Electronic Plan Review (EPR)
New Features in ProjectDox V9.1 (Customer)

This document identifies new features established with upgrading to ProjectDox Version 9.1.

I. Navigation

1. New Main Navigation Buttons

A. **Back**, **Forward** and **Refresh** buttons are now performed using the browser, mouse or shortcuts (see step I.4).

B. **Home** button will take users to the Home page with Tasks and Projects tabs (see steps I.2.A and I.2.B).

C. **All Tasks** button will allow users to open a separate window to view a full page of all project tasks available.

(New)

(Old)

2. New Home Page

A. **Projects** tab allows users to access projects previously worked on by clicking on the project link.

B. **Tasks (PD)** tab allows users to access the project home page or available task by clicking on the appropriate link.

3. **New Project Navigation Buttons**

A. **Home** button replaces the **Projects** button.

B. **Project Tasks** button replaces the **Workflow Portals** button

C. **All Reports** button replaces the **Site-Wide Reports** button

4. **Navigation Shortcuts**

Keyboard Combination	Action
Ctrl + Plus (+) or Ctrl + Minus (-)	Zoom In or Out
Ctrl + Scroll Wheel	Zoom In or Out
Alt + Left Arrow	Back
Alt + Right Arrow	Forward
Alt + Tab	Task Switcher
F5	Refresh Active Window

5. Grid View Configuration (Tasks and Projects Tab)

A. New configurable grids allow users to move, hide, sort and filter items they want to view. The grid configuration can be saved to the users preference.

PROJECT	OPTIONS	DESCRIPTION	OWNER	STATUS	CREATE DATE
▽ Contains...		▽ Contains...	▽ Contains...	▽ Contains...	▽ On...
1805100-LPRM		PROJECT 3 - ELECTRICAL CORRECTIONS	P&D Department	Batch Stamp	10/3/2018 8:32:58 AM
1805096-LPRS		New Shell Building	P&D Department	Plans Approved	9/26/2018 12:57:26 PM
1804474-LPSC		Tenant Improvement - Sutie 1293	P&D Department		7/17/2018 10:31:37 AM
1803916-LPRM		New Shops	P&D Department	Verify Final Fees	6/11/2018 12:26:18 PM
1802407-CPFL		Bob's Project	P&D Department		4/16/2018 9:51:13 AM
180106-PLAT		Project 2 - Final Plat	P&D Department	Plans Approved	10/3/2018 8:04:29 AM
1805099-LPRN		Project 1 - Floor & Electrical Plan	P&D Department	Plans Approved	10/3/2018 7:50:04 AM
1803805-LPRR		Interior Remodel - Doctor's Office	P&D Department	Applicant Resubmit	6/13/2018 1:37:17 PM
T81939-LPRN		New Building	P&D Department	Create PR - KIVA	10/2/2018 2:12:43 PM

1 - 9 of 9 records

6. Column Filter

A. Click the filter icon and choose one of the options from the dropdown.

PROJECT ⚙	OPTIONS ⚙	DESCRIPTION ⚙	OWNER ⚙	STATUS ⚙	CREATE DATE ⚙
▽ Contains…		▽ Contains…	▽ Contains…	☐ Contains…	▽ On… ▽
1805100-LPRM	🛠️🗑️	PROJECT 3 - ELECTRICAL CORRECTIONS	P&D Department		/3/2018 8:32:58 AM
1805096-LPRS	🛠️🗑️	New Shell Building	P&D Department		26/2018 12:57:26
1804474-LPSC	🛠️🗑️	Tenant Improvement - Sutie 1293	P&D Department		17/2018 10:31:37

Dropdown menu:
- Clear Filter
- Aa Starts with
- aA Ends with
- ▣ Contains
- ▦ Does not contain
- = Equals
- ≠ Does not equal

B. Type in key word to filter in real time.

PROJECT ⚙	OPTIONS ⚙	DESCRIPTION ⚙	OWNER ⚙	STATUS ⚙	CREATE DATE ⚙
▽ Contains…		▽ Contains…	▽ Contains…	▽ appl	▽ On… ▽
1803805-LPRR	🛠️🗑️	Interior Remodel - Doctor's Office	P&D Department	Applicant Resubmit	6/13/2018 1:37:17 PM

