ProjectDox
60% Review
Training Guide
2019

2019 ProjectDox 60% Training Guide

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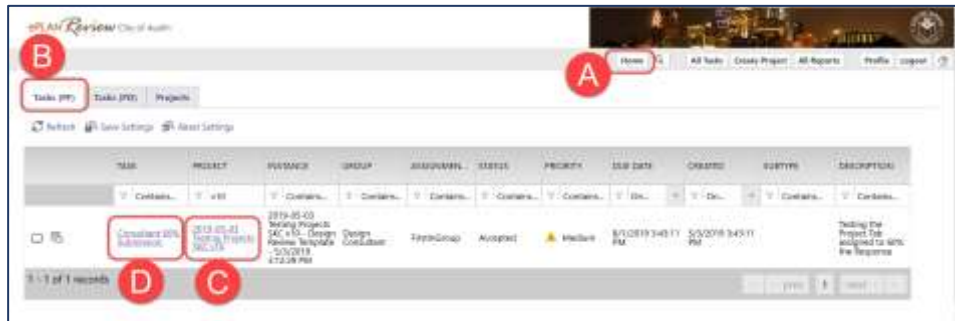
2

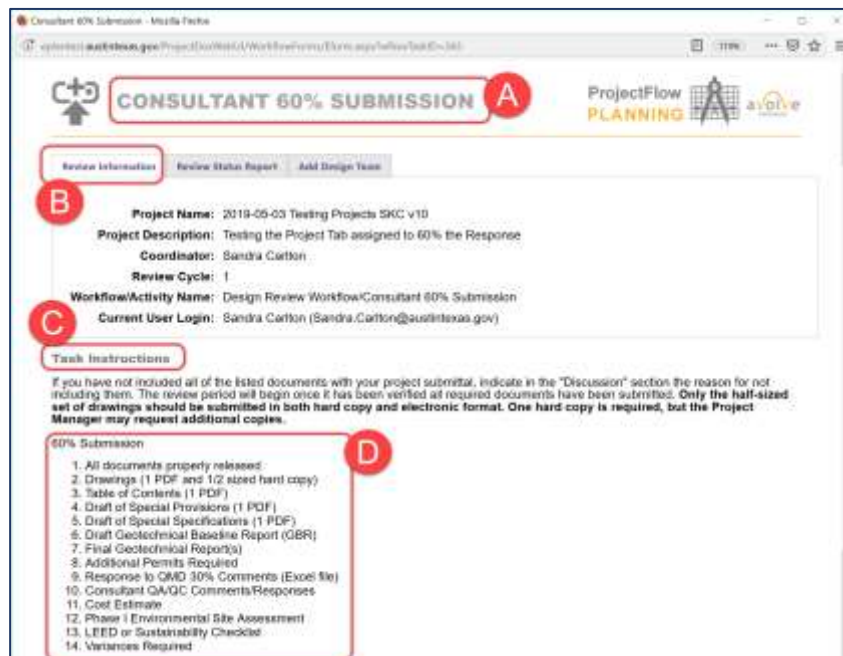## Where are we?

