ProjectDox®

Electronic Plan Solutions

Introduction to ProjectDox® 9

avolve®
professional services

4835 East Cactus Road Suite 420

Scottsdale, Arizona 85252

Phone: 602.714.9774

www.avolvesoftware.com

Table of Contents

About this Guide

This guide provides information to help end users leverage the features and functionality offered by the ProjectDox solution.

Audience

This guide is for end user using the ProjectDox end-user web interface. Effective use of the guide requires a certain amount of advanced technical knowledge.

Icon	Represents
	Caution
	If not done correctly, roadblock
	Good to know

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 more 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.

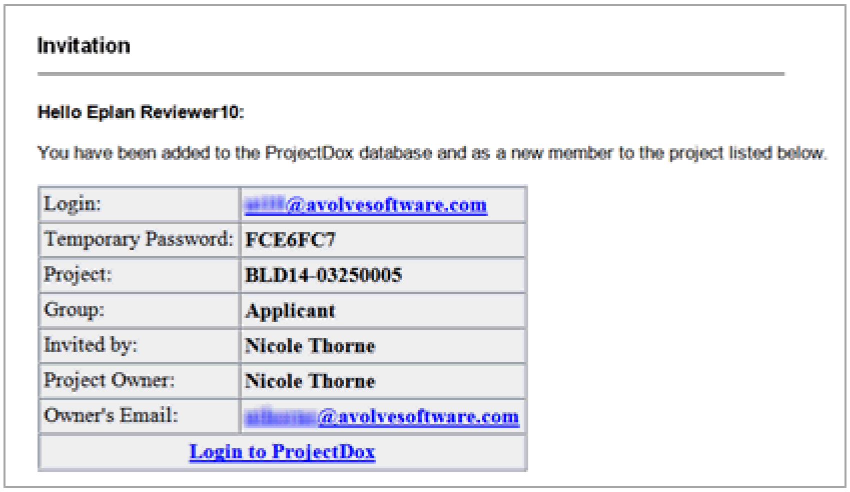
Here's what ProjectDox does to enable online project information management:

- All shared project information (documents, drawings, 3D models, annotations, project email, discussion threads, and faxes) is centralized in one location so it becomes visible, accessible and usable by everyone who needs it.
- The friendly user-interface makes 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 to project information, as well as subsets of that information, so that only appropriate personnel have access.
- Using electronic workflows and eForms, the flow of critical information from one person to the next is tightly controlled to maintain schedules and enforce accountability within a given process.
- ProjectDox enables simultaneous, multiple-user access to the same information, managing every session to keep document versions organized properly.
- Automation features ensure 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.

Logging in for the First Time

The first time you are invited to join a project in ProjectDox, you will receive an email notification, like the one below. If you are set up with multiple user roles, you will only receive one invite email for all roles. This email will contain a temporary password and a link to ProjectDox.



Invitation

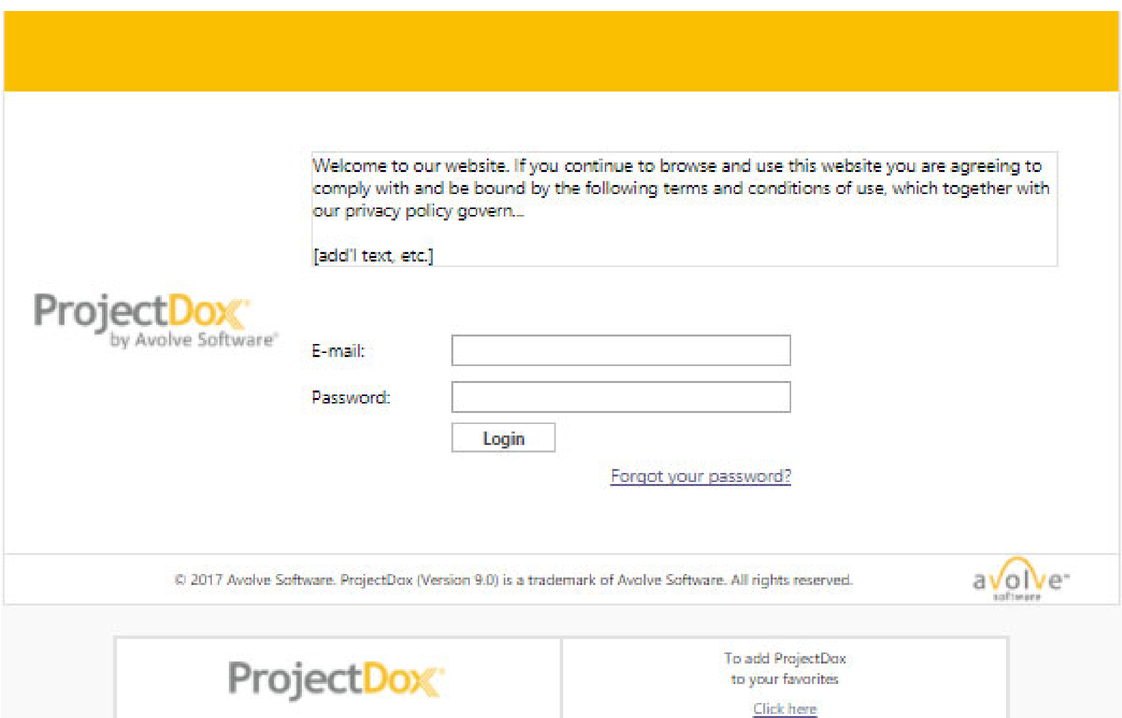
Hello Eplan Reviewer10:

You have been added to the ProjectDox database and as a new member to the project listed below.

Login:	[redacted]@avolvesoftware.com
Temporary Password:	**FCE6FC7**
Project:	**BLD14-03250005**
Group:	**Applicant**
Invited by:	**Nicole Thorne**
Project Owner:	**Nicole Thorne**
Owner's Email:	[redacted]@avolvesoftware.com
Login to ProjectDox	

ProjectDox uses pop-up windows (browser windows with no toolbars). If no ProjectDox window appears when logging on, there may be a pop-up blocker installed that is preventing the main project window from opening. Allow pop-ups for the ProjectDox site (pop-up blockers can be configured to allow pop-ups for specified sites. Please see Avolve's System Use Requirements document for a step-by-step guide).

The login page 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 to run the installation. Alternatively, your network administrator or IT department may use other methods to install the components.

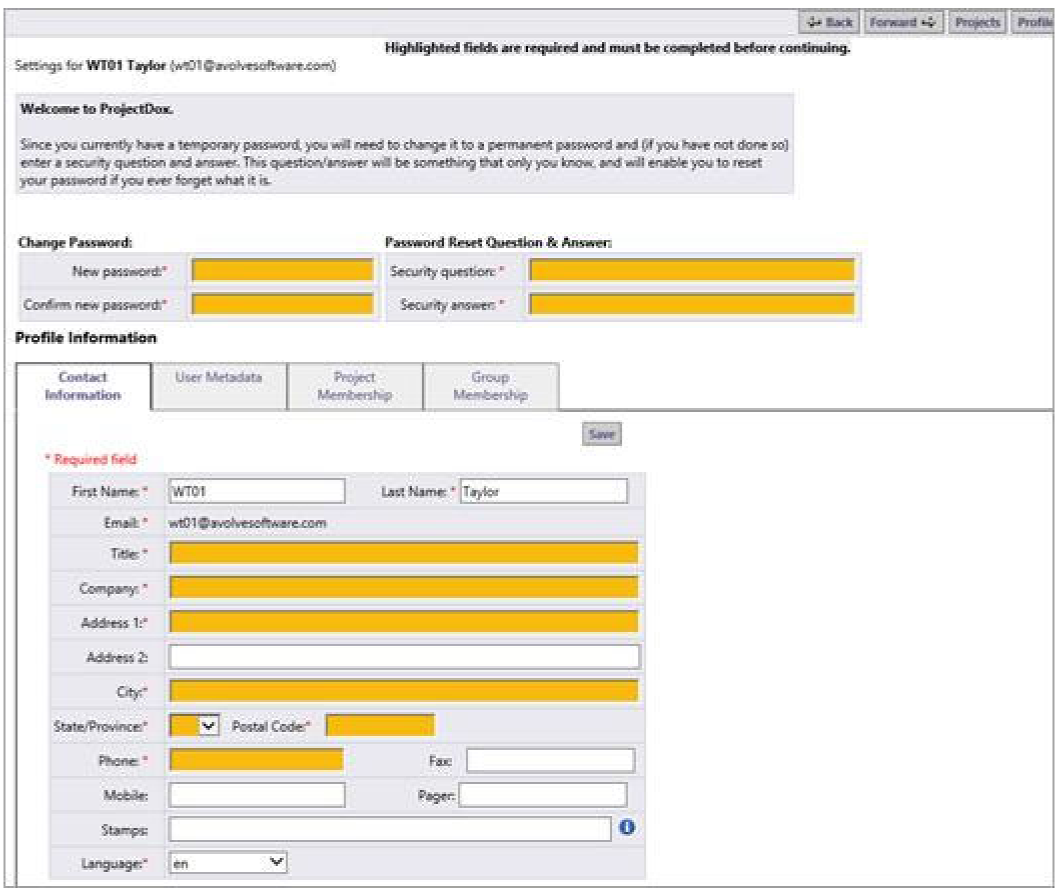


To log in:

1. Click on the “Login to ProjectDox” Link. This will automatically open a login screen web browser. You can also open a web browser and type in your ProjectDox URL. A login screen will display, like the one seen below.
2. Type or paste the temporary password into the Password Field and click **Login**.
    - If you have never logged into ProjectDox with your default password, then you will not be able to reset your password. Please contact the website administrator. Once a successful login has occurred with a default (unencrypted) password, you will be taken to the *Profile* screen to enter a security question and answer, then the "Forgot Password?" link will be available to you.

The password is case sensitive and must be entered exactly as it was provided to you in the email.

3. Once you successfully log in, you will be taken to your user profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself.
    - Your password must be between 8-12 characters with at least 1 upper case letter, 1 lower case letter, and 1 number. Special characters are not allowed.



4. Fill in the required fields (those marked with a red asterisk * (and highlighted) and click “**Save**.” You can return to this screen at any time by clicking on the “Profile” button on the Main Tool Bar.
5. After saving your profile information, you will be taken to the homepage, where your list of active projects will display. If workflow is part of the configuration, then assignments, referred to as tasks may also display on the home page in the *Active Task List*.

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 System Administrator.

User accounts that have been granted Multiple Login permission by an Administrator can run multiple ProjectDox sessions on separate machines using a single login account.

Logging in After the First Time

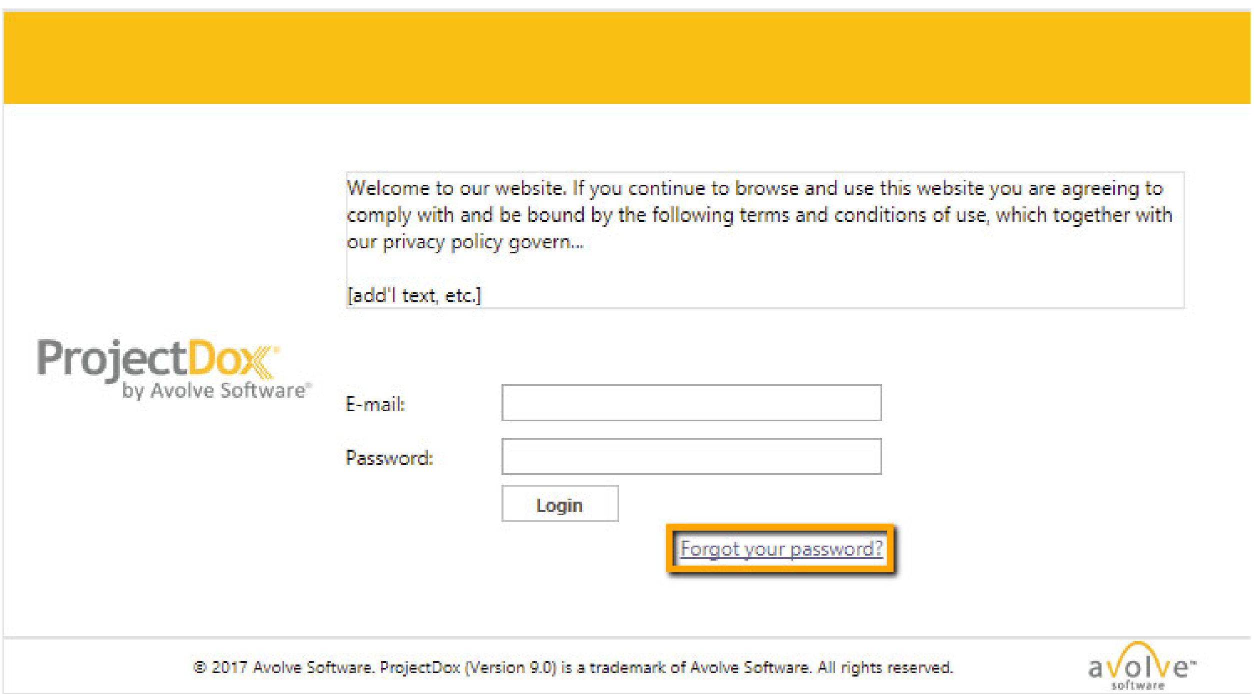
Logging in a second time (and every time after that); you will use the password that you entered in your User Profile page. After logging in, you will be taken to your home page. From this page, you can view the projects you have been invited to and all tasks for you to complete.

Forgot Your Password?

If you ever forget your password, there are two options to remedy this within the software.

When ProjectDox is Used

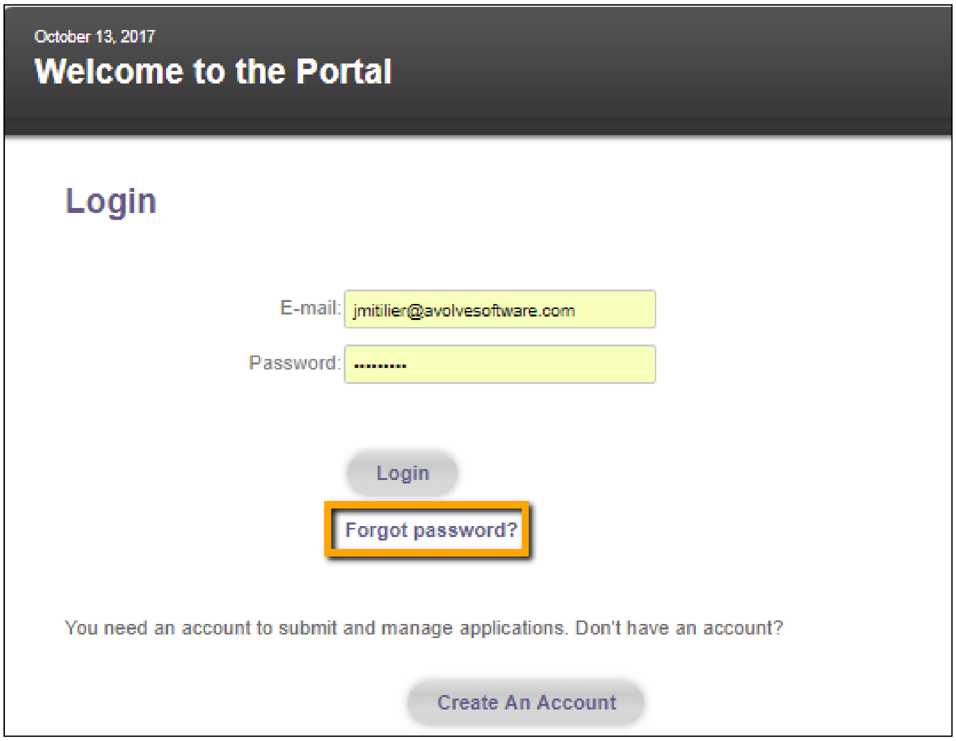
click on the "Forgot Your Password?" link next to the **Login** button.



The use of the "Forgot Your Password?" link requires that the user has logged in at least once and no longer has a temporary password associated to their account.

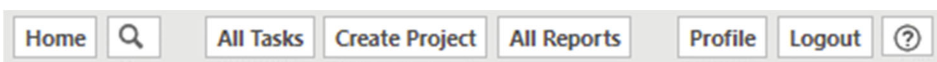
When OAS is Used with ProjectDox

If your site has the OAS platform enabled. users can reset their own passwords when needed by following the link on the login page.



Navigation Basics

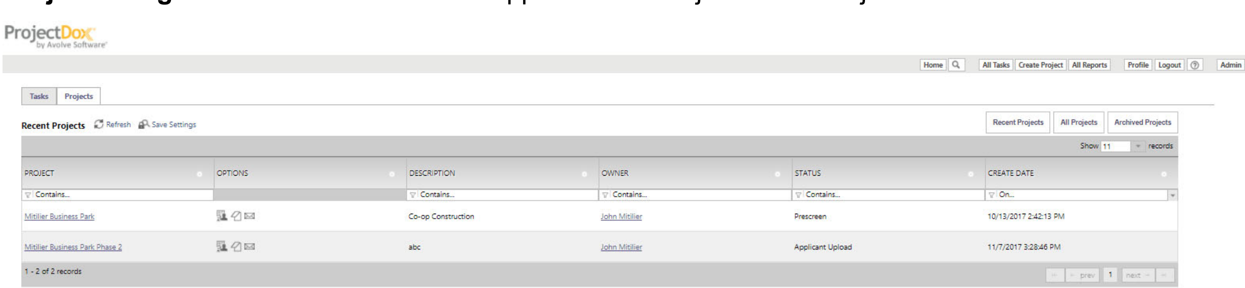
Main Tool Bar – The buttons in the image below make up the primary navigation controls used throughout the ProjectDox site. They appear at the top right of all pages for optimal accessibility.

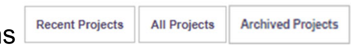


Task Navigation – The buttons below appear in the Tasks tabs of ProjectDox:

- **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 setting changes.
- **Reset Settings** button Reset Settings - this button displays indicating that the settings have been changed and can be reset.
- Quick Filter – filter buttons or select items can be added to this page in the Admin > Configuration > Workflow tab by assigning filter names in the TaskListPredefinedKeywords field and control types in the TaskListPredefinedKeywordsCtrlType field.

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



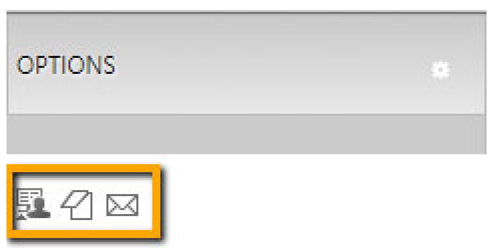
- **Recent**, **All Projects,** and **Archived Projects** buttons 

: 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 you make your browser larger then it will show more tasks. Because its dynamically sizes based on the browser it will not save the setting once you close the browser.
- *Active Projects List*: The *Active Project List* provides you with basic information about every project to for which you have permissions. The list can be sorted by name (or number), description, owner, or status, by clicking the column header. Clicking the header again will reverse the sort order. You can access a project by clicking on the project name. The below table displays the sort capabilities:

Column	Sort by?	Function	Description
Project	Yes	Link	Project name (or number)
Options	No	Button Group	Button Group
Description	Yes	Information	Project Description
Owner	Yes	Link	Project Owner
Status	Yes	Information	Project Status

Project Options Toolbar

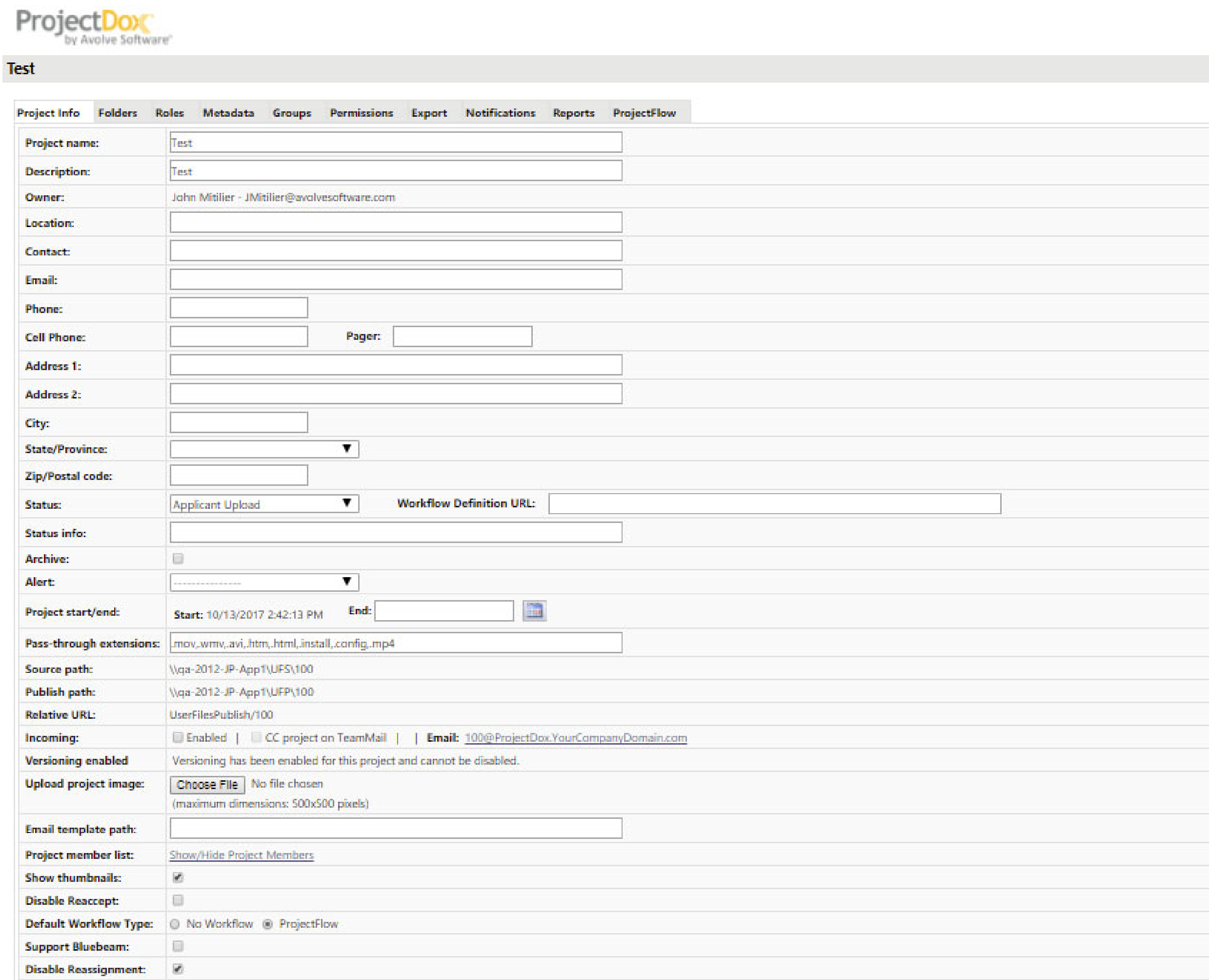
Each project is provided the *Options* toolbar that displays the project related features.



