
ProjectDox
Design Consultant Upload
Training Guide
2019

Login and Consultant Upload Part 1

Table of Contents

Design Consultant Upload	3
Where are we?	4
Email from ProjectDox	5
Consultant Login	5
The Consultant Upload	5
Accepting the Project	6
The Consultant Upload page	7
Starting the Review Process	7
Where To Upload Design Consultant's Files	7
Continue Uploading Files	8
Uploading Files	8
Selecting Files	9
Loaded Files	10
Upload Files	10
Upload Task Complete	11
Confirmation for Upload Complete – Notify the City of Austin	11
Ready for the Prescreen Review Task	12

Design Consultant Upload

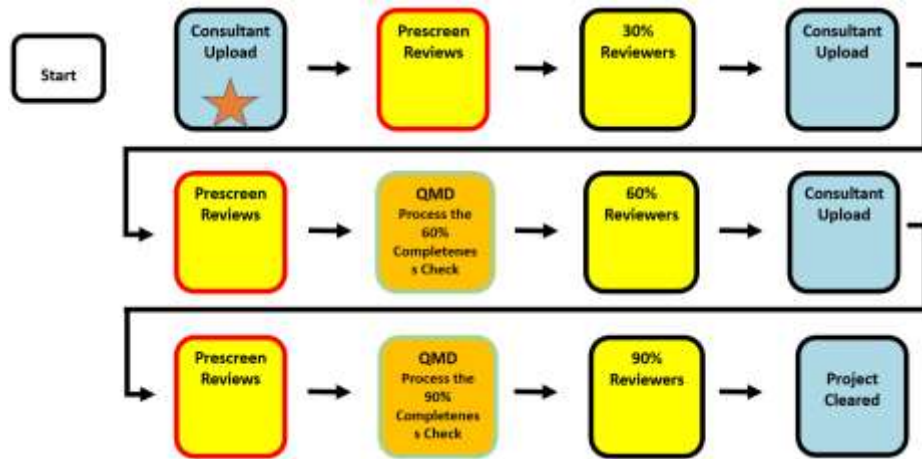
ProjectDox allows creating online, virtual project workspaces including:

- Sending a Login to ProjectDox projects for design consultant to enter the virtual project
- Uploading documents electronically to city staff from consultants' locations, 24 hours 7 days a week
- Communicating about project plans to city staff during the project progress
- Reviewing created mark-ups made directly on the virtual plans to communicate direction and clarity as to any items which require correction
- Re-submitting corrected plans electronically during the project progress
- Downloading once document plans cleared
- Providing detailed notes and comments to city staff, design consultants, or inspectors
- Accessing e-copies of approved plans during construction or inspections

Where are we?