High level ProjectDox flow
We are here ⭐
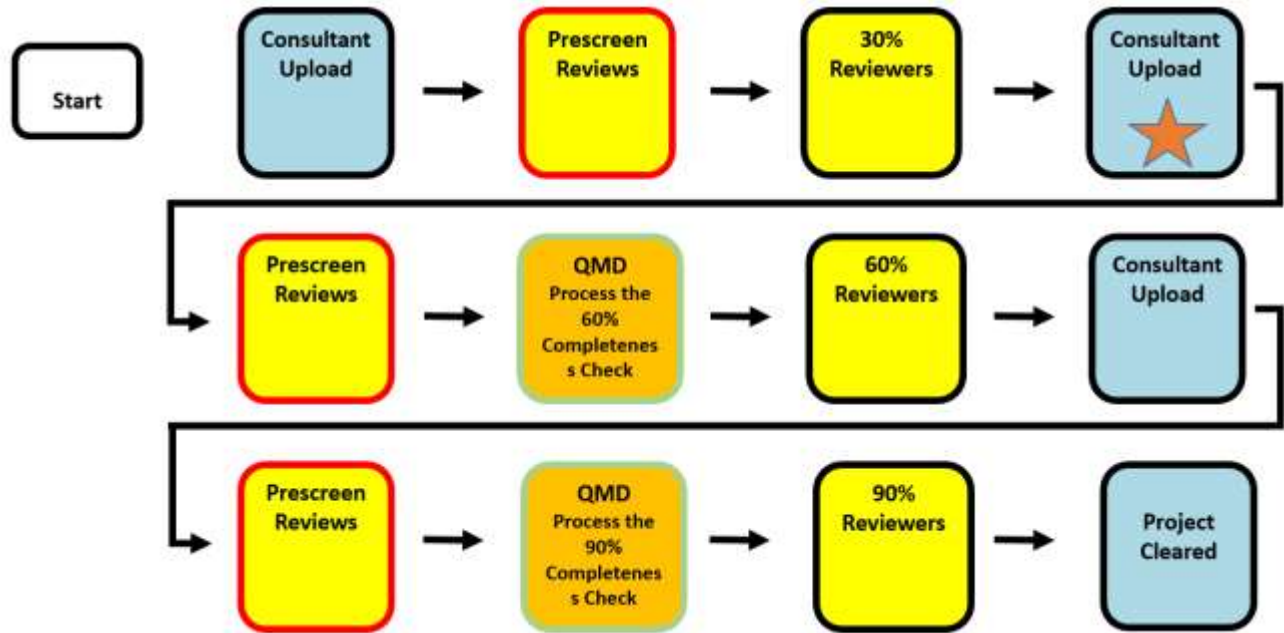
The Consultant 60% Upload

A. The **Home** page displays
B. **Tasks (PF)**
C. Review the **Project first** before accepting the Task **Consultant 60% Submission**
D. The Project Manager accepts the **Consultant 60% Submission**

The Consultant Upload Form displays

A. The **Consultant 60% Upload** form displays
B. **Review Information** tab
C. *Notice the **Task Instructions -** 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.***
D. Notice the **60% Submission** for required Documents in the submittal
   1. All documents properly released
   2. Drawings (1 PDF and 1/2 sized hard copy)
   3. Table of Contents (1 PDF)
   4. Draft of Special Provisions (1 PDF)

5. Draft of Special Specifications (1 PDF)
6. Draft Geotechnical Baseline Report (GBR)
7. Final Geotechnical Report(s)
8. Additional Permits Required
9. Response to QMD 30% Comments (Excel file must be saved as a **PDF** to download into **ProjectDox**)
10. Consultant QA/QC Comments/Responses
11. Cost Estimate
12. Phase I Environmental Site Assessment
13. LEED or Sustainability Checklist
14. Variances Required

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

To Start the Next Revew Process:

A. **To Start the Next Review Process** displays in the middle of the form
B. Notice the **View/Edit ChangeMark Items (2)** button
C. Notice the **View/Edit Checklist Items (3)** button
D. Select the **Documents** folder to add the newly requested documents based on your 60% review of **Discussion Comments and ChangeMarks**. Uploading **PDF** documents is the same as the original request
E. Review **Discussion Documents** and prepare and enter response comments

Submission Complete

A. **IMPORTANT**: must select the checkbox ☑ **I have reviewed and addressed, including responses where appropriate, all ChangeMark and checklist items.** near the bottom of the form

B. One last Item, must select the checkbox ☑ **I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project**

60% Submission Prescreen Task

   A. **Home**
   B. **Tasks (PF)**
   C. Using the **Contains Filter** enter 60% or other filters in the project
      Project Manager accepts the **60% Submission Prescreen**

60% Submission Prescreen

A. **60% Submission Prescreen** displays
B. Notice **Review Information** tab information
C. **Review Status Report** – assists with reviewing all the steps and questions for the consultant in the 30% review
D. **Task Instructions** - Please complete task based on action required. Design Consultant should have responded to 30% corrections and uploaded plans for 60% review.
E. Button options for 60% Submission
   1. Select **Sent to QMD 60% Completeness Check** button to continue the process
   2. **Return to Consultant** with comments of any mission issues for ChangeMarks or Checklists (after the 30% review, this option is rarely uses)
   3. **Save for Later**

QMD Process

QMD 60% Completeness Check

A. **Home**
B. **Tasks (PF)**
C. Accepts the **60% Completeness Check** task

Review QMD 60% Completeness Check Form

A. **Review OMD 60% Completeness Check form** displays
B. **Review Information** tab
C. **Task Instructions** - the Design Consultant has submitted plans for **60% Review**. Please perform a Completeness Check for 60% Submission. Update the Discussion Board with any issues to communicate with the PM.

