



Electronic Plan Solutions

---

**Using ProjectDox® 8.1  
End-User Training Reference Guide**



4835 East Cactus Road Suite 420  
Scottsdale, Arizona 85252  
Phone: 602.714.9774  
[www.avolvesoftware.com](http://www.avolvesoftware.com)

## Contents

<b>About this Guide .....</b>	<b>4</b>
<b>Audience.....</b>	<b>4</b>
<b>1 USER'S REFERENCE GUIDE.....</b>	<b>5</b>
<b>1.1 ProjectDox® Introduction.....</b>	<b>5</b>
<b>1.2 ProjectDox User Requirements.....</b>	<b>7</b>
1.2.1 Disable Popup Blockers .....	7
1.2.2 Disable Vista UAC.....	7
1.2.3 MSI Requirements .....	8
1.2.4 Add as Trusted Site.....	8
<b>1.3 Logging in.....</b>	<b>9</b>
<b>1.4 User Screens .....</b>	<b>12</b>
1.4.1 Notification Manager .....	14
<b>1.5 Working with Files .....</b>	<b>16</b>
1.5.1 View Project Files .....	16
1.5.2 Sort Files.....	17
1.5.3 Move or Copy Files .....	18
1.5.4 Upload Files .....	19
1.5.5 Download Files and Metadata.....	23
1.5.6 Compare Files.....	25
1.5.7 Check out files .....	25
1.5.8 View File History .....	27
1.5.9 View File with Markups .....	29
1.5.10 Delete Files .....	30
<b>1.6 Batch Stamp and Batch Publish Files .....</b>	<b>30</b>
1.6.1 About .....	30
1.6.2 Usage .....	31
1.6.3 Creating and Saving Stamp Templates:.....	31

1.6.4	Multiple Project Batch Stamping Notes: .....	33
1.6.5	Creating Stamps: .....	34
1.6.6	Creating Stamp Templates with Brava .....	35
<b>1.7</b>	<b>Topics and Notes .....</b>	<b>37</b>
1.7.1	Topics .....	37
1.7.2	Notes .....	40
<b>1.8</b>	<b>Team Mail.....</b>	<b>42</b>
<b>1.9</b>	<b>Searching in ProjectDox.....</b>	<b>44</b>
1.9.1	Lucene Index Search .....	46
<b>1.10</b>	<b>eCodes Integration.....</b>	<b>48</b>
<b>1.11</b>	<b>Dual Workflow .....</b>	<b>48</b>

## **About this Guide**

This guide provides information to help end users leverage the features and functionality offered by the ProjectDox solution. The information contained within this document is accurate at the date of publication. Technical information is dynamic so please also reference the documentation shipped with the product.

## **Audience**

This guide is designed for individuals using the ProjectDox end-user web interface. Advanced technical knowledge is not needed to effectively use this information guide.

# 1 User's Reference Guide

## 1.1 ProjectDox® Introduction

Thank you for selecting Avolve Software and our ProjectDox® project information management solution. ProjectDox gives your project team members the freedom to organize and collaborate as a community, so that you can manage critical project information easily and better than ever before.

By using ProjectDox to create online, virtual project workspaces, you enable people from many different locations, disciplines and schedules to share the same information at the same time facilitating communication and higher productivity.

Here's what ProjectDox does to enable online project information management:

- All the shared project information (documents, drawings, 3D models, annotations, project email, discussion threads, faxes) is centralized in one location so it becomes visible, accessible and usable by everyone who needs it
- The friendly user-interface make it easy for users at all technical skill levels to leverage the "power tools" in ProjectDox
- Permissions and roles-based security restrictions are configured and applied so that only appropriate personnel have access to project information, as well as subsets of that information
- Using electronic Workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and force accountability within a given process
- ProjectDox enables multiple-user access to the same information at the same time, managing every session to keep document versions organized properly
- Automation features make sure that when activity takes place in the workspace, those who need the updated information are informed immediately
- Tools for interacting with information, such as view and markups, online discussions, and group email make interacting with information timely, meaningful and productive for the whole team
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, email, annotations and markups, workflows and forms, access and egress, plus much more

In summary, ProjectDox web-enabled collaboration empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, conventional means.

**Quick Reference Table**

Project icons		Folder Icons		File Icons		Reprographics Icons	
	Revoke permissions		Delete Folder		Delete File		Add item to Cart
 	Project Topics/Notes Exist. Project Topics/Notes don't Exist.		Find Topic or Note in Folder	 	Topics/Notes Exist. Topics/Notes don't Exist.		View/Print Shipping label
	Edit Project	 	View File or Folder History		View File in Separate Window		Ordering not allowed
	View Project information		Add New Folder		View File in Pane		View Cart
 	Send TeamMail to project or Single user		Rename Folder		Markup Exists for this File	 	Order Pending Ready to Ship
	Display calendar – Click to select date		View or Manage Folder Permissions		Download File	<b>Administration Icons</b>	
	ProjectDox Help		Subscribe to this Folder for email Notification	 	Move File(s) Copy File(s)		View or Edit User Permissions
	Refresh Page		Currently Subscribed to this Folder		Start Workflow against file		Edit Workflow Definitions
	Topic Open		Inherit parent permissions		Compare files		Setting not editable or closed
	Edit Topic		Arrange sort order	 	Check-In File Check-Out File		
 	User logged in Not logged in	 	Subscribed to a folder/ subfolders	 	Copy internal/external markup link to Clipboard		
					Edit selected file metadata		
					Batch Stamp selected files		

## 1.2 ProjectDox User Requirements

This section will cover the configuration requirements that need to be met on Client machines in order for end-users to be able to view files from within ProjectDox.

### 1.2.1 Disable Popup Blockers

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).

### 1.2.2 Disable Vista UAC

With Vista, the User Account Control (UAC), depending on the User's Permission level and rights, may prevent the user from being able to perform some functions with the ProjectDox Brava! Enterprise Client:

- During installation, UAC (if on) can prevent the Brava Client from being installed as UAC blocks the user's ability to write files being downloaded by the browser (Internet Explorer).
- With the Brava Viewer installed, UAC (if on) can prevent the Brava Viewer from saving/writing files to the local file system.
- During Brava's client side loading/processing, UAC (if on) can prevent Brava's client side loading/processing by preventing the Brava Viewer from writing the temporary output CDL files to the user's temp directory.

#### To turn off UAC:

1. From the Control Panel, open **User Accounts**.
2. Click the "Turn User Account Control on or off" link.
3. In the "Turn on User Account Control (UAC) to make your computer more secure" options screen, un-check "Use User Account Control (UAC) to help protect your computer" check box.
4. Click "OK" and restart the system.

**Note:** The User's permissions level/rights will affect how the UAC works.

### 1.2.3 MSI Requirements

The MSI installer for the ActiveXcontrols can be pushed to the clients by the Network Administrator. *ProjectDoxComponents.msi* is located in `.\ProjectDox\Resources\ClientComponents\en` and can be distributed using your corporate standard process.

The link to this MSI file is available from the login screen or the network administrator can determine how the MSI can be launched for his group.

**Windows7 Specific note:** If your administrator is pushing the ProjectDox Components MSI to your machine, they must add your customer specific URL to the IE trusted sites in their script.

### 1.2.4 Add as Trusted Site

#### Internet Explore Security settings:

- Provided the user has the underlying permissions and rights, the Brava Viewer may install without an administrator deploying the Brava Client MSI install package.
- Add the site to the trusted site list as described in the following section.
- On the Trusted Sites Security level settings, set the **Zone** to Medium or Lower (assuming you're using the default settings for the zone).
- Make sure the *Enable Protected Mode* is not checked.
- Select OK in the *Internet Options Control Panel* and restart IE
- Access the ProjectDox website and attempt to open the file using Brava. The Brava Viewer should now install.

#### Adding ProjectDox as a Trusted Site:

You will need to set your browser security setting to a minimum level that allows certain ProjectDox technologies to function. There are two ways to achieve this. The easiest is to add the ProjectDox site to the list of Trusted Sites of your Internet browser. For IE, follow the steps below:

1. Click on the **Tools** menu and select **Internet Options**
2. In the Internet Options dialog box, click the **Security** tab
3. In the Security tab, click the **Trusted Sites** icon and then the **Sites...** button

4. Type in the main URL for the site you are trying to view, for example:  
`http://www.avolvesoftware.com`
5. Click the **Add** button to add the site to the list.
6. Close all open dialogs by clicking OK.