- Edit  - Displays all the information related to the project. The information can be edited on this page.
- 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.

Project Information Page

The Edit button links to the *Project Information* page which lists items relative to the project.

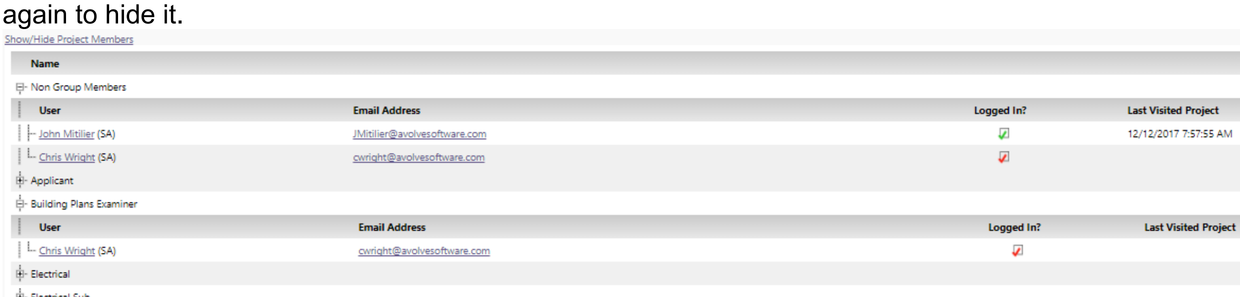


- Project name and description.
- Owner - this is not the owner of the physical property. It is the account that is responsible for the project in ProjectDox
- Location and contact information.
- Project status - status of the overall project as determined by the administrator or workflow.
- Status info - additional field available for entry by an administrator.
- Archive - selection of this checkbox by an administrator will remove the project from the user's active projects list.
- Alert [Optional] - if configured will display project alerts and messages configured by an administrator regarding the project.
- Project start/end - *Project Start* is the date the project was created and is not editable. The *Project End* date can be updated by an administrator to show the project completion date.
- Pass-through extensions- list of file types that can be uploaded into the project without being published by ProjectDox. These files will display in the projects with the icon and require the user to have the software on their computer to be able to view the file. Some common entries are: html,.htm,.mov

- Incoming [Optional] - when enabled by the administrator provides the project email address to be used to email the project. Emails sent to the address for the project are stored in the Incoming\Email folder and require permissions to access. The format of the email address is such that the number before the "@" is the ProjectID for the project. This is often the easiest way to identify the ProjectID.
- Versioning enabled - whether versioning has been enabled for this project. (See section *Versioning and File History* for more information)
- Email template path - identifies the location of project-specific email templates in the server configuration to be used by the project. If the Building department uses very different email content than the Planning department, customization is accomplished by creating a specific folder for each department or process.
- Project member list - a toggle to display or hide the list of project members, their contact information and login status.
- Show thumbnails - enabled/disabled by an administrator, it dictates whether file thumbnails display in the project.
- Disable Reaccept - if enabled, task owners are never allowed to reaccept and modify completed tasks prior to the Department Review step completing.
- Default Workflow Type - displays designated default workflow type, or none. In some, cases a customer may be transitioning from a previous generation Avolve workflow so their site will include the possibility of the two different workflow technologies or none.
- Support Bluebeam – supports Bluebeam integration for file viewing and marking up for review.
- Disable Reassignment - if enabled, task owners are never allowed to reassign and modify completed tasks.

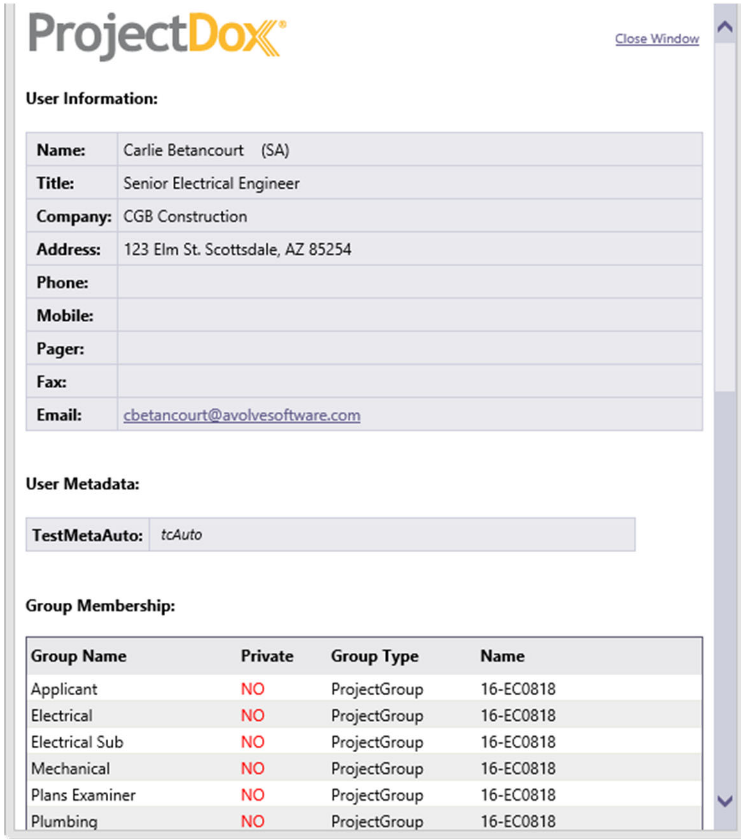
Show-Hide Member List

Click the link once to display a hierarchical list of group and non-group members for the project. Click again to hide it.



- The interface behaves in standard Windows fashion: clicking on a + sign will expand an item to view its contents, clicking a – sign will collapse it.
- You can navigate in the display to see users (as provided by your permissions) and information about them:
    - User's name
    - Email address
    - Group membership
    - Indication of SA (System Administrator) or PA (Project Administrator)
    - Indication if the user is logged in to ProjectDox

  - Green checkmark = logged in
  - Red Checkmark = not logged in
- Date and time of a project member's last visit to the project

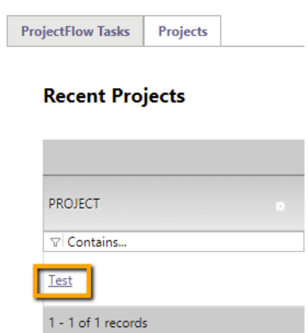


Private groups are set up to restrict visibility of their members. For further information about private groups.

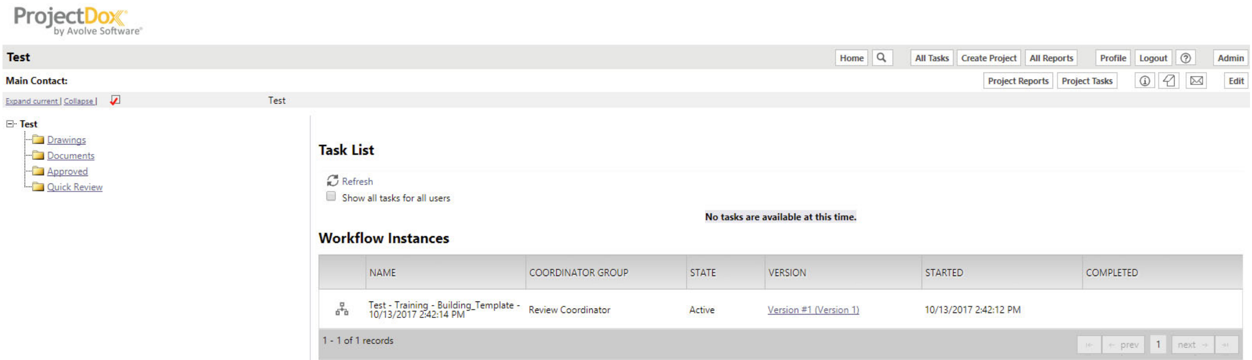
Project View

Entering a Project

On the *Projects List* on the home page, click the link under the **Project** column to access the project view.



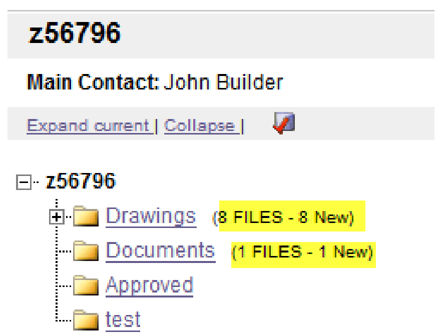
The project page appears. The left side of the screen displays the folder structure of the project. The right side of the page contains the workflow instances of the project and the Project Feature Tool bar in the upper right.



Project Folders

Navigation in the folder structure follows conventions typical in Windows: click a + sign to view a folder's subfolder; click a – sign to collapse the view back to a single folder. The folder names are actual links: click on a folder name to view its contents. You can also expand or collapse the view by clicking on the links above the folder structure.

If a folder contains files, next to the folder name will be displayed a count of the files and a count of new files.

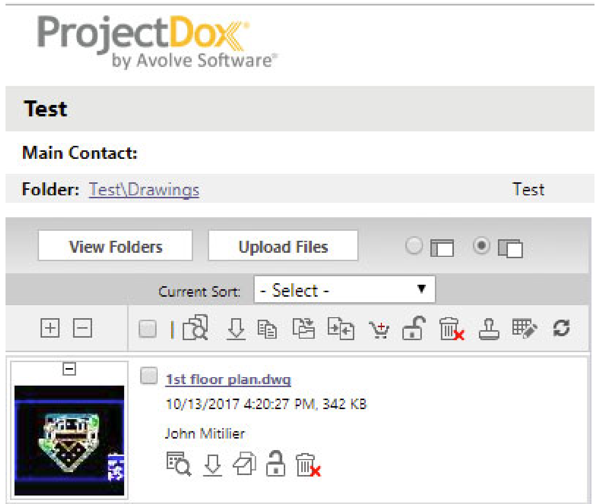


For example, the *Drawings* folder in the figure above contains 8 files, and all 8 of them are "New." A file is considered new for a certain number of days after it arrives in the folder. The number of days the file shows as "New" is determined by the System Administrator but is typically established for three (3) calendar days. Once a file's age in the folder passes 3 days, it will be part of the FILES count, and drops out of the "New" count.

View Project Files

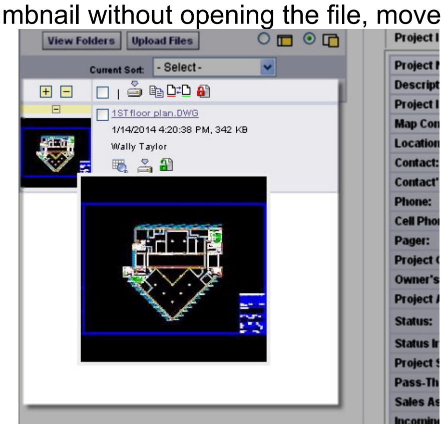
To view project files, enter a project folder by clicking the folder name. The left side of the window will display the files within the folder. Use the expand and collapse icons +/- to display just the filename or the thumbnail for the folder or choose the +/- icons at the top of each file to collapse each file individually.

By default, each file will be listed with a thumbnail, file name, upload date and time, file size, author (who uploaded the file), and relevant file action icons based on your permissions. To return to the folder view, click the **View Folders** button.



TIP Windows provides several means for navigating between open windows. Depending on the version of the operating system you are using, these include: hovering over icons in the taskbar, or using keyboard shortcuts such as Alt-tab or Windows-tab.

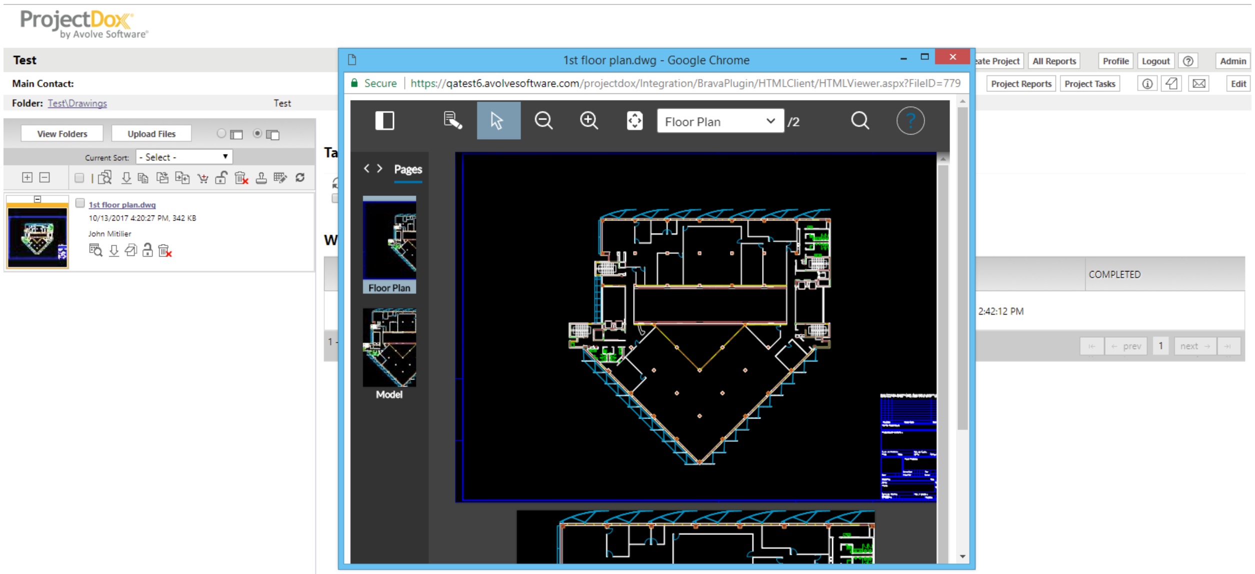
To see a larger version of the thumbnail without opening the file, move the cursor over the file.



To view a large rendition of the file, left click on the on the file name or thumbnail image. The viewer will launch and display the selected file. There are two modes for displaying the ProjectDox Viewer window:

- Set ProjectDox Viewer in right-side panel
- Set ProjectDox Viewer in separate window

By default, the viewer displays in a separate window, full screen.



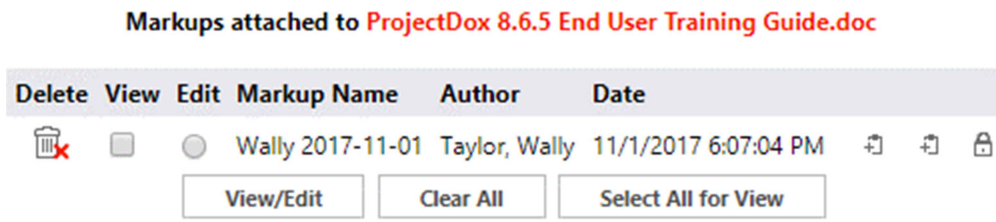
- Using the Viewer in separate window mode allows you to have multiple Viewer windows open simultaneously.
- Separate window mode can take advantage of multiple monitors: Viewer and ProjectDox windows can be viewed and moved independently between monitors.
- The number of Viewer windows are affected by the client machine resources. If you find that the Viewer windows are getting slower, close some of the instances of the Viewer. Generally, eight windows fall within a good user experience.

To launch the viewer in the right browser window, click the radio button above the file list. You can switch it back at any time by clicking the radio button.

Viewing Markup Files

Anywhere in ProjectDox that you see the Markup Exists indicator , you can launch the file with the desired markup overlaid.

1. Click the icon to display a details screen of the 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 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.



The two icons to the far right are available for you to copy the file and markup as an external or internal link. Click on either option and the link will be copied to the clipboard.

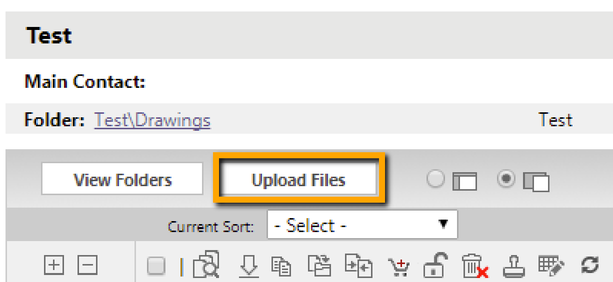
A benefit of the external link feature is that you can copy the link to your email application outside of ProjectDox and send that link to a team member. If the team member has permissions to View Markups, when they click the link in the received email, they will be taken to the ProjectDox login page. When they login, the file will view in Brava with the Markup displayed.

A benefit of the internal markup link is that you can copy that link to other areas of ProjectDox, such as a 'Topics and Notes.' Providing reference links from one file in a project to another file's markup file can aid in making decisions.

The Delete icon is only available if you have been granted Delete Markup permissions. For help in using the Brava! view and markup features, click the ⓘ icon of the Brava! Viewer user interface to launch a full, separate online help system. ProjectDox has activated the appropriate functionality for electronic plan review.

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:

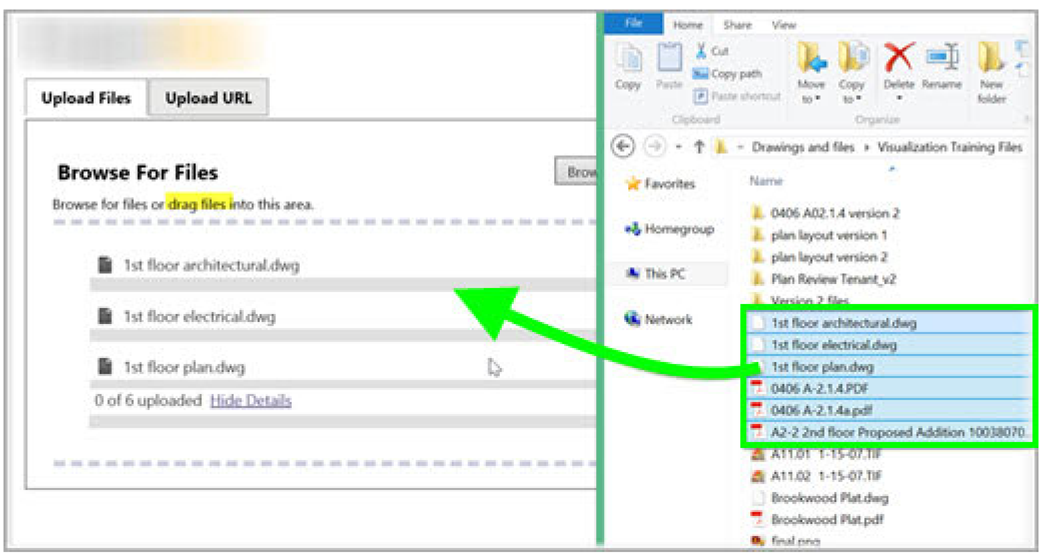
The System Administrator determines which file types can be uploaded. If you attempt to upload a file type that is not allowed, you either will not be able to see it in the list (if using *Browse For Files*, or if using drag-and-drop, you will receive a message indicating the file type is not allowed. The following is a list of invalid characters in a file name for upload:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)
- = (equal)

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:

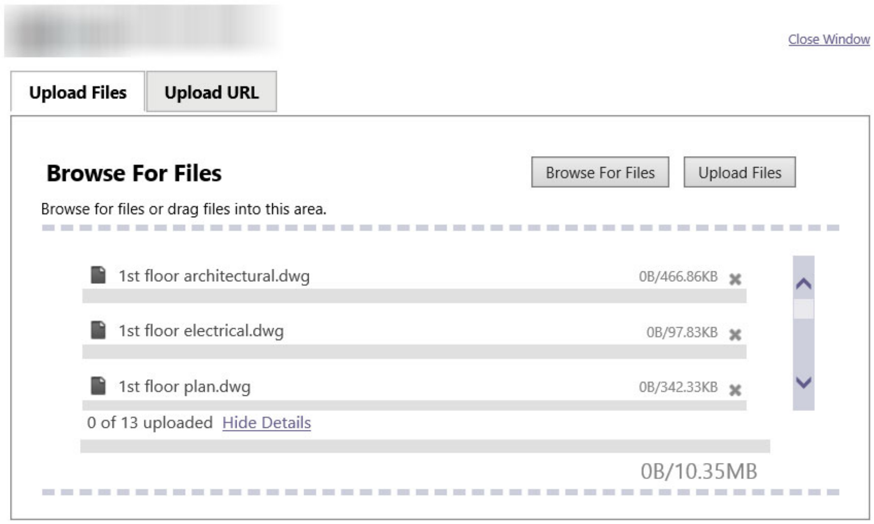
   - Click **Browse**. A navigation window will display to locate and select the files you would like to upload to the current folder. Click **Open** to select the file(s).
   - Open a Windows Explorer window and use drag and drop to place the selected files into the control window. (When using drag and 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**.



