

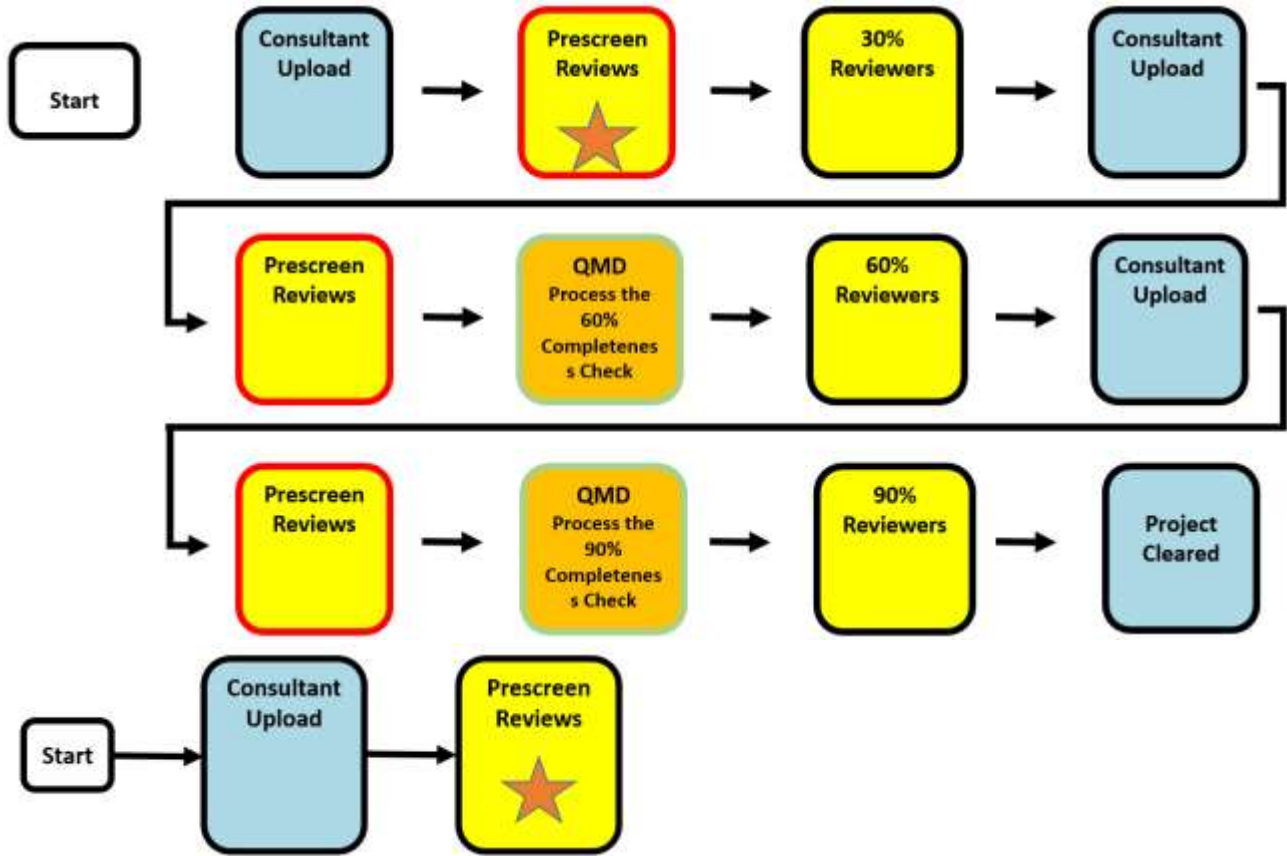
ProjectDox
Prescreen Review - Consultant
Training Guide
2019