The second option is to enable only the needed technologies without marking the entire site as trusted. Based on the Default Security Level as "High" in Internet Explorer, follow these steps:

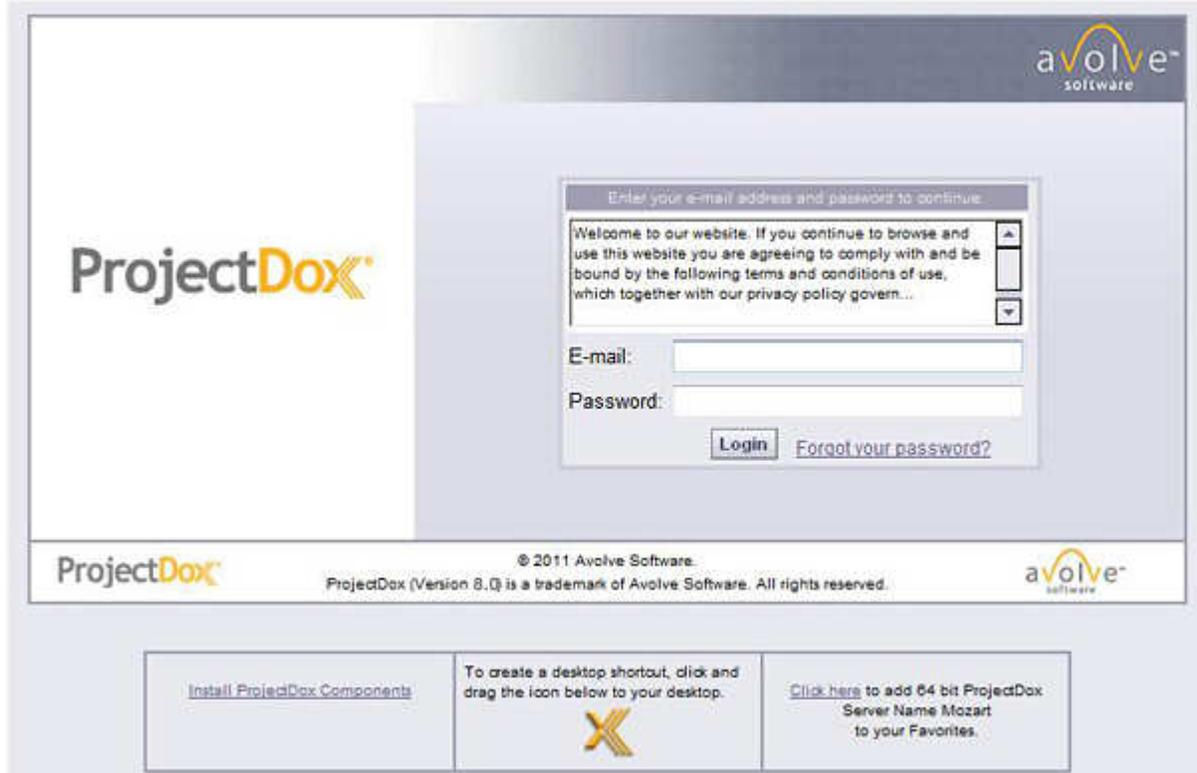
1. Click on the **Tools** menu and choose **Internet Options**.
2. In the Internet Options dialog box, click the **Security** tab.
3. In the Security tab, click the **Internet** icon. If the web site is on your Intranet, click the **Local Intranet** icon instead.
4. Click on the **Custom Level...** button.
5. In the **Security Settings** option list, enable the following options:
  - Run components signed with Authenticode
  - Download signed ActiveX controls
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls marked safe for scripting
  - File download
  - Active scripting
6. Click the OK buttons to close the settings dialogs. Restarting IE is not necessary.

The "Download signed ActiveX controls" option is only needed for the first visit to the site. If so desired, it can be disabled again after the viewer has automatically installed on the first view of a document on the site. The "File download" option only needs to be enabled, if the web site offers downloading of original documents.

### 1.3 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.
  4. 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.

Settings for **Heidi Maiers** (heidim@info-graph.com)

**Change Password:**

Current password:   
 New password:   
 Confirm new password:

**Password Reset Question & Answer:**

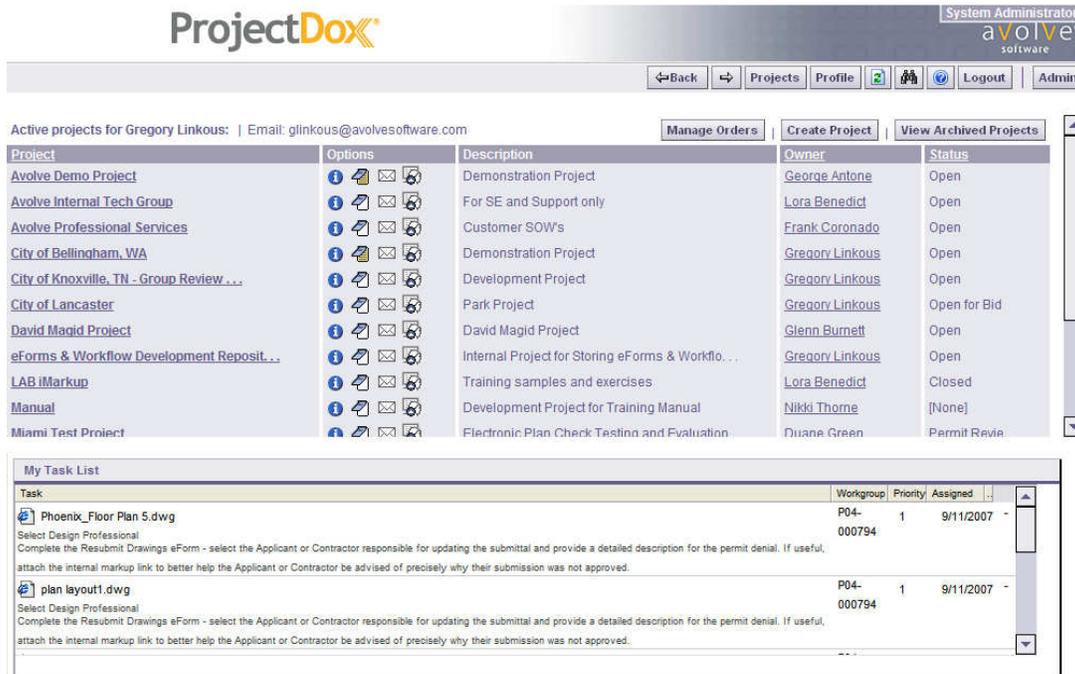
Security question:   
 Security answer:

*Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 10 characters*

**Profile Information**

Contact Information	User Metadata	Project Membership	Group Membership
<input type="button" value="Save"/>			
<b>* Required field</b>			
First Name: *	<input type="text" value="Heidi"/>	Last Name: *	<input type="text" value="Maiers"/>
Email: *	<input type="text" value="heidim@avolvesoftware.com"/>	<input checked="" type="checkbox"/>	HTML format 
Title:	<input type="text" value="Tech writer"/>		
Company:	<input type="text" value="IGC"/>		
Address 1:	<input type="text" value="Cactus road"/>		
Address 2:	<input type="text"/>		
City:	<input type="text" value="scottsdale"/>		
State/Province:	<input type="text" value="AZ"/>	Postal Code:	<input type="text" value="85254"/>
Phone:	<input type="text" value="6029716061"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/> 		
Language: *	<input type="text" value="en"/>		

- When you have successfully logged into ProjectDox, the **Projects** screen displays. 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 a Workflow option enabled only).



The screenshot shows the ProjectDox software interface. At the top, there is a navigation bar with buttons for Back, Projects, Profile, Logout, and Admin. Below this, the user is identified as Gregory Linkous with the email glinkous@avolvesoftware.com. The main area displays a table of active projects with columns for Project, Options, Description, Owner, and Status. Below the project list is a 'My Task List' section showing tasks like 'Phoenix\_Floor Plan 5.dwg' and 'plan layout1.dwg' with details on workgroup, priority, and assigned dates.

Project	Options	Description	Owner	Status
<a href="#">Avolve Demo Project</a>	[Info] [Edit] [Mail] [Share]	Demonstration Project	<a href="#">George Antone</a>	Open
<a href="#">Avolve Internal Tech Group</a>	[Info] [Edit] [Mail] [Share]	For SE and Support only	<a href="#">Lora Benedict</a>	Open
<a href="#">Avolve Professional Services</a>	[Info] [Edit] [Mail] [Share]	Customer SOW's	<a href="#">Frank Coronado</a>	Open
<a href="#">City of Bellingham, WA</a>	[Info] [Edit] [Mail] [Share]	Demonstration Project	<a href="#">Gregory Linkous</a>	Open
<a href="#">City of Knoxville, TN - Group Review ...</a>	[Info] [Edit] [Mail] [Share]	Development Project	<a href="#">Gregory Linkous</a>	Open
<a href="#">City of Lancaster</a>	[Info] [Edit] [Mail] [Share]	Park Project	<a href="#">Gregory Linkous</a>	Open for Bid
<a href="#">David Magid Project</a>	[Info] [Edit] [Mail] [Share]	David Magid Project	<a href="#">Glenn Burnett</a>	Open
<a href="#">eForms &amp; Workflow Development Reposit...</a>	[Info] [Edit] [Mail] [Share]	Internal Project for Storing eForms & Workflo...	<a href="#">Gregory Linkous</a>	Open
<a href="#">LAB iMarkup</a>	[Info] [Edit] [Mail] [Share]	Training samples and exercises	<a href="#">Lora Benedict</a>	Closed
<a href="#">Manual</a>	[Info] [Edit] [Mail] [Share]	Development Project for Training Manual	<a href="#">Nikki Thome</a>	[None]
<a href="#">Miami Test Project</a>	[Info] [Edit] [Mail] [Share]	Electronic Plan Check Testing and Evaluation	<a href="#">Diana Green</a>	Permit Review