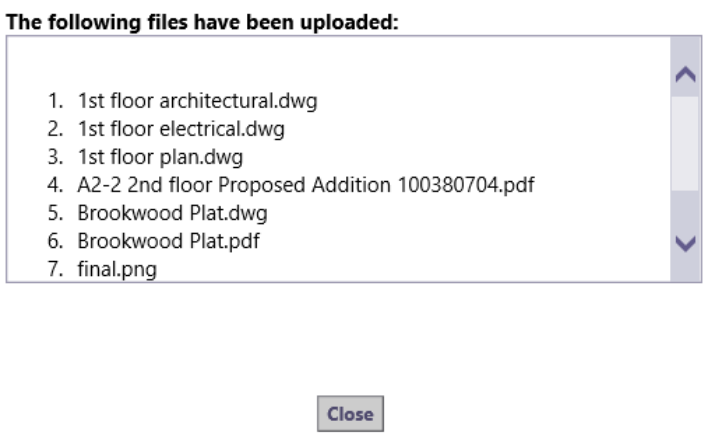
2. The image above shows the uploader dialog with files selected. You can:

   - 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.



4. If the upload notification feature is enabled, you can send a notification email to other project members by clicking **Notify Project Members**. Otherwise, click **Close**. If you choose to send a notification, a new dialog appears. The interface is like the one for showing the list of project members:

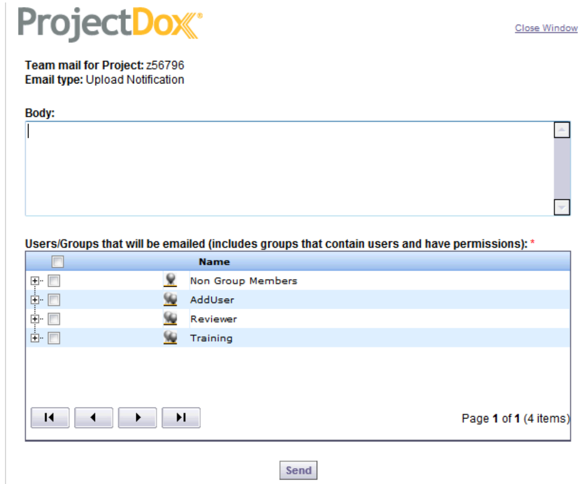
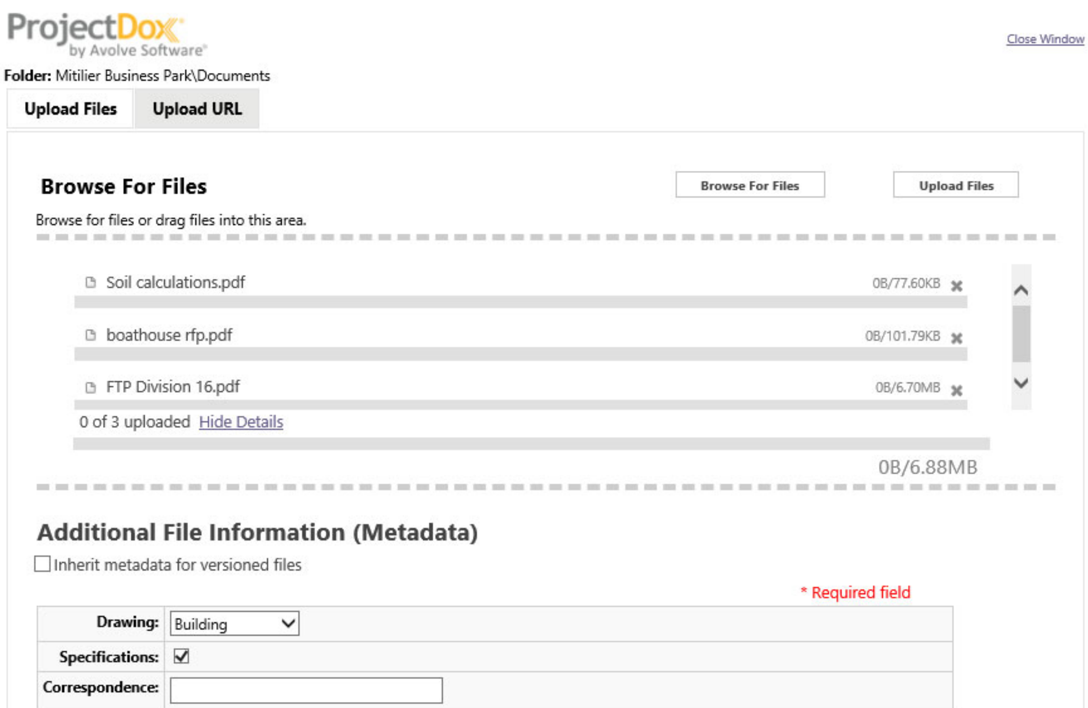
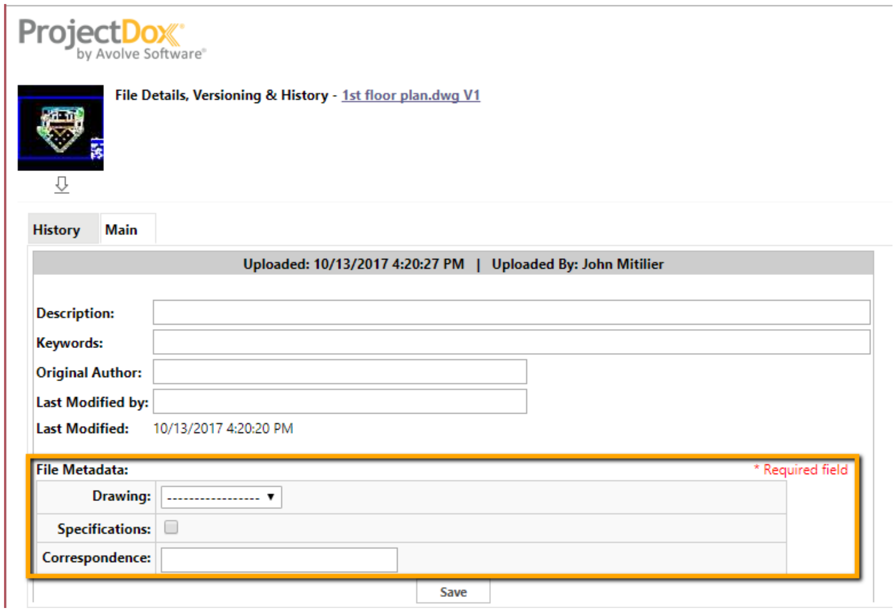


Figure Uploads and Metadata

If configured by your administrator, metadata can be applied to files during upload. Metadata is an underlying definition or description applied to all files being uploaded in a batch to the selected folder.



When 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. Metadata applied may be viewed from the history icon of the file and can be used to search for specific types of files.

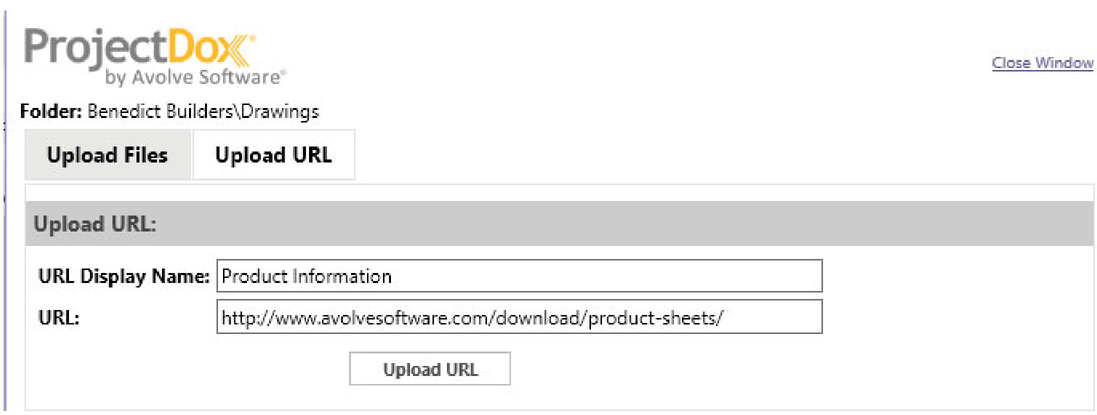


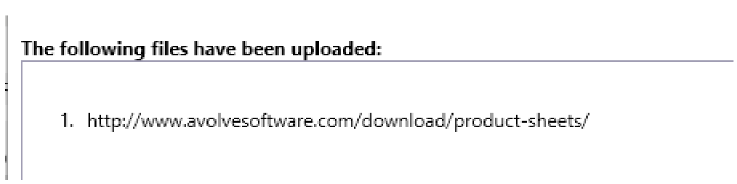
Upload URLs

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://www.avolvesoftware.com or avolvesoftware.com).

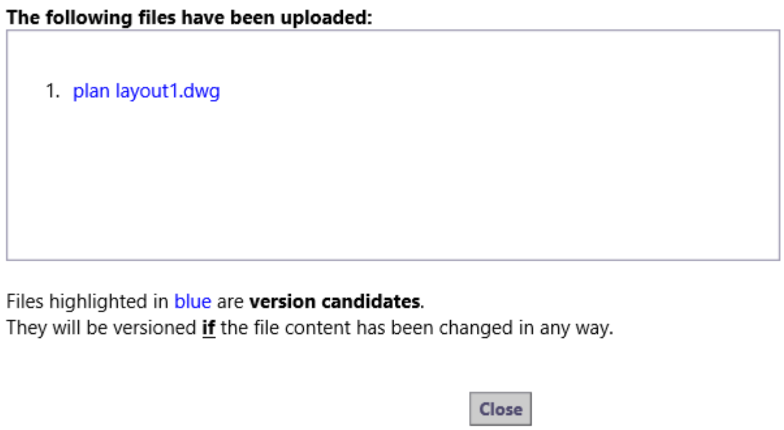




5. Click **Upload URL** to complete your URL upload. The Internet document icon will appear in place of the file thumbnail in the file panel.

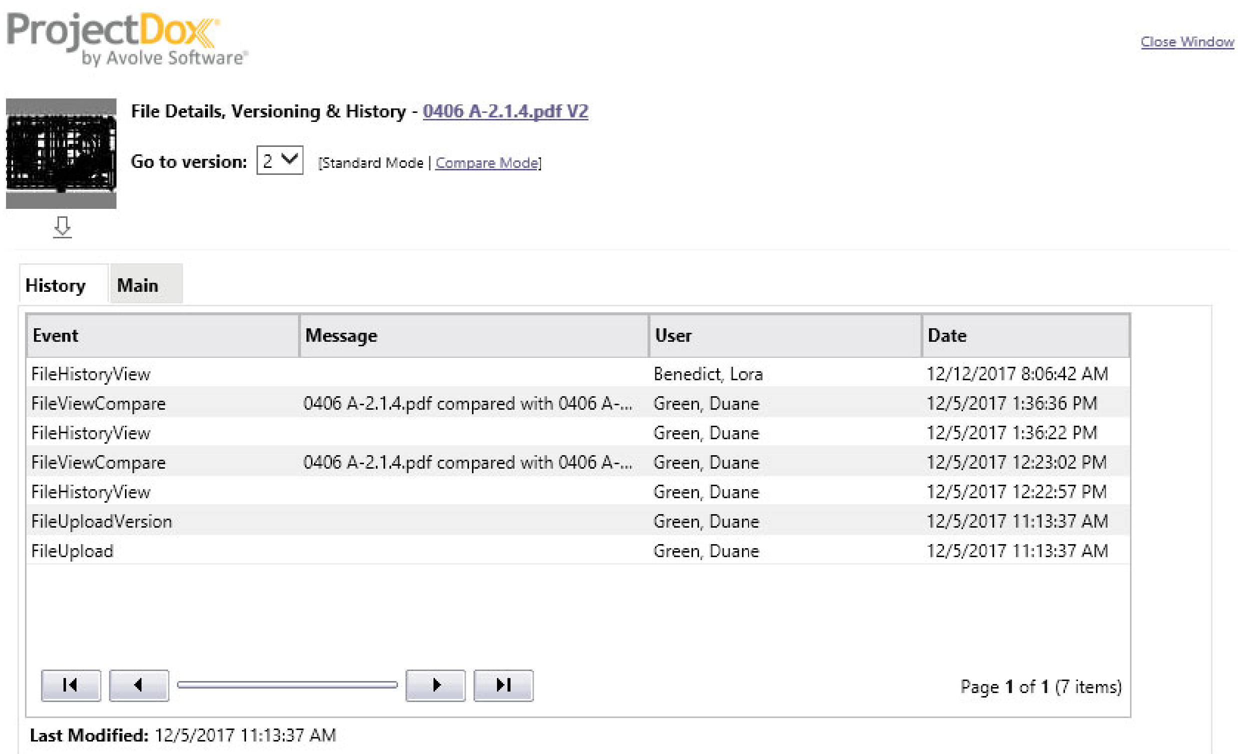
Versioning and File History

When versioning is enabled for a project, the upload process includes a system check for files with the same name as existing files in the target folder. These files are identified as candidates for versioning and will show in blue lettering:



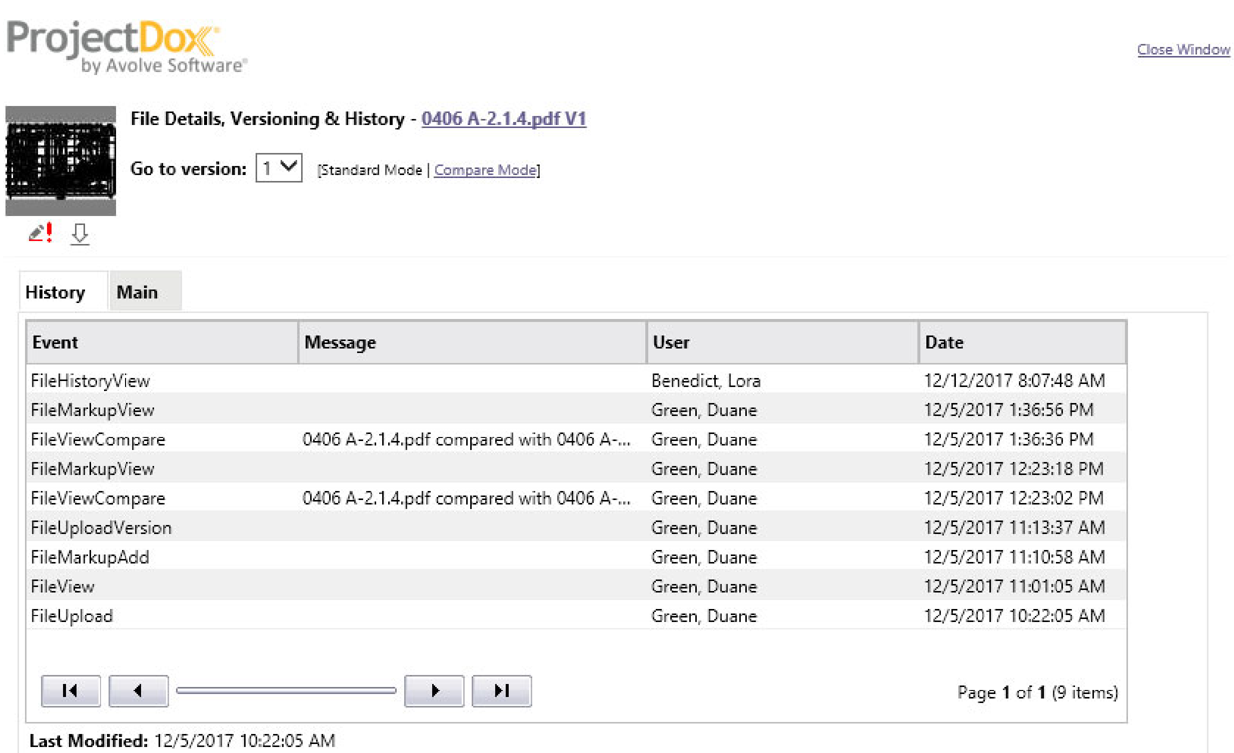
The application will do a checksum of the file for data changes. If changes in the file are identified, the file version will increment. In the image below, the original name of the file remains with a visual indication (V2) of the file's version.

If multiple versions exist for the file, the *File History* window will turn a yellow tint and will include additional features:



Event	Message	User	Date
FileHistoryView		Benedict, Lora	12/12/2017 8:06:42 AM
FileViewCompare	0406 A-2.1.4.pdf compared with 0406 A-...	Green, Duane	12/5/2017 1:36:36 PM
FileHistoryView		Green, Duane	12/5/2017 1:36:22 PM
FileViewCompare	0406 A-2.1.4.pdf compared with 0406 A-...	Green, Duane	12/5/2017 12:23:02 PM
FileHistoryView		Green, Duane	12/5/2017 12:22:57 PM
FileUploadVersion		Green, Duane	12/5/2017 11:13:37 AM
FileUpload		Green, Duane	12/5/2017 11:13:37 AM

The **Go to version** dropdown allows you to select a version of the file (by default, the most recent version is selected). The tabbed areas will display only the information for the selected version.

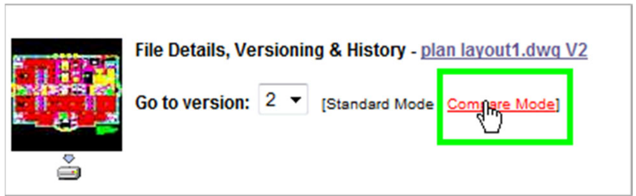


Event	Message	User	Date
FileHistoryView		Benedict, Lora	12/12/2017 8:07:48 AM
FileMarkupView		Green, Duane	12/5/2017 1:36:56 PM
FileViewCompare	0406 A-2.1.4.pdf compared with 0406 A-...	Green, Duane	12/5/2017 1:36:36 PM
FileMarkupView		Green, Duane	12/5/2017 12:23:18 PM
FileViewCompare	0406 A-2.1.4.pdf compared with 0406 A-...	Green, Duane	12/5/2017 12:23:02 PM
FileUploadVersion		Green, Duane	12/5/2017 11:13:37 AM
FileMarkupAdd		Green, Duane	12/5/2017 11:10:58 AM
FileView		Green, Duane	12/5/2017 11:01:05 AM
FileUpload		Green, Duane	12/5/2017 10:22:05 AM

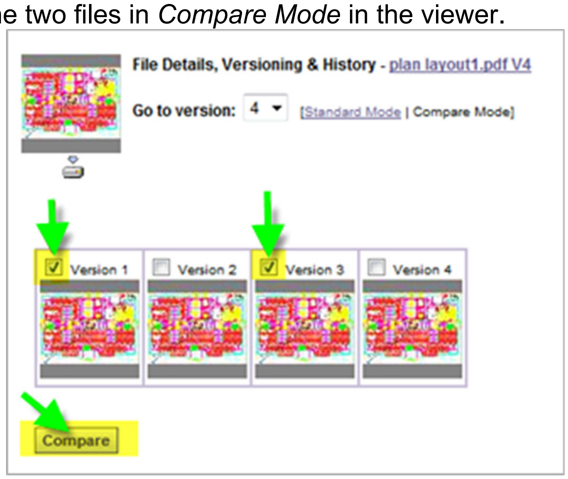
Compare File Versions

File History is also used to access the file comparison feature for versioned files:

1. In the File History dialog, click **Compare Mode** to view thumbnails for all versions of the file.



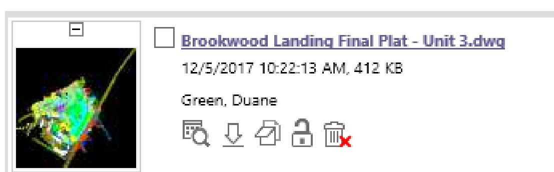
2. Click to select the check boxes for the two versions you would like to compare; then click **Compare** to view the two files in *Compare Mode* in the viewer.



File Viewing Features

Download Files

If you have download privileges, you can download a source file by clicking the icon next to the desired file.



Remember you need the source application or a viewing utility such as a PDF viewer, Autodesk viewer, Bluebeam, or MS Word installed locally to view the downloaded file, because you will be viewing the source file outside ProjectDox. Download permissions are made available, for example, when plans are approved. In addition, permissions are changed to accommodate different tasks in a workflow process.

Sort Files

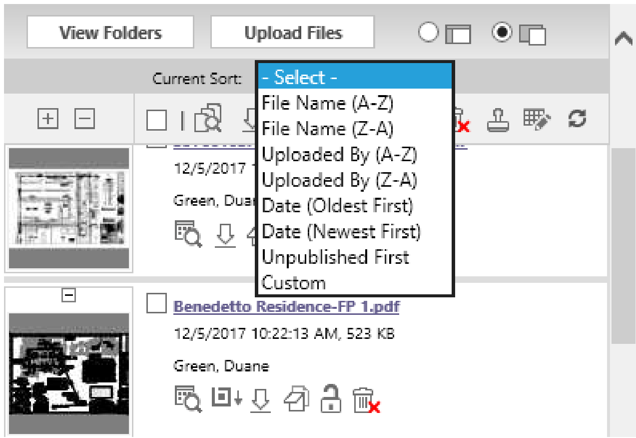
When viewing the file list (thumbnails) for a folder, you can quickly sort the order of files by criteria offered in the **Current Sort** drop down list.

From the dropdown, you can select to sort the list by:

- File name – ascending (default) or descending
- Uploaded by – ascending or descending
- Date uploaded – Oldest First or Newest First

- Unpublished First
- Custom

More information can be found on the custom sort setup feature in the Manage Folders topic.

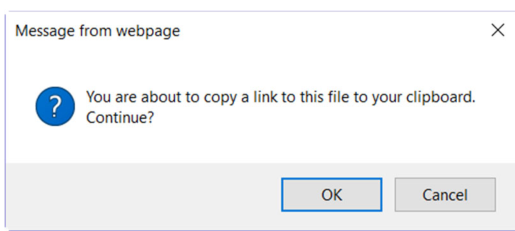


Once you leave a folder, the order will revert to the default order set by the administrator.

