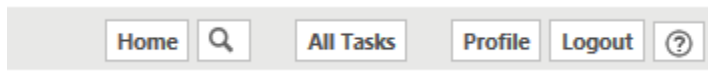


DC Department of Buildings




PROJECTDOX 9.1 APPLICANT USER GUIDE

Navigation Basics:

Main Tool Bar – The buttons in the image below make up the primary navigation controls used throughout the ProjectDox site. They appear at the top right of all pages for optimal accessibility.

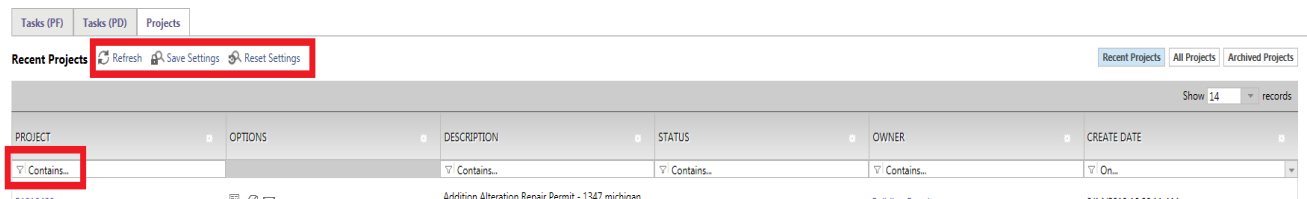



Task Navigation: The buttons below appear in the Tasks tabs of ProjectDox:

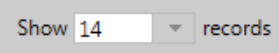
- **Refresh** button  Refresh - this button will refresh the page.
- **Save Settings** button  Save Settings - if changes are made to the page, such as a column reorg, click this button to save the settings changes.
- **Reset Settings** button  Reset Settings - this button displays indicating that the settings have been changed and can be reset.

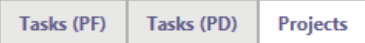
- **Quick Filter**  Contains... is used to sort the select items on the page.

Project Navigation – The buttons below appear in the project tab of ProjectDox:



- **Recent, All Projects, and Archived Projects** buttons  : You can view all your projects by clicking on the “All projects” button. The “Recent Projects” button will show the 15 most recently accessed projects, sorted by most recent first. The “Archived Projects” button will display all projects that have been completed.

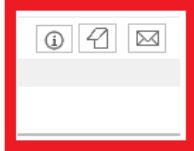
- The **Show records**  number is dynamic based on the size of the page. For example, if your browser larger than it will show more tasks. Because it’s dynamically sizes based in the browser it will not save the setting once you close the browser.




- **Tasks (PF), Tasks (PD), Projects** tabs -  By selecting Projects tab, you can view all your projects. By selecting **Tasks (PD)**, you can view all you active tasks (**PD**):

denotes ProjectDox workflow - OLD). By selecting **Tasks (PF)**, you can view all your active tasks for Project Flow workflow (**PF**: denotes project Flow workflow –New “Coming Soon”).

Project Options Toolbar

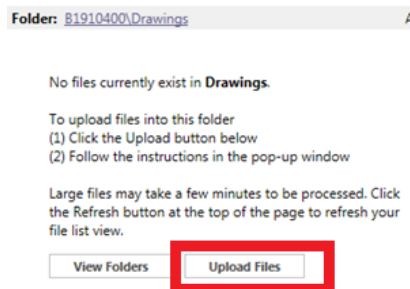
Each project is provided the Options toolbar that displays the project related features.



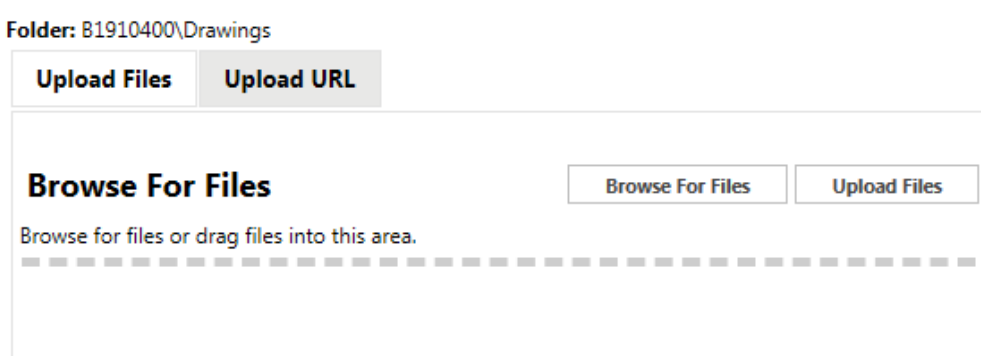
- **Info**  - Displays Project information
- **Discussion Board**  - Allows messages to be written, stored, and emailed between members of the project.
- **Team Mail**  - Allows for an email to be composed and sent from the project to project members. This feature is permission-driven and can be enabled or disabled by a system Administrator site-wide.