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WHERE ARE WE

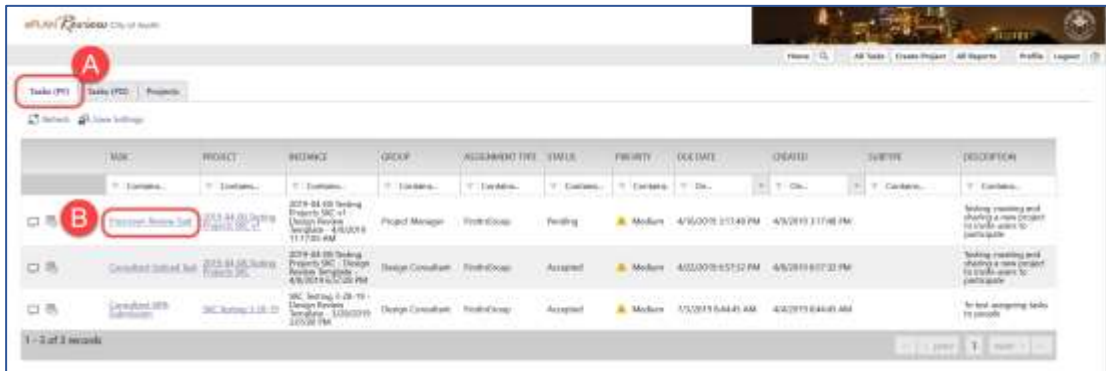
The Design Consultant completed the Consultant Upload page in ProjectDox. Therefore, we are at the Prescreen Review. ★



CONSULTANT PRESCREEN REVIEW PROCESS

- A. **Consultant Upload** – The Design Consultant prepared his documents and uploaded these documents
 - a. All documents properly released
 - b. Cost Estimates
 - c. Draft Geotechnical report(s)
 - d. Drawings (1 PDF and ½ size hardcopy)
 - e. LEED or Sustainability Checklist
 - f. It is important to ensure the consultant has submitted all required documents and if not, why/ reason for not complying with the contract.
- B. **Prescreen Review** – the next step is a Project Manager reviews all the documents to proceed through the ProjectDox process
- C. **Prescreen Review** – Are Corrections Required for Upload? – The Project Manager determines the next step
 - a. Yes, continue to the 30% Review
 - b. No, The Project Manager request Submission Corrections by using the [Return to Consultant](#) button at the bottom of the Prescreen Review page to the Design Consultant for additions or corrections through

Project Manager Logins to ProjectDox



- A. The **Task (PF)** tab displays
- B. The Project Manager selects the **Prescreen Review Task**. Meaning that the Project Manager accepts the **Prescreen Review Task**

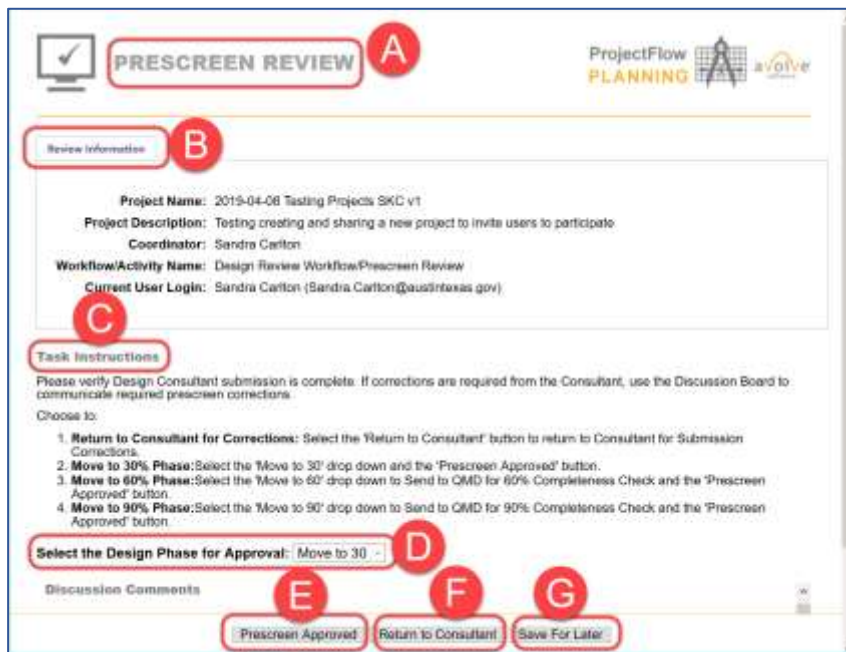
The Project Manager message: Do you want to accept this task?