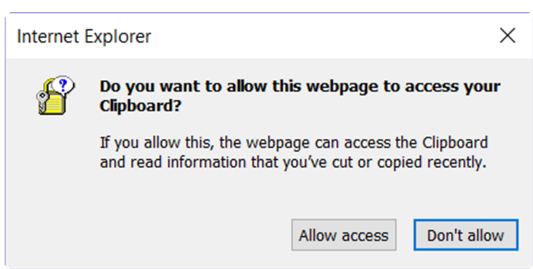
Copy File Links

You can easily copy a link to a file to your clipboard. The link can be pasted into an email message or Team Mail for quick access to the file.

1. Right-click on the thumbnail image.
2. The following dialog will appear. Click **OK**.



3. If the following dialog appears, click **Allow access.**



The link is now copied to your clipboard. It will resemble the following link: http://YourProjectDoxDomain/ProjectDox/?FileID=168693, and can be pasted as desired.

If the recipient is not currently logged on to ProjectDox when they click on the link, then they will first be taken to the ProjectDox login page.

Move or Copy Files

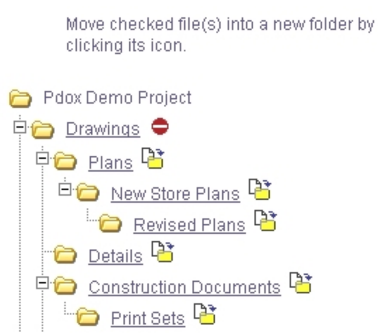
With the necessary permissions, you can move and copy files and their markups from one project folder to another if the destination folder does not have a file of the same name existing. If a user attempts to copy or move a file to a folder where the filename already exists, the system will display the icon and prohibit the user from completing the action.

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.

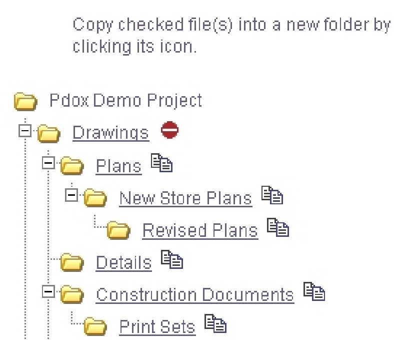
Move: Moving files requires Delete permissions from the folder you are moving from and Upload permissions for the folder you are moving files into.

To move or copy a file follow the steps below:

1. From the project folder view, select the folder containing files that you want to move or copy into another folder.
2. In the file thumbnails view, select file(s) that you want to move or copy to the same folder.
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 will now display the **Move Files** or **Copy Files** icon next to each folder name, depending on which icon was selected. Click on the **Move** or **Copy Files** icon beside the folder that you would like to move or copy the chosen files to.



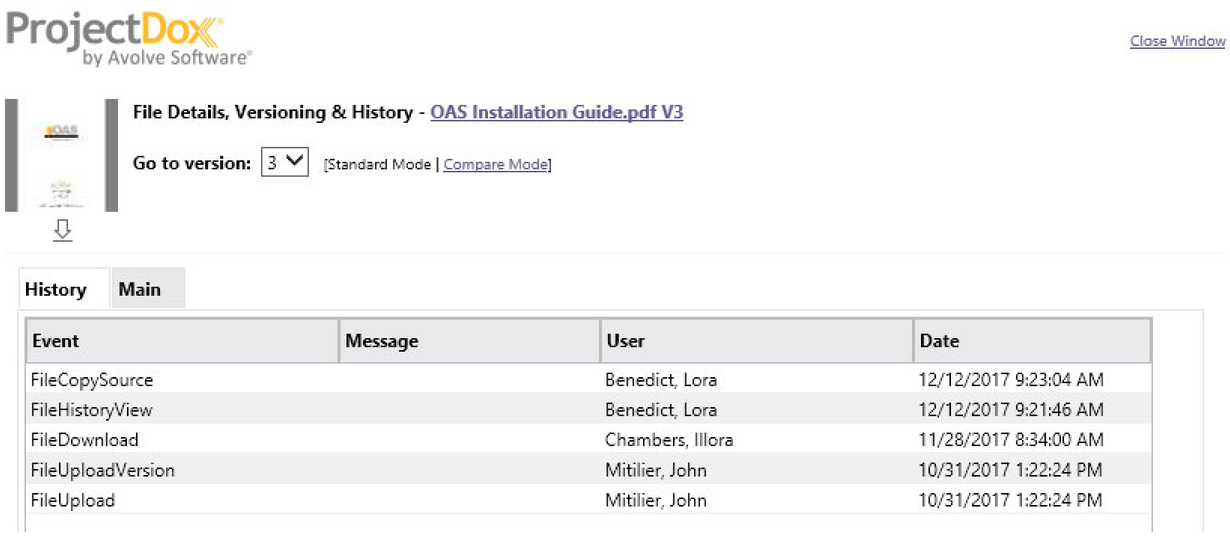
Move Selected Files



Copy Selected Files

Rules:

- 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.
- 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.



Event	Message	User	Date
FileCopySource		Benedict, Lora	12/12/2017 9:23:04 AM
FileHistoryView		Benedict, Lora	12/12/2017 9:21:46 AM
FileDownload		Chambers, Illora	11/28/2017 8:34:00 AM
FileUploadVersion		Mitilier, John	10/31/2017 1:22:24 PM
FileUpload		Mitilier, John	10/31/2017 1:22:24 PM

Copy Multiple Files

After selecting the desired file(s), click the **Copy Selected Files** icon .

Check out and Check in Files

Files can be checked out in the file thumbnail pane by users who have been granted upload/download permissions.

Checking out a file prevents the following actions by other users:

- Downloading, copying, or deleting the file
- Saving markup layers for the file
- Uploading a new version of the file

The check-out can be cancelled by the person who checked out the document, a Project Administrator, or a System Administrator. Only the person who checked out the document can upload a newer version of the document to check it back in.

To check out/in a 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 .

Checked-Out File

1. Click the download icon to save a copy of the file you just checked out on your machine to make the desired updates.

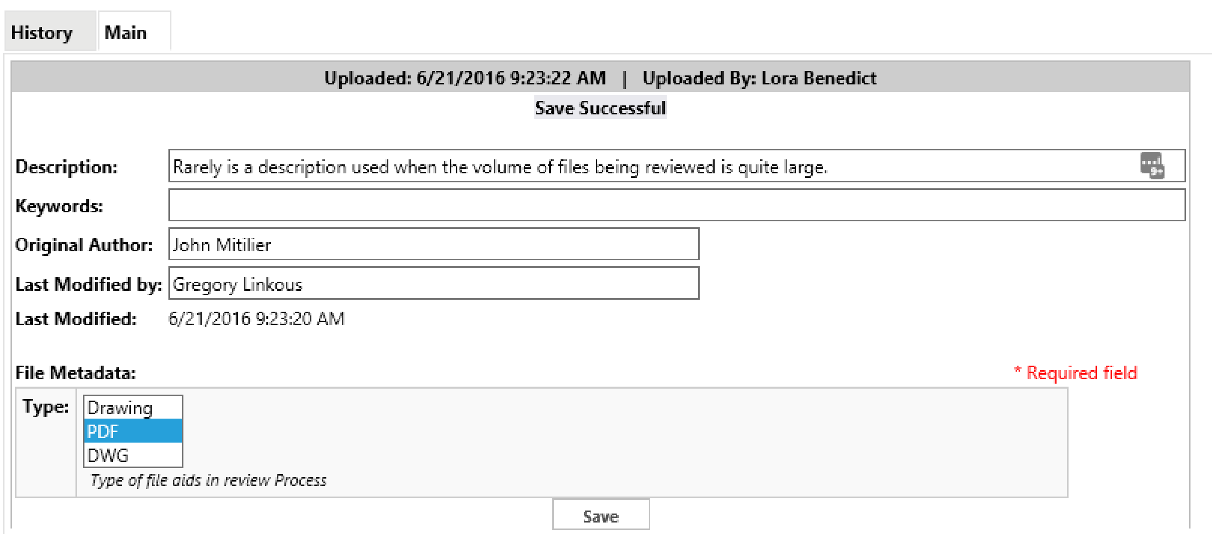
2. When you have finished editing the document and have saved your changes (using the same file name), click the **Upload Files** button in the file thumbnail panel where you have the file checked out.
3. Browse to the folder where you saved the new version and click the **Upload Now** button. The resulting window displays the file name in blue, indicating that it has been uploaded as a revision of a current document in that folder.
4. When viewing the uploaded file version in the thumbnail panel, the version information display's and the file is automatically checked in (the check-out icon now displays).

Check Out and In Multiple Files

To check out and in multiples files, select the checkbox next to all the files you want to check out or in and follow the procedures above.

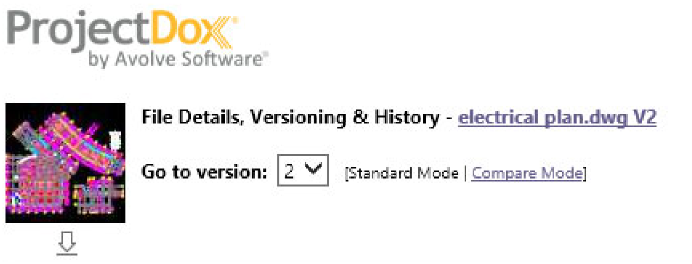
View File History

The **File History** icon links to a window that displays a file's details, versioning, and other history through two tabs (*Main* and *History*).



To view a file's details or history:

1. Click the **History** icon.
2. The *Main* and *History* tabs show information about the selected file.
   - Due to changes in Microsoft Office's file formats, the *Description*, *Keywords*, *Original Author* and *Last Modified by* fields do not automatically populate when the file is uploaded. Information can be entered manually into the fields.
3. When more than one version of a file exists, click on the version number from the *Go to Version* selections.



4. The *Main* tab lists the file's details, which are editable by the user who uploaded the file and administrators only.
5. The *History* tab lists activity history for the file. Information for each event (such as viewed, downloaded, markup up, etc.), includes the name of the user who performed the action, and date and time it occurred.

History | **Main**

Event	Message	User	Date
FileHistoryView		Lora Benedict	12/12/2017 9:32:29 AM
FileUpload		Lora Benedict	6/21/2016 9:23:20 AM

6. To open the file in the 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** icon will display above the thumbnail image.
   - You can also download the file to your system if the download icon is present.

Events such as copying, moving, versioning, and batch stamping can result in a file's history being split between the earlier and later copies or versions of the file.

Multiple File Actions

Multiple file actions typically either begin with or result in multiple files (or multiple copies of the same files). The controls for these actions operate on the selected file(s) in current folder. They are found below the *Current Sort* dropdown, and above the list of files in a folder. The controls typically displayed for end users are shown below.

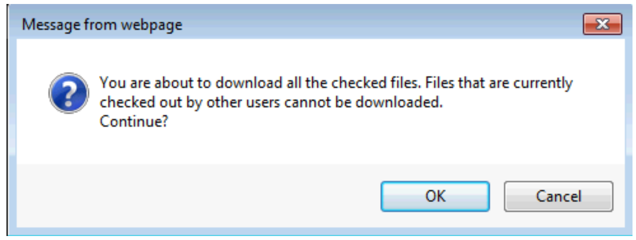
Select Multiple Files

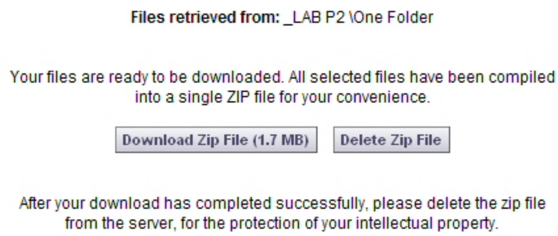
Click the checkbox to select or to clear selection of all files in the folder. The checkbox is a toggle. You can also click the checkboxes for individual files to select or clear them.

Changing the sort order will clear any selection of files.

Download Multiple Files

After selecting the desired file(s), click the Download Checked Files icon. When downloading multiple files, ProjectDox will first produce a .zip file containing the selected files. Prompts will appear in the right panel.





Download Zip File Dialog

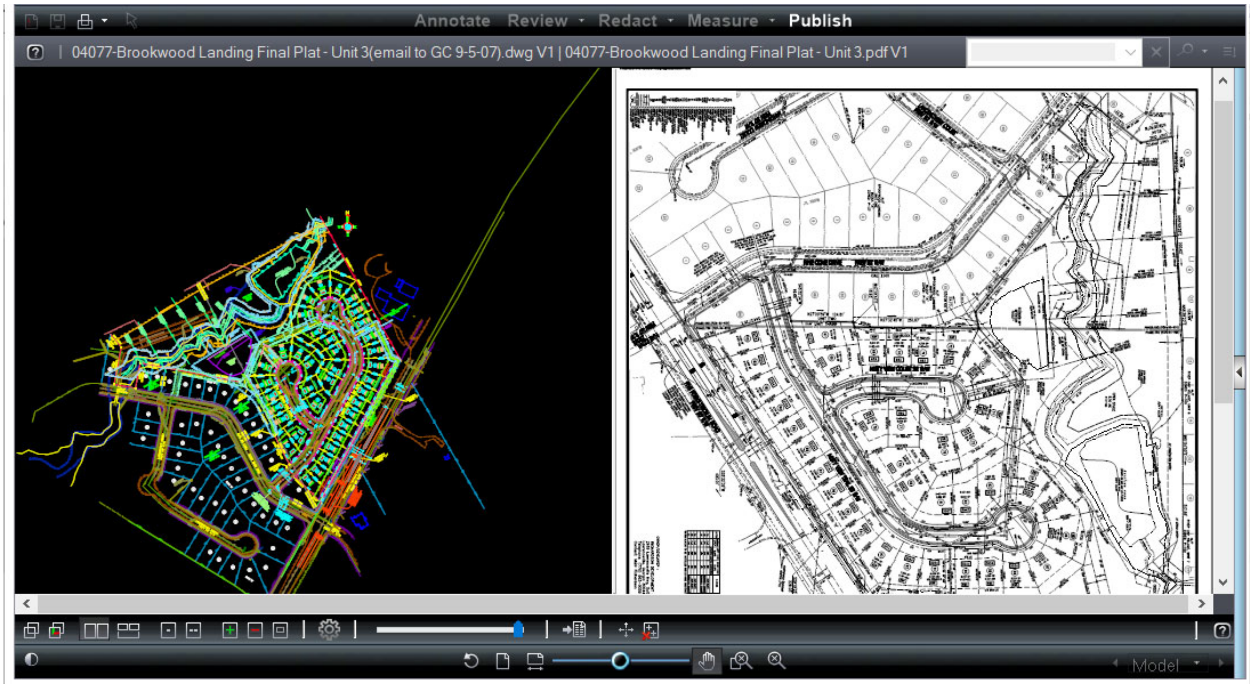
Select the destination and download the .zip file, which can then be extracted. A button also presents to delete the zip package out of the temporary folder on the server (recommended).

The ProjectDox Utility deletes the files on a scheduled basis. Typically, it is every 24 hours.

Compare Two Files in Same Folder

You can select two files listed in a folder and open them for comparison.

1. Select the two files and click the **Compare** button .
2. The viewer launches in *Compare* mode, with side-by-side as the default view.
   - The sort order in effect for the folder when you selected the two files will determine their position in the viewer – the higher file in the list will display to the left.
   - The files can be compared in the following modes: overlay, overlay differences, side-by-side, added or deleted information only, and others.
   - In overlay view, elements unique to the left file display in red, those unique to the right file display in green. Unchanged areas display in gray.



- See the viewer online help file for additional information about the compare file and the compare alignment tools.

The *Compare* feature boasts the following tools:

Overlay - the two files are placed one on top of the other for comparison. Use the slider to change the transparency of the files.

Show Differences - the left file opens overlaid over the right file.

- The left file displays in cyan.
- The right file displays in red.
- Any aspects of the file that are the same will appear in grey.

Side-by-Side - both files are displayed in a split-screen view. Select *Left* or *Right* to choose which is the active file that will receive any markups or other changes.

Left Document (Only) - only the file that was first opened displays.

Right Document (Only) - Only the file that was opened for compare is displayed.

Balance - available for *Overlay* and *Overlay Differences* to adjust the slider. Moving it to one side or the other will fade out the opposing side's document.

View Checked Files in Binder

Binder is a supplemental review tool for the plans examiners. It is used as a reference tool to review and check other file pages while marking up the main drawing sheet. Binder is not recommended as the tool to add markups to multiple files. It is recommended that plans examiners open 20 files or less in a Brava binder window on their secondary monitor.

Open the single file/drawing plan to markup on the main screen. Then, view and quickly toggle between multiples files in a binder by selecting all the files to view and clicking the *Binder* button. The files will display in a binder view. If selecting several large files, there may be a delay in publishing time.

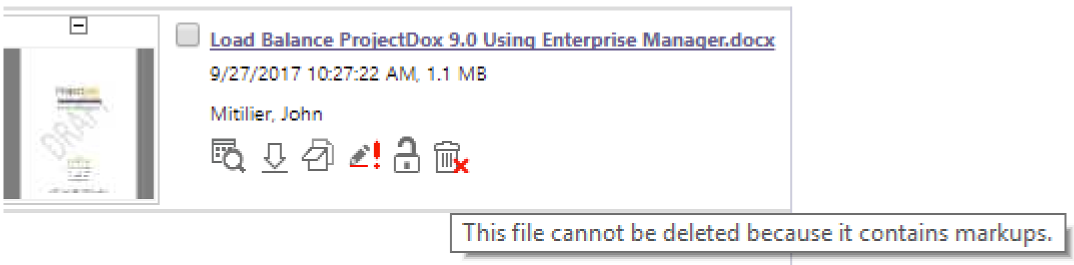
File Markups Icon

The presence of the File Markup icon means that there are markups (annotations) associated with the file. For more information about markups, see the viewer help. For more information on the creation and editing of markups, please see Avolve's training documentation on marking up in ProjectDox.

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.

Files that contain markups cannot be deleted, regardless of the delete permission, unless configured by the system administrator to allow.



Brava

View Feature Matrix

The following matrix is intended for Brava! Enterprise users. It provides a quick comparison view of the features available in Brava clients. Brava Enterprise is available with ActiveX and HTML client options. The ActiveX client offers the highest level of functionality and performance and works best on Windows with IE. Browsers such as Chrome, Safari and Edge use the HTML viewer which has a different user interface and lower level of functionality.

Features	ActiveX	HTML Desktop	HTML Tablet
View	●	●	●
Find	●	●	●
Annotate	●	●	●
Publishing	●	●	pdf only
Compare	●	●	
Measure	●	●	
Takeoff	●		
PDF Bookmark	●	●	
Print	●	●	
Doc Merge	●		●

Platform	ActiveX	HTML Desktop	HTML Tablet

PC	●	●	
MAC		●	
Browser	●	●	
iPad/Android Tablet			●
Mobile Phone			

Annotation Features	**ActiveX**	**HTML Desktop**	**HTML Tablet**
Arrow Pointer	●	●	●
Changemark	●	●	●
Changemark Discussion	●	●	●
Changemark Arrow	●	●	
Changemark Cloud	●	●	
Changemark Highlight	●	●	
Changemark Text Highlight	●	●	
Changemark Strikethrough	●	●	
Crosscut	●	●	●
Ellipse	●	●	●
Highlight	●	●	●
Insert Image	●	●	●
Line	●	●	●
Polygon	●	●	●
Sketch	●	●	●
Polyline	●	●	●
Rectangle	●	●	●
Text	●	●	
Round Rectangle	●	●	
Scratch Out	●	●	
Stamps	●	●	
Edit Text Markups	●	●	
Cloud	●	●	●
Polycloud	●		
Arc	●		
Consolidate Markups	●	●	

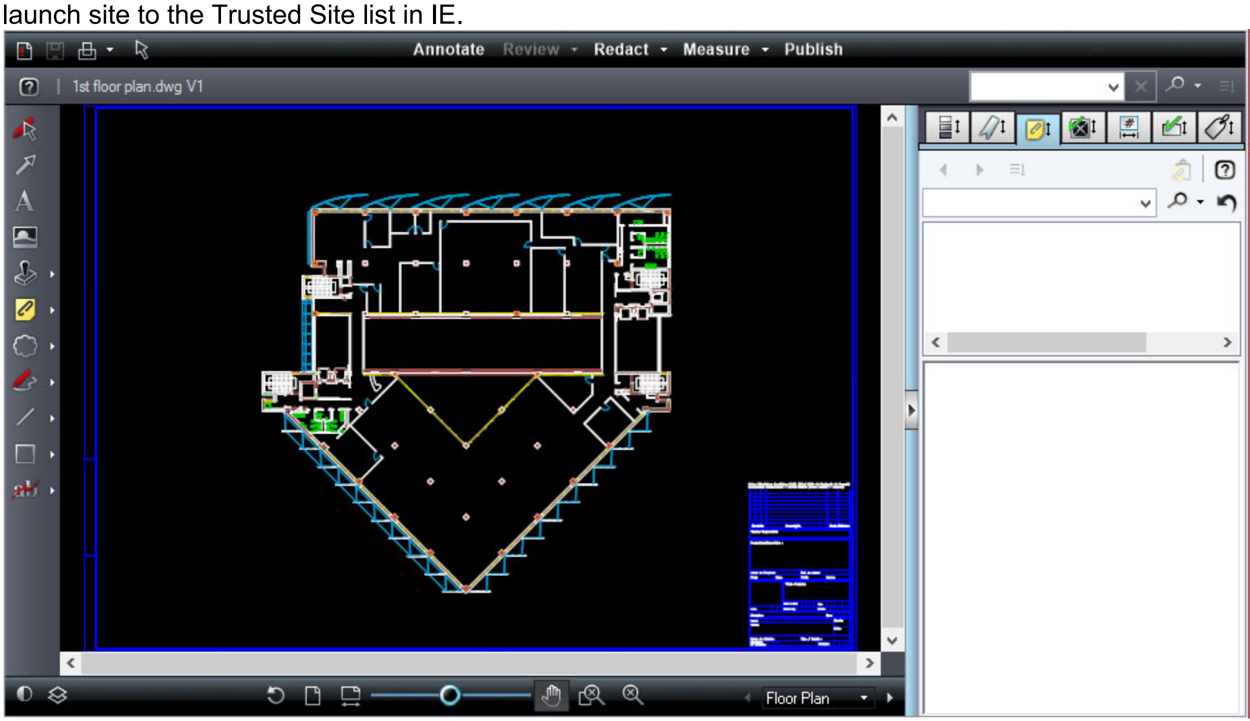
Burn in Markups	●	●	to PDF
Electronic Signature	●	●	
CAD Symbol	●	●	
Checkview	●	●	
Bookmark	●	●	
Export to Word		●	

Running the Brava Client

The first time you access a published document for viewing through your browser, you will be required to download the Brava! ActiveX control onto your system. This requirement is a one-time installation. Click Run at the prompt to begin the installation.