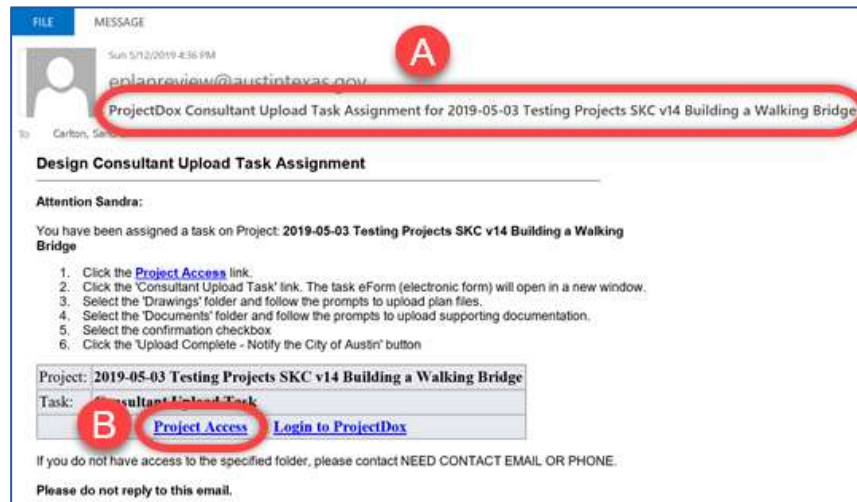
High level ProjectDox flow

We are here ★



Login and Consultant Upload Part 1

Email from ProjectDox



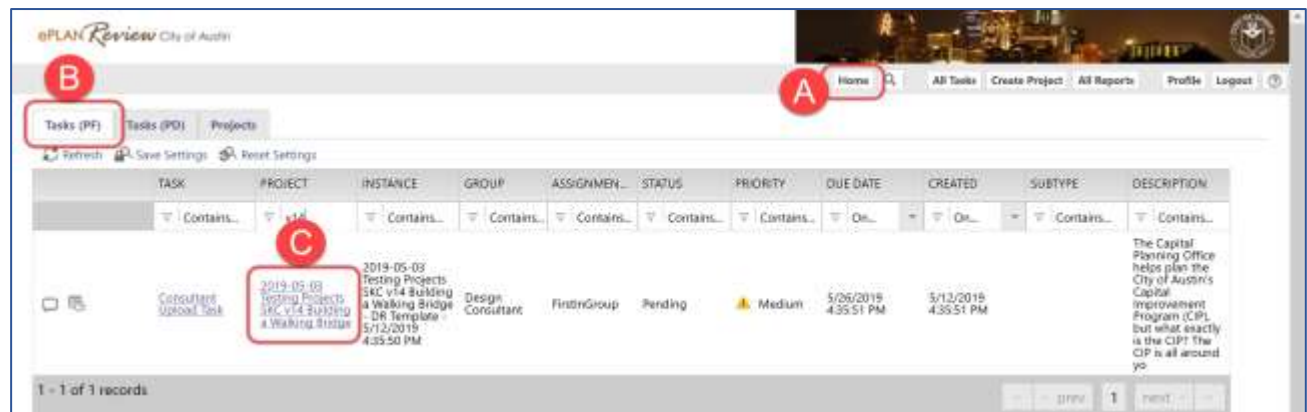
- A. The Project Title
- B. Select the Project Access

Consultant Login

Using an **email notification**.

- A. Email address for user id
- B. **Password**
- C. Select the **ProjectDox** link to project

The Consultant Upload



- A. Start at the **Home** page
- B. In the **Tasks (PF)** tab
- C. Select the **PROJECT** column project underlined title to review the project and ensure the project is exactly the one that you want to submit project plans (If the project is not for you, go back to **Home**)

Login and Consultant Upload Part 1

Accepting the Project

The screenshot shows the ePLAN Review City of Austin web application. The breadcrumb path is "2019-05-03 Testing Projects SKC v14 Building a Walking ...". The "ProjectFlow Task List" table contains the following data:

TASK	PROJECT	INSTA...	GROUP	A...	STATUS	PRI...	DUE DATE	CREATED	SU DESCRIPTION
Consultant Upload Task	2019-05-03 Testing Projects SKC v14 Building a Walking Bridge - DE Template	5/12/20...	Design Consultant	First...	Pending	M...	5/26/2019 4:35:51 PM	5/12/2019 4:35:51 PM	The Capital Planning Office helps plan the City of Austin's Capital Improvement Program (CIP), but what exactly is the CIP? The CIP is all around yo

- A. Continue in the **Home** Page
- B. **TASKS (PF)**
- C. Select **Consultant Upload Task** if you choose to take the task

Do you want to accept this task?

Do you want to accept this task?

OK Cancel

- A. Select the **OK** button

The Consultant Upload page

The screenshot shows the 'CONSULTANT UPLOAD' page. Callout A points to the title. Callout B points to the 'Review Information' tab. Callout C points to the project details: Project Name (2019-04-08 Testing Projects SKG), Project Description (Testing creating and sharing a new project to invite users to participate), Coordinator (Sandra Carlton), Workflow/Activity Name (Design Review Workflow/Consultant Upload), and Current User Login (Sandra Carlton (Sandra.Carlton@ausintexas.gov)). Callout D points to the 'Task Instructions' section, which includes a note about document submission and a list of required documents. Callout E points to the '30% Submission' list: 1. All documents properly released, 2. Cost Estimate, 3. Draft Geotechnical Report(s), 4. Drawings (1 PDF and 1/2 sized hardcopy), 5. LEED or Sustainability Checklist. At the bottom, there is a 'TO START REVIEW PROCESS' instruction.