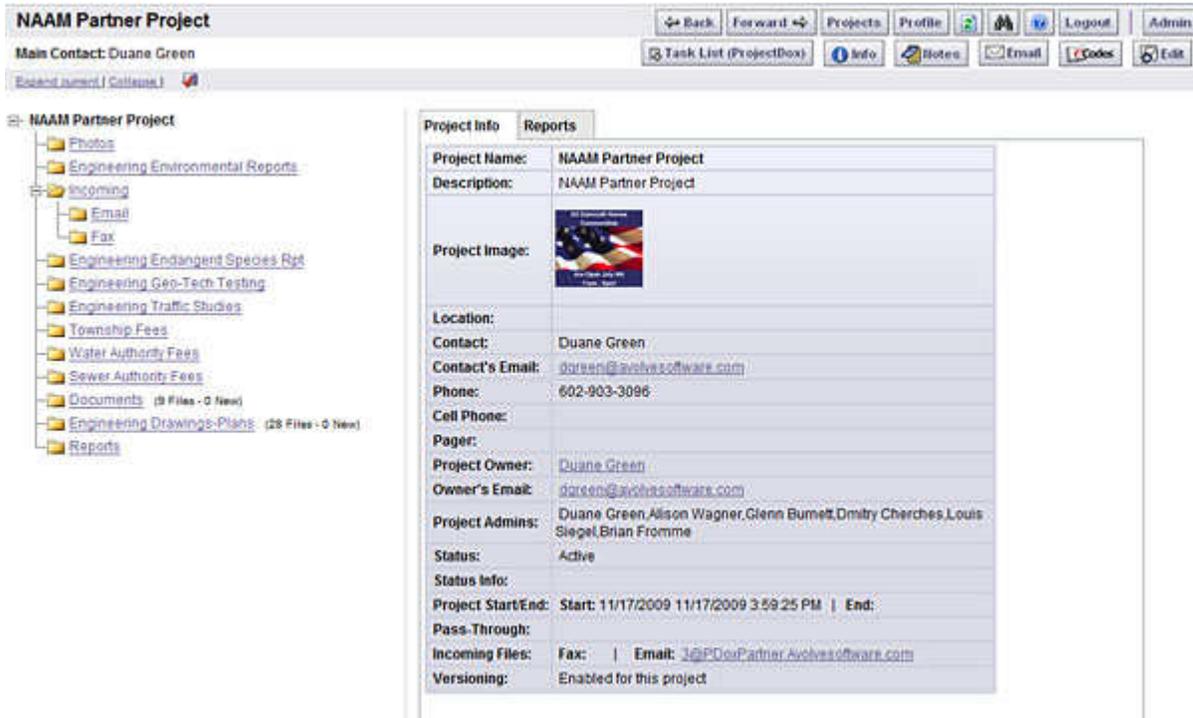
Task	Workgroup	Priority	Assigned
<a href="#">Phoenix_Floor Plan 5.dwg</a> Select Design Professional Complete the Resubmit Drawings eForm - select the Applicant or Contractor responsible for updating the submittal and provide a detailed description for the permit denial. If useful, attach the internal markup link to better help the Applicant or Contractor be advised of precisely why their submission was not approved.	P04-000794	1	9/11/2007
<a href="#">plan layout1.dwg</a> Select Design Professional Complete the Resubmit Drawings eForm - select the Applicant or Contractor responsible for updating the submittal and provide a detailed description for the permit denial. If useful, attach the internal markup link to better help the Applicant or Contractor be advised of precisely why their submission was not approved.	P04-000794	1	9/11/2007

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

**Note:** The edit project icon  is available only if you have *Invite*, *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.

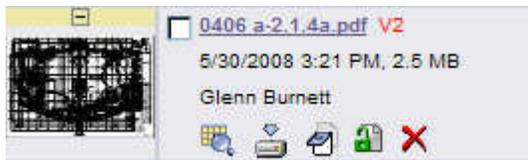
## 1.4 User Screens

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. Most project information is displayed in the main project screen until a file is selected for viewing.

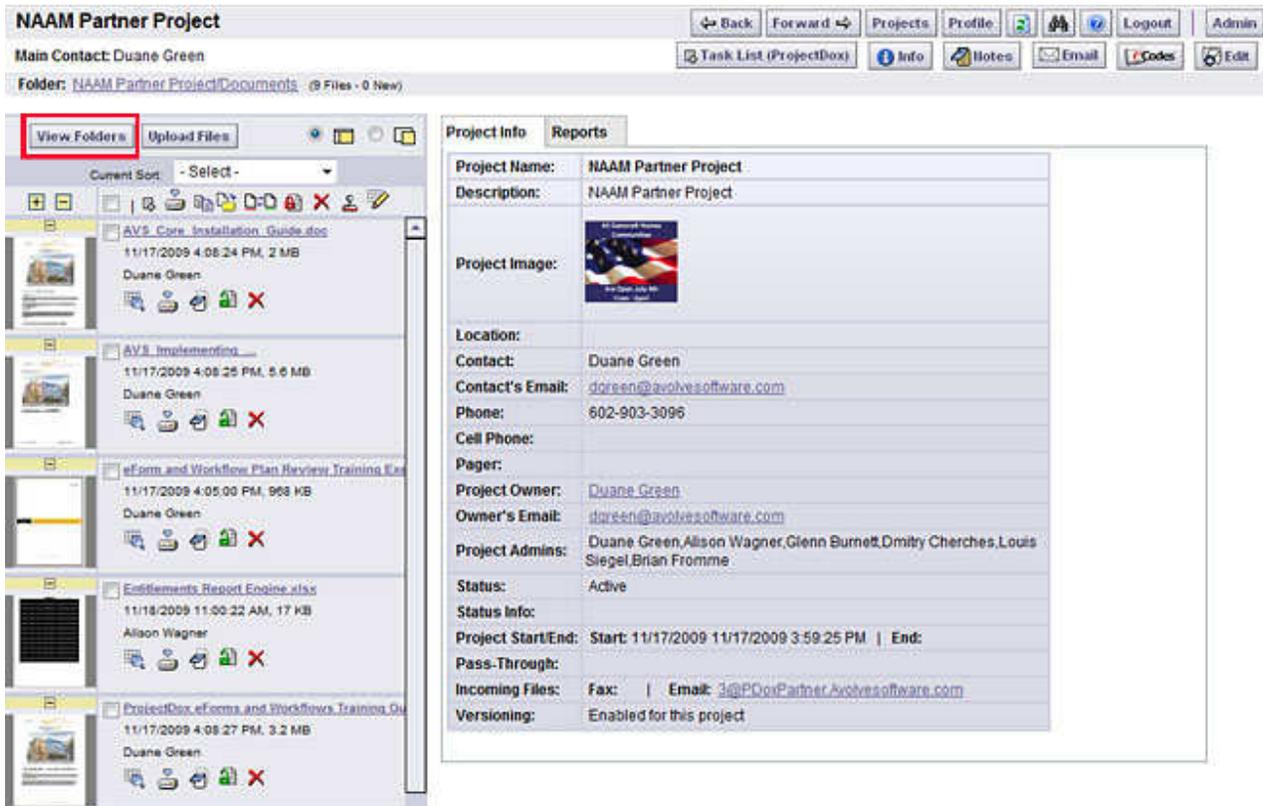


Project Administrators (and users if permitted) can add files and folders to the main project folder. Following each folder name are numbers indicating how many files currently exist in the folder and how many of those files are considered to be new. The System Administrator can determine how many days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



**NAAM Partner Project**

Main Contact: Duane Green

Folder: NAAM Partner Project/Documents (9 Files - 0 New)

**View Folders** | Upload Files

Current Sort: - Select -

AVS\_Core\_Installation\_Guide.doc  
11/17/2009 4:08:24 PM, 2 MB  
Duane Green

AVS\_Implementation...  
11/17/2009 4:08:25 PM, 5.6 MB  
Duane Green

eForm\_and\_Workflow\_Plan\_Review\_Training...  
11/17/2009 4:05:00 PM, 968 KB  
Duane Green

Entitlements\_Report\_Engine.xls  
11/18/2009 11:00:22 AM, 17 KB  
Allison Wagner

ProjectDox\_eForms\_and\_Workflows\_Training...  
11/17/2009 4:08:27 PM, 3.2 MB  
Duane Green

**Project Info** | Reports

**Project Name:** NAAM Partner Project  
**Description:** NAAM Partner Project

**Project Image:** 

**Location:**  
**Contact:** Duane Green  
**Contact's Email:** [dgreen@avolvesoftware.com](mailto:dgreen@avolvesoftware.com)  
**Phone:** 602-903-3096  
**Cell Phone:**  
**Pager:**  
**Project Owner:** [Duane Green](#)  
**Owner's Email:** [dgreen@avolvesoftware.com](mailto:dgreen@avolvesoftware.com)  
**Project Admins:** Duane Green, Allison Wagner, Glenn Burnett, Dmitry Cherches, Louis Siegel, Brian Fromme  
**Status:** Active  
**Status Info:**  
**Project Start/End:** Start: 11/17/2009 11/17/2009 3:59:25 PM | End:  
**Pass-Through:**  
**Incoming Files:** Fax: | Email: [3@PDoxPartner.Avolvesoftware.com](mailto:3@PDoxPartner.Avolvesoftware.com)  
**Versioning:** Enabled for this project

### 1.4.1 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 View 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.

 **Subscription Manager** | [View all subscriptions for the selected user or group](#)

**Selected User:** Heidi Maiers  
**Entity:** Folder  
**Folder:** NAAM Partner Project/Incoming

**Notification event options:**

- |  |   |  |  |                                       |
|--|---|--|--|---------------------------------------|
| <input type="checkbox"/> Create Folder | <input type="checkbox"/> Create Folder Topics & Notes | <input type="checkbox"/> Create Markups          | <input type="checkbox"/> Create Project Topics & Notes | <input type="checkbox"/> Delete Files |
| <input type="checkbox"/> Delete Folder | <input type="checkbox"/> Download Files               | <input checked="" type="checkbox"/> Upload Files |  |                                       |

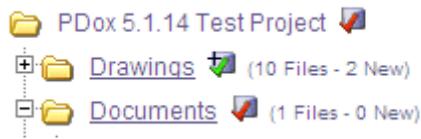
- This folder only     Cascade down entire folder tree

2. Choose your Notification Event preferences. Subscribed users are sent notification emails whenever one of the selected event options occurs within the subscribed folder or directory tree (except a user will *not* be automatically notified of their own activity).