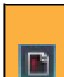
You may not have to install the control if your Brava! administrator already deployed the client over the network. Once installed, if you have ActiveX controls blocked in your browser option settings, you will need to select Allow Blocked Content from the IE Security bar when prompted.

For the ActiveX Client running on Windows 8, 8.1, and Windows 10, users must have the Internet Explorer browser set up with Protected Mode disabled. The safest way to do this is to add the viewer launch site to the Trusted Site list in IE.



File Toolbar

This toolbar, located in the upper left corner of the viewer, contains icons for executing markup commands, saving markups, printing pages and regions, and object selection.

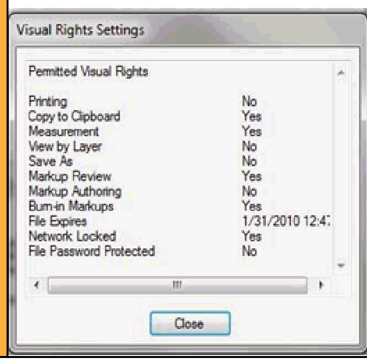
	**Markup.** Access commands regarding markup files, such as creating a new markup file, opening a markup file for edit or review, saving a markup file, consolidate markups, as well as accessing a stamp template submenu.

	Markup Save. Available when a markup is open for edit, use this button as a quick way to save the current markup file.
	Print. Accesses the Print menu. The **Print** dialog box contains standard print options, such as choosing a printer, giving a range of pages to print, etc. You can also select to print to scale options, view Print Preview, and set Watermark and Banner options. An option is available to print Changemark information and/or redaction reasons as an appended page. If **Print Region** is selected from the Print menu, press the mouse on a starting point of the viewer and draw a rectangle on the area of the document that you would like to print. The Print dialog appears when you release the mouse.
	Select. Use the Select tool to select text in a document to copy (if allowed), select an intelligent object, and to activate Changemark notes.
	Find. You can search the text on documents and images with the search tool. Wildcards, macros, and regex search strings are accepted. You can search up, down, find whole word, match case, and turn on term-hit highlighting.
	Download. If allowed by your administrator, you can download the current (original) document to your local machine and open it in its native environment.

Display Toolbar

Contains tools to control how 2D images display.

	Background. Use this button to change the background color of file types with "transparent" background colors, such as monochrome raster and vector file types (color raster files are not affected) to black, white, or gray. **Monochrome:** Available from the color menu is also the Monochrome setting**.** Turning on Monochrome change all lines of a color vector image to a single color (the default is black) while leaving markup entities in color for quick identification. **Raster Background**: This option allows setting a transparent background or custom color for raster images only.
	Set Visible Layers. Turn image layers (e.g., layers of a DWG file) on or off to minimize clutter in the view window or to focus on an area or part.
	Rotate. The Rotate button allows you to rotate the image in 90-degree clockwise increments.
	Fit All. Returns the zoom level to 100% so the full image displays in the Brava! window.
	Fit Width. Ideal for 8.5" X 11" office documents, Zoom Width changes the zoom level so that the entire width of the image appears in the window. You can read rows of text without having to scroll right and left to see the entire line.
	Zoom Slider. You can move the slider ball from left to right to increase or decrease magnification. Move left to decrease, right to increase. The ball snaps back to center on release.
	Pan/Zoom. When zoomed in on an image, use the Pan tool to maneuver around the image.
	Zoom Window. Use the Zoom tool to zoom in, zoom out, (by holding down the right mouse button and moving the mouse up and down) or zoom to an area by dragging a box around the desired display area.

	**Magnifier.** Use the Magnifier to summon a magnified view window on your image. The magnification can be adjusted and a toggle tool is available to allow you to switch between eye glass, bird's eye, and docking behavior.
	**Page Control.** Use page control to navigate through the pages of your documents. You can select a specific page from the drop-down list.
	**CSF Icon –** this icon displays when viewing secure CSF format documents. Clicking on the icon launches a dialog that shows you what Visual Rights were applied to the published file.  Visual Rights Settings Permitted Visual Rights Printing No Copy to Clipboard Yes Measurement Yes View by Layer No Save As No Markup Review Yes Markup Authoring No Burn-in Markups Yes File Expires 1/31/2010 12:47 Network Locked Yes File Password Protected No Close

Brava Compare Toolbar

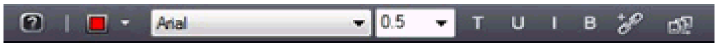
The Compare toolbar offers tools for viewing two versions of a file while in Compare mode. Compare mode can only be enabled through your Brava! Administrator and is available via integration to a document management system. Through your integration, open a file, and then browse to and select another version of the file for comparison. The Compare toolbar displays at the bottom of the viewing window.

	**Overlay**: Use this button to overlay both versions on top of each other. Both files display at their original colors. Use the slider to change the transparency of each file - left to dim the compare version, right to dim the open version.
	**Overlay Differences:** With this button, the compare file version opens overlaid on the open file. The open file displays in color1(deleted geometry), and the compare file displays in color2(added geometry). Geometry that has not changed (common between both revisions) is color3.
	**Side-By-Side:** Both versions are displayed in a split-screen image. Move the slider to view transparent differences overlaid in each version.

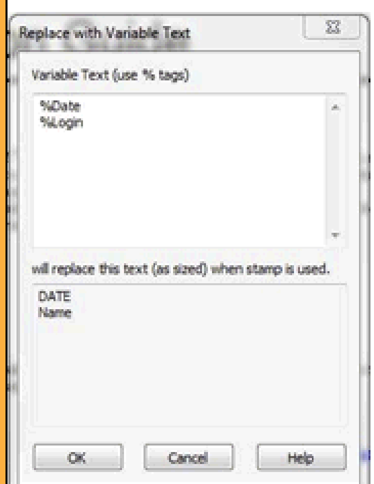
	Text Comparison: While a graphical comparison is useful for viewing differences in CAD drawings (as overlaid images), this method has limitations when it comes to comparing the actual text contained in a document file. Use the Text Comparison mode to view the (non WYSIWIG) text content comparison of the open and compare documents. The document is shown in split screen mode with the open and compare files displayed in two windows as lines of text, and the WYSIWIG view of the Compare or Open file shown beneath. Text differences between the two documents are highlighted in three different (custom) colors. Color1 indicates something that was deleted out of the open document. Color2 indicates something that was added to the compare document. Color3 indicates something that has changed between the two documents. A merged report can be exported to PDF using the Text Compare Report button.
	Open File (Only): Only the file that was first opened is displayed (normal colors). The set alignment points for comparison tool is available in this mode. All Annotate, Review, Redact, Measure, and Publish features are supported in this compare mode only.
	Compare File (Only): Only the file that was opened for compare is displayed (normal colors). The set alignment points for comparison tool is available in this mode. Measure and Publish features are supported in this compare mode.
	Additions: Only added areas (areas present in the compare version, but not in the open version) are displayed in custom color1.
	Deletions: Only deleted areas (areas present in the open version, but not in the compare version) are displayed in custom color2.
	Unchanged: Only areas that are present in both the compare version and open version are displayed in custom color3. You can close the comparison file (and toolbar) at any time by selecting **Close Compare** from the **File** menu.
	Nudge Alignment: This button is available when using the Overlay, Overlay Differences, Side by Side, Additions, Deletions, and Unchanged viewing modes. You can use the Nudge Alignment commands to nudge and re-scale a compare image or drawing to an open drawing, allowing you to interactively make small adjustments to align the files more precisely. This feature is especially useful for comparing two TIFF images that contain the same text but have different line spacing. Click the Nudge Alignment button and select a direction to nudge the compare file by one increment.
	Set/Clear Alignment Points. The **Set Alignment Points** tool allows you to compare two versions of a file that are of different scales, or world page sizes. Use the tool to select two points on each version that define a single identical location that is used as a common alignment section when the two files are overlaid. **Clear alignment** clears any currently set points.
	Transparency Slider: This tool is available for Overlay, Overlay Differences, and Side-by-side modes to adjust the transparency amount of the two documents. In the two overlay modes, move the slider to the left to reduce the transparency of the Compare document (additions), move the slider to the right to reduce the transparency of the Open document (deletions). When the slider is centered, both documents display at 50% transparency. In Side-by-side mode, center the slider to view the changes side by side, overlaid at 25% transparency. Move the slider all the way to the left to view 50% transparency, or all the way to the right for 0% transparency (no overlay)
	Text Compare Report: Use this button to generate a merged text compare report and output the results to PDF.

	Compare Settings: Use this button to change color options, hide unchanged text (can be expanded/collapsed), wrap lines, and enable smooth scrolling.

Tool Properties Toolbar



This toolbar contains tools to modify the properties of Markups and Measurements. The properties bar is located directly below the file toolbar.

	Help. Launch the on-line Help file to access detailed information about using the application's features.
	Text Properties. Use the Bold, Italic, and Underline buttons to modify the style of your markup text. Use the font style and size drop down boxes to change the markup font style and size used. Changing the size of the markup text box on the image will dynamically update the size of the font used in the font size selection box
	MarkupText Background. Use this feature to select a background type for your markup text box. Available choices from the drop-down menu are *Transparent*, *Match Display Background*, and <*Color*>. Use **Select Background Color** to choose the markup text background color from the *Color Chooser* dialog.
Var Text	**Tokens.** Available when creating a stamp template, use this button to replace markup text with token variables. The token expressions will be resolved when a user inserts or double clicks on a stamp containing token variables. If the token used is a *%prompt()*, the user will be prompted with a text entry field where he can type in the requested information. 
	Line Width. Change the width of markup lines using the Line Width tool.
	Line Style. Choose the style of line used for any of the Sketch, arrow, shape, edit text, or line tools. Choices include solid, dotted, dashed, or dash-dot.
	Shape Properties – Fill Type. Select Solid, Hollow, Highlight, or Background Fill as attributes for a Rectangle, Ellipse, or Polygon shape. Choosing solid or highlight fills the shapes with the currently selected markup color.

	Arrow End Styles – Choose the start and end arrow styles to use with the Line Arrow tool.
	Color. Change the color of any markup entity using the 16 predefined markup colors, or you can choose **More**… to use the custom *Color Chooser* dialog.
	Hyperlink. You can add a hyperlink to the markup entity when this icon is available. Hyperlinks can be launched by clicking on a markup entity containing a hyperlink with the Select tool .
	Copy Markups – Use this button to copy selected markup entities to one or all pages of the document (specific page numbers can be entered in the *Copy to Designated Pages* dialog). Entities that cannot be copied include Edit Text entities, Changemark entities, and Redactions.
	Signature Settings. Use to set or change the current signature tool item data.

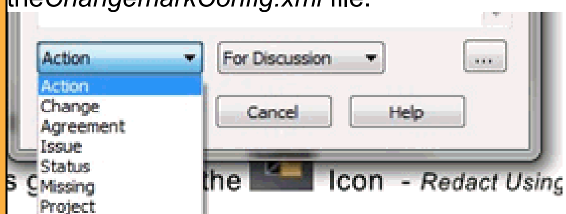
Markup Toolbar

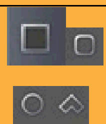
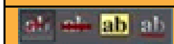
The Markup toolbar contains tools for adding markup entities and Changemark notes (annotations) to the current file. The Markup toolbar is displayed on the left side of the viewer when you:

- Click Annotate from the functions toolbar.
- Click and select New.

Additional markup tools are available by clicking on any arrow that exists to the right of the currently displayed tool. Please see the Properties section of this document for available tool options.

	Select Entity. Use to select and edit markup attributes, resize, reshape, rotate, copy, or move entity.
	Arrow Pointer. Use to add arrows to your images. The arrow head is set at the first selection point.
	Text. Use the Text tool to insert text directly on the image (rather than in a note). Use the Markup Properties tools to change the font name, size, etc.

	Changemark. The Changemark tool allows markup authors to type or copy/paste in detailed text in a scrolling window. Authors can also add hyperlinks to point the user to additional information. Reviewers simply need to double-click on the markup entity while in select mode to review the text, or automatically scroll through each Changemark contained in the Changemark list by clicking a Next arrow. See Also "Changemark Panel". **Changemark combination tools:** These tools are available purely for convenience. With one single click, you can add a Changemark with either a *Highlight* , *Text Highlight* , *Cloud* , *Text Strikethrough* , or *Arrow* . Once added, the two entities behave totally independent of each other. **Changemark Type and State**: *Type* and *State* are attributes that can be assigned to the original Changemark content and to each reply that is added to a discussion. After the Type is selected, the *State* drop-down will show only the States associated with the currently selected *Type.* Types and States can be customized in the*ChangemarkConfig.xml* file. 
	Checkview: This tool, available from the Changemark group, allows users to tag certain spots within similar documents that require efficient review for verification of completeness (such as signature). Like Changemark notes, the tags can be reviewed sequentially in the Checkview tab and marked as OK or not OK.
	Insert Image. Use this markup tool to insert external raster images (JPG, BMP, or PNG) into your current markup layer. Once selected, images can be resized and positioned where you want them. You can set multiple instances of this same image entity or use the Browse button in the Markup Properties bar to choose another raster image to insert. The properties bar also contains a list of 10 most recently used images which can be individually selected and inserted.
	Add Markup Stamp. If Stamp Templates have been authored and saved, the markup stamp button is available on the Markup Toolbar. When clicked, a list of available markup stamps is shown that can be added to the current markup layer. The stamp template is a group of markup entities that have been defined as a single unit and all elements of the template are resized and moved as a single entity and cannot be edited otherwise. Color, content, and other elements are defined by the author when a stamp template is created and saved. When a stamp is inserted, if a dynamic text field (such as %Page, %Date, %dbstring(value), etc.) exists, the field is resolved and results are populated in the stamp.
	Electronic Signature. Inserts a user-specific signature image that can be used to digitally sign documents.
	Cloud and Polyclouds. Add cloud or polycloud shapes on your images.
	Highlight. Creates highlight entities by drawing a rectangle. Unlike the filled shape entity, highlights do not have the option of being filled or hollow.

	**Sketch and Polysketch.** Use this tool to draw freehand shapes and lines on your image. Polysketch can be filled or unfilled.
	**Crossout, Scratchout, Arc, and Line Tools.** Use any of these tools to add linear shapes on your documents and images. The mouse cursor will change to reflect the tool selected. Line width and style can be selected in the markup properties toolbar, with additional arrow end styles available for the Line Arrow tool.
	**Rectangle, Rounded Rectangle, Ellipse, and Polygon shapes.** Shapes can be used as highlights or hides, and can be filled or hollow as determined by your selection in the Shape Properties drop down. Use the Hides shapes to cover or “hide” areas of the image. Hides shapes are automatically the same color as the background color. The mouse cursor will change to reflect the tool selected. Note that hiding an area does not remove text from search.
	**Edit Text.** You can strikeout, strikethrough, highlight, and underline selectable text contained in a drawing or document. Simply drag a box around the text area you want to include to select and mark it.

Review Tools

The Review button allows quick access to open and close markup files for review.

	**Review.** Brava! Enterprise can open markup files for review. Though an image file can have only one editable markup associated with it, there can be multiple overlaid, or read-only markups attached. Markups opened for review cannot be edited, but one or more overlaid markup layers can be permanently published with the current file, along with any newly created markup layers, as a new markup. Clicking **Review** opens a file explorer window where you may select an associated markup file, or files, to open for review. When markup files are overlaid for review, clicking on the review drop-down **arrow** displays a list of currently open markups that you may close for review (Close Review). Selecting Review Changemark opens the Changemark panel where you may cycle through any Changemark contained in the markup file.

Measure/Takeoff Toolbar

The Measure toolbar contains tools for measurement and measurement takeoff purposes. The toolbar is displayed on the left side of the viewer when you click .

Measure. Access commands for measurement and calibration. You can measure lines, polygons, circles, and rectangles, use the measure count feature, and access the measurement settings dialog.

Measurement Properties. Depending on the measurement tool selected from the menu (line, polyline, polygon, rectangle, circle, or count), various properties display for that measurement, including:

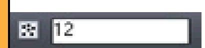
Distance *Angle* *X,Y Coordinates*

Perimeter Area (poly)

Height *Area (rectangle)*

Radius *Circumference* *Area (circle)*

Count



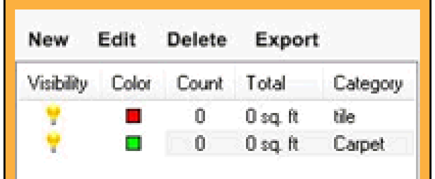
Clear All and **Undo Last**. Clears all or only the last count marker placed on an image.

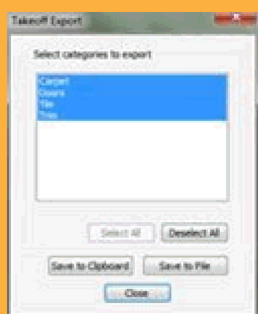
You can select the **Snap** check box if you would like your measurement points to snap to the nearest picking point or to the midpoint of segments and circles. Note that only CAD type formats support snap. The setting has no effect on raster images and text documents.

Measure Takeoff mode includes these additional options;

If **Show Leader** is selected in the tool properties, a text box (with category color border) will display each individual measurement result on the entities you place.

The **Negative Area** check box of the tool properties allows you to place a negative entity for that category. If the check box is selected, any entity you place on the drawing will subtract from the accumulated results. The measurement entities text box displays a negative number if Show Leader is selected.





Measure Takeoff

To access the Measure Takeoff panel, click or from the **Measure** button dropdown , select **Takeoff**. The **Takeoff**button now displays in its place.

You can create categories of different types (length, area, and count) and accumulate total measurement values for each category defined. Select **New** to define a new category through the *Takeoff Category* dialog. You can **Edit** or **Delete** a selected category if you are the author.

You can assign a different color for each category and the measurements placed on the document will display with that color.

The list of categories can be sorted by name (click Category in the top column). Click the ascending/descending arrow to arrange the list accordingly.

Once the categories are defined, highlight a category and use the available (dependent on type) measurement tools to place multiple measurements on the document. As you place each measurement entity, accumulated totals display in their respective takeoff panel category.

Takeoff information can be **Exported** to a file or to the Clipboard through the *Takeoff Export* dialog.

To hide a category, click the hide icon to toggle between visible and hide. To toggle all categories from visible/hide state, click the icon located in the column heading. Hidden category information will remain available for export.

Category and takeoff information is saved as a markup layer to the current file and can be reviewed as any other markup file.

Publish Tool

The Publish toolbar contains tools for republishing documents. The Publish options menu is displayed when you click .

Select Save Current View as JPG from the submenu to save the current view displayed in the viewing window as a JPG file. This feature captures the image window as a screen capture and will include all visible elements (e.g., markup entities, magnifier window, measurement indications, etc.).

Select Publish to CSF from the submenu to publish the current file to secure CSF format with encrypted Visual Rights. CSF is a neutral 2D format that is a replica of the source file, including images, graphics, layout, and more. Secure CSF files published with Brava! Desktop or Brava! Enterprise can be opened in the free Brava! Reader.

Select Publish to PDF or TIFF from the submenu to publish the current file (with any open markups) to PDF or TIFF format. A variety of publishing options can be selected from the dialog. The list below represents the supported formats:

NEUTRAL FORMATS	EXTENSION
Portable Document Format	PDF
Tagged Image Format	TIFF/TIF
CAD FORMATS	**EXTENSION**
AutoCAD Drawing (2D) (through version 2015)	DWG

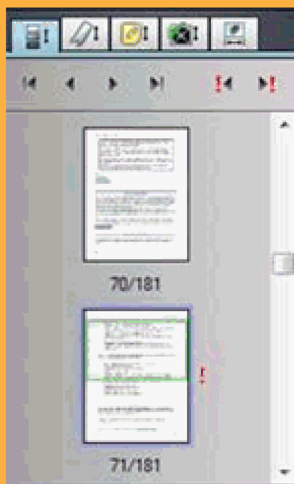
AutoCAD DXF (through version 2014)	DXF
AutoCAD Web Format (through version 2015)	DWF
Computer Graphics Metafile	CGM
MicroStation Drawing (through version 8.11, including XM, V8i)	DGN
IMAGING / IMAGE FORMATS	**EXTENSION**
Adobe Photoshop	PSD
Enhanced Metafile	EMF
GEM Paint	IMG
GIF	GIF
JPEG Compressed Image	JPG, JPEG, JP2, JPGM
Portable Network Graphic	PNG
Tagged Image File	TIF, TIFF
Windows Bitmap	BMP
Windows Media Photo	WPD
Windows Metafile	WMF
DOCUMENT	**EXTENSION**
Hyper Text Markup Language	HTML, HTM
Microsoft Email	MSG, EML
Microsoft Excel	XLS, XLSX, XLSM, XLSB
Microsoft Word HTML Document	DOCHTML
Microsoft Word	DOC, DOCX, DOCM
Rich Text Format	RTF
Text file	TXT

Select Export to Word if this feature is enabled by your administrator. This option is used with DOCX formatted files that contain a Changemarks Text entity. The command exports the Changemark text to Word Comments on a published DOCX file.