D. Selects the **View/Edit Checklist Items (0)** button

1. The **Workflow Review Checklist Item Review** form displays
2. If missing documents
    a. Select the Comment Type dropdown menu
    b. Select the **60% Completeness Check**
3. Selects checkboxes of any of the missing documents
4. Select Add **Checklist Items** button
5. In the **Selected Checklist items for All Review Cycles** the selected checkbox items display
6. Selects **Save** and **Close** to close the page and return to the **QMD 60% Completeness Check**
E. If no missing documents, you may add a discussion comment
F. Select the **Complete** button to move workflow forward

Review QMD CC Results

A. Home
B. Tasks (PF)
C. Accept **Review QMD CC Results**

Review QMD Result Form

A. The Review **QMD Result Form** displays
B. Notice the **Review Information** tab
C. **Task Instructions** - Please review the **discussion board** and **checklists** for any issues found with the **QMD 60% Completeness Check** review. **If there are outstanding items from the review, start an Ad Hoc review with the Consultant to obtain missing items.**
D. Select **the View/Edit Checklist Items** button or select the **View Status Report** for items results
E. **Add Comments** for the project manager
F. Select the **Complete** button or **Save For Later** review button

Assign 60% Reviewers Task
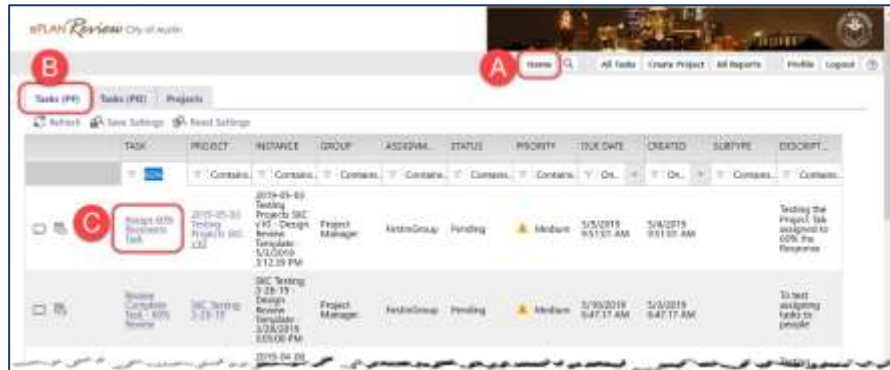
- A. **Home**
- B. **Task (PF)**
- C. Accept the **Assign 60% Reviewers Task**

Assign 60% Reviewers Task Form

- A. The **Assign 60% Reviewers** Task displays
- B. Notice the **Review Information** tab
- C. **Task Instructions** - Please select the required review departments for the 60% Review from the list. Select **the checkbox** by the City Departments to review the 60% Reviewers step.
- D. In the example we selected the **Public Works (Office of the City Architect)**; however, the selection of departments in the 60% Review depends on the Project Manager and knowledge of requirements
- E. Select the **Begin Review** button to start the reviews or **Save For Later** button to save any changes and complete the task at a later time

## Public Works (Office of the City Architect) 60% Review Cycle #2
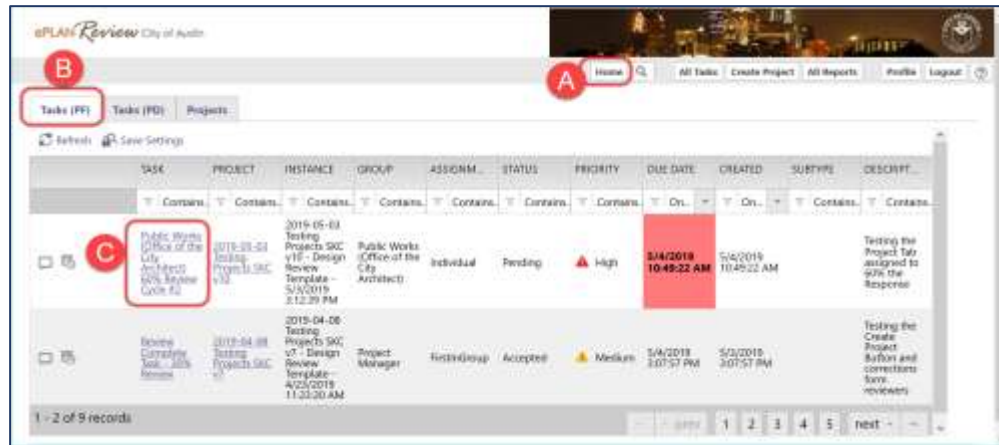
- **A. Home**
- **B. Tasks (PF)**
- C. Accept the **Public Works (Office of the City Architect 60% Review Cycle #2**