3. Select the *Cascade down entire folder tree* radio button to subscribe to all subfolders of the current folder.
4. Click the **Save** button. You can update your subscription preferences at any time by clicking the preferred subscription manager icon, selecting different options, then clicking Save.

The Notification icon changes color (to green) 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.

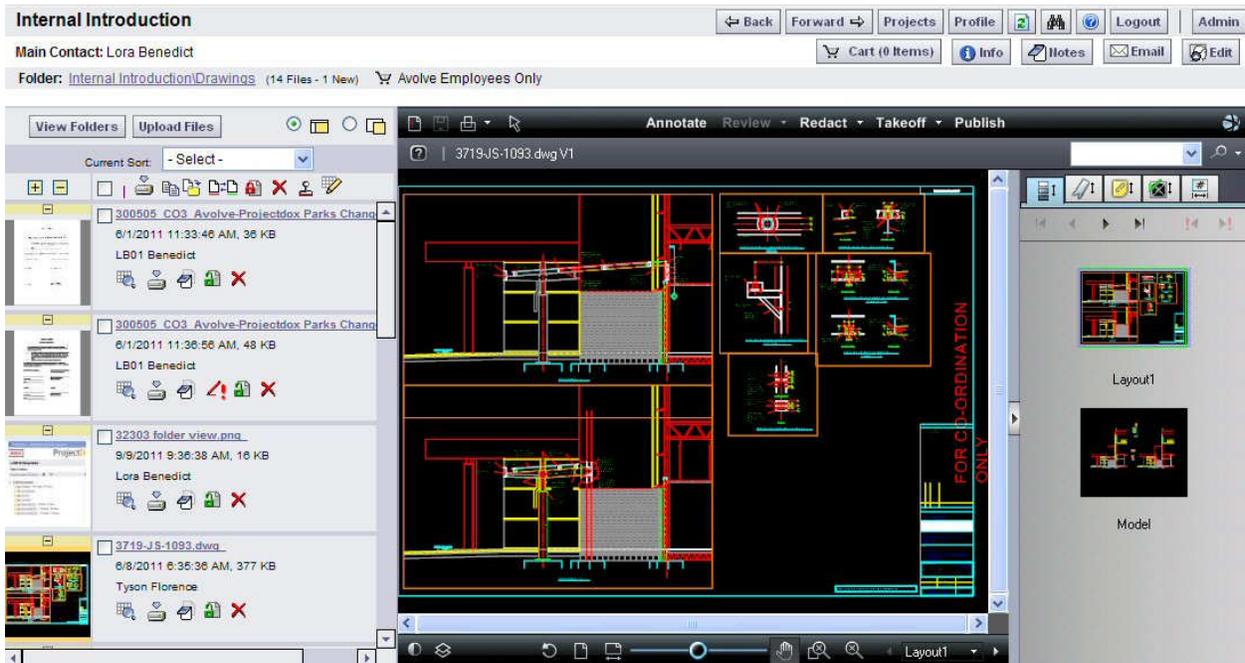


To unsubscribe to all notification events, click **Unsubscribe All**. This will unsubscribe you from the selected folder and the subscription icon will again appear red.

## 1.5 Working with Files

### 1.5.1 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 ActiveX viewer or Flash viewer (depending on which has been set up by your administrator).



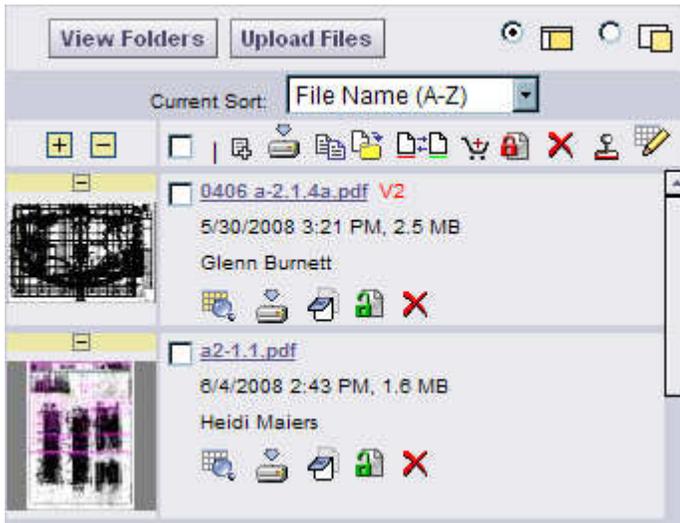
By default, Brava viewer displays in the right pane of the ProjectDox window. To launch it in a separate browser window, click the  radio button above the file list. You can switch it back at any time by clicking the  radio button. You can use the +/- icons to expand and collapse the file information 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.

### 1.5.2 Sort Files

When viewing file list (thumbnails) for a folder, you can quickly sort the order of files by criteria offered in the **Current Sort** 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.



### 1.5.3 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 check boxes 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.

Move checked file(s) into a new folder by clicking its icon.

Copy checked file(s) into a new folder by clicking its icon.



#### 1.5.3.1 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.

#### 1.5.3.2 Move or Copy Permissions

**Copy:** If a user has Download permissions from the folder they are copying from and Upload permissions to the folder they are moving to, Copy is permitted.

**Move:** Moving files is a Project Administrator function as it requires Delete permissions from the folder you are moving from and Upload permissions for the folder you are moving the files into.

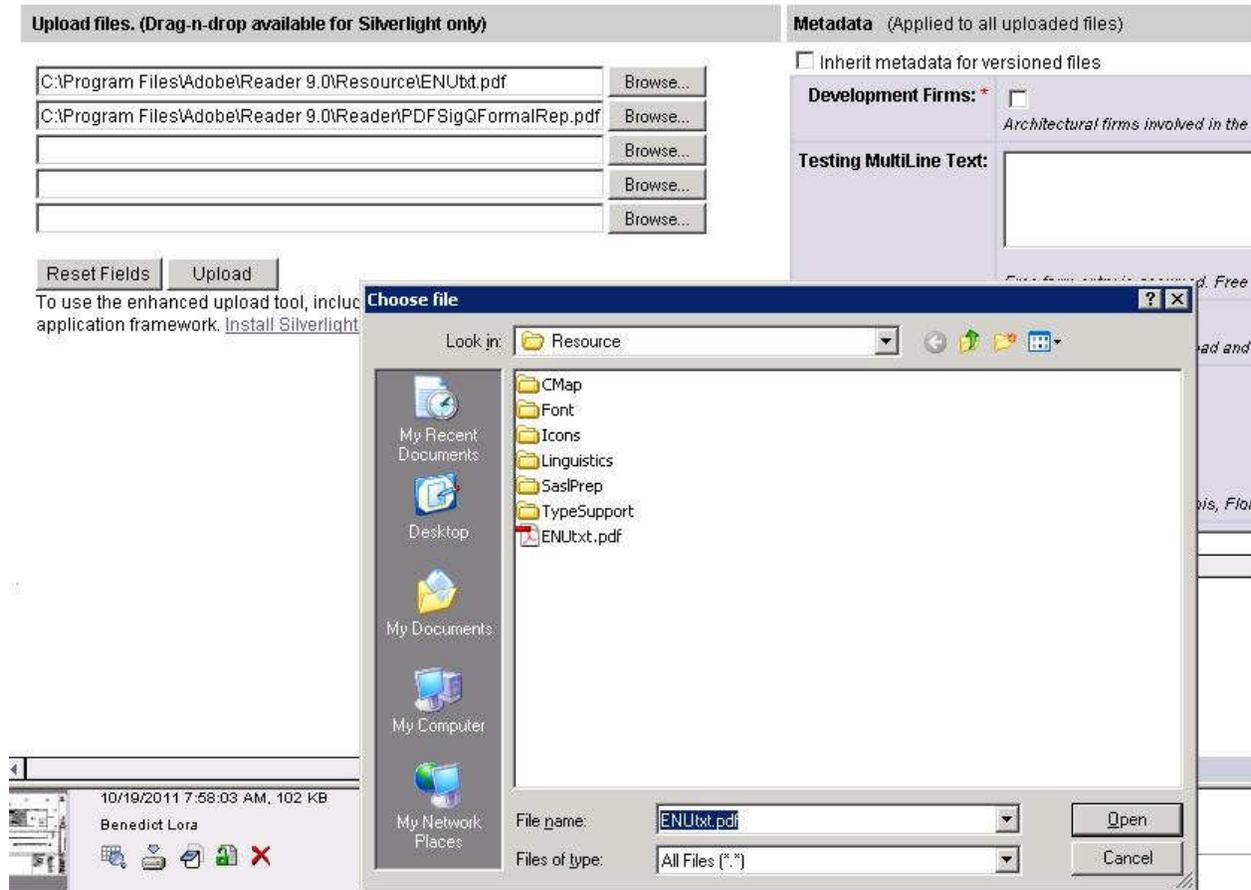
#### 1.5.4 Upload Files

You can upload files 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 *Upload Files* area, browse to and select the files you want to upload to the current folder. The maximum size file name is limited to 70 characters. You can drag and drop files into the Upload window list if you are using Silverlight. Click the Install

Silverlight Now link if you would like to install this framework for enhanced file uploading. (See next section)

- Click **Open** to add the file path to the list of files to upload and. Note: Once the Silverlight 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.