2D Task Pane

The task pane can be toggled open and closed by clicking on the Pane Arrow on the right side of the Viewing window.

	**Pane Arrow**. This icon, located on the right side of the viewing window, expands and collapses the tabbed tool panel when clicked.

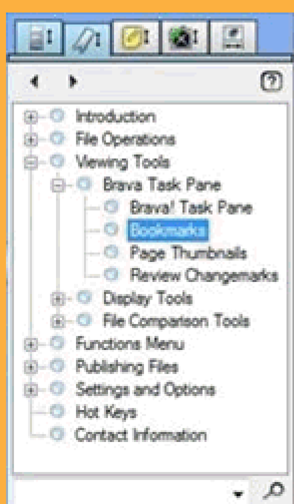


Page Thumbnails Panel

The Page Thumbnails Tab opens a scrollable thumbnail navigation panel on the right side of the Brava! viewing area. When clicked, the pages of the currently opened file appear in the panel as small click-able thumbnail images. First/Previous/Next/Last buttons are provided for quick page navigation.

If a markup file is open, an exclamation point  appears to indicate the pages that contain markups. You can use the next/previous markup page arrows to navigate through only those pages containing markups.

The thumbnails panel can be resized, and thumbnail image size can be reduced or increased (to page extents) through the right mouse button menu. Markup entities display on the Thumbnails panel images.



Bookmarks Panel

The bookmark panel lists the internal bookmarks contained in the document being viewed. In this panel, you can expand or collapse the bookmark trees by clicking the +/- signs. Click a bookmark to go to that location in the document. Use the search field to search for bookmark titles. Use the next and previous arrows to navigate through bookmarks.

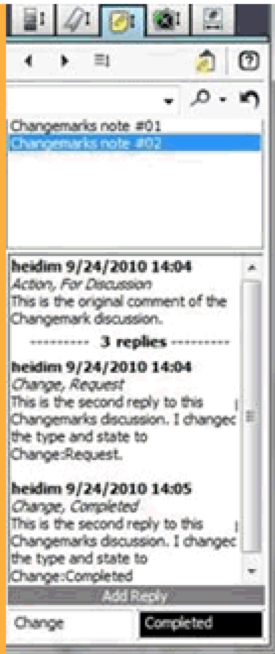
Changemark Panel

Next and **Previous** arrows are provided to navigate through the Changemark list. The list can be sorted by the categories provided in the *Sort* drop down list .

The Changemark list window also contains buttons to **search**  the content, title, or author information of a Changemark.

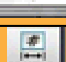
Use the **Show All** button  to undo any filters applied and show all Changemark contained in the document.

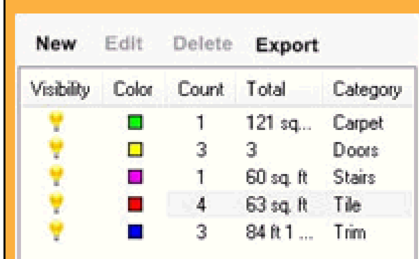
Use the **Extract Changemark** button  to copy the selected Changemark, or all Changemark information contained in a document to the Clipboard. This function captures the



Changemark title, comment (text description), attached hyperlink (as text), and image (WMF bits) to the Clipboard. The resulting RTF stream can be pasted into Microsoft Word.

Changemark Discussion: Users reviewing Changemark can click Add Reply to reply to a selected Changemark. The type and state can be updated and the current type and state of the last reply is what displays at the bottom of the Changemark panel. The Changemark replies are shown in the Changemark window along with their author, date and time, type and state information, and note content. Only reviewers with markup edit permissions can reply to Changemark.

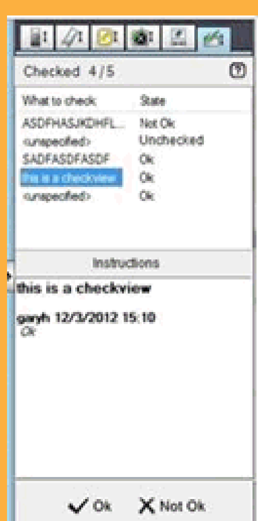




Measure/Takeoff Panel

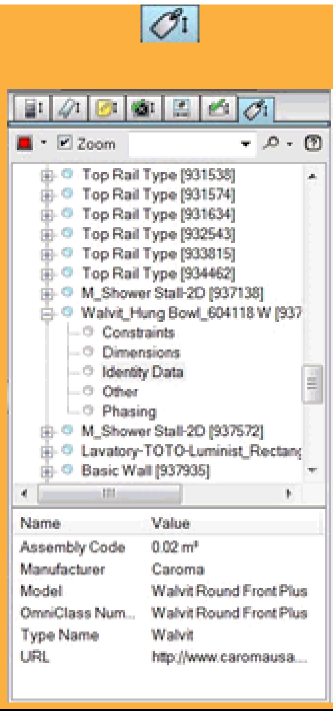
To access the Measure Takeoff panel, click this tab, or from the **Measure** button, select **Takeoff**.

The takeoff panel lets you create categories and accumulate measurements and export the information to a (markup) file or to the Clipboard. You can total length, area, and counts by placing multiple measurement entities on the drawing for each category defined.



Checkview Panel

The Checkview panel allows reviewers to step through each Checkview tag (that has been authored in a markup file), read any instructions, and select either OK or Not Ok to proceed to the next Checkview tag. This panel allows quick verification for document completeness, such as whether certain areas have been signed or not.



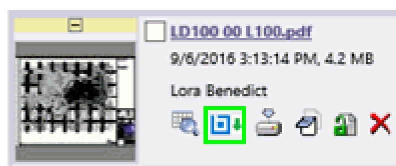
CAD Attributes Panel

The CAD Attributes panel displays the metadata that is contained in CAD drawings, in a hierarchic tree view with expandable/collapsible levels. You can customize the view by setting the attribute color, zooming from one attribute to the next, or filter and search the current attributes.

Bluebeam

Bluebeam Integration Client Overview

No installation action is required on the web server for Bluebeam Integration. The integration is strictly related to the client clicking on a PDF file in ProjectDox and viewing the file in Bluebeam Revu instead of Brava. When the Bluebeam checkbox is checked in a Project Template or project, the Bluebeam icon will display for PDF files. The checkbox is available from the Info screen of the Project Template or project.

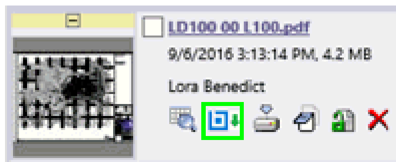


In order to install Bluebeam on the client machine, the logged in user must be part of the network's administrator group; this is the same requirement as installing the Brava ActiveX client. The Bluebeam integration works with both Internet Explorer and non-IE Windows browsers. Currently, we support Bluebeam on Windows systems only. The ProjectDox Bluebeam Integration MSI can also be pushed to users in the same way the Brava ActiveX Client is distributed by network administrators.

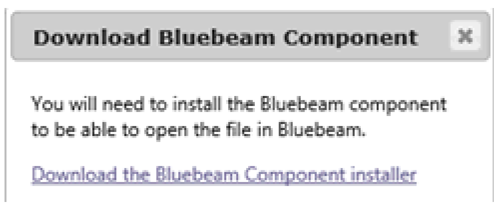
This MSI allows a client to view ProjectDox files in three editions of Bluebeam Revu listed below. It is the responsibility of the client to purchase and install one of these editions either before or after the ProjectDox Bluebeam Integration is installed.

Install ProjectDox Bluebeam Integration

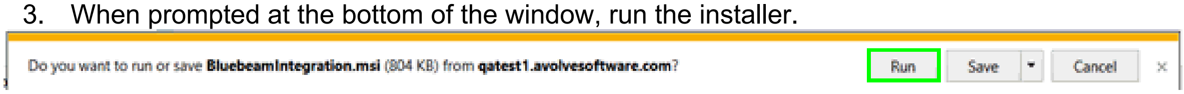
1. Once Bluebeam has been activated for your project, click on the Bluebeam icon for a PDF file in the ProjectDox file view.



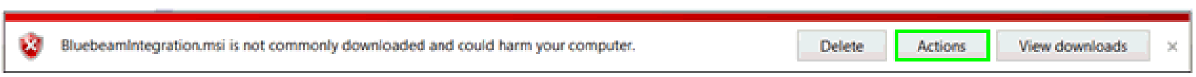
2. You will be prompted to download and install the ProjectDox Bluebeam Component. The installer is applicable to 32-bit and 64-bit Windows operating systems.



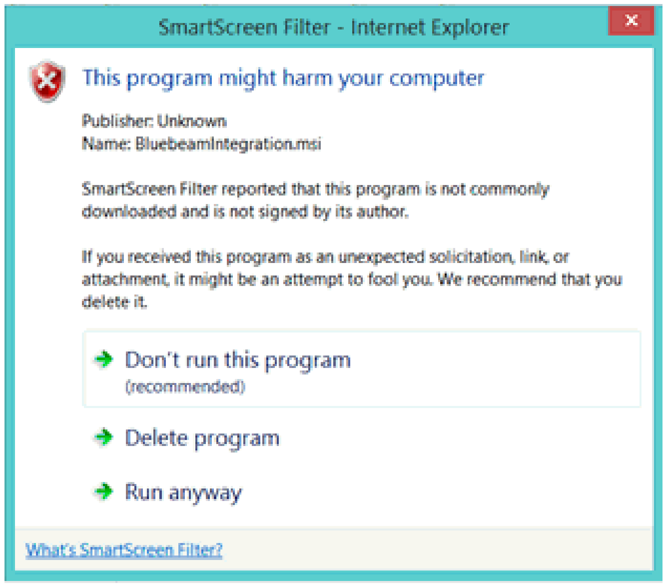
3. When prompted at the bottom of the window, run the installer.



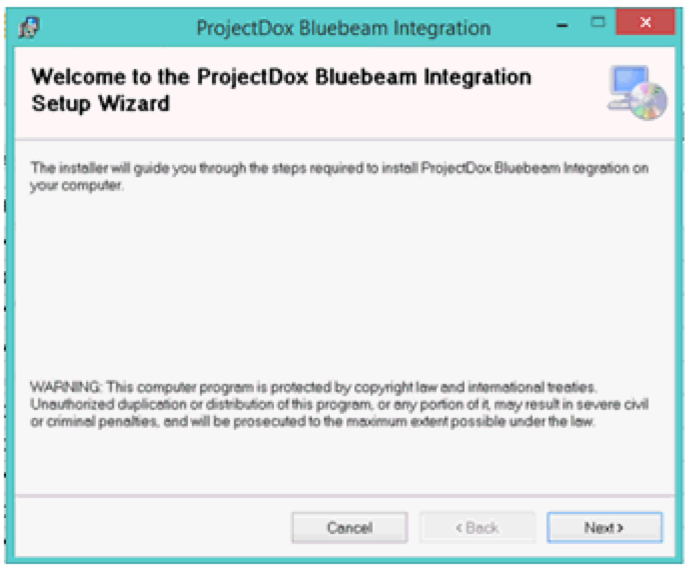
4. You will receive the following message. Click the **Actions** button. TFS 14461 All warnings will be removed once the MSI is signed, may not be enough time prior to PDUG 2016.



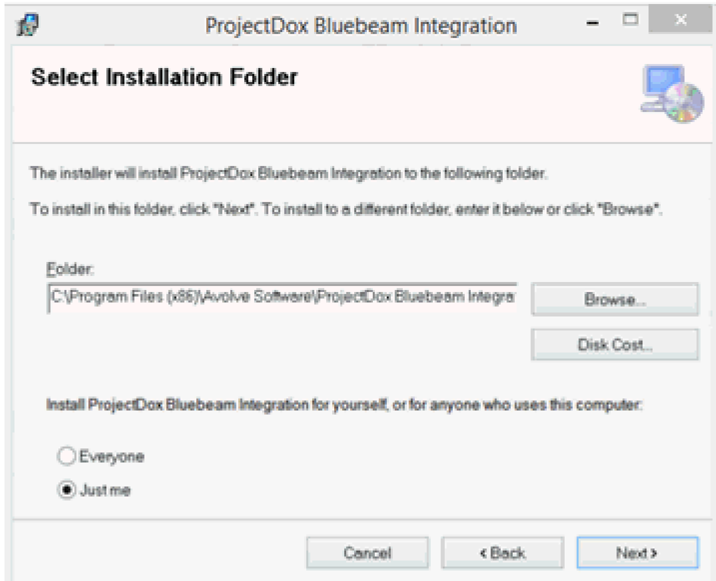
5. Click **More** at the bottom of the dialog to access additional options.
6. Click **Run anyway**.



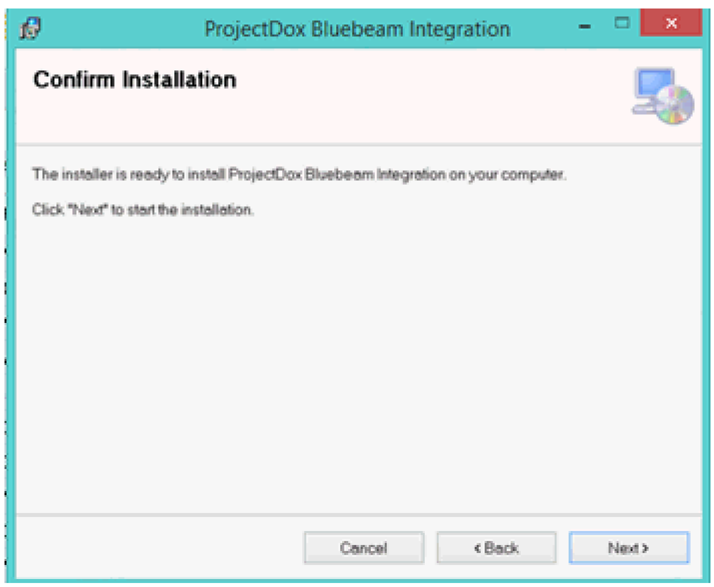
7. When the installer starts, click **Next**.



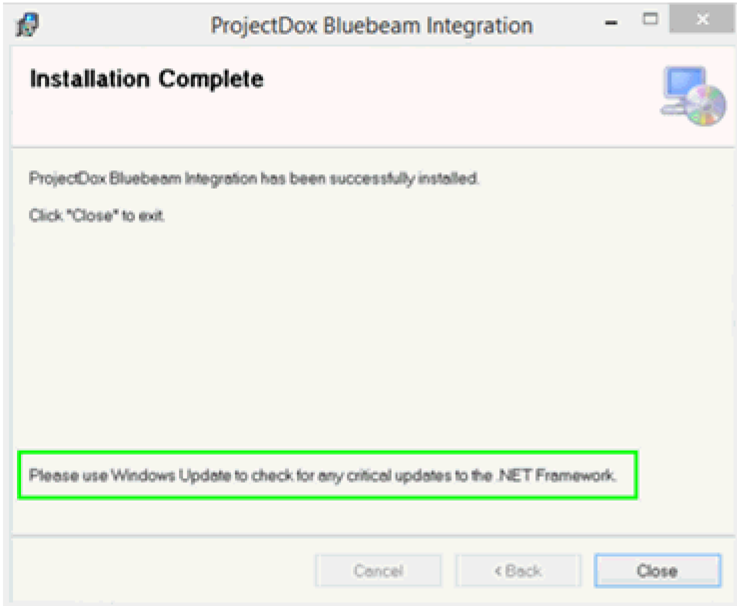
8. Use the default folder or update the installation path, if you choose. Click **Next**.



9. To confirm the installation, click **Next** and the install will begin.

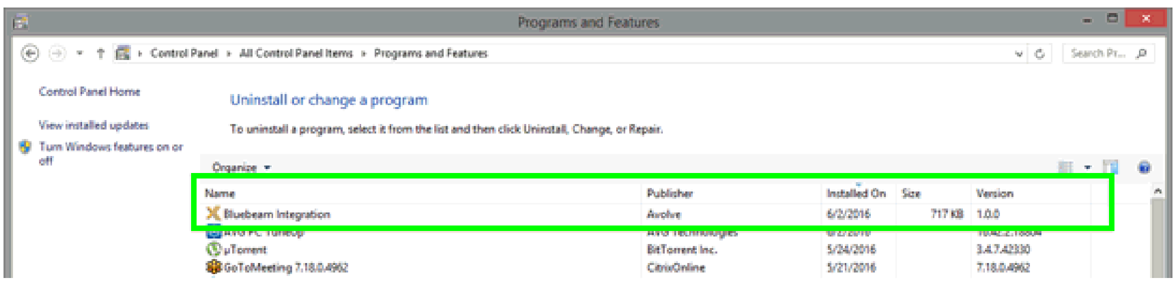


10. At the bottom of the dialog, you are being directed to confirm that all critical .NET Framework Windows Updates have been applied to your system. Take that action if you are unsure of your systems Windows Update status. Click **Close**.



Client Installation Technical Results

After installation, there will be a *ProjectDox Bluebeam Integration* record on the *Programs and Features* screen (*Control Panel -> All Control Panel Items -> Programs and Features*).



- During installation, new registry keys are added:
  [HKEY_CLASSES_ROOT\pdox]
  @="URL:pdox Protocol"
  "URL Protocol"=""

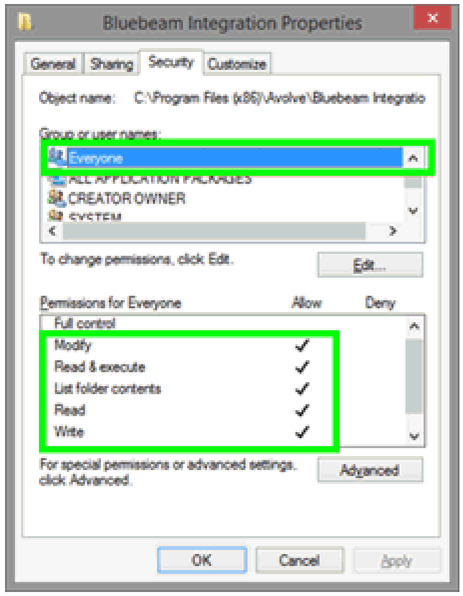
  [HKEY_CLASSES_ROOT\pdox\DefaultIcon]
  @=" c:\Program Files (x86)\Avolve\Bluebeam Integration\ BluebeamIntegration.exe,1"

  [HKEY_CLASSES_ROOT\pdox\shell]

  [HKEY_CLASSES_ROOT\pdox\shell\open]

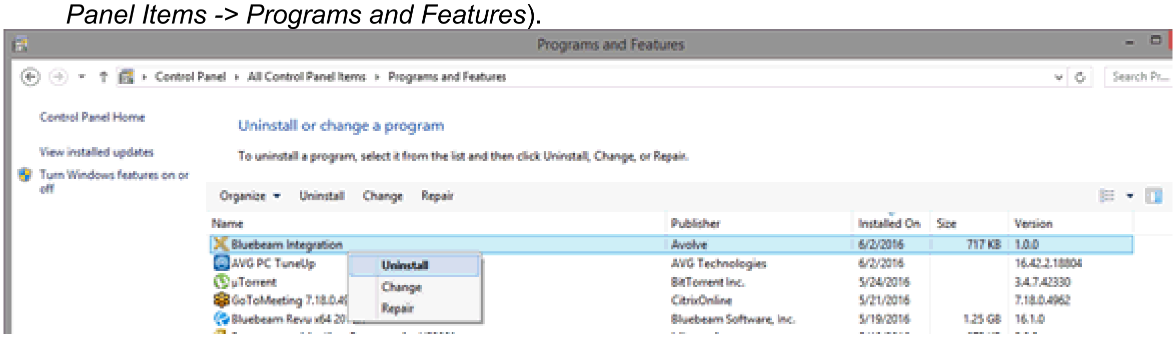
  [HKEY_CLASSES_ROOT\pdox\shell\open\command]
  @="c:\Program Files (x86)\Avolve\Bluebeam Integration\ BluebeamIntegration.exe" "%1"

- During installation, access permissions are changed for the target install directory. It is changed so “Everyone” can modify target install directory content.



Bluebeam Client Integration Uninstall/Change

- User can uninstall the Bluebeam integration from Control Panel (*Control Panel -> All Control Panel Items -> Programs and Features*).



- To update the application version, the user should run new installer and it will update the existing install.

How it Works

Bluebeam REVU Integration

- The Bluebeam integration installer doesn't check whether the client machine has Bluebeam REVU installed.
- The user must download and install Bluebeam REVU on the client machine. The order of the installation (Bluebeam REVU first or Bluebeam integration first) is not important.
- During the ProjectDox file checkout process, Bluebeam integration will try to open PDF document in Bluebeam REVU. If there is no Bluebeam REVU installed the user will be notified with a message box in ProjectDox.
- When the ProjectDox Bluebeam Integration is uninstalled, the Bluebeam REVU software will not be affected.

Optional Configuration

- The Bluebeam integration is installed with settings that allow the user to use the application right away. However, the user is free to overwrite settings in the configuration file. The use case would be for someone who wants to change where the ProjectDox files are downloaded to edit in Bluebeam or if they reinstall Bluebeam Revu to a different directory.
- The configuration file **BluebeamIntegration.exe.config** exists in the folder where the ProjectDox Integration was installed.
- Settings in the configuration file:

  BluebeamFilesPath - full path to the directory where downloaded files are stored. User that runs application should have read/write permission to that folder. By default, the path points to directory where application was installed.