- A. The **Consultant Upload** page displays
- B. **Review Information** tab
- C. Review the name and description of the project to ensure it is correct for you
- D. Review the **Task Instructions** also seen on the Tasks (PF) page as an icon
- E. Notice the **30% Submission** for required Documents in the submittal
 - 1. All documents properly released
 - 2. Cost Estimates
 - 3. Draft Geotechnical report(s)
 - 4. Drawings (1 PDF and ½ size hardcopy)
 - 5. LEED or Sustainability Checklist
 - 6. It is important to that the consultant has submitted all required documents and if not, why/ reason for not complying with the contract.

Starting the Review Process

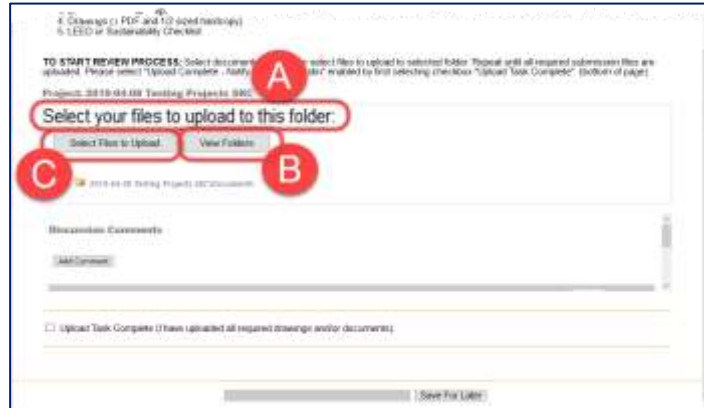
Where To Upload Design Consultant's Files

The screenshot shows the file upload interface. Callout A points to the 'TO START REVIEW PROCESS' instruction. Callout B points to the 'Documents' folder under the project name '2019-04-08 Testing Projects SKG v1'. The interface also shows a 'Select destination folder for files' section with options like 'Documents', 'Business Review Comments', 'Review Comments', 'Shared', and 'Task Review'. At the bottom, there is a 'Save For Later' button.

- A. **TO START REVIEW PROCESS** displays in the middle of the page
- B. Select the **Documents** folder under the Project's name

Login and Consultant Upload Part 1

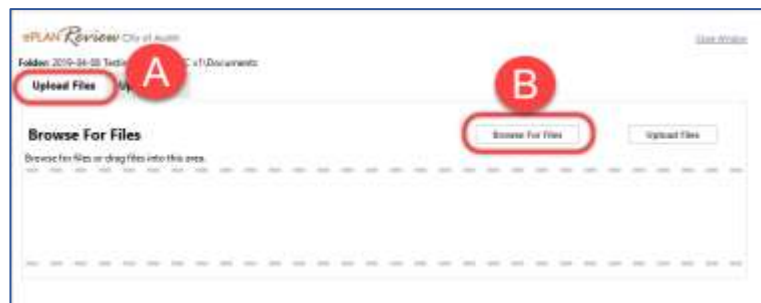
Continue Uploading Files



- A. Notice the **Select your files to upload to this folder**
- B. Select the **View Folders** and all the Project's folders display again
 - a. Documents
 - b. Bluebeam Review Comments
 - c. Reviewer attachments
 - d. Cleared
 - e. Quick Review
- C. Select the **Select Files to Upload** button to upload all required submission files to the documents folder