Public Works (Office of the City Architect 60% Review Cycle #2 Form

- A. **My Public Works (Office of the City of Austin Architect)** displays
- B. Notice **Review Information** tab information
- C. **Task Instructions** - Upon acceptance of task, please review the required drawings (of images) and provide any applicable comments and status. (D and E on next page)

IMPORTANT TO RESOLVE CHANGEMARKS- Select the <u>View/Edit ChangeMarks Items</u> button
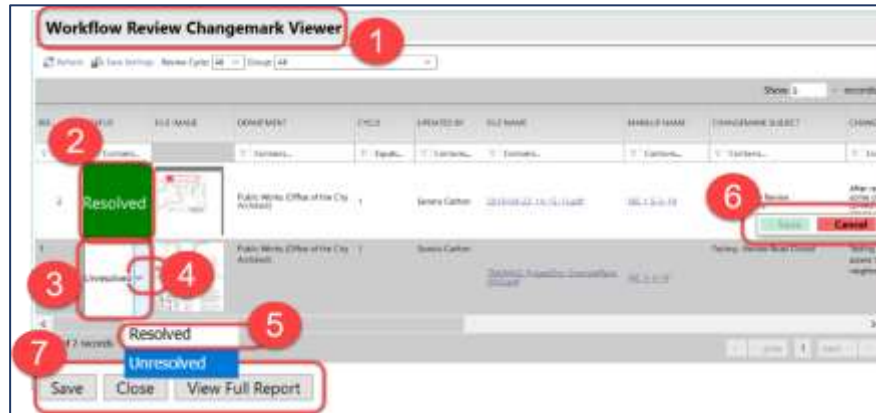
1. The **Workflow Review ChangeMark Viewer** displays
2. Notice, once a **ChangeMark** is completed, **Resolved** displays on a green background

3. **Unresolved** displays on a red background
4. A dropdown **menu** is available to use to either select Resolve or Unresolved
5. Select **Resolve** to approve the ChangeMark has been accepted
6. Select the green **Save** button to save the change to the ChangeMark alone with scrolling across the page and enter a reviewer's comments about the ChangeMarks
7. Select **Save** and then **Close** to end the review of **ChangeMarks**

D. Review Status, select the **dropdown menu** and select **Release to Next Phase** or **Resubmit** for this phase
E. When complete select **Review Completed** button

Review Complete Task 60% Review
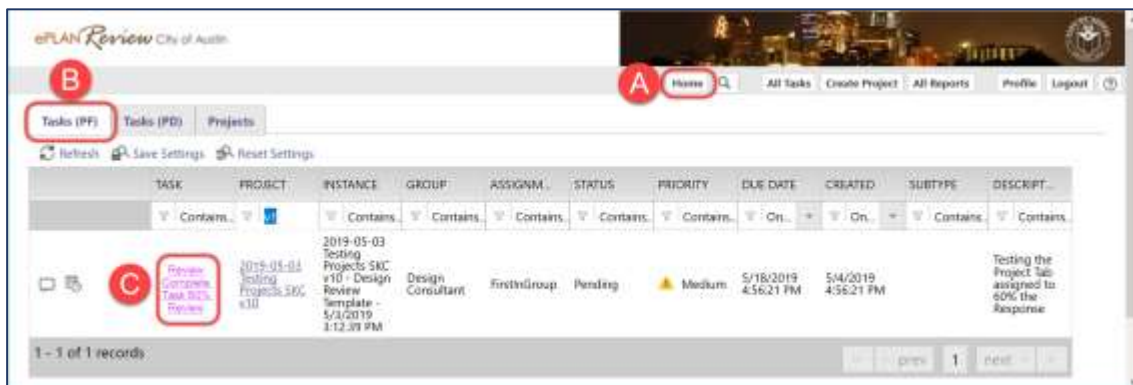
A. **Home**
B. **Tasks (PF)**
C. Accept the **Review Complete Task 60% Review**

Review Complete Task 60% Review Form

D. **Review Complete Task 60% Review** displays
E. **Review Information** tab
F. **Task Instructions**

   Review the results from the 60% Review Process. Based on the Review Results, the Consultant may need to resubmit for 60% Corrections, or Submit for 90%.