  Example:

  <add key ="BluebeamFilesPath" value ="c:\Program Files (x86)\Avolve\Bluebeam Integration\BBFiles\"/>

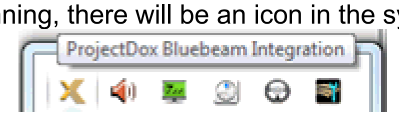
  BluebeamRevuExeFullPath- full path to Bluebeam Revu executable.
  Example:

  <add key ="BluebeamRevuExeFullPath" value ="c:\Program Files (x86)\Bluebeam Software\Bluebeam Revu\2016\Revu\Revu32.exe" />

- Once the application starts the user will see the console box briefly open when the integration is invoked from ProjectDox or from Bluebeam.

Bluebeam Integration Execution

- After installation, the Bluebeam Integration is not running. The program is started automatically after the first ProjectDox protocol command is issued.
- There is always a single instance of the program running, per machine, per user.
- Once the application is running, there will be an icon in the system tray.



- To exit application – mouse right click on system tray icon -> Exit.

Protocol Commands

- Bluebeam Integration supports ProjectDox protocol:

  BluebeamDownloadCheckout– downloads pdf document to the directory specified in configuration file (see BluebeamFilesPath).
  Example: pdox://BluebeamDownloadCheckout/?fileid=71&sessionid=6110eda8-c08a-411e-a2f2-43e2c80eee50&webApiBaseUrl=http%3a%2f%2flocalhost%2fProjectDox.Web.API.Dev

  BluebeamUploadCheckin – uploads pdf file from directory specified in configuration file (see *BluebeamFilesPath*) to server, checks file in and triggers publishing process.
  Example:
  pdox://BluebeamUploadCheckin?fileid=12&sessionid=bbe1337f-37b4-4fba-a6f2-67e985e5a98e&webApiBaseUrl=http%3a%2f%2flocalhost%2fProjectDox.Web.API.Dev

  Both protocol methods require parameters: field, sessionid and webApiBaseUrl. Parameter webApiBaseUrl should be encoded.

- The application communicates with web API methods, target base URL is specified in configuration file (see **PdoxWebAPIBaseUrl**).

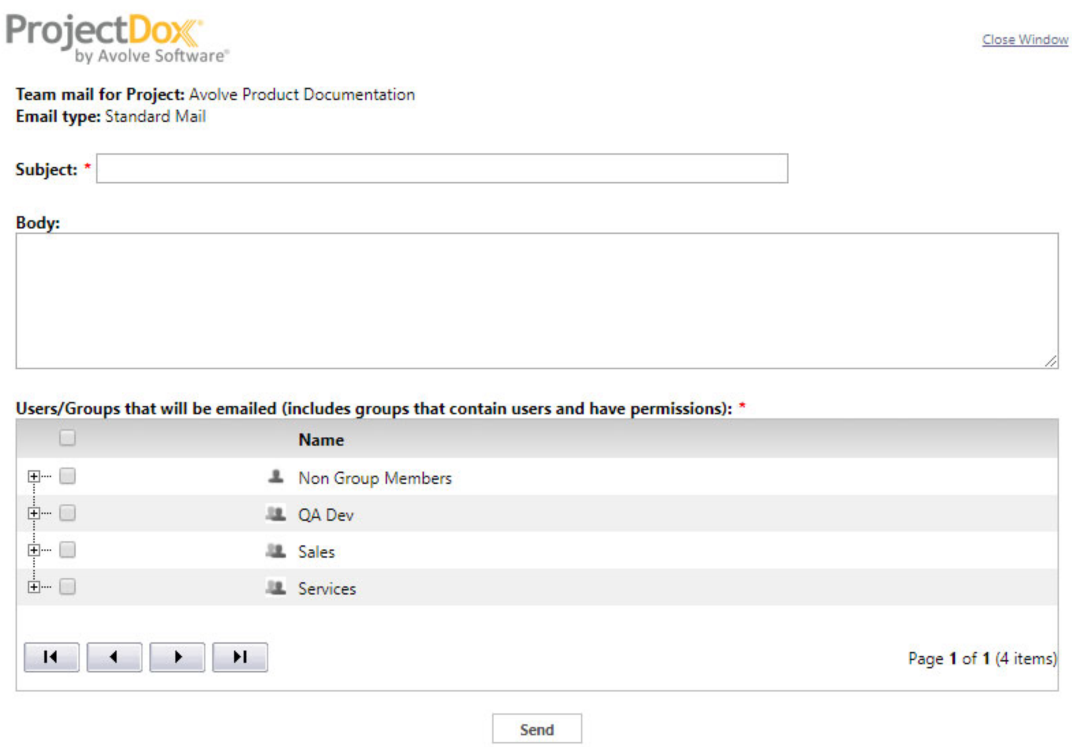
  List of web API methods that application relies on:
  - [POST] File/CheckInOutFiles/json

- [GET] File/DownloadFiles/json
- [POST] File/UploadFileVersion/json

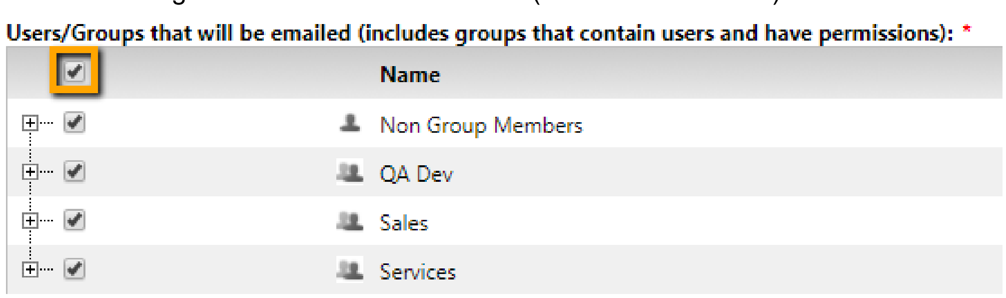
Team Mail

Team Mail is a convenient way to send email to project members.

1. You can access Team Mail from several places in ProjectDox:
   - On the Homepage, in the Option button group, click the mail icon for the desired project
   - On the Project page, click the Team Mail button in upper right-hand corner.
   - At the top of the Project Information screen, click the mail icon
2. The Team Mail screen appears.



3. The interface for selecting recipients is the same as the one for Show-Hide Member List in a project. You can select the recipients in several ways:
   - The image below shows how to select (or clear selection of) all members.



- You can expand and click to select or clear individual check boxes for Team Members or Project Groups as recipients

4. Enter a message subject and body.
5. Click **Send** to send your message.

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.

Users who are only Private Group members cannot see members of any group in the project; they can see Non-Group Members, however.

Team mail can be sent to any public Project Group, and to any individual member of the Project. Project level Team Mail is only available if the System Admin configures it to be available. It is governed on a site basis.

Discussion Board

The Discussion Board feature is used within the ProjectDox platform as a central communication tool for all parties involved in the life cycle of a project. For example, questions about payments, contractors/inspectors or any other topic regarding the project can be discussed in a place accessible by all involved in the project. It allows messages to be written, stored, and emailed between members of the project, so the history of correspondence about a file or project is easily accessible within ProjectDox. When any new notes are added they must be related to the wflowTaskID so that when the task is completed the notes can be locked.

The ability to view and participate in the Discussion Board is controlled by permissions. A System Administrator can disable/enable this feature site-wide. A Project or System Administrator can grant groups view and/or creation rights to the feature.

Using the Discussion Board

Access and Permissions

The discussion board is accessible two different ways:

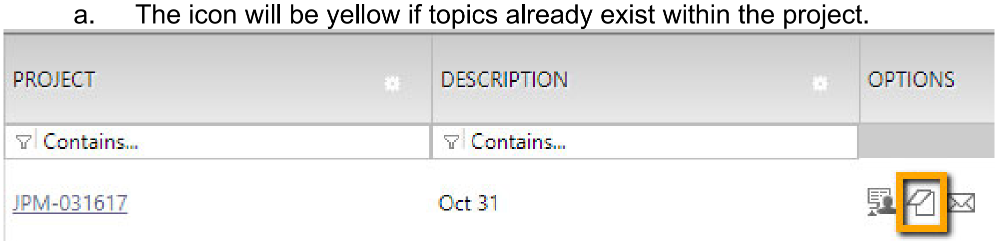
- At the project level – when enabled, the Discussion Board is accessible to everyone involved in the project.
- At the folder level – viewing and participating in the Discussion Board at this level is controlled by permissions. An admin would have to grant the following permissions to applicable folders, for the users in groups and roles to use this feature.

ProjectFlow Discussion Board formlet should have **no** bearing on permissions for Discussion Board in ProjectDox.

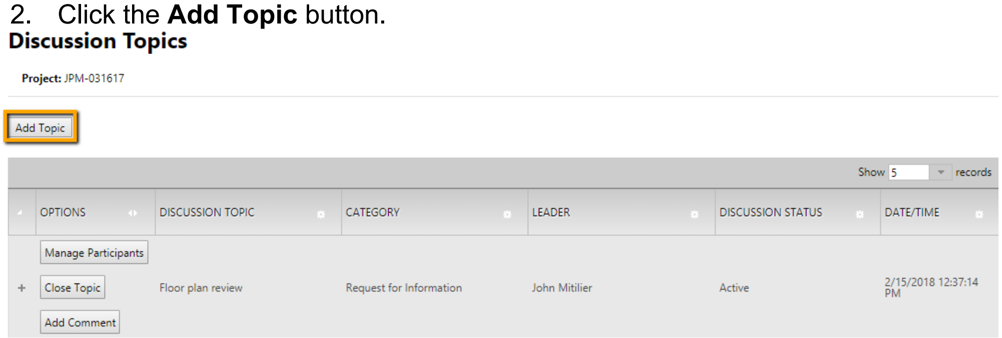
Creating a Discussion

To create a topic for discussion, follow the steps below.

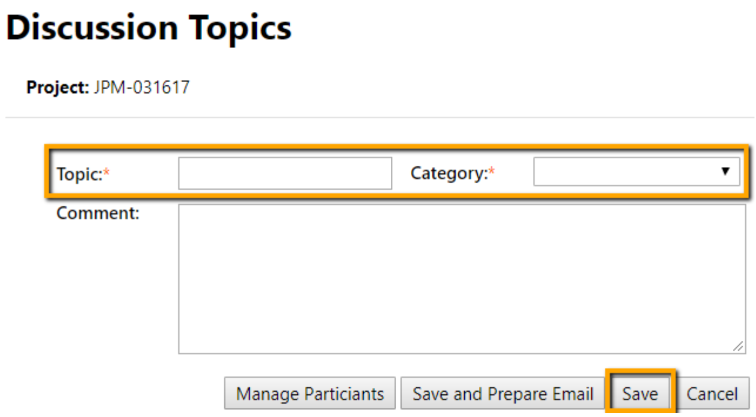
1. Click the **Discussion Board** icon for the desired project.
   a. The icon will be yellow if topics already exist within the project.



2. Click the **Add Topic** button.



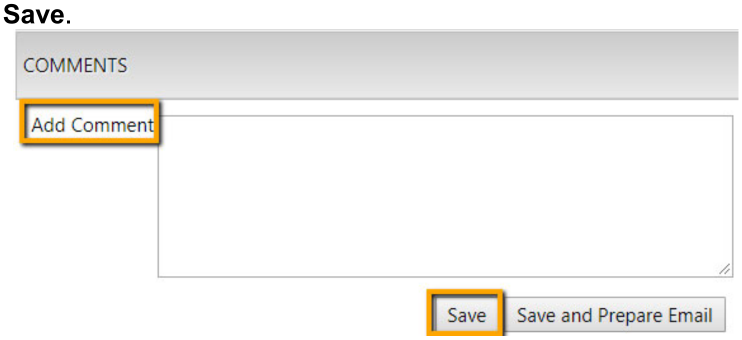
3. Enter a descriptive title into the *Topic* field.
4. Select a category which fits the topic you are creating.
5. Click **Save**.



Topics cannot be edited or deleted once they have been posted to the Discussion Board.

Creating a Comment in a Topic

1. Once the *Discussion Topics* dialog is open, click Add Comment.
2. Enter comments in the **Add Comment** dialog box.
3. Click **Save**.

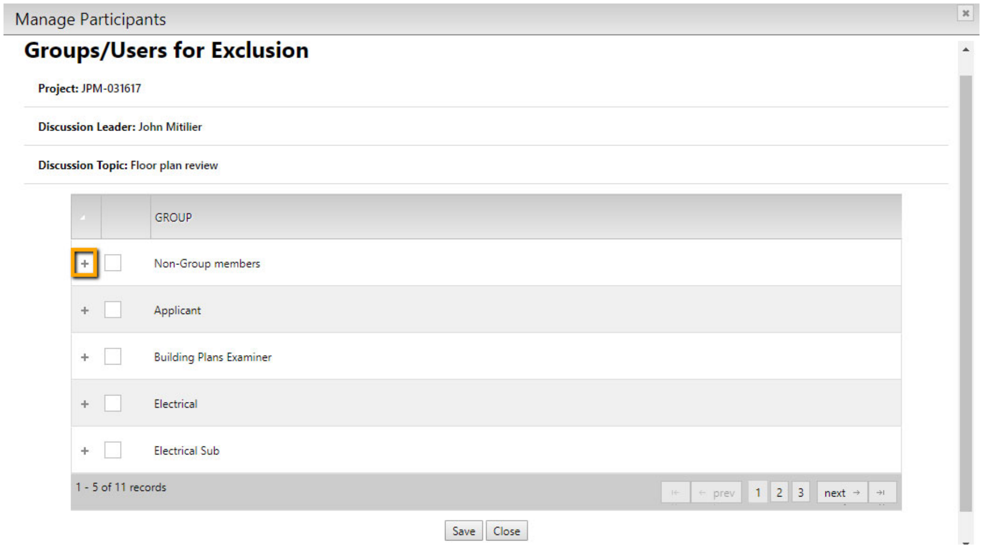


Comments cannot be edited or deleted once they have been posted to the Discussion Board. Comments cannot be added to discussions that are closed.

Excluding a User or Group from a Discussion

By default all users see the discussion board. Discussion administrator can exclude users or groups. To exclude a participant or group to a discussion topic:

1. Click the Manage Participants button. The Manage Participants dialog box will display.
2. Select a group ✔ to exclude or click + to exclude an individual of a group.



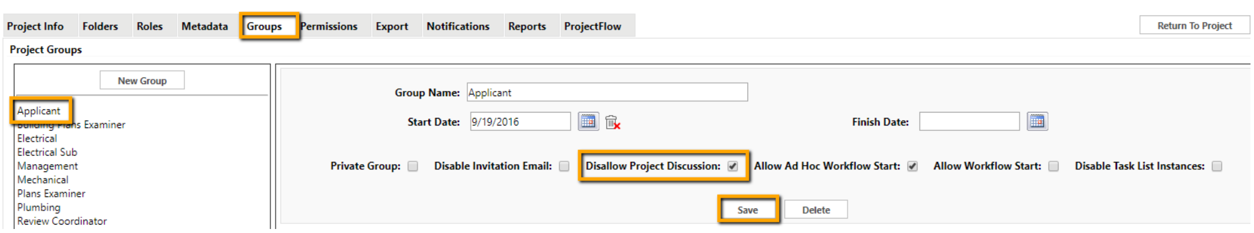
3. Click **Save**.

The owners are the only individuals allowed to exclude participants to their topics.

Removing a Group

By default, all discussions are public. To remove a group from a discussion:

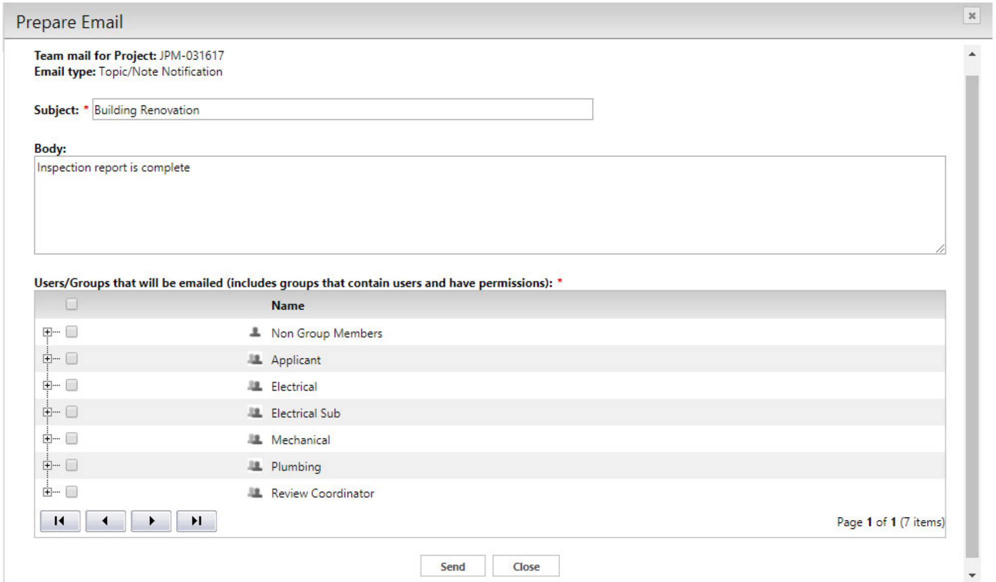
1. Click the button on the project.
2. Select the *Groups* tab.
3. Select the group to have removed from the discussion.
4. Click the “Disallow Project Discussion” radio button, users in that group will not be able to participate in the project discussions (i.e. applicants).
5. Click Save.



Preparing an Email

Once a comment is created, an email notification can be sent to individuals or groups by:

1. Expanding an open topic + .
2. Click Prepare Email next to the appropriate comment. The *Prepare Email* dialog box will display.



3. Select the group or individual participant to send the notification to.
4. Click Send.

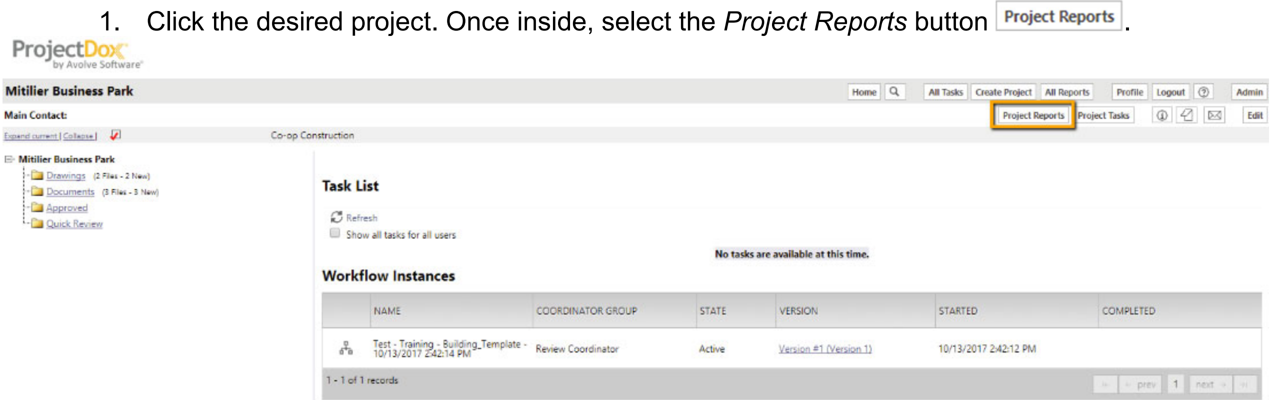
Closing a Topic

A topic can be closed by clicking on the Close Topic button next to the topic that is to be closed. Once a topic is closed it cannot be opened or edited. The status of the discussion will display as *Active* or *Closed* under the Discussion Status field.

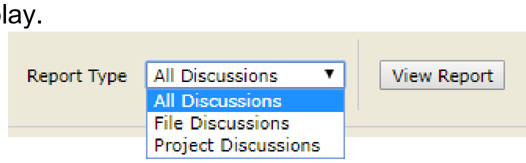
Discussion Board Reporting

A project report is available that displays all topics and comments created within a project. To view this report, follow the steps below:

1. Click the desired project. Once inside, select the *Project Reports* button Project Reports.



2. Click the button next to the Discussion Board Report. The Discussion Board Report dialog page will display.



3. Select the Report Type and click the View Report button.
4. A dialog will appear with the report visible.

ProjectDox

Current Project - Discussion Board Report

JPM-031617

Generated On 03/21/2018 02:28 PM

PROJECT DISCUSSIONS				
DISCUSSION TOPIC	**CATEGORY**	**DISCUSSION STATUS**	**DISCUSSION LEADER**	**DATE UPDATED**
Discussion Topic: Building Renovation	**Category:** Inspectors/Contractors	**Discussion Status:** Active	**Discussion Leader:** John Mitilier	**Date Updated:** 3/21/2018 1:55:44 PM
PARTICIPANT NAME	**DISCUSSION COMMENT**			**DATE UPDATED**
John Mitilier	Inspection report is complete			3/21/2018 1:55:44 PM
John Mitilier	Need inspection report			2/15/2018 12:34:31 PM
Discussion Topic: Building Review	**Category:** Workflow	**Discussion Status:** Active	**Discussion Leader:** John Mitilier	**Date Updated:**
PARTICIPANT NAME	**DISCUSSION COMMENT**			**DATE UPDATED**
Discussion Topic: Floor plan review	**Category:** Request for Information	**Discussion Status:** Closed	**Discussion Leader:** John Mitilier	**Date Updated:**

Reports

Project Reports

By default, any user can run a project level report from the *Reports* tab or **Project Reports** button of a project. There is a set of standard project reports that provide the end-users with project specific information. To execute and view the report, click the icon.

