sign displays on the folder's icon.

5. To unsubscribe to a folder, click the Notification icon again. In the Subscription Manager screen, click the **Unsubscribe** button.

Project Information

Most project information is displayed in the main project screen (shown above) until a file is selected for viewing. To view the project information at any time and a list of project members and their contact information, click the Project Info button in the user button bar (upper right corner, below the main ProjectDox menu bar).



Project name:	City of Lancaster
Description:	Park Project (Demo)
Owner:	Maiers, Heidi
Location:	Main and Center Street
Contact:	Steve Goodens
Email:	steve@lancaster.gov.us
Phone:	55-555-5555
Cell Phone:	55-555-5555 Pager:
Status:	Active
Attached sales person:	
Status Info:	
Project Start/End:	Start: 9/26/2007 8:49 AM | End: 10/5/2007 12:00 AM
Pass-Through:	.mov,.avi,.htm,.html,.mif
Print-Ready:	.tif,.tiff,.plt,.hpgl,.906,.907,.000,.dwf,.pdf,.doc,.zip
Order Fulfillment:	, Test Site 1
Order Lock Level:	Partials
Source Path:	\\AS705\UserFilesSource\42
Publish Path:	\\AS705\UserFilesPublish\42
Relative URL:	UserFilesPublish/42
Incoming: Fax: | Email: 42@as701.int.infograph.com	
Bill to credit card · Bill to account · Bill to 3rd party:	
Versioning Enabled	Versioning is disabled for this project.

Member List:

Name

Non Group Members

User Name	Email Address	Last Visited Project
Maiers, Heidi	heidim@IGC.com	
Maiers, Heidi	heidimaiers@cox.net	
Linkous, Gregory	gregoryl@infograph.com	
Linkous, Gregory	gregoryl@infograph.com	
Benedict, Lora	lbenedict@avolvesoftware.com	
Macy, Adam	amacy@avolvesoftware.com	

Electrical Bidders Group

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The **Pass-Through** field lists file extensions that are not processed and converted for viewing by ProjectDox.

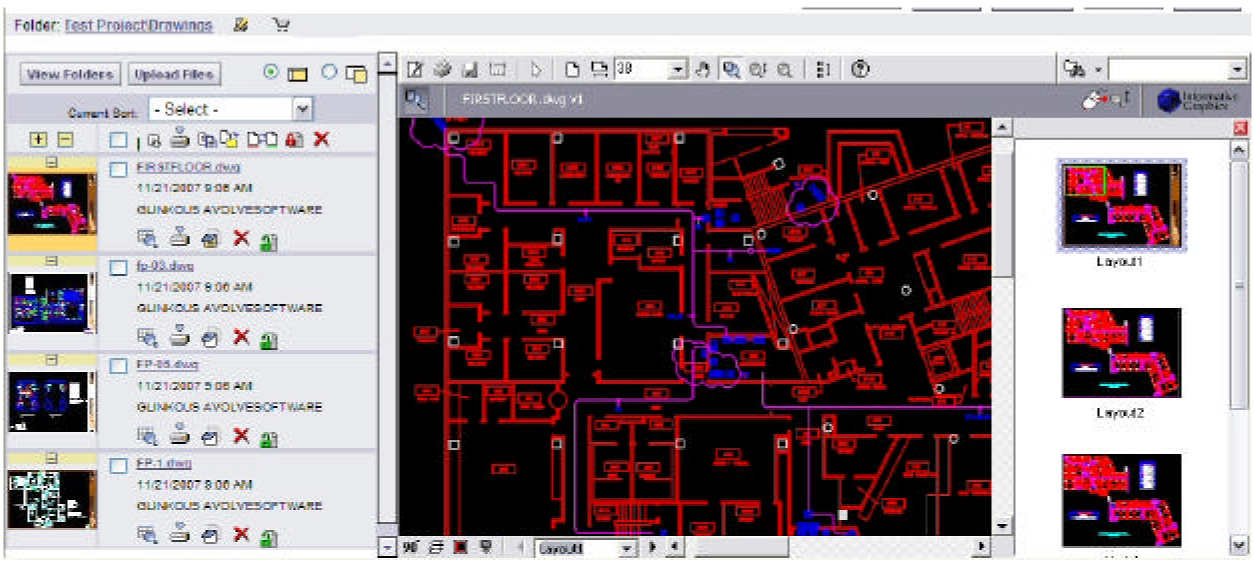
Administrators can define which types of files will be accepted as **Print Ready** (e.g., plt, tiff, pdf, dwf, doc, etc.). Once the allowed types have been defined, only those types of files will be allowed to be uploaded to the Print Ready Folders.

The **Incoming** section shows the fax number for the eFax account (if one has been setup by the System Administrator) and project email address (if one has been established). Faxes sent to the eFax account are automatically sent to the Incoming/Fax folder for the project. Emails sent to the project email account, including any attachments, are stored in the Incoming/Email folder.

Working with Files

View Project Files

To view a project file, simply enter a project folder and click on the file name or thumbnail image. The file will launch in the Brava! viewer.



By default, Brava displays in the right pane of the ProjectDox window. To launch it in a separate browser window, click the radio button above the file list. You can switch it back at any time by clicking the radio button.
You can use the +/- icons to expand and collapse the file information to just display the filename. The top +/- icons control all files, or you can collapse each file individually with its own icon.

For help using the view and markup features of the Brava! viewer, click the help button of the viewer to launch a separate online help window.