Uploading Files

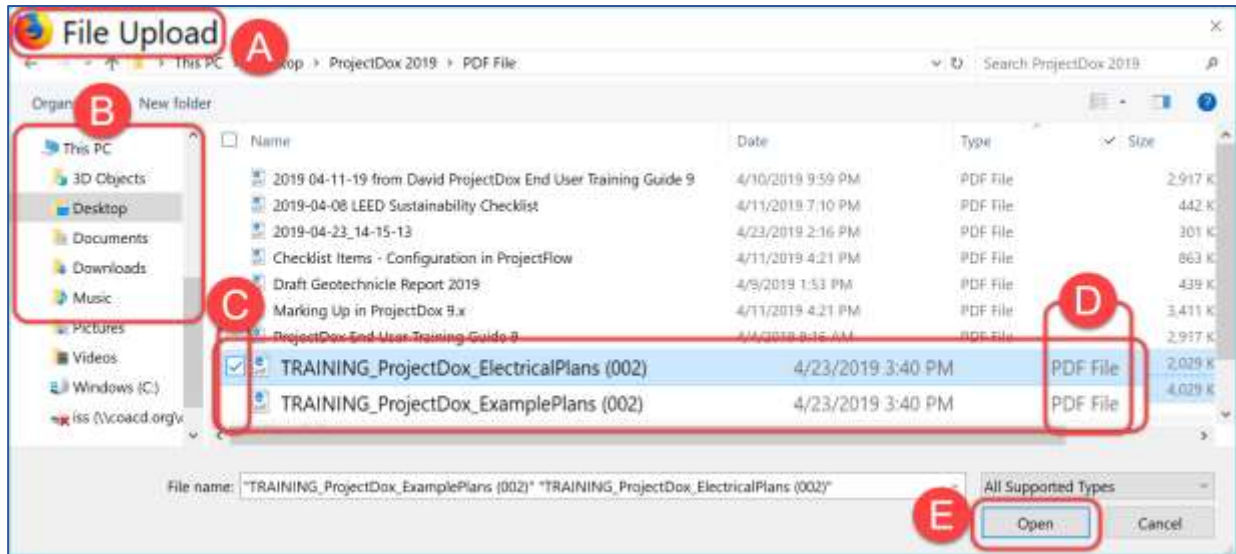
Upload files to any folder that you have Upload privileges; files to upload should not include characters in the file name (<, >, :, ", /, \, |, ?, *, =)



- A. Notice **Upload Files** tab
- B. Select **Browse For Files**

Login and Consultant Upload Part 1

Selecting Files

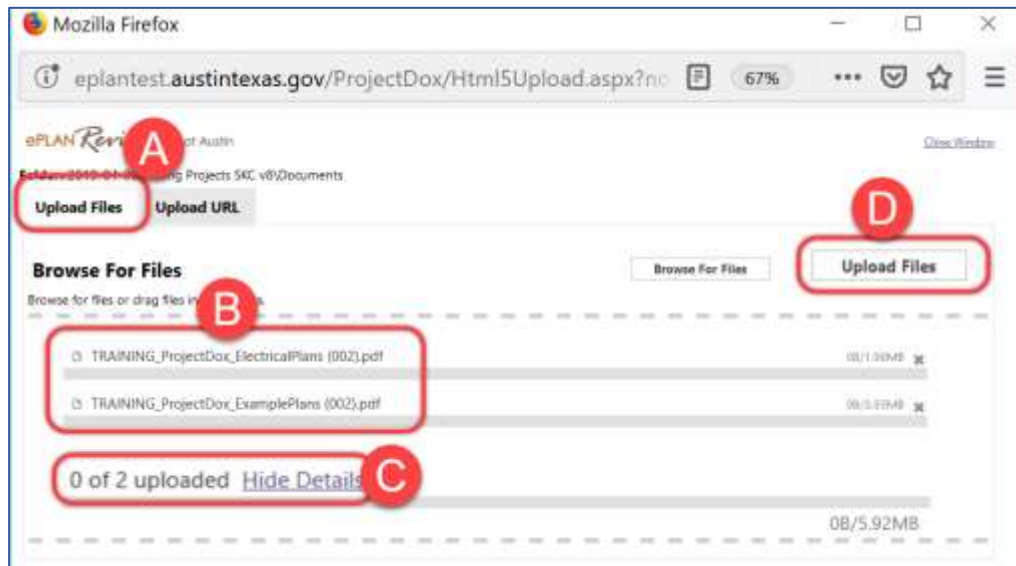


- A. **File upload** displays
- B. Browse or select folder location
- C. Select one file or more file names
- D. ensure that the file type is **PDF File**
- E. Select the **Open** button