- 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. When you are uploading a new version of a document that already exists in the ProjectDox database, you can choose to inherit any metadata that has already been applied to the files you are uploading by selecting the "Inherit metadata for versioned files" check box
- Click the **Upload** button to transfer the files to the project folder. The files will publish and appear shortly in the file thumbnails screen of the folder you uploaded to, along with the name of the user doing the upload, the upload date, and file size information.

**Note:** When a single CAD file containing Xrefs (reference files) is uploaded, the Xref files must be uploaded together with the main file. In addition, all of the associated Xrefs to be uploaded must reside in the same folder. 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 file in the project folder as a single file. In addition, the Xrefs 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).

7. When the Upload Notification feature is enabled in ProjectDox, you will have the option to send a Notification Email to other members of the Project by clicking on the Notify Project Members button in the upload complete window. If you choose to send a notification, only Project Groups and Users that have permission to the uploaded folder will appear in the Notification Email to choose from as the recipients of the message. This prevents users that do not have access to the folder from receiving an "Upload Notification" email to a folder that they do not have access to view.

#### 1.5.4.1 Silverlight Uploader

The Silverlight Uploader provides an enhanced file upload utility that can be used in place of the standard ProjectDox uploader. It allows you to drag and drop files into the Upload window list, upload multiple files at once, and upload a URL.

To install\* and use Silverlight for uploading files:

1. Click the *Install Silverlight Now* link in the *Upload Files* screen.
2. Click RUN on the Silverlight file installation dialogs and then click **Install Now** on the Install Silverlight screen. The files will install and the uploader will launch for immediate usage.



- Click the Browse button to locate and select the files you would like to upload to the current folder and click **Open**. Select to **Add more files**, or click **Upload** to upload your current list.

**Upload files:(Drag-n-drop available for Silverlight only)**

**Selected Files:**

background.bmp	2.25 MB	✕
img13.jpg	1.17 MB	✕
img14.jpg	1.45 MB	✕
img18.jpg	675.6 KB	✕

**Total** **0%** **5.53 MB**

**Upload URL:**

URL Display Name:

URL:

**ProjectDox<sup>®</sup>**

**Upload files:(Drag-n-drop available for Silverlight only)**

**Selected Files:**

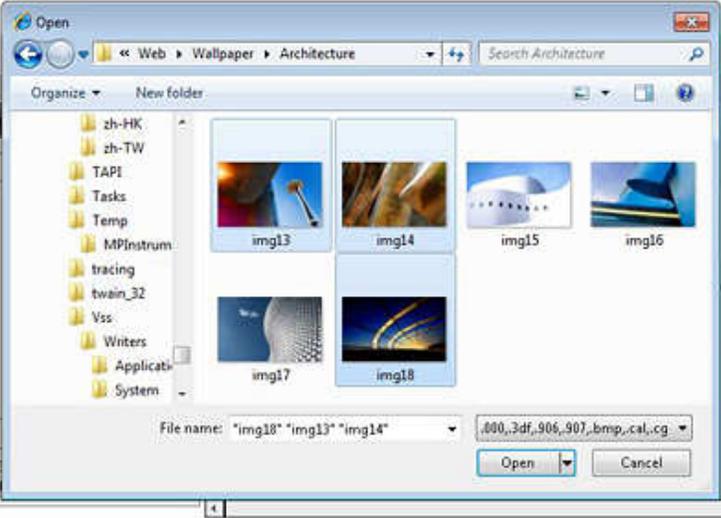
background.bmp
----------------

**Total** **0%**

**Upload URL:**

URL Display Name:

URL:



4. You can also upload a URL (up to 255 characters long) to a project folder using the Silverlight Uploader:
  - a. In the URL Display Name field, enter the name as you would like it to display in the file panel and then type the web address (e.g., <http://www.avolvesoftware.com> or [avolvesoftware.com](http://www.avolvesoftware.com)) in the URL text field.
  - b. Click Upload URL to complete your URL upload. The Internet document icon will appear in place of the file thumbnail in the file panel.

### \*Silverlight on Macintosh Requirements Notes

If you are installing Silverlight on a Macintosh system, the following requirements must be met:

- Silverlight versions after 1.0 run only on Intel processor based Macintosh (not PCC processor)
- Mac System requirements for Silverlight 5 - Macintosh OS 10.5.7+ (Intel-based), Browsers supported: Firefox 3.6+ and Safari 4+ <http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx>
- Mac System requirements for Silverlight 4 - Macintosh OS 10.4.11+ (Intel-based), Browsers supported: Firefox 3+ and Safari 3+ <http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL4.html>

### 1.5.5 Download Files and Metadata

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 (in groups of 20) for the selected action. For example, select the top check box and a check will appear in all visible thumbnail check boxes. **Note that if a folder is very large, you must scroll down and continue to select all files in groups of 20 until all files in the folder are marked.**

Clicking the Download Checked Files icon will then download all selected 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.

Files retrieved from: \_LAB P2 \One Folder

Your files are ready to be downloaded. All selected files have been compiled into a single ZIP file for your convenience.

[Download Zip File \(1.7 MB\)](#) [Delete Zip File](#)

After your download has completed successfully, please delete the zip file from the server, for the protection of your intellectual property.

### 1.5.5.1 Downloading Metadata

You can use the download metadata for selected files button  to download just the metadata for one or more files. The list of selected files will be presented in the Download Metadata screen where you may select export options. Use the Save button to preserve your preferences for all selected files.

Once you have selected your Export Options, the metadata file can be exported to any format listed in the *File Type* drop down, including CSV, DOC, HTML, XML, XLS, or Office XML. Click **Download Metadata** to export the data to the specified file type.

Cascade Save [Save](#)

\* Required field

	Development Firms *	Testing MultiLine Text	Hidden fm user *	State *	Comments
img1.jpg	<input checked="" type="checkbox"/>	This is an opportunity to choose Structural in the text field. Architectural California	<input checked="" type="checkbox"/>	Arizona Washington Illinois California Montana	Structural in the comment field to
img10.jpg	<input checked="" type="checkbox"/>	This is an opportunity to choose Structural in the text field.	<input checked="" type="checkbox"/>	Arizona Washington Illinois California Montana	Structural in the comment field to
img11.jpg	<input checked="" type="checkbox"/>	This is an opportunity to choose Structural in the text field.	<input checked="" type="checkbox"/>	Arizona Washington Illinois California Montana	Structural in the comment field to

**Export Options:**

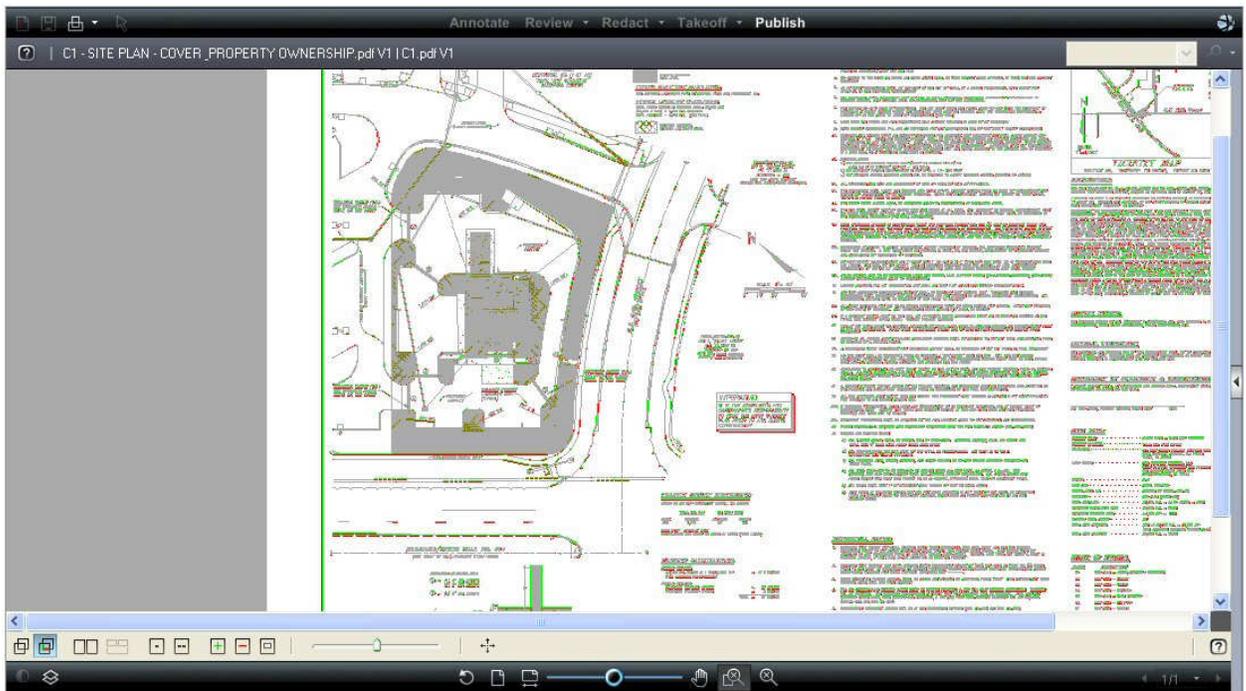
Show Column Titles:  Show Grid Lines:  Column Titles Forecolor:  Alternating Row Color:  Column Titles Backcolor:  File Type:

[Download Metadata](#)

### 1.5.6 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 Viewer online help file for assistance in using the compare file and the compare alignment tools.