Sort Files

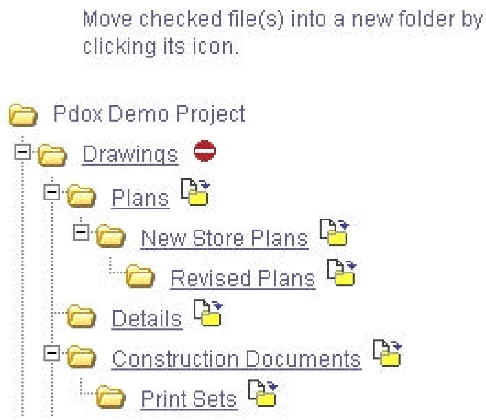
When viewing file list (thumbnails) for a folder, you can quickly sort the order of files by criteria offered in the **Sort By** drop down list. This sort order is only a temporary view and the order will revert back to the default file order set by the project manager. You can expand and collapse each file information panel individually by clicking the +|- sign above each thumbnail image, or you can expand or collapse all file information panels by using the +|- icons below the View Folders button.

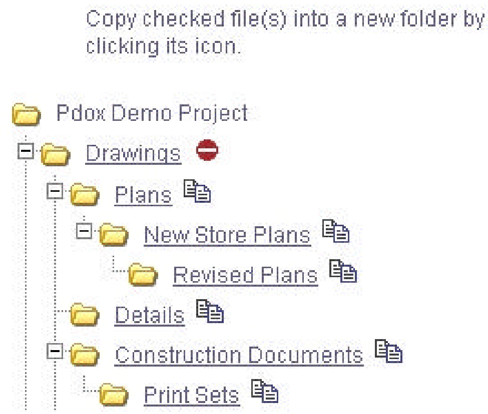
Right-clicking on the thumbnail image will copy a link to the file to the user's clipboard. The link can be pasted into an email message or team mail for quick access to the file. If the user is not currently logged on to ProjectDox when they click on the link then they will first be taken to the ProjectDox logon page.

Move or Copy Files

If you have Project Administrator permissions, you can move and copy files from one project folder to another.

1. From the main project folder view, select the project folder containing files that you want to move or copy into another folder.
2. In the file thumbnails view, select the checkboxes for each file that you want to move or copy to the same folder. You can mark all file check boxes as selected by clicking the toggle all check boxes icon above the thumbnail images.
3. Click the Move Files icon to enter Move Files mode or click the Copy Files icon to enter Copy Files Mode.
4. The folders on the right pane now display the Move Files or Copy Files icon next to each folder name. Click on the Move or Copy Files image beside the folder that you would like to move or copy the selected files to.





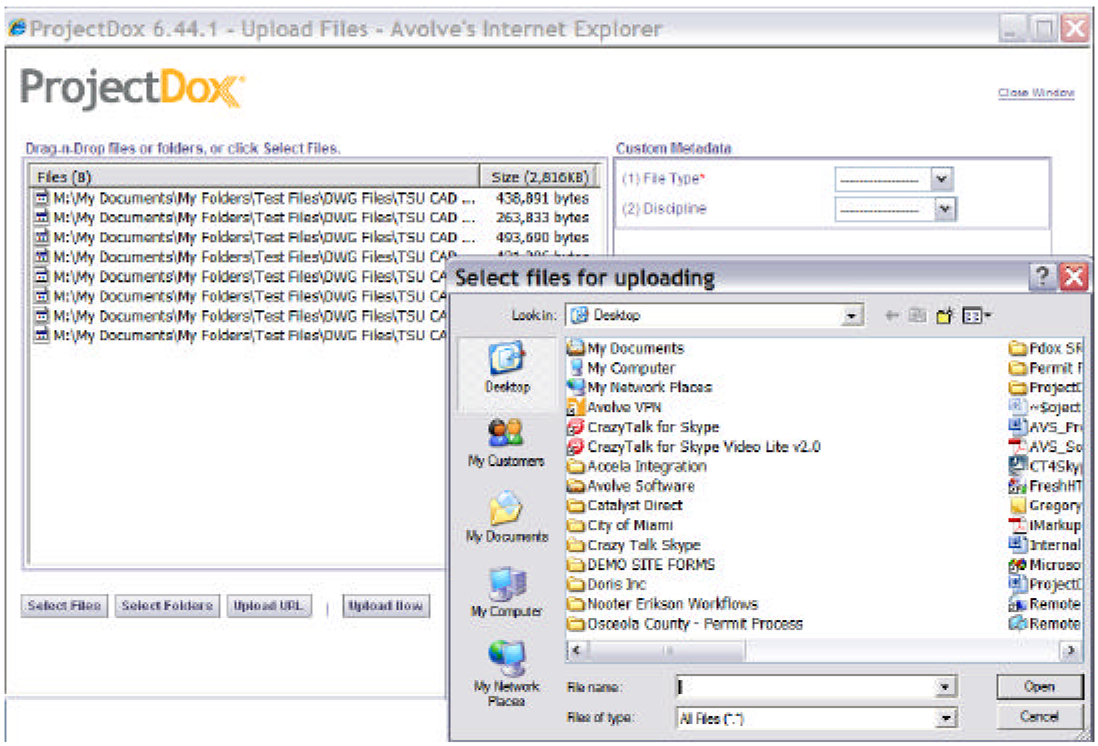
Notes:

- You cannot move or copy a file to a folder displaying the red icon . Folders containing a file with the same name and the originating folder will all display this icon.
- Files contained in any existing Incoming/Email or Incoming/Fax folders can be copied, but not moved.
- Files contained in non-Print Ready folders cannot be copied or moved into folders flagged as Print Ready.
- The Move/Copy function will move or copy all versions of the selected file(s)
- The original dates of all the metadata and markups associated with moved or copied files will remain the same as the original.
- The history of all files moved or copied will be updated with the date and person who moved/copied the file.

Upload Files

You can upload files and folders to any project for which you have been granted Upload privileges. When using the check-out feature, files that have been downloaded and edited can be uploaded as a new version and are automatically checked back in. (Note that Check in/out permissions are only available if upload and download permissions are given to a folder.)