- A. Select the **OK** button

Once the task is accepted, the task is removed from other employee's view in their ProjectDox pages

PRESCREEN REVIEW



- A. The **Prescreen Review** page displays
- B. **Review Information** only one tab displays
- C. **Task Instructions** - Please verify Design Consultant submission is complete. If corrections are required from the Consultant, use the Discussion Board to communicate required prescreen corrections.
 1. **Return to Consultant for Corrections:** Select the 'Return to Consultant' button to return to Consultant for Submission Corrections.
 2. **Move to 30% Phase:** Select the 'Move to 30' drop down and the 'Prescreen Approved' button.
 3. **Move to 60% Phase:** Select the 'Move to 60' drop down to Send to QMD for 60% Completeness Check and the 'Prescreen Approved' button.
 4. **Move to 90% Phase:** Select the 'Move to 90' drop down to Send to QMD for 90% Completeness Check and the 'Prescreen Approved' button.
- D. The Select the Design Phase for Approval dropdown menu for the above Task Instructions
- E. **Prescreen Approved** button
- F. **Return to Consultant** button
- G. Select the **Save for Later** button so that we can view the documents provided by the consultant

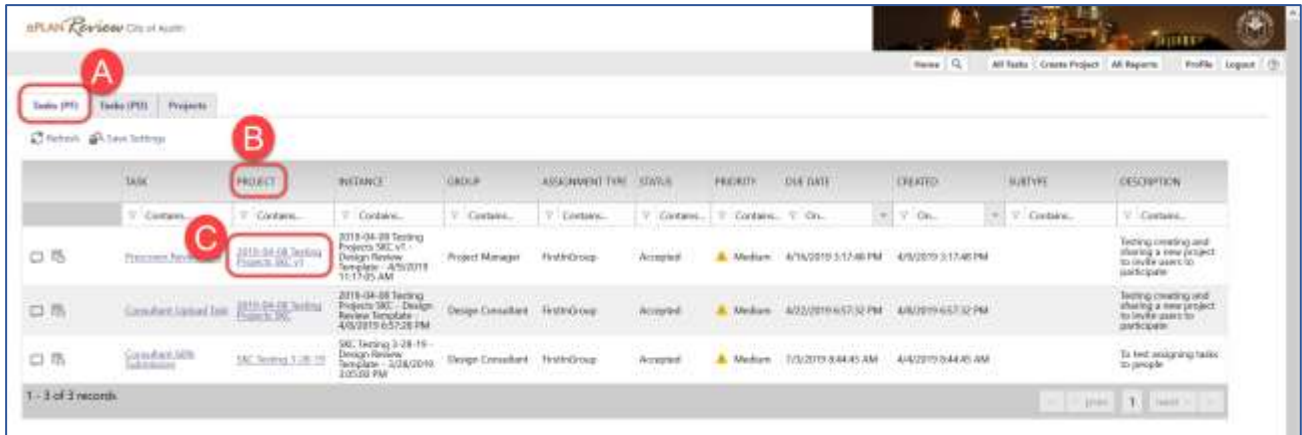
Successfully saved displays



- A. Select the **OK** button

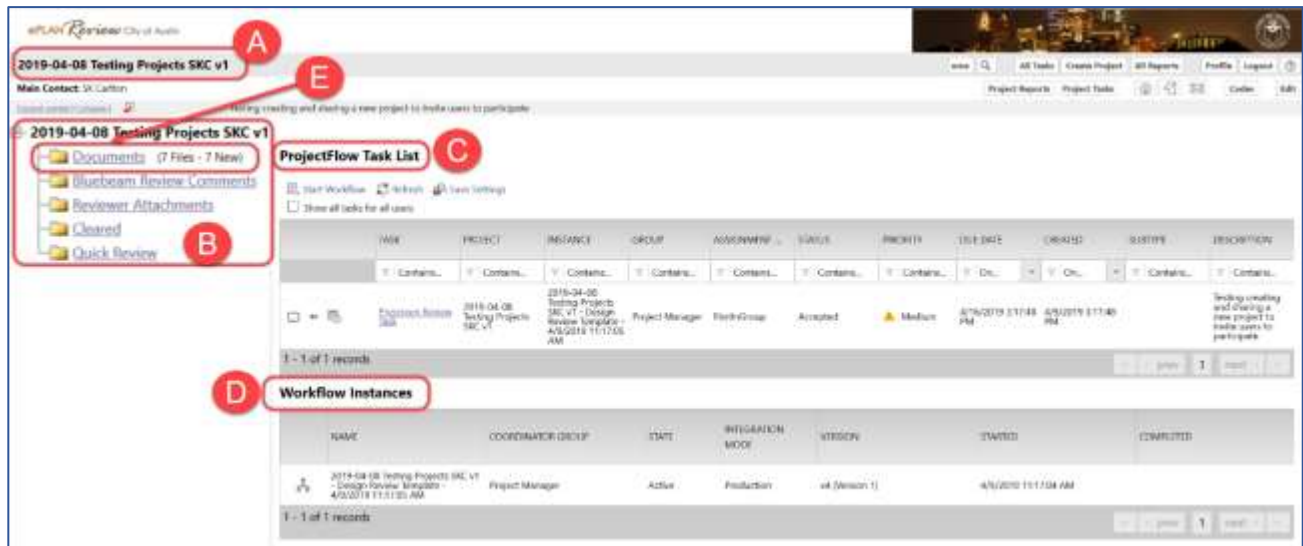
OPENING THE CONSULTANT'S PROJECT


In ProjectDox program



- A. Continuing under **Tasks (PF)**
- B. Under the **Project** column
- C. Select the Project, in our example the project title is **2019-04-08 Testing Projects SKC v1**