Login and Consultant Upload Part 1

Loaded Files

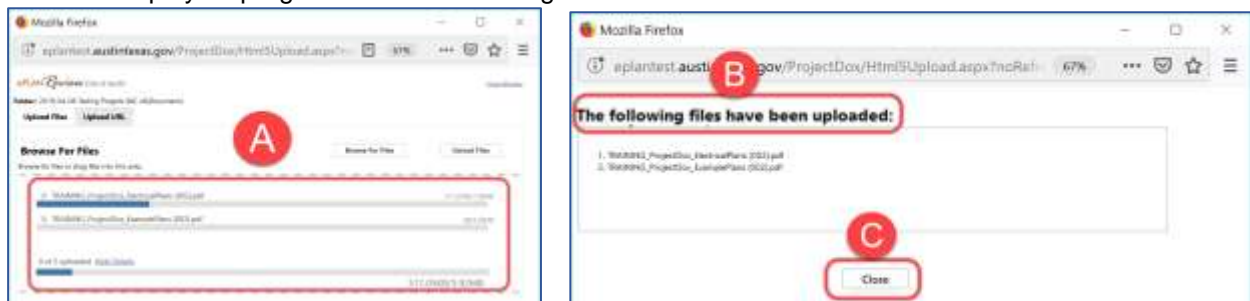
All required files must be uploaded or sufficient reasons for missing files



- A. The **Upload Files** tab displays
- B. Notice, the files the selected files
- C. A total of 2 uploaded files display
- D. Select the **Upload Files** button

Upload Files

Each file displays a progress line while loading all files



- A. The files start uploading
- B. **The following files have been uploaded**
- C. Select the **Close** button

Login and Consultant Upload Part 1

Upload Task Complete

Consultant Upload - Mozilla Firefox

67%

If you have not included all of the listed documents with your project submittal, indicate in the "Discussion" section the reason for not including them. The review period will begin once it has been verified all required documents have been submitted. **Only the half-sized set of drawings should be submitted in both hard copy and electronic format. One hard copy is required, but the Project Manager may request additional copies.**

30% Submission

1. All documents properly released
2. Cost Estimate
3. Draft Geotechnical Report(s)

Drawings (1 PDF and 1/2 sized hardcopy)

LEED or Sustainability Checklist

TO START REVIEW PROCESS: Select documents folder, then select files to upload to selected folder. Repeat until all required submittal files are uploaded. Please select "Upload Complete - Notify the City of Austin" enabled by first selecting checkbox "Upload Task Complete". (bottom of page)

Project: 2019-04-08 Testing Projects SKG v8

Select your files to upload to this folder:

Select Files to Upload View Folders

2019-04-08 Testing Projects SKG v8/Document

TRAINING_ProjectDox_ElectricalPlans (002).pdf

TRAINING_ProjectDox_ExamplePlans (002).pdf

Discussion Comments

Add Comment

Show 5 records

DISCUSSION COMMENT	PARTICIPANT	DATE/TIME
0 of 0 records		

☒ Upload Task Complete (I have uploaded all required drawings and/or documents)

Upload Complete - Notify the City of Austin Save For Later

- A. The **Consultant Upload** page displays with the **To Start Review Process**
- B. Check that all the files were uploaded (if missing file, check file type saved as PDF only)
- C. Select **Add Comment** button for any comments to reviewer (example: *File missing because of late LEED review, coming soon*)
- D. **IMPORTANT**: must select the checkbox ☒ **Upload Task Complete I have uploaded all required drawings and/or documents** near the bottom of the page
- E. One last item, select the **Upload Complete – Notify the City of Austin** button that all of the files are loaded **OR**
- F. Select the **Save For Later** button to review and complete the upload later

Confirmation for Upload Complete – Notify the City of Austin

Completing this task will finish your participation in this step and cannot be undone. Are you sure you want to complete the task?