1. Select the folder where you want to upload your file.
2. Click the **Upload Files** button (next to View Folders). You may need to grant permission to install the ActiveX Upload Control. The best practice is to initially click the Install ProjectDox Components link on the login page to install all required ActiveX controls before you begin to work.
3. In the Add Files dialog, browse to and select the files you want to upload to the current folder. You can select multiple files using your Shift or Ctrl keys. The maximum size file name is limited to 70 characters.
4. Click **Add** to move the files into the Files window of the upload screen. **Note**: Once the ActiveX upload control is installed, you can add files by simply opening a Windows Explorer window and using drag and drop to place the selected files into the control window. When using drag and drop to move files, the Add dialog box should be closed.



5. To gather additional files and folders for uploading to the current folder, click the **Select Files** button and continue to add files to the window until you have gathered all that you wish to add.
6. To delete a file, select it then press your **Delete** key.
7. You can add any **Custom Metadata** information from the available fields. The selected metadata will be applied to all files that are being uploaded in this batch

8. Click the **Upload Now** button to transfer the files to the project folder.

> **Note:** When a single CAD file containing Xrefs is uploaded, the Xref files must be uploaded together with the main file. Navigate to the folder where the Xrefs are stored and upload the drawing complete with references. Once all supported files have been uploaded, ProjectDox will publish and display this published file in the project folder as a single file. In addition, the Xrefs or references will also be uploaded as a single file. You can perform a multiple file upload of CAD files containing Xrefs if there are no nested Xref files associated (they will be ignored).

You can also upload a URL to a project folder.

1. Click the **Upload URL** button to upload a URL (up to 255 characters long) to a ProjectDox project folder.
2. Enter the name as you would like it to display in the thumbnails list and then type the full web address (e.g., http://www.avolvesoftware.com) in the URL text field.
3. Click **Upload URL** to complete your URL upload. The Internet document icon  will appear in place of a file thumbnail in the file list.

When you have uploaded all files and URLs, close the Upload Files window and click the **Refresh** button in the main ProjectDox button bar.

Uploading Folders

You can upload a folder and its subfolders files:

1. Click the **Upload Files** button and close the file selection dialog if it displays.
2. Click the **Select Folders** button, below the drag and drop window.
3. Navigate to a folder and select whether to include subfolders in the upload. If you choose both folders and subfolders, all files will be deposited into a single folder and the folder structure is not recreated.

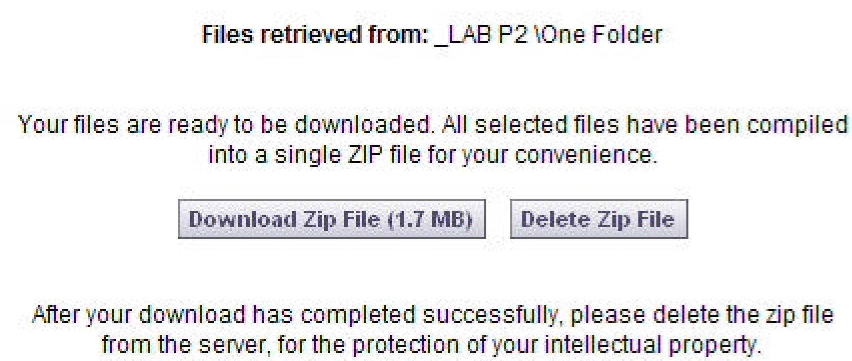
Download Files

If you have download privileges, you can download a source file by clicking the  icon next to the desired file.

Remember that you will need the source application or a viewing utility such as Brava! Desktop installed locally to view the file. To download a group of files, select the check box for each file you wish to download and click the *Download Checked Files* icon at the top of the thumbnails panel.

Clicking the top check box marks all files for the selected action. For example, select the top checkbox and a check will appear in all thumbnail checkboxes. Clicking the Download Checked Files icon will then download all files in that folder (although you can first individually deselect any that you don't want to download).

When selecting multiple files for download, the download itself will transfer as a single .zip which you will need to uncompress. On the right panel, you can view the zip file size and are offered the opportunity to delete the zip package out of the temp folder on the server.