   Use the Discussion Board below to communicate the required submission to the Consultant.
   1. **Send to Consultant for 60% Corrections OR 90% Submission**, Select the 'Send to Consultant' drop down and the 'Corrections Required - Return to Applicant' button.
   2. **If the Reviewer needs to make Corrections to their Review**, Select the 'Internal Corrections' drop down, select the Group to perform another Review, and choose the 'Assign Internal Corrections' button.
   3. **To Terminate the Workflow**, Select the 'Terminate Workflow' drop down and the 'Terminate' button.
G. Selection of **dropdown menu** as mentioned in **C** above
H. Select **Corrections Required – Return to the Applicant, Terminate the Workflow , Internal Correction or Save For Later**

Consultant Submission Task 60% Review Complete
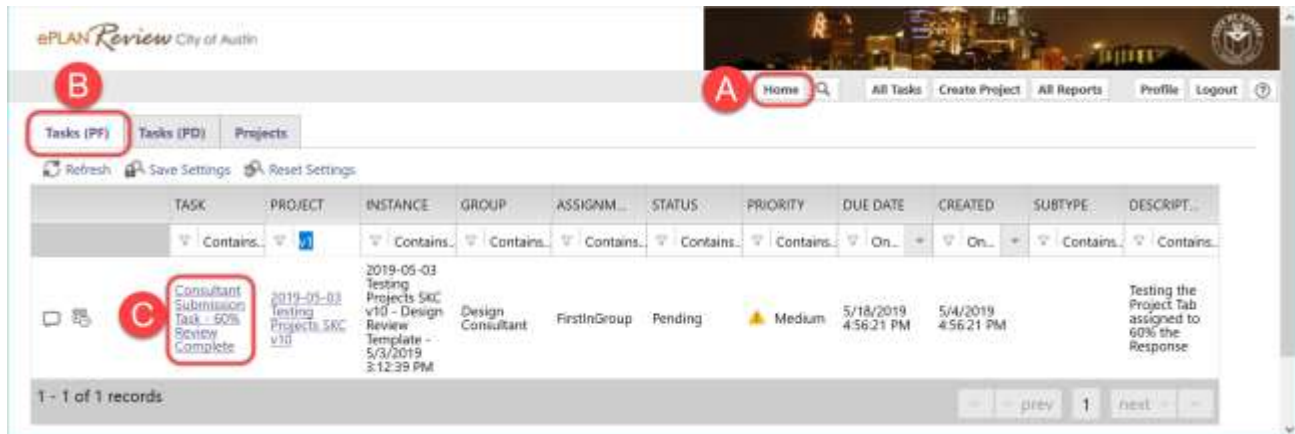
A. **Home**
B. **Tasks (PF)**
C. Accept the **Consultant Submission Task 60% Review Complete**

The Submission Task – 60% Review Complete

A. The **Submission Task – 60% Review Complte** form displays
B. **Review Information** tab
C. Notice the **Task Instructions** - *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.***

D.   Notice, the **90% Review Submission**
1.   All documents properly released
2.   Drawings (1 PDF and 1/2 sized hard copy)
3.   Project Manual (1 PDF per Volume)
4.   Final Geotechnical Report(s)
5.   Final Geotechnical Baseline Report (GBR)
6.   LEED or Sustainability Checklist
7.   LD Calculation Form
8.   Additional Permits Required
9.   Response to QMD 60% Comments (Excel file must be saved as **PDF** to download to **ProjectDox**)
10. Consultant QA/QC Comments/Responses
11. Cost Estimate
12. Easement Provisions
13. Phase I Environmental Site Assessment
14. Variances Required

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

To Start the Next Revew Process:

A.   **To Start the Next Review Process** displays in the middle of the form
B.   Notice the **View/Edit ChangeMark Items (2)** button (the ChangeMarks are resolved in **My Public Works (Office of the City of Austin Architect)** above)

C. Ensure the **Documents** folder has all documents based on **Discussion Comments** and **ChangeMarks**. Uploading more documents is the same as the original request

D. Review **Discussion Comments** and prepare to enter needed response comments

E. Be sure and select the checkbox ☑ by **I have uploaded all required documents**

F. Select **Submission Complete** button to send the project to the 90% Reviews

Process continues to the 90% Assign Reviewers to determine if the Design Consultant submitted acceptable files, OR, submitted corrections form the 60% Reviews.