Uploading Files

You can upload files to any folder for which you have Upload privileges by clicking **Upload Files**:



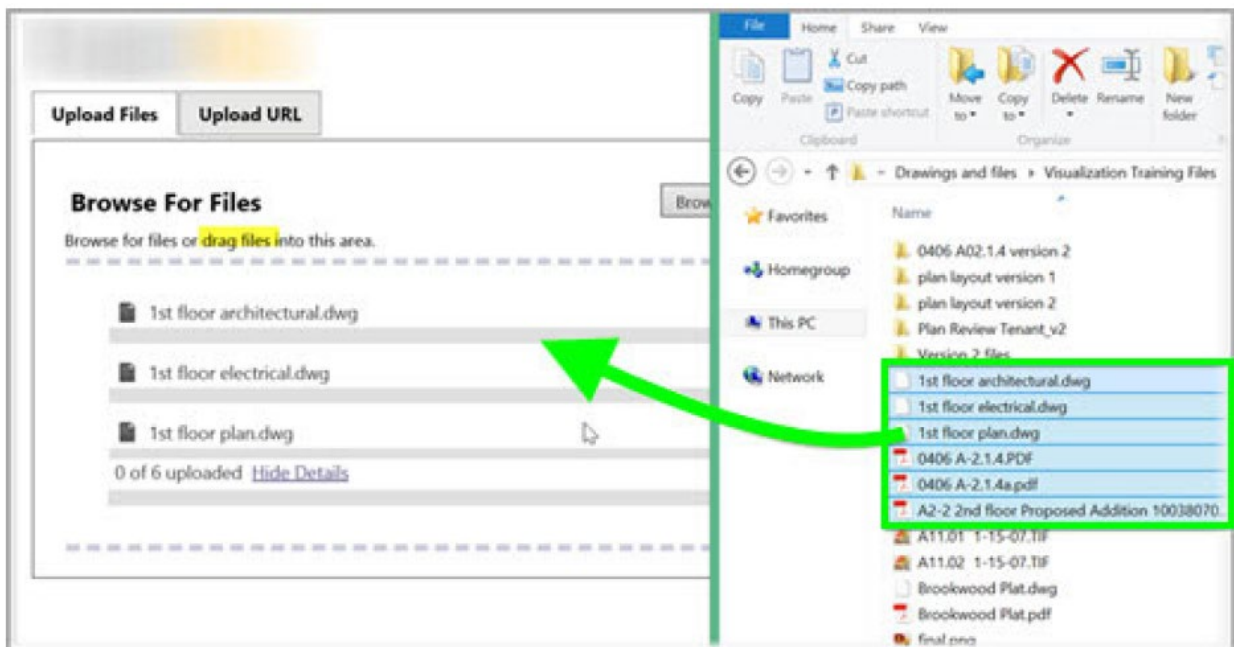
The HTML uploader screen will display:



Files can be consolidated into .ZIP files to save on upload time to the ProjectDox application. When the ZIP file is uploaded successfully, the application will unzip the file and process the files in the folder as Individual files. ZIP files cannot be retained in folders within ProjectDox. Once the file is uploaded, any hierarchy that existed in the zip will not be recreated. It should also be noted that any files that are not allowed will keep the .ZIP file from publishing, as seen below.