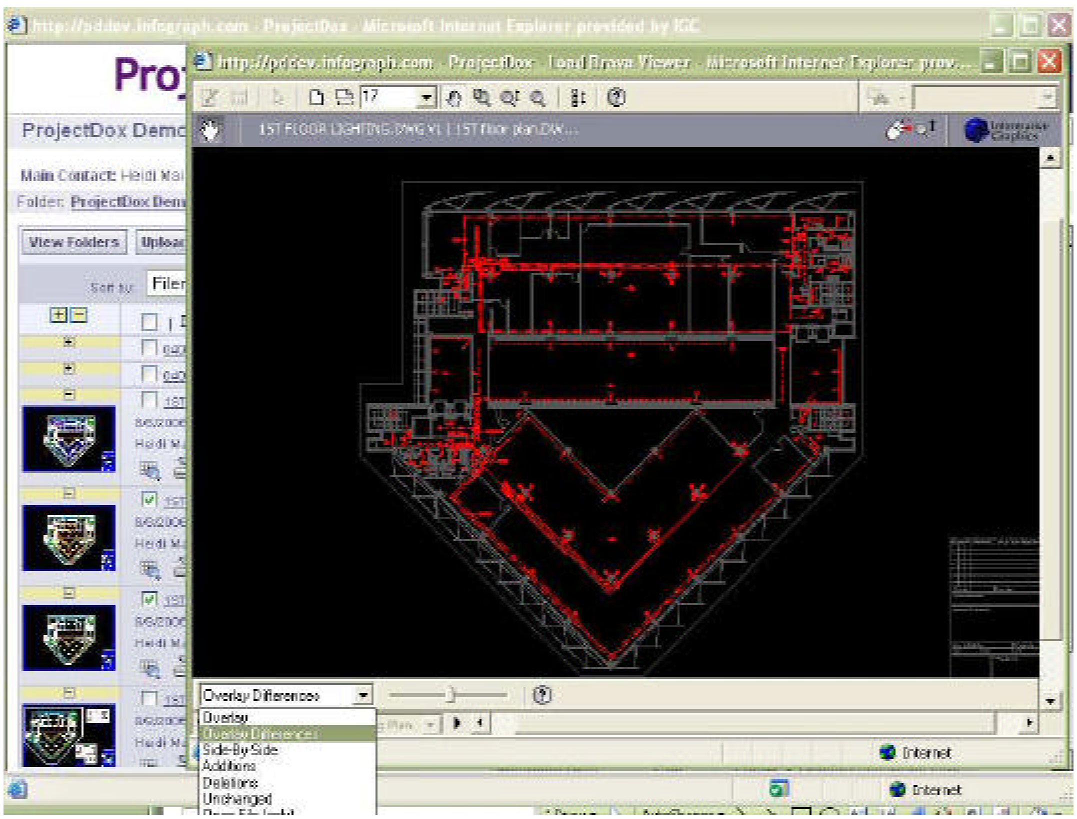


Compare Files

You can select two file versions contained in the thumbnails list and open them for comparison.

1. Select the two files you would like to view in Compare mode and click the Compare button.

2. Brava launches in Compare mode, with side by side as the default view. The files will always display from oldest to newest version, with the oldest in the far left position. Two versions of the files can be compared by overlay, side by side, added or deleted information only, and more from the drop down list of the Compare toolbar. In overlay view, the older file displays in red and the newer file displays in green for easy identification (unchanged areas display in grey). Please view the Brava Enterprise online help file for assistance in using the compare file and the compare alignment tools.



Check out files

One or more files can be checked out in the file thumbnail pane by users who have been granted upload/download permissions.

Once checked out, the files cannot be downloaded or versioned by anyone else except the person who has them checked out. The check out can be un-done by the person who checked out the document, a Project Administrator, or a System Administrator. Only the person who checked out the document, however, can check it back in by uploading a newer version of the document.

To check out/in a single file:

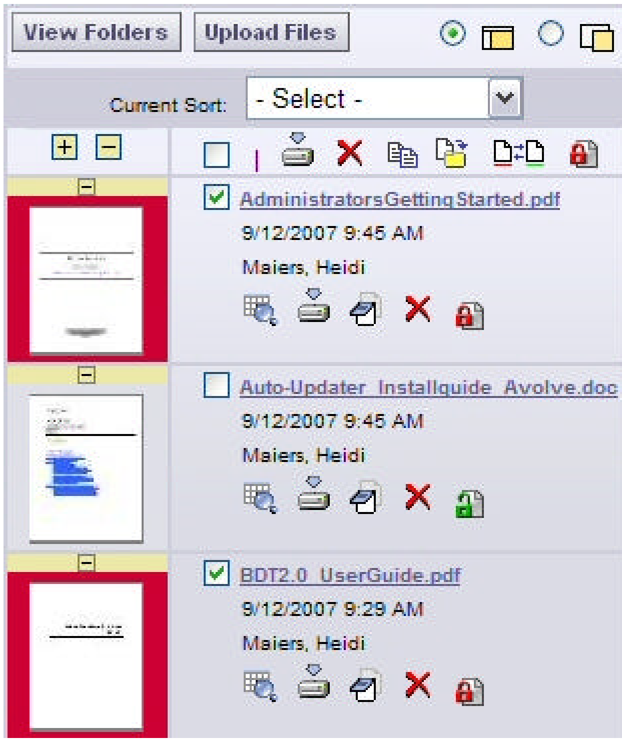
1. Navigate to a project folder that contains the file you want to check out.
2. From the file thumbnail panel, click on the check-out icon for the file.
3. The area around the thumbnail image changes to red and the undo check-out icon is now displayed in the file details area indicating that the file is checked out and locked .
4. Click the download icon to save a copy of the file you just checked out on your machine to make the desired updates.
5. When you have finished editing the document and have saved your changes, click the **Upload Files** button in the file thumbnail panel where you have the file checked out.
6. Browse to the folder where you saved the new version and click the **Upload Now** button. The resulting window displays the file name in blue, indicating that it has been uploaded as a revision of a current document in that folder.
7. When viewing the uploaded file version in the thumbnail panel, the version information displays and the file is automatically checked in (the check-out icon now displays)

To check out/in multiple files:

1. Navigate to a project folder that contains the files you want to check out.
2. In the thumbnail panel, select the check boxes for the specific files.
3. From the top of the panel, click on the icon to check out all selected files. Note that if one or more files you selected are already checked out, clicking this icon will undo the checkout of those files.
4. The area around the checked out thumbnail images changes to red and the locked icon is now displayed in the file details area for each file that is now checked out.