1 - 1 of 1 records |← ← prev **1** next → →|

7. Column Width Control

A. Click and drag on the column border to adjust the column width.

DESCRIPTION	OWNER ⚙
▽ Contains…	▽ Contains…
PROJECT 3 - ELECTRICAL CORRECTIONS	P&D Department

8. Column Reorder

A. Click and drag the header to move the column.

PROJECT ⚙	Options ⚙	RIPTION ⚙	OWNER ⚙	STATUS ⚙	CREATE DATE ⚙
▽ Contains…		▽ Contains…	▽ Contains…	▽ Contains…	▽ On… ▽
1805100-LPRM	🛠️🗑️	PROJECT 3 - ELECTRICAL CORRECTIONS	P&D Department	Batch Stamp	10/3/2018 8:32:58 AM

9. Column Control

A. Click the gear icon to access the Hide Filter, Hide, Column Chooser and Move To options.

B. The **Column Chooser** option allows users to **Show** or **Hide** columns.
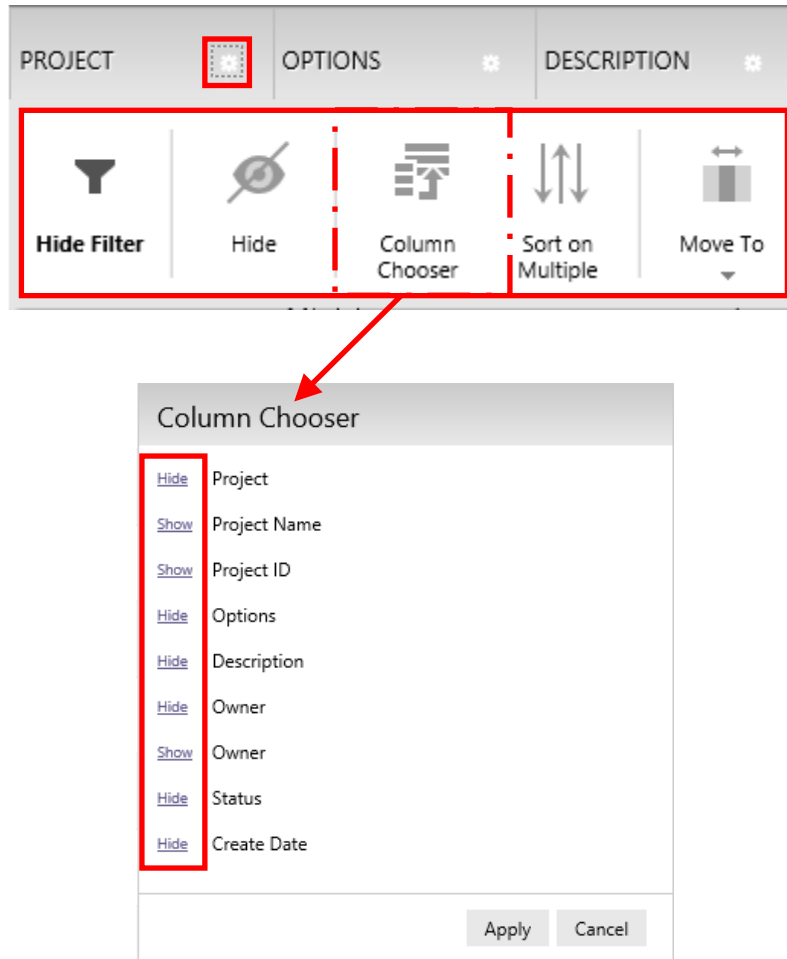
10. Save Settings

A. **Refresh** link updates the data in the grid.

B. **Save Setting** link saves the configured grid settings.

C. **Reset Settings** link restores the grid to default settings and will only appear if changes have been made to the grid.

11. New Uploader

A. New HTML5 uploader replaces Silverlight. Silverlight is no longer needed for uploading files.

ProjectDox ®

Folder: 1805100-LPRM\DRAWINGS

| Upload Files | Upload URL |

Browse For Files

Browse for files or drag files into this area.