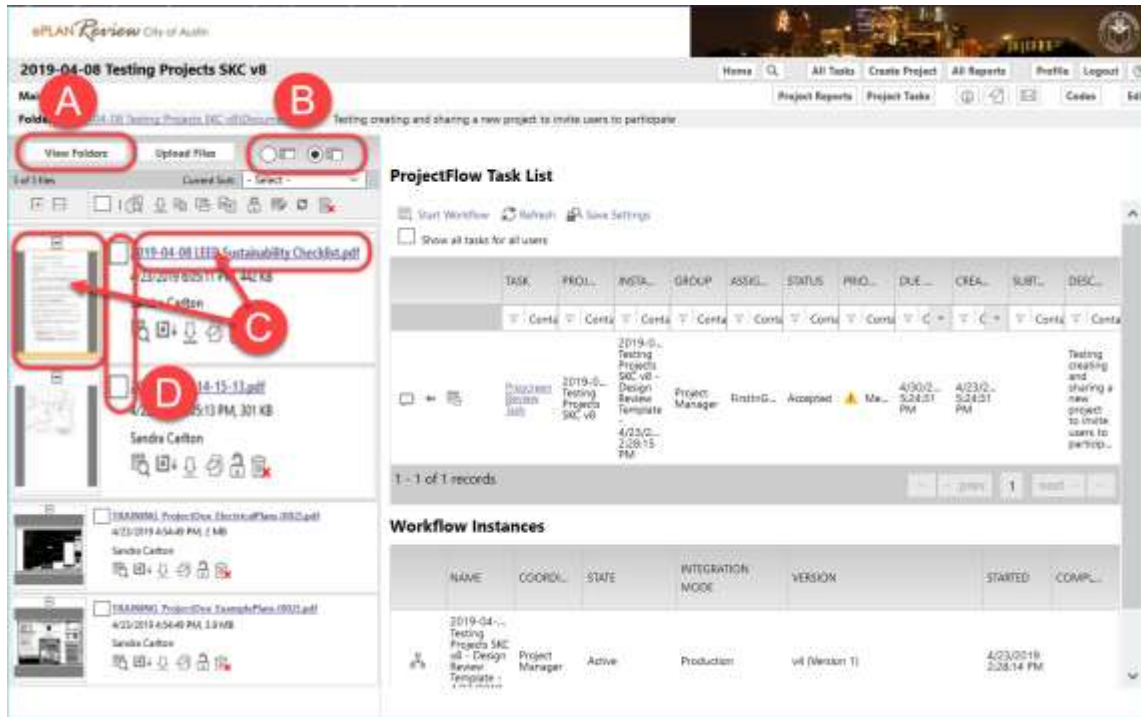
ENTERING THE CONSULTANT'S DOCUMENTS



- A. The Project Title, in our example, title is 2019-04-08 Testing Projects SKC v1. Your titles will have a specific format using numbers and letters according to best practices
- B. The ProjectDox folders of documents from the consultant
 1. **Documents** – notice the 7 of 7, If a folder has files, next to the folder name is displayed a count of total files and a count of new files
 2. **Bluebeam Review Comments**, many engineers use Bluebeam to prepare their projects, ProjectDox integrates with Bluebeam to accept the documents
 3. The **Reviewer Attachments**, if the reviewer prefers adding documents to the folders for the consultant to review, there is a location to save those documents