Whenever you see this icon, moving your mouse cursor over the icon (Tool Tip) will show you the name of the person that has the file checked out

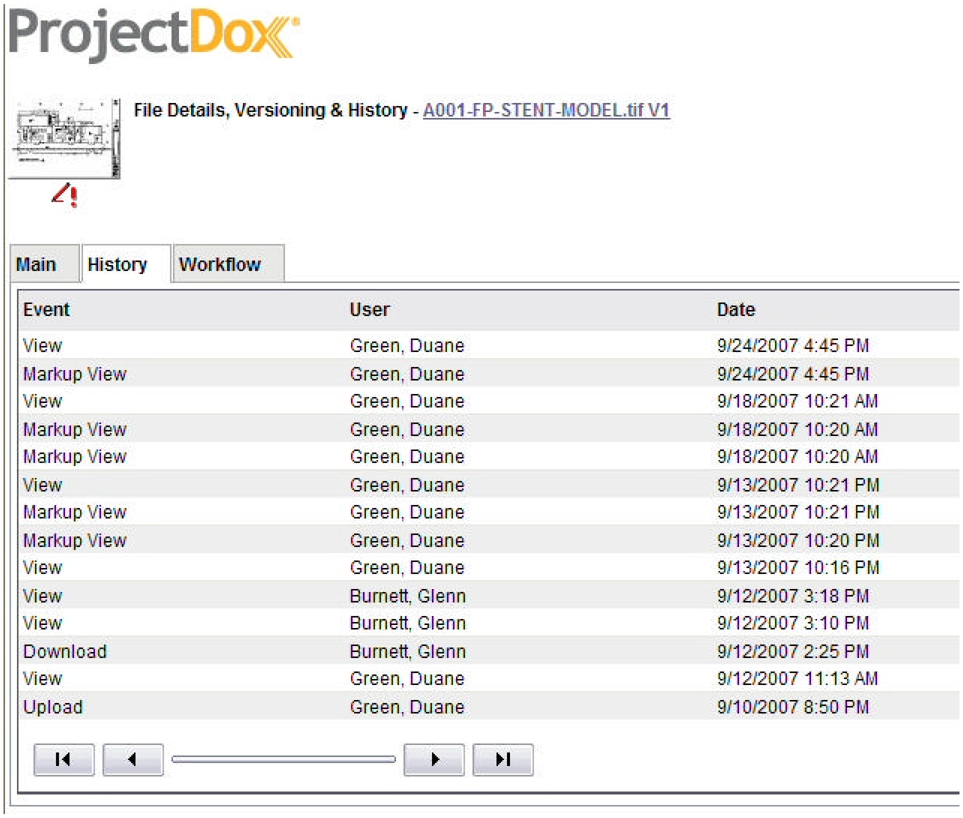
5. Select the check boxes for the specific files you want to download and edit.



6. Click the download icon  to save a copy of the selected files on your machine to make the desired updates.
7. When you have finished editing the documents and have saved your changes, click the **Upload Files** button in the file thumbnail panel where you have the files checked out.
8. Browse to the folder where you saved the new versions and click the **Upload Now** button. The resulting window displays the file names in blue, indicating that each has been uploaded as a revision of a current document in that folder.
9. When viewing the uploaded file version in the thumbnail panel, the version information displays and the file is automatically checked in (the check-out icon  now displays beside each file revision you uploaded).

View File History

The File History icon reveals a document's file details, versioning, and history through three tabs (Main, History, and Workflow).



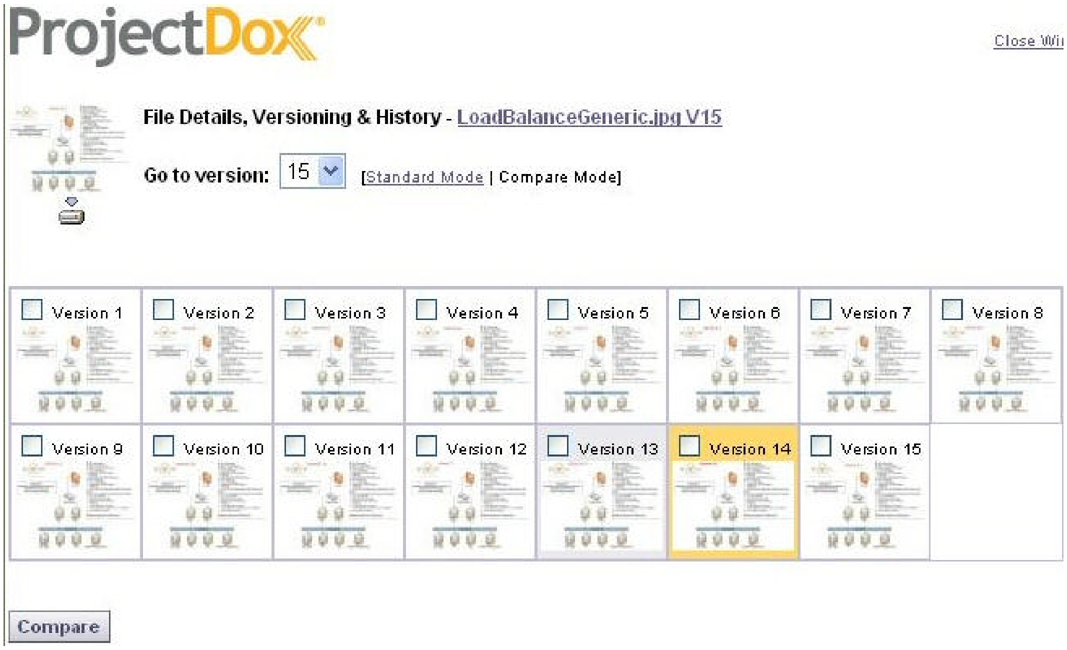
Event	User	Date
View	Green, Duane	9/24/2007 4:45 PM
Markup View	Green, Duane	9/24/2007 4:45 PM
View	Green, Duane	9/18/2007 10:21 AM
Markup View	Green, Duane	9/18/2007 10:20 AM
Markup View	Green, Duane	9/18/2007 10:20 AM
View	Green, Duane	9/13/2007 10:21 PM
Markup View	Green, Duane	9/13/2007 10:21 PM
Markup View	Green, Duane	9/13/2007 10:20 PM
View	Green, Duane	9/13/2007 10:16 PM
View	Burnett, Glenn	9/12/2007 3:18 PM
View	Burnett, Glenn	9/12/2007 3:10 PM
Download	Burnett, Glenn	9/12/2007 2:25 PM
View	Green, Duane	9/12/2007 11:13 AM
Upload	Green, Duane	9/10/2007 8:50 PM