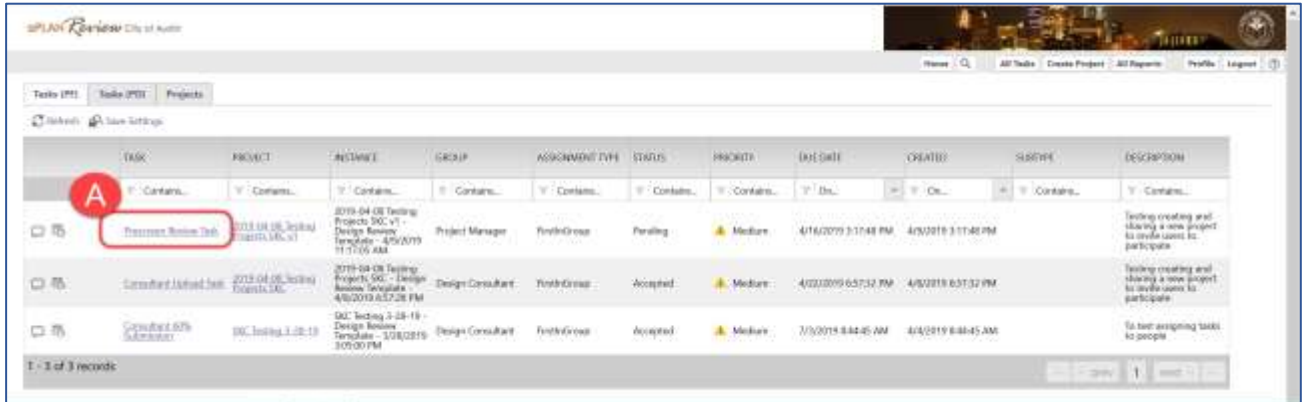
OK Cancel

- A. Select the **OK** button

Login and Consultant Upload Part 1

This completes the Design Consultant's login and upload documents. The next step in the process is for the City of Austin Project Manager to review the **Prescreen Review** of the Design Consultant's upload.

Ready for the Prescreen Review Task



The screenshot shows the 'SPLASH Review City of Austin' web application. The interface includes a navigation bar with 'Home', 'All Tasks', 'Create Project', 'All Reports', 'Profile', and 'Logout'. Below the navigation bar, there are tabs for 'Tasks (PM)', 'Tasks (DC)', and 'Projects'. The 'Tasks (PM)' tab is selected, and a 'Save Settings' link is visible. The main content area displays a table of tasks with the following columns: TASK, PROJECT, ATTACHEE, GROUP, ASSIGNMENT TYPE, STATUS, PRIORITY, DUE DATE, CREATED, SUBTYPE, and DESCRIPTION. The first row is highlighted with a red circle and a white 'A', indicating the 'Prescreen Review Task'. The table shows three tasks in total, with the first task being the 'Prescreen Review Task' assigned to the 'Project Manager' group, with a status of 'Pending' and a priority of 'Medium'.

TASK	PROJECT	ATTACHEE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	SUBTYPE	DESCRIPTION
Prescreen Review Task	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	Project Manager	ProjectGroup	Pending	Medium	4/16/2019 3:17:48 PM	4/16/2019 3:17:48 PM		Testing creating and sharing a new project to create users to participate
Consultant Upload Task	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	Design Consultant	ProjectGroup	Accepted	Medium	4/16/2019 6:57:32 PM	4/16/2019 6:57:32 PM		Testing creating and sharing a new project to create users to participate
Consultant BPA Submission	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	2019-04-08-Testing-Projects SOC v1 - 2019-04-08-Testing-Projects SOC v1	Design Consultant	ProjectGroup	Accepted	Medium	4/16/2019 8:44:45 AM	4/16/2019 8:44:45 AM		To test assigning tasks to people

1 - 3 of 3 records