### 1.5.7 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.

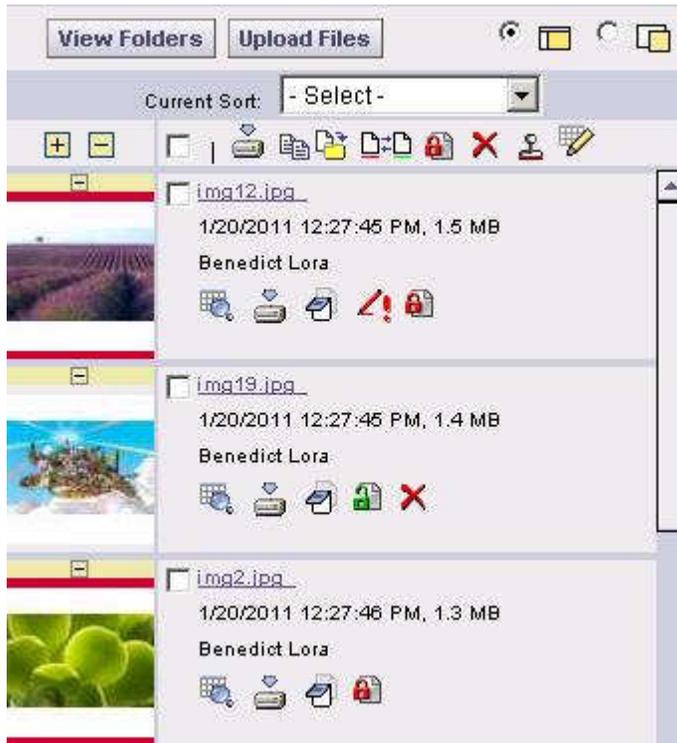
Once checked out, the files cannot be downloaded or versioned by anyone else except the person who has them checked out. The check out can be un-done by the person who checked out the document, a Project Administrator, or a System Administrator. Only the person who checked out the document, however,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

#### 1.5.7.1 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)

#### 1.5.7.2 To check out/in multiple files:

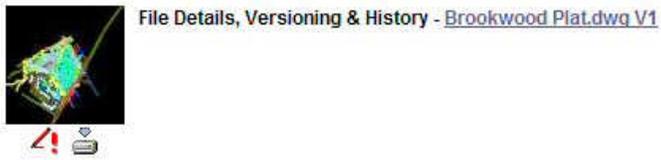
1. Navigate to a project folder that contains the files you want to check out.
2. In the thumbnail panel, select the check boxes for the specific files.
3. From the top of the panel, click on the  icon to check out all selected files. Note that if one or more files you selected are already checked out, 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).

### 1.5.8 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
FileView	Duane Green	6/23/2011 11:22:18 AM
FileView	Steve Alexander	6/8/2011 12:33:01 PM
FileMarkupAdd	Tyson Florence	6/8/2011 6:56:58 AM
FileView	Tyson Florence	6/8/2011 6:36:45 AM
FileUpload	Tyson Florence	6/8/2011 6:36:38 AM


Page 1 of 1 (5 items)

### To view a file's history:

1. Click the history icon .
3. The Main, History, and Workflow (if enabled) tabs shows information about the selected file.
4. 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.
5. The Main tab lists the file's details, which are editable by Administrators only.
6. 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. Note that the batch publish event displays in the history for the original file only. The resulting stamped files just show upload information.
7. 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.
8. 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.
9. 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 ActiveX Viewer.



### 1.5.9 View File with Markups

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

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



2. Click **View** to view one or more markup files in Brava with the markups overlaid for

- review only. You can select individual markups for view or edit, or use the “**Select All for View**” button to populate all of the View markup check boxes.
3. Click **Edit** to view the file in Brava and open the markup for editing. Only one markup may be selected for edit. The Edit and Delete columns will only be seen if you have markup Create and Delete privileges.
  4. Click the **View/Edit** button to launch your selected markup layers in the ProjectDox viewer along with the associated file.

### 1.5.10 Delete Files

If you have Delete privileges, you will see the Delete Icon  for each file. Click the icon to delete the file, and then click **Yes** in the confirmation dialog box. To delete a group of files, select the check box 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* or the Admin Configuration screen).

## 1.6 Batch Stamp and Batch Publish Files

### 1.6.1 About

**Batch Stamp:** The Batch Stamp feature allows a user that has been granted permissions by the System Administrator (SA) to select multiple files from a single folder or from multiple folders and send them to be processed and converted from their native format to PDF, TIFF or DWF. Additionally, a raster stamp (JPEG or PNG) or Dynamic Stamp may be applied to the files. The files, once created and stamped, will be automatically uploaded back into ProjectDox in the folder specified in the batch job.

**Batch Publish:** When using the Batch Stamp feature, you have the option of inserting a raster or dynamic stamp. If you choose not to use stamps, this feature is simply a Batch Publishing function.

**Permissions:** Only users that have been granted permissions by a systems administrator (SA) will be allowed to batch stamp or batch publish. If this permission is enabled, you will have access to all the batch stamp templates, stamps and dynamic stamps. Additionally you will need to have upload permissions on the destination folder (the location where the batch processed file will go).

## 1.6.2 Usage

From the project's thumbnails page, use the thumbnail image check boxes to select the files you want to batch stamp or publish.

1. Select the batch stamp icon . The Batch Stamp options page appears in the right frame of ProjectDox.
2. You can enter your options and select a template at this time, or you can go to any folder in the current project and add additional files to be batch processed.
3. To add files to a batch, navigate to the project folder's file view, select the check boxes for the additional files you want to add and click . The Selected file list is updated to include the additional files. You can remove any file from the list before processing by clicking the red X next to the file name.
4. To process files through the **Basic** tab, simply select a template from the drop down and click the Process Batch button. This action will (optionally) apply the stamp to each selected document and output to the format and directory specified in the saved template.

## 1.6.3 Creating and Saving Stamp Templates:

1. To create and save new templates, or to apply Saved Templates with variations, use the **Advanced** tab of the Batch Stamp Options panel.
2. Select a saved template to use, or type in a Template Name to begin a new template.
3. In the **Output File Type** field, select which format to use as your output format for all selected files. Available choices include PDF, TIFF, or DWF.
4. In the **Destination Folder** area, select the check box for the directory where you would like the published output files to be placed, or enter a valid output directory. (See Multiple Project Batch Stamping Notes below)
5. In the **Burn in Markups** area, select whether to permanently overlay any existing markups on the selected files. Once burned in, markups cannot be removed from the published rendition of the file.
6. In the **Inherit Metadata** area, select whether to apply the metadata from the originating file and apply to all output files of the batch.
7. In the **Where to place Stamp** field, select an area of the document from the drop down. The selected stamp will be published on all output files in the page location specified.
8. In the **Pages to Stamp** area, select which pages of the document to place a stamp. Available choices are First, Last, First and Last, or All.
9. In the **Select Stamp** area, you can optionally apply a markup stamp to all of your

processed documents. The stamps listed in this dropdown have been created by a System Administrator using the Brava Viewer's Stamp Template tool. Stamps can contain dynamic text (table of tokens that can be used in these text strings is listed below).

10. When all options have been selected, you can use the Save Template button to save your options as a new template that will become available in the Select Templates drop down list for future batch processing.
11. When you are ready to process the batch with the specified options, click the Process Batch button. A rendition of the files will be created in the specified output format and placed in the chosen output directory. A link to that output directory appears in place of the batch options screens allowing you to quickly navigate to that folder and view the output files. Note that the files may need some time to process and may not be immediately available for viewing.

Basic	Advanced
Selected Files:	✗ Project 2 lab\Folder 1\111PC0126.pdf ✗ Project 2 lab\Folder 1\ARCH008 A-1.1.pdf
Select Template:	Final Drawings <input type="button" value="Add New"/>
Template Name:	Final Drawings
Output File Type:	pdf
Destination Folder:	Approved <b>This folder is not unique or does not exist within the current project. Please select a folder below:</b> <div style="border: 1px solid gray; padding: 5px;"> <p>Project 2 lab</p> <ul style="list-style-type: none"> <li>Folder 1 (3 Files - 0 New) <input type="checkbox"/></li> <li>abc (2 Files - 0 New) <input type="checkbox"/></li> <li>def <input type="checkbox"/></li> <li>Files (6 Files - 0 New) <input type="checkbox"/></li> <li>Result <input type="checkbox"/></li> </ul> </div>
Burn in Markups:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Inherit Metadata:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Where to place Stamp:	Top Center
Pages to Stamp:	All
Select Stamp:	Final-CitySeal
<input type="button" value="Process Batch"/> <input type="button" value="Save Template"/> <input type="button" value="Delete Template"/>	

#### 1.6.4 Multiple Project Batch Stamping Notes:

- Templates are NOT project specific. They are, however, set up for output to a target directory. If the directory is unique to the project, then the files are deposited into this folder. If the folder is not unique, or if the folder does not exist, then you will be prompted to choose a valid directory. You can always choose a valid destination directory by checking one in the directory listing.
- Files can be stamped across projects. The final destination project for the stamped files is the last project you accessed before going to the batch stamp options page.

### 1.6.5 Creating Stamps:

*Raster stamps* (JPG, BMP, or PNG images) must be loaded to the server in a location available to the Job Processor. The image should be created in the desired size and off set of the image. ProjectDox will not scale the image. If the image is created at 2 inches by 2 inches, it will be placed at that size on either a 36" X 48" sheet or an 8.5" X 11" sheet.

*Dynamic stamps* are stored in the database accessible to permitted users. Any user with "Stamp" permissions can create a dynamic stamp through the Brava Viewer's Stamp Template feature. Once created, any user with the "Stamp" permission may select and use a dynamic stamp on a document.