To view a file's history:

1. Click the history icon .
2. The Main, History, and Workflow (if enabled) tabs shows information about the selected file.
3. To view the file history of a specific version's, if more than one version is available, click on the version number from the *Go to Version* selections.
4. The **Main** tab lists the file's details, which are editable by Administrators only.
5. The **History** tab lists all activity for the file including the event (such as viewed, downloaded, markup up, etc.), the name of the user performing the event, and date the event occurred.
6. From the **Workflow** tab, you can click on a Workflow Name to view a detailed history of the workflow package. A workflow is active if a checkmark icon is listed in the Active column. This tab is only present when the Workflow and eForm module is installed.
7. To view the file in the Brava! Viewer, click the thumbnail image contained in the upper left corner of the view history screen (or click the file name link in the Main or History tab). If markups are associated with the file, the markups present icon will be

available above the thumbnail image. You can also download the file to your system if the download icon is present.

8. If multiple versions exist for the file, you can select to view the history tab in Standard or Compare Mode. Click **Compare Mode** to view the available versions as thumbnails. Select the check boxes for two of the versions you would like to compare and click **Compare** to view the two files in Compare mode in Brava Viewer.



View File with Markups

If the markup exists indicator is present, you can launch the file with the desired markup overlaid.

1. Click the markups icon . The View Markup List screen appears showing all associated markups.

2. Click **View** to view the file in Brava! with the markup overlaid for review only.
3. Click **Edit** to view the file in Brava! and open the markup for editing.

Notes

See *Topics and Notes* below.

Delete Files

If you have Delete privileges, you will see the Delete Icon for each file. Click the icon to delete the file, then click **Yes** in the confirmation dialog box. To delete a group of files, select the checkbox for each file you want to delete and click the *Delete Checked Files* icon located at the top of the thumbnails panel. (Note that files that contain markups cannot be deleted, regardless of the delete permission, unless this option has been overridden by an Administrator in *Web.config*)

Topics and Notes

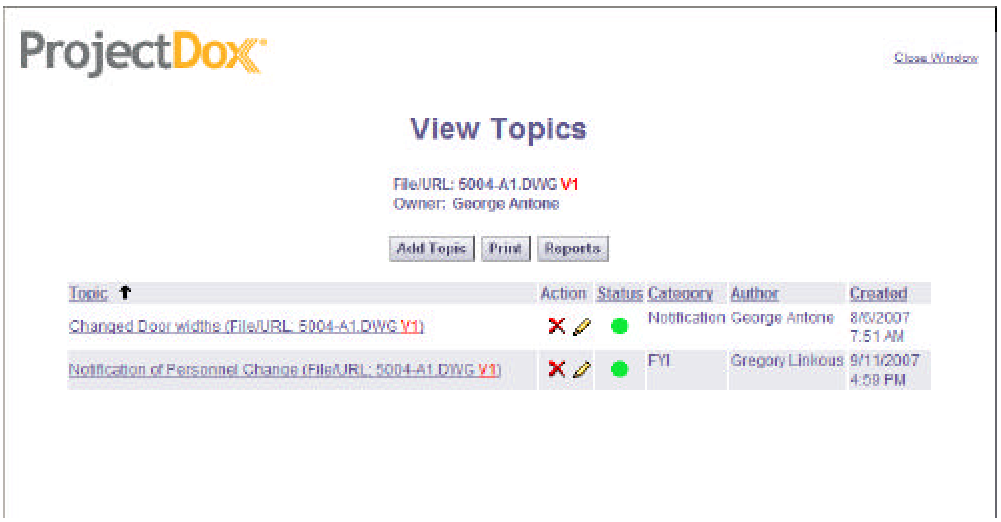
Topics are high level categories for discussion. Notes are additional conversation threads about a particular topic. Topics and Notes exist at both the project and file level, and while they are accessed differently, they are otherwise very similar. We will discuss the file Topics and Notes below, noting differences for project Topics and Notes where applicable.

Topics

You can create or view existing topics and notes for any file in the project, or for the project itself.

1. Rest the mouse pointer over the Topics + Notes icon next to a file thumbnail to see if any notes exist for a file. Find a file with notes.
2. Click the Topics + Notes icon to view the topics. The View Topics screen appears. Notice that the topic names end with (*File:…*) to remind you that you are viewing topics for files, not the project.

Note: To access notes for the project, click the **Notes** button in the User button bar. Topics names at the project level will end with (*Project:…*).



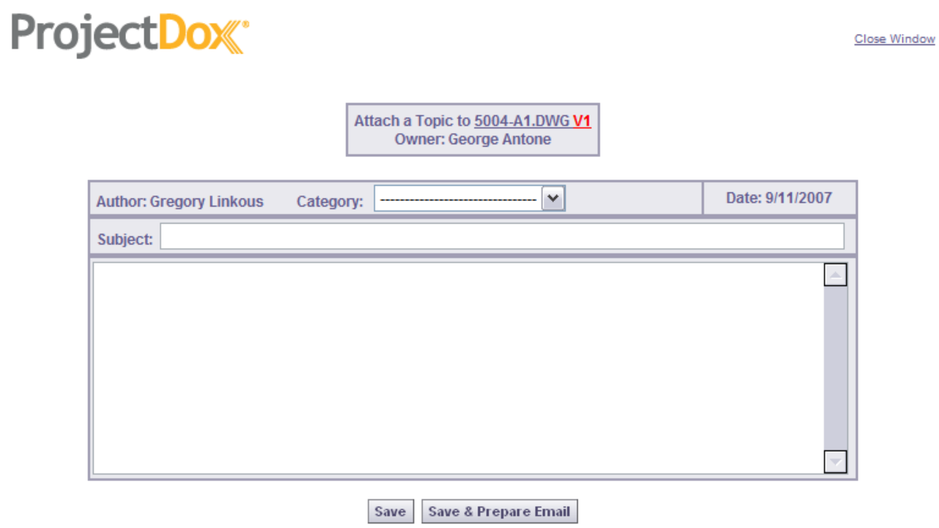
You can edit or delete any topic you created using the Edit icon and Delete icon , respectively. Project and System Administrators can edit or delete any topic. Once a note has been modified, the yellow pencil icon will change to red (see *Edit Notes*).