 4. The **Cleared** folder
 5. The **Quick Review** folder that contains documents from a quick review of the project
- C. The **ProjectFlow Task List**, this is the Task list, in our example, the Prescreen Review Task, the step following the consultant first download is available to select and review
- D. The **Workflow Instance**, selecting the  icon provides a preview of ProjectDox's flowchart or workflow and the location of the project in the current workflow in the process
- E. Select **Documents** folder for reviewing

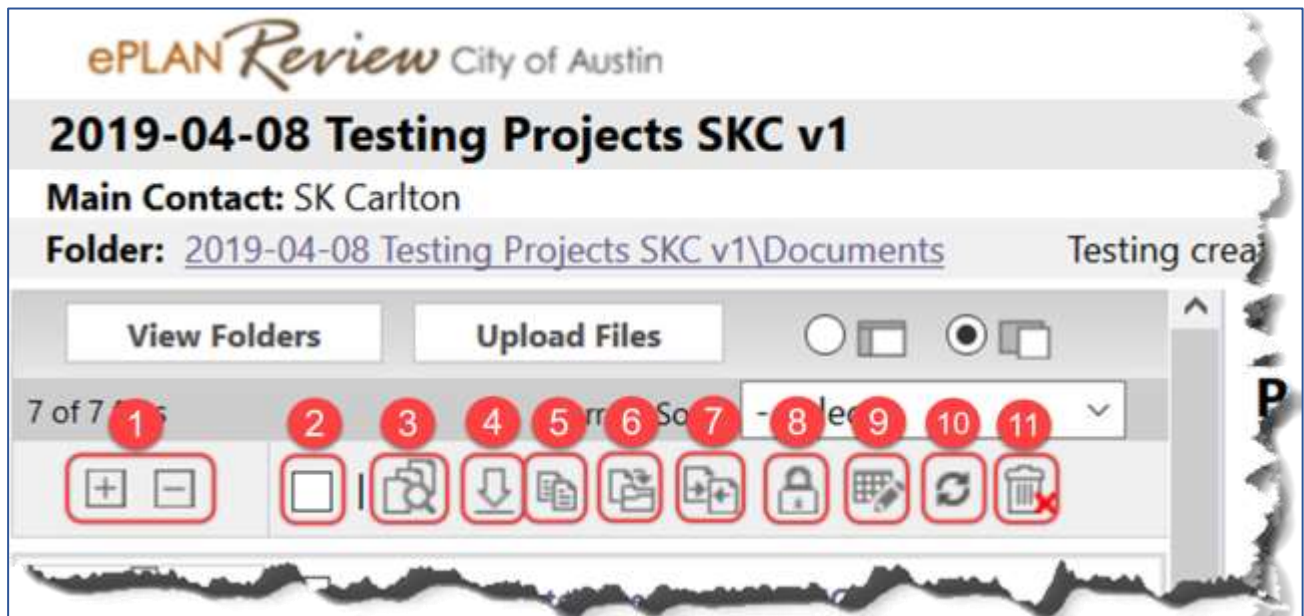
Viewing the Consultant's Documents

To enlarge the document, select the file name or thumbnail of the image. ProjectDox displays the selected file.