Only users with the "Stamp" permission (applied in Admin → Users) can apply a stamp to a number of documents at one time. This is referred to as "Batch Stamp". Note that if your ProjectDox site does not use the Batch Stamp module, then the Stamp Template feature is only available to System Administrators to create and use dynamic stamps as a markup layer to the files.

The information in the [next section](#) is contained in the Brava online help file and is provided to assist you in creating dynamic stamps with Brava. Please refer to the Brava online help file for additional information. What makes a dynamic stamp dynamic is the ability to use special keywords or "Tokens" that update the markup text fields automatically.

### Dynamic Stamp Tokens:

The following are all the replacement tokens that can be used with Brava Dynamic Stamps:

PROJECT TOKENS	FILE OWNER TOKENS	USER TOKENS
%ProjectName	%OwnerUserID	%UserID
%ProjectID	%OwnerUserName	%UserName
%ProjectDescription	%OwnerCompany	%Company
%ProjectStatus	%OwnerTitle	%Title
%ProjectLocation	%OwnerAddress1	%Address1
%ProjectContact	%OwnerAddress2	%Address2
%ProjectEmail	%OwnerCity	%City
%ProjectCellPhone	%OwnerState	%State
%ProjectPager	%OwnerCountry	%Country
%ProjectSourcePath	%OwnerZipCode	%ZipCode
%ProjectPublishPath	%OwnerWorkPhone	%WorkPhone
%ProjectURL	%OwnerCellPhone	%CellPhone
%ProjectCreateDate	%OwnerPager	%Pager
%ProjectEndDate	%OwnerFax	%Fax
%Date	%OwnerEmail	%Email
%Time	%OwnerLastLogin	%LastLogin
	%OwnerSignupDate	%SignupDate

FILE TOKENS	FILE METADATA	USER METADATA
%FileID	%FileMetadata1	%UserMetadata1
%FileAuthorID	%FileMetadata2	%UserMetadata2
%FileName	%FileMetadata3	%UserMetadata3
%FileSize	%FileMetadata4	%UserMetadata4
%FileSourcePath	%FileMetadata5	%UserMetadata5
%FilePublishPath	%FileMetadata6	%UserMetadata6
%FilePublishURL	%FileMetadata7	%UserMetadata7
%FileUploadDate	%FileMetadata8	%UserMetadata8
%FileVersion	%FileMetadata9	%UserMetadata9
%FileSheetSize	%FileMetadata10	%UserMetadata10
%FileSquareFeet	%FileMetadata11	%UserMetadata11
%FileFriendlyPath	%FileMetadata12	%UserMetadata12
%FileErrorCode	%FileMetadata13	%UserMetadata13
%FileErrorMessage	%FileMetadata14	%UserMetadata14
	%FileMetadata15	%UserMetadata15
	%FileMetadata16	%UserMetadata16
<b>FOLDER TOKENS</b>	%FileMetadata17	%UserMetadata17
	%FileMetadata18	%UserMetadata18
%FolderID	%FileMetadata19	%UserMetadata19
%FolderParentID	%FileMetadata20	%UserMetadata20
%FolderName	%FileMetadata21	%UserMetadata21
%FolderSourcePath	%FileMetadata22	%UserMetadata22
%FolderPublishPath	%FileMetadata23	%UserMetadata23
%FolderCreateDate	%FileMetadata24	%UserMetadata24
	%FileMetadata25	%UserMetadata25

### 1.6.6 Creating Stamp Templates with Brava

A Stamp Template is a group of markup entities, defined by an author as a "stamp". The template can contain any of the *available* markup entities, including dynamic text (similar to banner strings) that update when a user adds the stamp to a markup layer that is open for edit.

#### To create a New Stamp Template:

1. In Brava, open a document to use as a reference in regard to size and shape of the stamp template you wish to create.
2. Verify that you are on **page 1** of the document.
3. Click  on the toolbar. Select **Stamp Templates -> New**. (Note: If the option is not available, see notes below about permissions.)

4. The Markup toolbar opens. Use the available markup tools (see note) to create a group of one or more entities and/or raster images that will be saved as a single stamp template. You can use Tags in your stamp's markup text that will dynamically update to the tag's value when in use.
  - o Note that the following markup tools are not available for use with the stamp tool: Changemarks, redactups, hyperlinks, and edit text group.
5. To save the group as a stamp template, click  and select **Stamp Templates -> Save or Save As**.
6. Enter a name for the new template and click **OK**. The template is saved to the server's list of available stamp templates (by default C:\Program Files\IGC\Brava!\Brava! Server\stamptemplates) that users may summon when inserting a stamp into an editable markup layer. A newly created or updated stamp becomes immediately available to an end user when he accesses the server folder through the markup stamp **Browse** button.

**Note:** Stamp templates created in one file format (such as PDF) should only be applied to files of the same format type or the stamp may not be applied with the correct scaling for the file format. It is recommended that you append the file type to the name of the stamp template, for example, a template created on a PDF document might be named *template1\_pdf.xsp*.
7. To exit Stamp Template mode, select  ->**Stamp Templates->Close**.

### To Edit an existing Stamp Template:

1. Open the file on which the original Stamp Template that you wish to edit was created. Stamp templates should be edited against the same document each time.
2. Click  on the toolbar and select **Stamp Templates -> Open**
3. Choose a Name in the "Open Stamp Templates" list box and click **OK**. The template opens at the same coordinates as when it was last saved.
4. You can edit the individual elements of the template as any other markup file by adding, deleting, moving, and copying markup entities. (Note that you cannot copy markup entities to other pages of the document. The template must be created only on page 1.)
5. When finished editing, select  - > **Stamp Templates->Save** to save the template with the same name. Select **Save As** if you would like to save the template with a different name.

### Stamp template notes:

- When a new or existing stamp template is open for edit, the Save Markup menu items are disabled. In addition, the following markup tools are not available and cannot be used when creating stamp templates: Changemarks, redaction tools, Place Stamp, hyperlink, and edit text tools.
- A group of entities can only be saved as a stamp template that was created on the first page of the current file.
- After saving a template that contains dynamic tags, you should verify that the template works as expected by opening up another browser session, loading a file, and creating a new markup layer that includes the stamp to be tested.
- The stamp template feature may not be available if your administrator has disabled this feature through its optional parameter *EnableMarkupStampTemplate*.
- Stamp authoring can be disabled separately from stamp usage. If this feature (stamp authoring) is disabled, you will still be allowed to use the stamps (available from the markup toolbar Insert Stamp tool) that a user with more privileges creates.

## 1.7 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.

### 1.7.1 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:...*).

## View Topics

File: ProjectDox SA Training\_72.docx **V7**
  
 Owner: Heidi Maiers

Topic ↑	Action	Status	Category	Author	Created
<input type="checkbox"/> <a href="#">SA Training Manual</a>	 		Notification	Nikki Thorne	1/6/2010 12:36:19 PM
<input type="checkbox"/> <a href="#">Updates to SA Manual</a>	 		Notification	Nikki Thorne	10/6/2009 2:15:11 PM
<p><b>Author:</b> Nikki Thorne   <b>Created:</b> 1/6/2010 12:34:21 PM</p> <p>Hi Heidi -</p> <p>Just a few modifications are needed. For some reason the Branding Table is messed up. I can provide you with a copy of that table if that will help from my original version of the document. If you need it let me know.</p> <p>Thanks for all your help in this! It's looking good.</p> <p><b>Author:</b> Nikki Thorne   <b>Created:</b> 1/19/2010 10:26:30 AM</p> <p>Additional Updates ---</p> <p>The ProjectDox Backups section has been updated to include the latest work from the combined efforts of Wally and Forrest. In addition, I have gone thru and updated some grammatical issues and done a grammatical and spelling check to remove the plethora of green and red lines from the documentation.</p>					

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.

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.

Use the +/- buttons to expand or collapse the additional notes associated with each topic. You can use the Expand All button to view all topic notes at once.

### 1.7.1.1 Add a Topic

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

**Attach a Topic to V1**  
 Owner: Steven Alexander

Author: Heidi Maiers	Category: <span style="border-bottom: 1px dashed gray; display: inline-block; width: 100px;"></span> ▼	Date: 2/26/2010
Subject: <input style="width: 90%;" type="text"/>		
<div style="border: 1px solid gray; min-height: 100px;"></div>		
<input type="button" value="Save"/> <input type="button" value="Save &amp; Prepare Email"/>		

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 Team Mail (see Team Mail) to send the note to other team members. This also places a copy in the project's Incoming/Email folder when the Project's email check box is selected.

#### 1.7.1.2 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**.

### 1.7.1.3 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.

### 1.7.2 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.

### View Chosen Topic & Notes

[Add Note](#) [View Topics](#) [Print](#)

Topic   File: ProjectDox SA Training_72.docx V1 (File)   Owner: Steven Alexander	Category	Author	Created
Updates to SA Manual	Notification	Nikki Thorne	10/6/2009 2:15 PM
<p>Hi Heidi-</p> <p>We are looking to make many updates to the SA training manual to give more detail and explanation regarding the features and tools available in ProjectDox. Our goal is to make this a document that can give those SA's details that will help them make decisions prior to having the system installed and help them in understanding the importance of the various features and how it affects the overall system. I have added several changemarks to the document which are rather general, but can give you more detail as you need it or want it. I am happy to help you out if you need it or I was just unclear.</p> <p>Thanks, Nikki</p>			

**Close Topic** by choosing an Action Code:

<p> <b>Author:</b> Nikki Thorne   <b>Created:</b> 1/6/2010 12:34:21 PM</p> <p>Hi Heidi -</p> <p>Just a few modifications are needed. For some reason the Branding Table is messed up. I can provide you with a copy of that table if that will help from my original version of the document. If you need it let me know.</p> <p>Thanks for all your help in this! It's looking good.</p>
<p> <b>Author:</b> Nikki Thorne   <b>Created:</b> 1/19/2010 10:26:30 AM</p> <p>Additional Updates ---</p> <p>The ProjectDox Backups section has been updated to include the latest work from the combined efforts of Wally and Forrest. In addition, I have gone thru and updated some grammatical issues and done a grammatical and spelling check to remove the plethora of green and red lines from the documentation.</p>

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, or close the topic by selecting an **Action Code** from the drop down list.