The Status column indicates whether or not a topic has been closed. The green circle in the Status category indicates that the topic is open and notes can be added or edited. The red circle indicates that the topic is closed, so no notes can be added or edited. A closed topic can be deleted by a user with sufficient permissions.

Topics can be sorted by any column (Topic, Action, Status, Category, and Created date) by clicking on the desired column heading. Clicking on a column header toggles the topics from ascending to descending based on the contents of the column selected.

Add a Topic

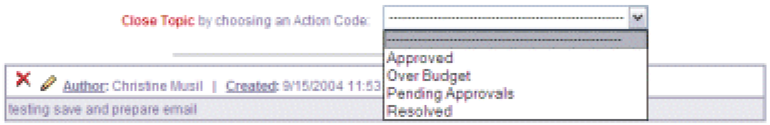
1. In the View Topics screen, click the **Add Topic** button. The Add Topic screen displays.



2. Choose a Category for the topic. Topic Categories are created and maintained by the System Administrator.
3. Enter a subject (or title) for the topic and a description.
4. Click the **Save** button to save the topic and close the window. Use the **Save and Prepare Email** to save and close the topic and open a new TeamMail (see *TeamMail*). This also places a copy in the project's Incoming/Email folder.

Close a Topic

1. In the View Chosen Topic and Notes screen, expand the **Close Topic** drop-down.



2. Select an Action Code from the list. A confirmation dialog will appear warning that the topic will be permanently closed. This action cannot be undone.

3. Click **OK**.

Topic Reports

From the View Topics screen, you can view and generate reports for project and file level topics and notes.

1. Click the **Reports** button and select an available report from the drop-down list.

2. Select a report:

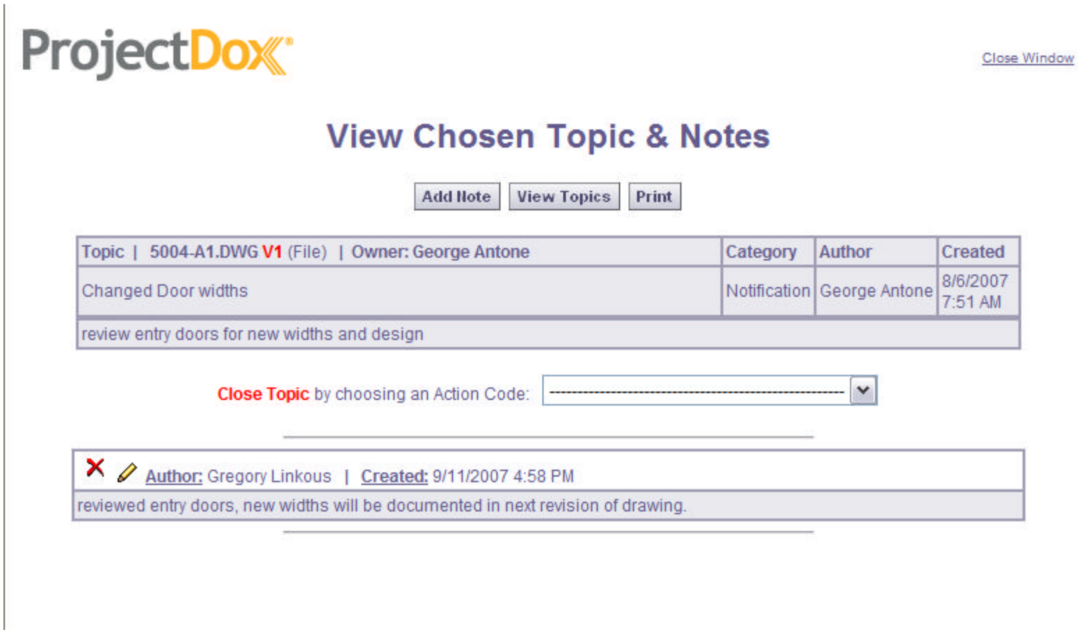
    - a single file contained in a project
    - all files contained in a project (exclude project level topics and notes)
    - project level only (exclude file level topics and notes)
    - both project level and file level topics and notes (all)

3. Click **Go** to view the report on screen.

4. Click the **Print Report** button to print the report, if desired.

Notes

In the View Topics screen, click a topic name to view more information on that topic and any associated notes. The View Chosen Topic & Notes screen appears.