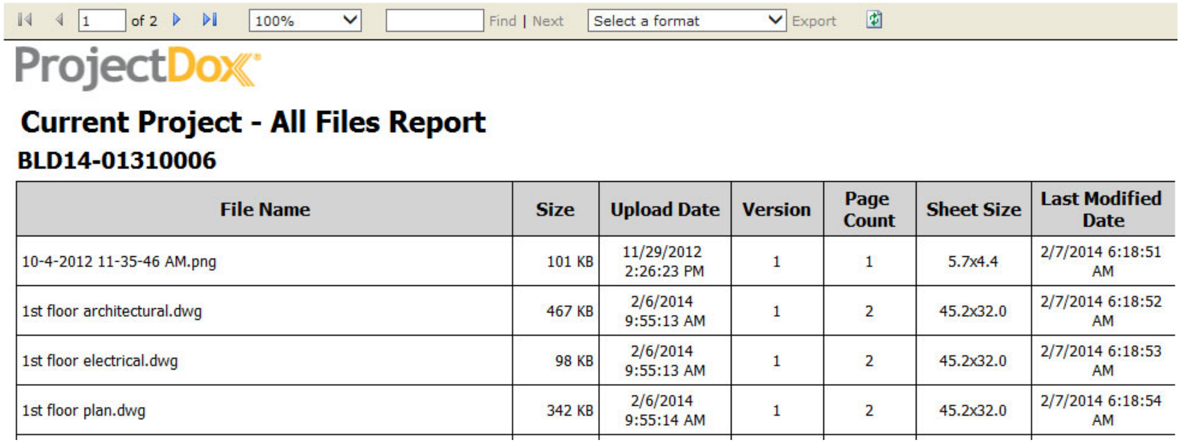
View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report	Project	Discussion Board Report

Each report has a report viewing tool bar with feature such as page navigation, keyword search, parameter entry such as date range to narrow the results of the report, and the ability to export data into an alternate format.

To export report data into another format for viewing outside of the ProjectDox application in the viewing tool bar select the format from the “Select a format” dropdown. There are several options available including XML, CSV, TIFF, PDF Web Archive and Excel, but Avolve recommends exporting the data to Excel for better quality and capability to sort and manipulate the data.

Exporting a Report

1. From the *Available Reports* list, click the report icon to view the information in Report Viewer. The sample below is the first link, *Current Project – All Files Report*.

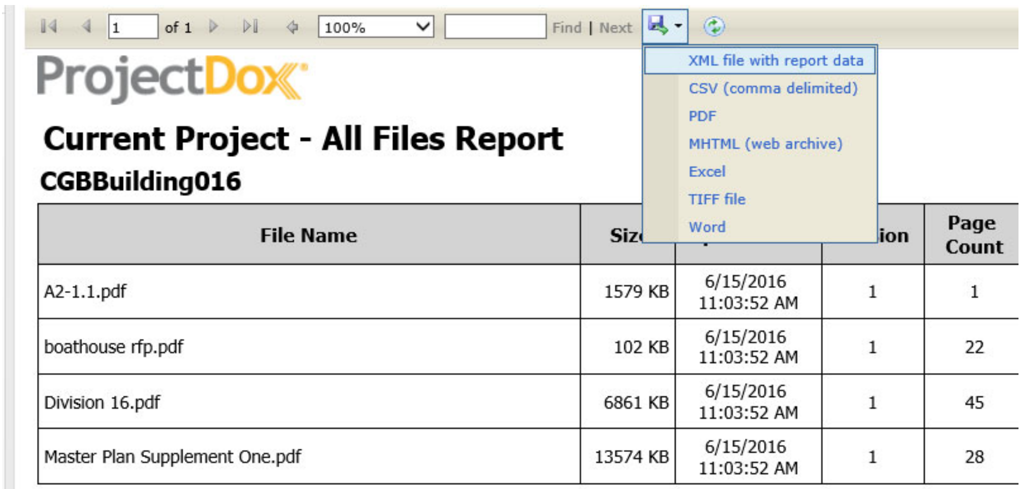


Current Project - All Files Report

BLD14-01310006

File Name	Size	Upload Date	Version	Page Count	Sheet Size	Last Modified Date
10-4-2012 11-35-46 AM.png	101 KB	11/29/2012 2:26:23 PM	1	1	5.7x4.4	2/7/2014 6:18:51 AM
1st floor architectural.dwg	467 KB	2/6/2014 9:55:13 AM	1	2	45.2x32.0	2/7/2014 6:18:52 AM
1st floor electrical.dwg	98 KB	2/6/2014 9:55:13 AM	1	2	45.2x32.0	2/7/2014 6:18:53 AM
1st floor plan.dwg	342 KB	2/6/2014 9:55:14 AM	1	2	45.2x32.0	2/7/2014 6:18:54 AM

2. From the *Export Options* dropdown of the report viewer, you can choose to export the data to XML, CSV, PDF, HTML, XLS, TIFF, or DOC format.



Current Project - All Files Report

CGBBuilding016

File Name	Siz		ion	Page Count
A2-1.1.pdf	1579 KB	6/15/2016 11:03:52 AM	1	1
boathouse rfp.pdf	102 KB	6/15/2016 11:03:52 AM	1	22
Division 16.pdf	6861 KB	6/15/2016 11:03:52 AM	1	45
Master Plan Supplement One.pdf	13574 KB	6/15/2016 11:03:52 AM	1	28

3. Click the **Export** link to export the report into the selected format and click the **Save** button to save it to a location of your choice.

Site-Wide Reports

A system administrator may grant permission to a project administrator or other selected users of the application to view reports classified as "Sitewide" reports. When permission is granted to view reports at this level the All Reports button All Reports will display in the upper right tool bar. The standard site-wide reports are listed below and subject to change by the system administrator:

View	Report Name	Report T	Report Description
	Sitewide - Active and Revoked User Counts	SiteWi...	Active and Revoked Users Counts
	Sitewide - All Logged In Users	SiteWi...	All Logged In Users
	Sitewide - All Projects Info Report	SiteWi...	All Projects Info Report
	Sitewide - Configuration Changes By Date	SiteWi...	Configuration Changes By Date
	Sitewide - Emails Sent Detail By Date	SiteWi...	Emails Sent Detail By Date
	Sitewide - Events By Date	SiteWi...	Logged Events By Date
	Sitewide - Login Failures By Date	SiteWi...	Login Failures By Date
	Sitewide - Login Success By Date	SiteWi...	Login Success By Date
	Sitewide - Site Activity Report By Date	SiteWi...	Site Activity Report By Date
	Sitewide - Timesheet Logs	SiteWi...	Displays a list of all timesheet values entered across all projects
	Sitewide - Unpublished Files	SiteWi...	All Unpublished Files

Searching in ProjectDox

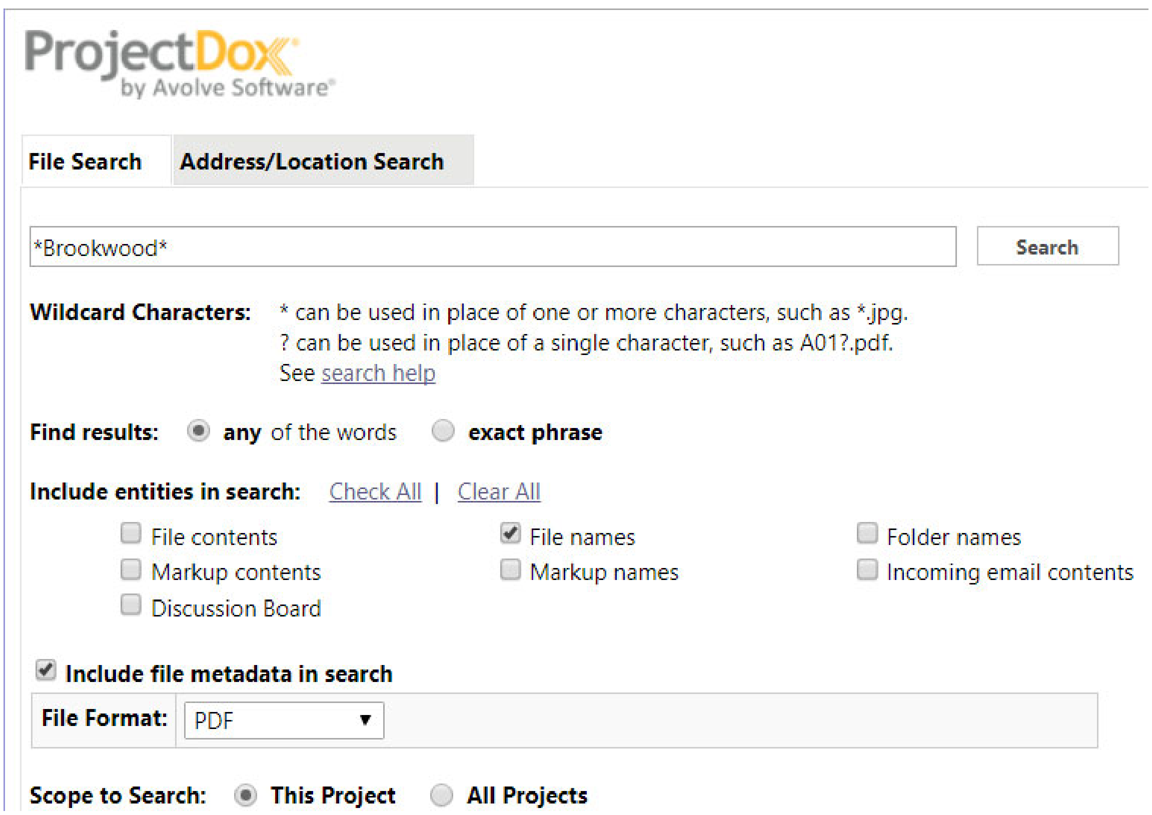
Searches will only be performed in the projects, folders, markups, and discussion board for which you have access permission.

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 duscussions. 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.

The *Search* tool is available in the upper right-hand corner.

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.



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

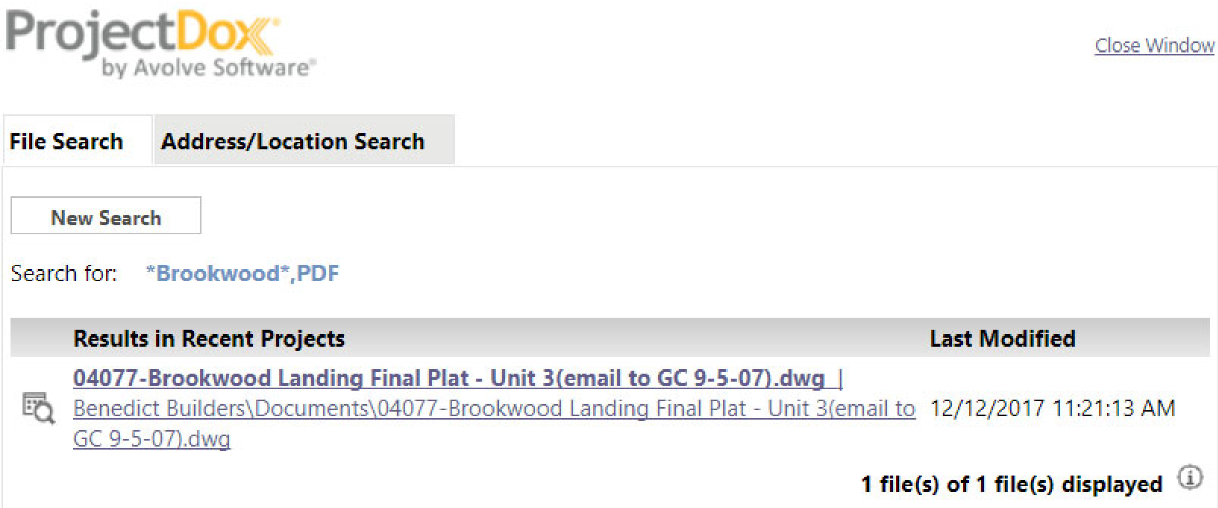
is found in its entirety. To search exact terms, select the “exact phrase” check box and type in the exact term you want matched. To search for partial words and phrases, use wildcard characters.

- 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.

3. 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.

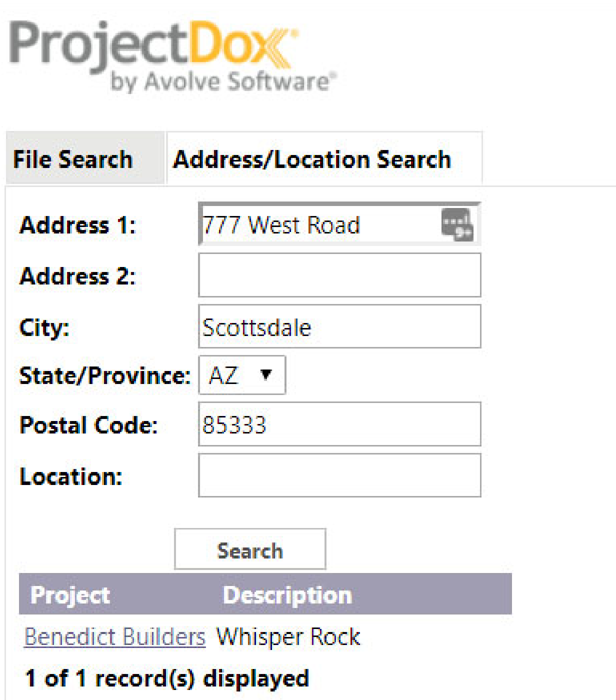
4. You may select **include file metadata in your search**. Choosing this option displays the metadata information to search by when searching within a project that has metadata associated with it.
5. In the *Scope to Search* area, select your desired scope. When searching at the File level, your scope can be as narrow as searching a single folder or as wide as searching all projects contained in a ProjectDox site.
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).



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

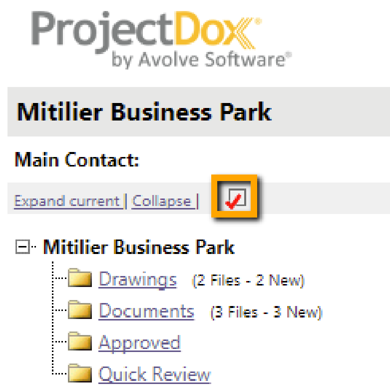
Support for retrieving File Author and File Description was discontinued after Microsoft Office 2003. The fields are now considered to be legacy due to Microsoft's change of internal file format.

8. 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**.

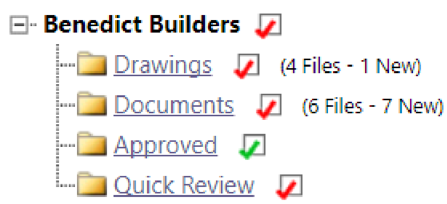


Subscription Manager

The Subscription Manager is used to subscribe to notification emails whenever one of the selected events occurs within the subscribed folder or directory tree (except for your own activity). Click the **Notification** icon as shown below to access the *Subscription Manager*, and view the notification icon for each folder:



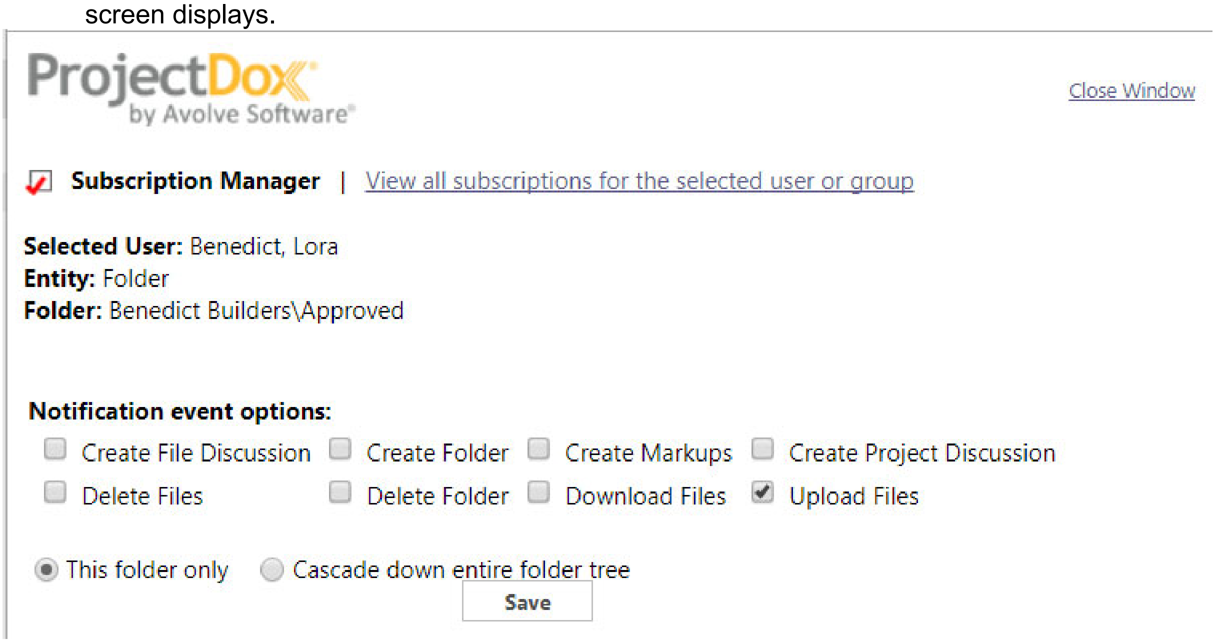
When set to show, the icons will display as shown.



The main **Notification** icon functions as a toggle: click it to show or hide the notification icons for the project folders.

To subscribe:

1. Click the Notification icon for the folder you wish to subscribe. The *Subscription Manager* screen displays.



2. Choose your Notification Event preferences by selecting or clearing the checkboxes.

- Select the *Cascade down entire folder tree* radio button to subscribe to all subfolders of the current folder.
- To receive notification emails for the entire project, select the Notification icon for the top folder and check the option to Cascade down entire folder tree from the Subscription Manager window.
- To unsubscribe from all notification events, click **Unsubscribe All**. This will unsubscribe you from the selected folder and the subscription icon will again appear red.

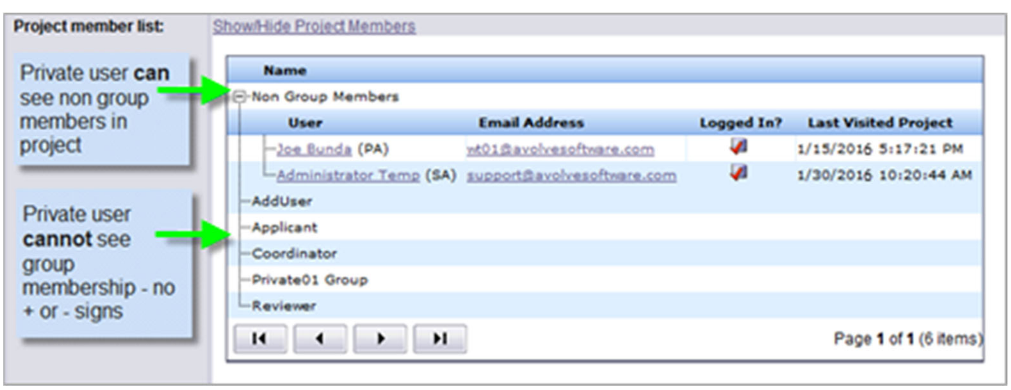
3. Click **Save**.
    - The Notification icon changes to green when notification has been assigned. If notification cascades on a folder level, a plus sign displays on the icon. If notification was inherited from a folder up the hierarchy, then a minus sign displays on the folder's icon.

    - You can update your subscription preferences at any time by clicking the applicable notification icon, selecting different options, then clicking **Save**.

Appendix

Appendix: Private Groups

A user who is a member only of private group(s) cannot see membership of groups.

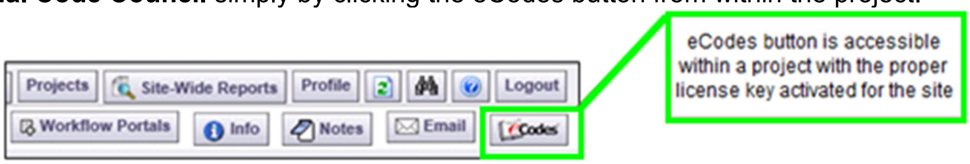


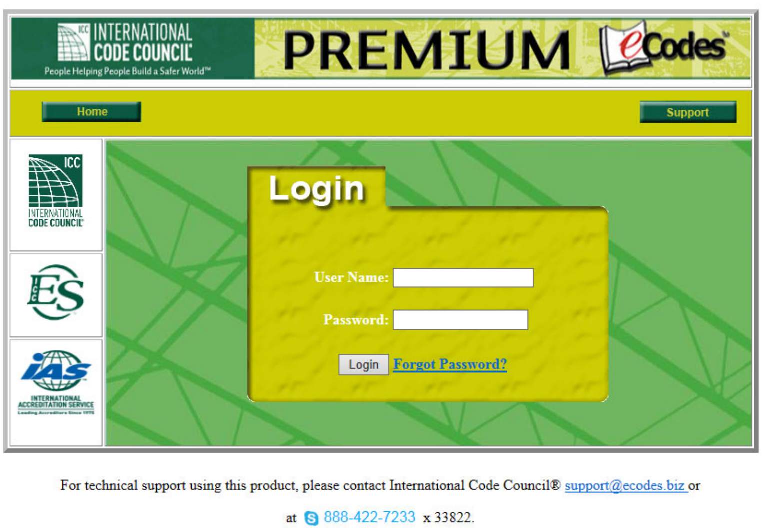
Scenario	See…	Seen by…
Member only of private group(s) in project	Members of any group – No Non-group members – Yes	System Administrators – Yes Project Administrators – Yes Users – No

Member of private and public group(s)	Members of any public group – Yes Members of any private group – No Non-group members – Yes	System Administrators – Yes Project Administrators – Yes Other users – Public group membership – Yes; Private group membership – No
Member of private group(s) and with individual (non-group) permissions	Members of public groups – Yes Members of private groups – No Non-group members – Yes	System Administrators – Yes Project Administrators – Yes Other users: Non-group membership – Yes Private group membership – No

Appendix: eCodes Integration

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 website for the **International Code Council** simply by clicking the eCodes button from within the project.





About the 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.