- A. **View Folders** – Selecting this button returns back to the view all the Document folders
- B. Set ProjectDox viewer **radio buttons**
 - a. There are **two modes** for displaying the ProjectDox Viewer window:
 - **Set ProjectDox Viewer in right-side panel** or displays the document to the right within the document window
 - **Set ProjectDox Viewer in separate window** or displays the document in its own separate window to manipulate and open in a full screen for better viewing
 - b. By default, the viewer displays in a separate window, full screen.
- C. Select the Thumbnail or link to open the document
- D. **Checkboxes** – when checked, you may open more than one document at a time for reviewing

Documents Tool Bar



1. **Show or Hide all Thumbnail images**
2. **Toggle all checkboxes On or Off** in the checkbox at the top of the Thumbnails
3. **View checked files in a binder** - the selected files display separately in the binder even if one Thumbnail has several documents
4. **Download checked files**
5. **Copy checked file to another folder**
6. **Moved checked files to another folder**
7. **Compare two checked files**
 - a. Compares pictures side by side
 - b. Compares one picture on top with transparency
8. **Check Out/Undo check out files**
9. **Edit Metadata in the checked boxes** (Currently not using Metadata)
10. **Refresh files** – Refresh files often to have an up to date screen preview
11. **Delete checked files**; however, if the file has changes due to reviews of the file, the file cannot be deleted

Thumbnail Toolbar

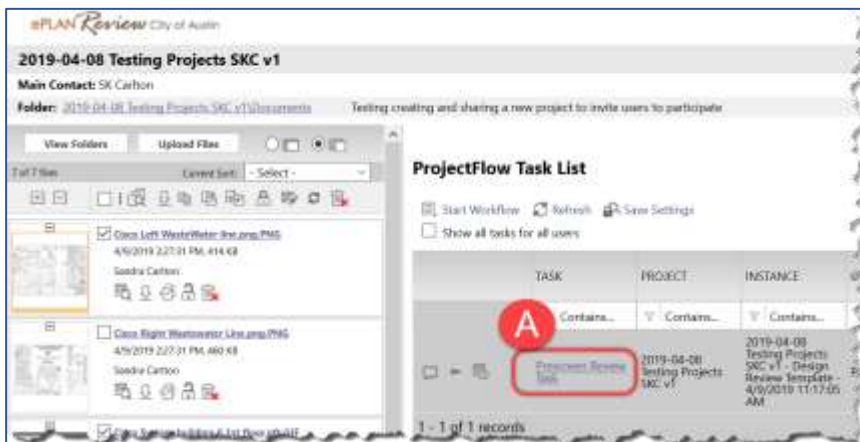


1. **View History** for “the file name or title” selecting view history displays file details, versioning, and file’s history
2. **Download** the file “the file name or title”
3. **(0) Conversations attached to** “the file name or title”
4. **Checkout** “the file name or title”
5. **Delete** “the file name or title” however, if the file has changes due to reviews of the file, the file cannot be deleted

COMPLETING THE PRESCREEN REVIEW

The prescreening is to verify the Design Consultant submissions are complete. If corrections are required from the Consultant, use the **Discussion Board** to communicate required prescreen corrections

After reviewing all the documents against the **Upload document checklist**, the Design Consultant has met all the requirements



- A. Select to open the **Prescreen Review Task** to open the **Prescreen Review** dialogue window

Opening the Prescreen Review

PRESCREEN REVIEW A

ProjectFlow PLANNING **avolve**

Review Information

Project Name: 2019-04-08 Testing Projects SKC v1
Project Description: Testing creating and sharing a new project to invite users to participate
Coordinator: Sandra Carlton
Workflow/Activity Name: Design Review Workflow/Prescreen Review
Current User Login: Sandra Carlton (Sandra.Carlton@austintexas.gov)

Task Instructions

Please verify Design Consultant submission is complete. If corrections are required from the Consultant, use the Discussion Board to communicate required prescreen corrections.

Choose to:

- Return to Consultant for Corrections:** Select the 'Return to Consultant' button to return to Consultant for Submission Corrections.
- Move to 30% Phase:** Select the 'Move to 30' drop down and the 'Prescreen Approved' button.
- Move to 60% Phase:** Select the 'Move to 60' drop down to Send to QMD for 60% Completeness Check and the 'Prescreen Approved' button.
- Move to 90% Phase:** Select the 'Move to 90' drop down to Send to QMD for 90% Completeness Check and the 'Prescreen Approved' button.