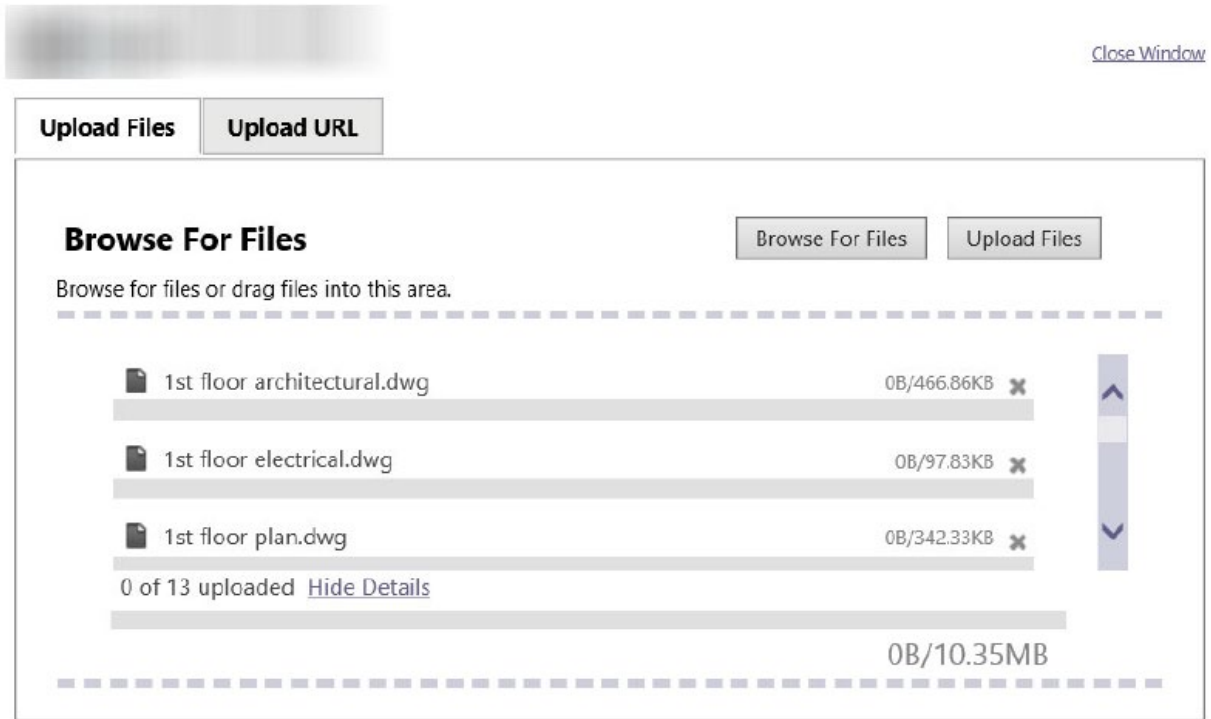
1. Use one of the two following methods:

- Click **Browse**. A navigation window will display to locate and select the files you would like to upload to the current folder. Click **Open** to select the file(s).
- Open a Windows Explorer window and use 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.) When you have completed your selection, click **Upload**, or to begin again, click **Cancel**.



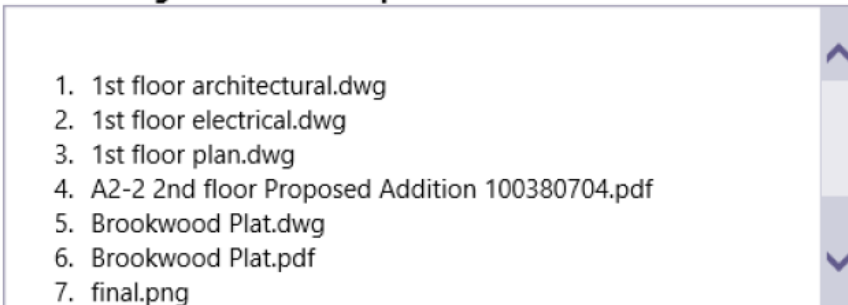
2. The image above shows the uploader dialog with files selected. You can:

- Delete selected files from the list by clicking the “x” to the right of the file size.
- Click **Browse For Files** to select additional files.
- Drag and drop additional files onto the file list area.
- Click **Upload Files** to complete the upload.
- Click **Close Window** to cancel the upload.



3. When the file uploading has completed, a dialog box appears. The publishing process will continue in the background until completed.

The following files have been uploaded:



Close

Upload URLs

In the ProjectDox application, you can upload a URL (up to 255 characters long) to a project folder. This could be useful when additional information for the project is desired, such as weather for a specific city, surveys or online reference materials.