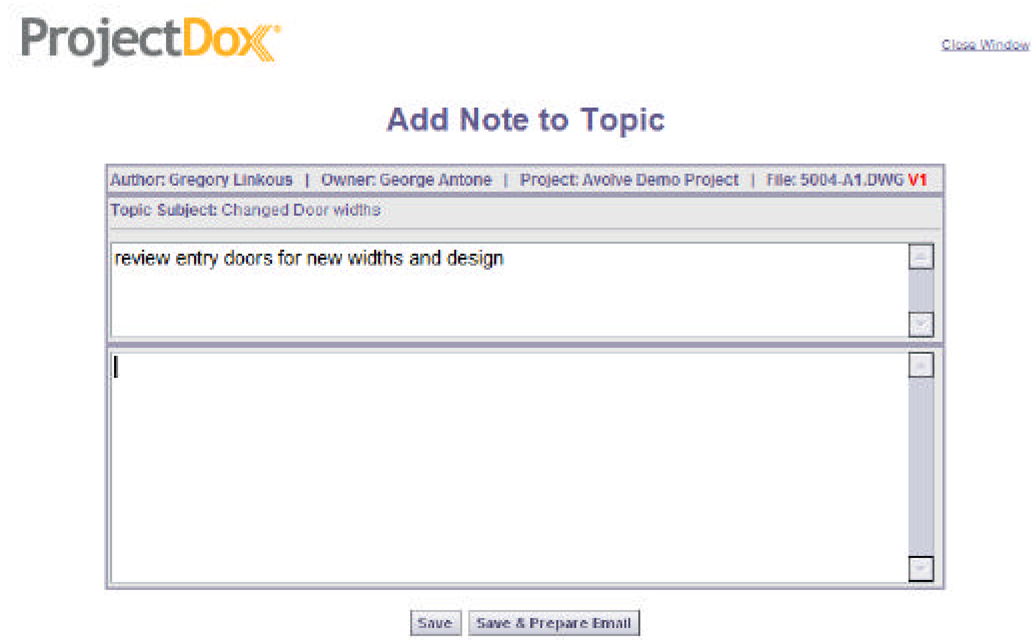


At the View Chosen Topic & Notes screen, you can review notes, edit and delete your notes (Project and System Administrators can edit and delete any notes), add a new note, close the topic, or print the current screen.

Click the **View Topics** button to return to the View Topics screen.

Add Note

1. In the View Topics & Notes screen, click the **Add Note** button. The Add Note to Topic screen displays.



2. Type the note message in the bottom scrolling window.

3. Click the **Save** button to save the note and close the window. Use the **Save and Prepare Email** to save and close the note and open a new TeamMail (see *TeamMail*). This also places a copy in the project's Incoming/Email folder.

TeamMail

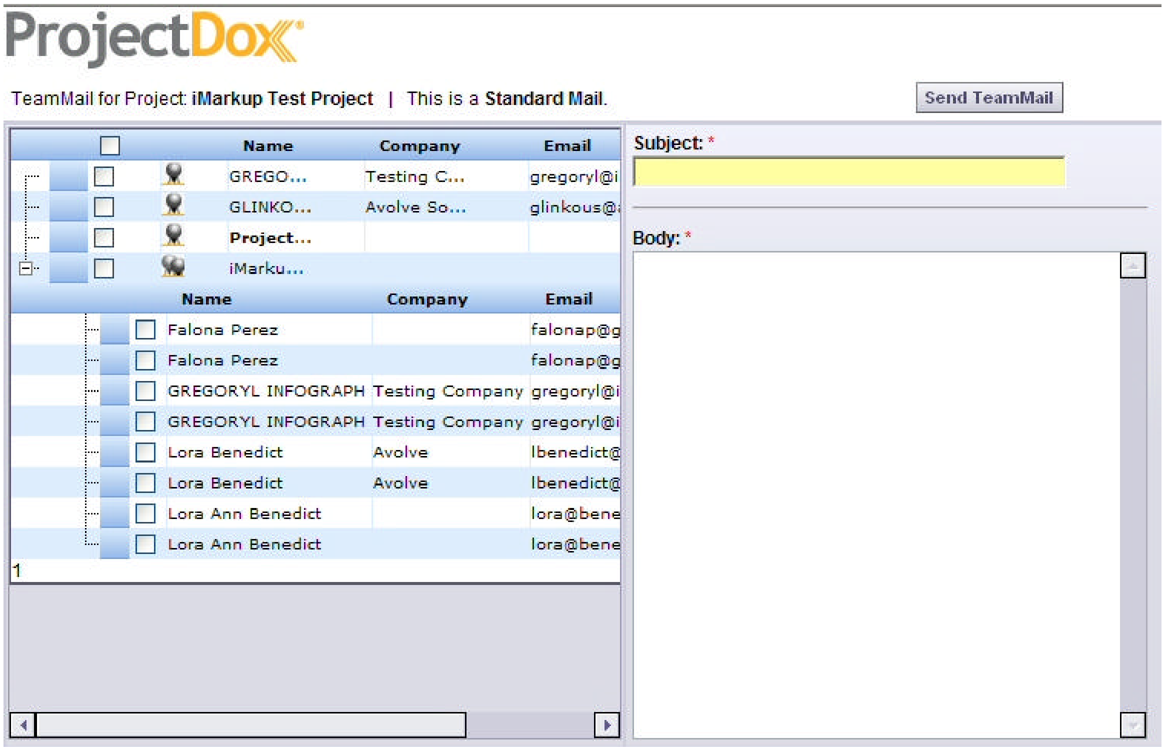
TeamMail is a convenient way to send team members updates and messages quickly. You can access TeamMail from several places in ProjectDox.

1. In the User button bar, click the TeamMail button. The TeamMail screen appears.

2. Select the All link (above the checkboxes) to select all members. You can then deselect any individually. Select All again to clear all checkboxes.

3. Enter a Subject and message.

4. Click Send TeamMail to send your message.



You can also access TeamMail from the Edit Topic, Edit Note, Add Topic, and Add Note screens by clicking Save and Prepare Email. The Subject and Message fields will be automatically populated. You can also access TeamMail by clicking the mail icon, such as at the top of the Project Info screen.

Select the checkbox for the Team Member or Project Group that you would like to send the TeamMail to. You can choose to select an entire group, or expand the Project group to reveal and select individual members.

Select the checkbox at the top of the form to select all team members and groups. Note that members of a Private Group will not show in the TeamMail list, but selecting the Private Group's checkbox will send the email to its members.

TeamMail is automatically sent to the project's Incoming/Email folder (if project email is enabled).