Select the Design Phase for Approval: Move to 30 B

C Prescreen Approved Return to Consultant Save For Later

- Prescreen Review** dialogue window displays
- Ensure the **Select the Design Phase for Approval: Move to 30** is selected, meaning the project will be moved to the **30% completion** for review
- Select the **Prescreen Approved** button

Are you sure?

Approving this task will move the workflow to the next step and cannot be undone. Are you sure you want to approve the task?

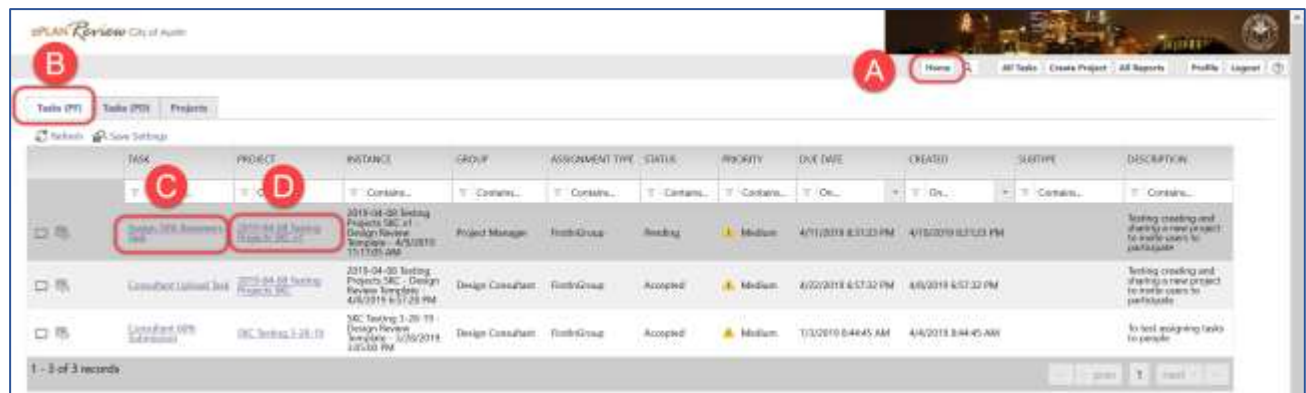
A OK Cancel

Approving this task will move the workflow to the next step and cannot be undone. Are you sure you want to approve the task?

- Select the **OK** button

2019 ProjectDox Prescreen Training Guide

THE PROJECT CONTINUES INTO THE 30% REVIEW



The screenshot displays the ProjectDox interface for the City of Austin. The top navigation bar includes a 'Home' button (A) and a 'Tasks (PF)' tab (B). The main content area shows a table of tasks. The first task, 'Assign 30% Reviewers' (C), is highlighted with a red box. The project name '2019-04-08 Testing Projects SKC v1' (D) is also highlighted with a red box. The table columns include TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT TYPE, STATUS, PRIORITY, DUE DATE, CREATED, SILENCE, and DESCRIPTION.

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	SILENCE	DESCRIPTION
Assign 30% Reviewers	2019-04-08 Testing Projects SKC v1	2019-04-08 Testing Projects SKC v1 - Design Review Sample	Project Manager	WorkGroup	Ready	Medium	4/11/2019 8:33:33 PM	4/15/2019 8:33:33 PM		Testing creating and starting a new project to make users to participate
Complete Initial Test	2019-04-08 Testing Projects SKC	2019-04-08 Testing Projects SKC - Design Review Sample	Design Consultant	WorkGroup	Accepted	Medium	6/20/2018 6:57:32 PM	6/6/2018 6:57:32 PM		Testing creating and starting a new project to make users to participate
Complete WFL Submission	SKC Testcase 1.28.13	MC Testing 1.28.13 Design Review Sample	Design Consultant	WorkGroup	Accepted	Medium	1/30/2019 8:44:45 AM	4/4/2018 8:44:45 AM		to test assigning tasks to people

- A. Select the **Home** button
- B. **Tasks (PF)** tab displays
- C. **Assign 30% Reviewers** Task displays
- D. The example Project is **2019 04-08 Testing Projects SKC v1**