To add a URL to a project:

1. Navigate to the folder where you want to upload your URL.

2. Click **Upload Files** (next to View Folders).
3. URL Display Name field (near the bottom of the window), enter the name as you would like it to display in the file panel.
4. In the URL field paste or type the web address (e.g., <http://dcra.dc.gov>).

ProjectDox[®]
by Avolve Software[®]

Folder: Benedict Builders\Drawings

Upload Files Upload URL

Upload URL:

URL Display Name:

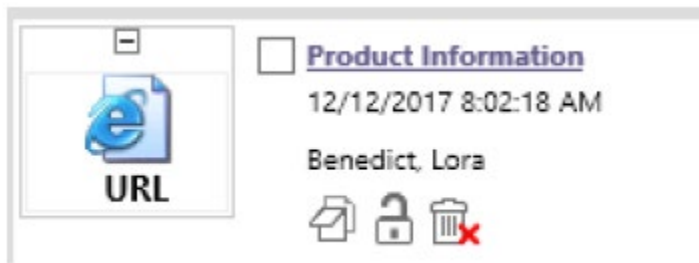
URL:

Upload URL

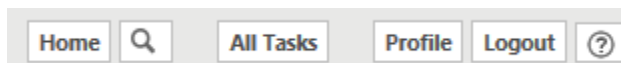
The following files have been uploaded:


1. <http://www.avolvesoftware.com/download/product-sheets/>

5. Click **Upload URL** to complete your URL upload. The Internet document icon will appear in place of the file thumbnail in the file panel.



Searching in ProjectDox:



 **Search Button:** will only be performed in the projects, folders, markups, and discussion board for which you have access permission.

ProjectDox has a comprehensive and powerful Search tool. The Search tool makes it easier to find information, especially in large sites with many users, projects, and discussions. The search engine can search for objects in the database and return all matches in various fields and properties including

metadata, markup text, discussion board, file, folder, and project names, addresses, and more. All versions of a file can be searched.

To use the **Search tool**:

1. Click the Search button
 - If selected from the home page the Scope to Search area will only display the radio button to search All Projects. This allows a search of all projects the user has access to.
 - If selected from within a project the Scope to Search will display the ability to search the project you are in or all projects.

ProjectDox
by Avolve Software

File Search | **Address/Location Search**

Brookwood

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

Find results: any of the words exact phrase

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

File contents File names Folder names
 Markup contents Markup names Incoming email contents
 Discussion Board

Include file metadata in search

File Format: PDF ▼

Scope to Search: This Project All Projects



Include file metadata in search will only display when the search is performed within a project and when file metadata has been implemented for the project.

2. Type the string you want to search for:
 - Search allows 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 return all results where that word is found in its entirety. To search exact terms, select the “exact phrase” check box and type in the exact term you want matched. To search for partial words and phrases, use wildcard characters.
 - 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 return the result "windy roadside", you would 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?

- 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". There is no need to add double quotes to each end of the search term(s).
- Search is NOT case sensitive.
- Wildcard characters do not work when using "exact phrase"; they should only be used with the "any of the words" option.

1. Select the desired items from the *Include entities in search* area. ProjectDox will search all the selected entities.



You must select at least one entity, or your search will return no matches.

2. You may select **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.
3. In the *Scope to Search* area, select your desired scope. 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.

Search


6. Click **Search** (or press <Enter>). The results display 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 exists will display. When you click on a file, you are quickly taken to the page where the first occurrence of the item exists (zoomed and highlighted).

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by Avolve Software

[Close Window](#)

File Search | **Address/Location Search**

Search for: ***Brookwood*,PDF**

Results in Recent Projects	Last Modified
 04077-Brookwood Landing Final Plat - Unit 3(email to GC 9-5-07).dwg Benedict Builders\Documents\04077-Brookwood Landing Final Plat - Unit 3(email to GC 9-5-07).dwg	12/12/2017 11:21:13 AM

1 file(s) of 1 file(s) displayed ⓘ

7. When you check the **Include file metadata in search** checkbox, project specific metadata will be available for selection and searching.



Support for retrieving File Author and File Description was discontinued after Microsoft Office 2003. The fields are now considered to be legacy due to Microsoft's change of internal file format.

8. 8. Click 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.



File Search	Address/Location Search
Address 1:	<input type="text" value="777 West 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="85333"/>
Location:	<input type="text"/>
<input type="button" value="Search"/>	
Project	Description
Benedict Builders	Whisper Rock
1 of 1 record(s) displayed	