**Close Topic** by choosing an Action Code:

 **Author:** Nikki Thorne | **Created:** 1/6/2010 12:34:21 PM

Just a few modifications are needed. For some reason the Branding Table is messed up. I can provide you with a copy of that table if that will help from my original version of the document. If you need it let me know.

Thanks for all your help in this! It's looking good.

**Action Code** dropdown menu:

- Approved
- Complete**
- Denied
- FYI
- On Hold
- Over Budget

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

### 1.7.2.1 Add Note

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

ProjectDox®

[Close Window](#)

### Add Note to Topic

Author: Gregory Linkous   Owner: George Antone   Project: Avolve Demo Project   File: 5004-A1.DWG V1	
Topic Subject: Changed Door widths	
review entry doors for new widths and design	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

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 Team Mail (see *Team Mail*).

## 1.8 Team Mail

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

1. In the User button bar, click the  Team Mail button. The Team Mail screen appears.
2. Select the All link (above the check boxes) to select all members. You can then expand and deselect any check boxes individually. Select All again to clear all check boxes.
3. Enter a Subject and message.
4. Click **Send** Team Mail to send your message.

Team mail for Project: Internal Introduction  
Email type: Standard Mail

Subject: \*

Body: \*

Users/Groups that will be emailed: \*

<input type="checkbox"/>	Name
<input type="checkbox"/>	 Project: Internal Introduction (6@mozart.avolvesoftware.com)
<input type="checkbox"/>	 Non Group Members
<input type="checkbox"/>	 Employees
<input type="checkbox"/>	 Frank Test

Page 1 of 1 (4 items)

You can also access Team Mail 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 Team Mail by clicking the mail icon , such as at the top of the Project Info screen.

1. Select the check box for the Team Member or Project Group that you would like to send the Team Mail to.
2. Type in a subject and message text and click **Send**.

Select the check box 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 Team Mail list, but selecting the Private Group's check box will send the email to its members.

When you send a Team Mail, you should be able to send the email to any public Project Group (regardless of permissions) as well as any individual user that is a member of the Project. The only exclusion to this rule is with Private Groups, users that are placed in Private Groups are not allowed permissions to see any other members of the Project

## 1.9 Searching in ProjectDox

With many users, projects and topic lists can get very large. Use the Advanced Search feature to make it easier to find the information you need. ProjectDox supports the ability to search for objects in the database. The search engine results return all objects that contain matching text in the various fields and properties, including metadata, markup text, topics and notes, folder and project names, addresses, and more. All versions of a document history can also be searched.

1. Available from the *main ProjectDox toolbar*, you can access the Simple and Advanced Search page by clicking  .
2. For a simple search, enter your desired keywords or phrases into the search text box, select how you would like to find results, and click  (or you can hit <Enter>).
  - Search allows a full, exact, and partial word searches. To search a full word, select “any of the words” and type the word and the search engine will give back all results where that word is found in its entirety. To search exact terms, select the “exact phrase” check box and type in the term exactly how you want to search for it. To search for partial words and phrases, use wildcards similar to a regular expression engine or DOS.
  - If you are searching "**any of the words**", and enter `wind road`, you will only get results with the whole word “wind” or the whole word “road”. The search will not find "winding roads" because the whole words “wind” or “road” do not exist in either of those terms in their entirety. If you wanted to get back the result, "windy roadside", you would have to use wildcards such as `wind* road*`. The words DO NOT need to be next to or near each other, just contained in their entirety somewhere in the item being searched. If you don't want to search for the entire word, use a partial search with a wildcard \* or ?. Please see Wildcard Searches for more information.
  - If you search with "**exact phrase**" selected, the words must be in the exact order and be an exact match. For example, if you search for `Admin User`, the results will contain "admin user", but not "Admin Users". Wildcards do not work when using “exact phrase”. There is no need to add double quotes to each end of the search term(s).
  - Search is NOT case sensitive.
  - Wildcard Characters should only be used with the “any of the words” option. If wildcards are used with "exact phrase" searching, unexpected results may be returned. When used with Exact phrase searching, the asterisk \* can be used in place of one or more characters. The question mark ? can be used to replace a single character (such as `A01?.pdf`). See "[Wildcard Usage](#)" below.

3. To perform an in depth search of a project, including topics and notes, file and folder names, email, and file and markup contents; Select your search criteria from the *Include entities in search* area.
  - If you select one or more "Entities", ProjectDox will find the search word in ANY of the entities and you will get results for all of those items. For example, you will find files, markups, Topics and Notes Folders, and emails with the search word in them.
4. You may select to **include file metadata in your search**. Choosing this option displays the metadata information to search by when searching within a project that has metadata associated with it
5. Finally, in the *Scope to Search* area, select your desired scope to apply the selected search criteria. When searching at the File level, your scope can be as narrow as searching a single folder or as wide as searching all projects contained in a ProjectDox site.

File Search

Address/Location Search

Search | Project: Project 2 lab

**Wildcard Characters:** The asterisk \* can be used in place of one or more characters, such as \*.jpg. The question mark ? can be used in place of a single character, such as A01?.pdf. See [search help](#) documentation for more information.

Find results:  any of the words  exact phrase

**Include entities in search** | [Check All](#) | [Clear All](#)

<input type="checkbox"/> File contents	<input type="checkbox"/> File names	<input type="checkbox"/> Folder names
<input type="checkbox"/> Markup contents	<input type="checkbox"/> Markup names	<input type="checkbox"/> Incoming email contents
<input type="checkbox"/> Topics/Notes		
<input type="checkbox"/> <b>Include file metadata in search</b>		

**Scope to Search:**  This Project  All Projects

6. Click **Search**. The advance search results display in the View Search Results window with the keyword or phrase highlighted. Term hit highlighting is supported in ProjectDox so that when you perform a search, all files where this word or phrase exist displays. When you click on a file, you are quickly taken to the page where the first occurrence of the item exists (zoomed and highlighted).
7. You can use the *Address/Location Search* tab to quickly locate address information from the Project Information screens. The results appear on the bottom portion of the tab once you enter the criteria and click **Search**.

**NOTE:** Advanced search checks User Permissions and your searches will only be performed in the projects, folders, markups, and topics & notes for which you have access permission.

File Search

Address/Location Search

Address 1:

Address 2:

City:

State/Province:  ▼

Postal Code:

Location:

Project	Description
<a href="#">Project Administrator Training</a>	Demonstration and Examples project for PA

**1 of 1 record(s) displayed**

### 1.9.1 Lucene Index Search

Introduced in ProjectDox 8.0, this search technology offers an improved, high-performance, full featured text search engine library that has been integrated into ProjectDox. This technology provides ProjectDox with a new platform on which to build additional search features, as well as eliminates load on the database while searching. Please refer to the *Avolve ProjectDox Lucene Integration Installation and Deployment.docx* document (available from your ProjectDox integration AE) for details about installation and configuration of this tool.

#### Wildcard usage:

Lucene supports wild card queries. You can perform single and multiple character wildcard searches within single terms. You can also use a \* or ? symbol as the first character of a search.

- To perform a single character wildcard search use the "?" symbol.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for "text" or "test" you can use the search: te?t

- To perform a multiple character wildcard search use the "\*" symbol.

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search: `test*`

You can also use the wildcard searches in the middle of a term: `te*t`

You can also combine wildcard searches. For example, to search for test, tests, tester, you can also use the search: `te?t*`

#### NOTES:

- Wildcard searches cannot be combined with any other metacharacters besides wildcard characters or no results will be returned. The search engine will treat the metacharacters as literal characters and attempt to search for them. Metacharacters are stripped out and not stored in the search index so if any metacharacter is consumed by the search, no results will be returned.

Metacharacter list: + - && || ! ( ) { } [ ] ^ " ~ : \

- The following "stop" words, used in the Lucene Standard Analyzer, are stripped out of searches and should not be used in search terms as they are not stored in the search index. Note that Lucene will find words containing less than 4 characters as long as they are not stop words:

a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with

- Index frequency notes: In the *ProjectDoxWCFServer.exe.config* file, the following entry exists:

```
<!-- How many seconds between each call to all the configured
methods for polling -->
  <add key="NumSecondsBetweenQueries" value="300" />
```

The default, 300 seconds, in the config file (along with the *SearchEngineConfig?.xml* interval time) is the total time until the index is updated.

The *SearchEngineLog.log* shows the result of the re-indexing. Using this file, you are able to confirm that the deleted files or folders were removed.

## 1.10 eCodes Integration

Available from the top of the ProjectDox screen is a convenient eCodes button  that provides users with quick login access to the website for the **International Code Council**. If your administrator has set your login information in your user profile metadata, and you have been licensed to use this service, you will be automatically taken to and logged into the site by simply clicking this button.

### About ICC

The International Code Council (ICC) is a membership association dedicated to building safety and fire prevention. ICC develops the codes and standards used to construct residential and commercial buildings, including homes and schools.

## 1.11 Dual Workflow

<NEED INFO>