Browse For Files   Upload Files

B. New drag and drop feature.

ProjectDox ®

Folder: 1805100-LPRM\DRAWINGS

| Upload Files | Upload URL |

Browse For Files

Browse for files or drag files into this area.

11
PDF

DRAWINGS_2145661   Compressed Folder Tools

File Home Share View   Extract

Extract
all

Extract To

« Com Re… › DRAWINGS_2145661

OneDrive
This PC
Network
ONE

0 G001 Title Code Site Plan
1 A101 Floorplans Rcps
2 A601 Door Window Schedules Elevations
3 A901 Finish Plan Casework Isometrics
4 E001 symbols, abbreviations and general notes
5 E101 demo power & lighting plans
6 E102 new power & lighting plans
7 E501 oneline panel schedule and calculations
8 ET101 demo new special systems plans
9 ET102 demo new security plans
10 M101

11 items   11 items selected 9.32 MB

II. ActiveX (IE) Viewer Enhancements

1. PDF Publish Options

A. PDF/E and Fast Web View support was added.
   i. PDF/E is an open, neutral exchange format for engineering and technical documents.
   ii. Fast Web View is a file structured to allow the web server to send the request page, rather than the entire PDF. This may be useful for viewing large documents.
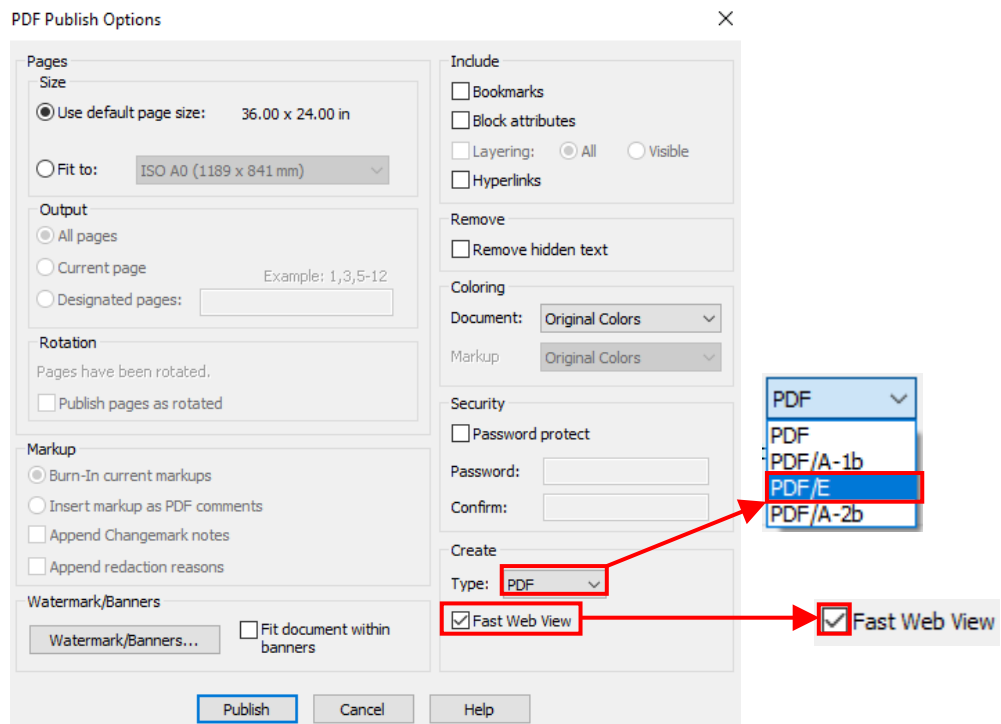
III. HTML5 Enhancements

1. Platform Support

Platform	Active X	HTML Desktop	HTML Tablet
PC	X	X	
MAC		X	
Browser	X	X	
iPad/Android Tablet			X

2. Pan/Zoom and Zoom Window Tools

A. New Pan/Zoom features in plan viewer.

3. Watermarks and Banners

A. Print Menu

Print options for plan layout1.pdf V1 ✕

Options	☐ Grayscale
Markup	☐ Append Changemark notes ☐ Append redaction reasons
Watermark	Watermark/Banners...

| Print | Cancel | Help |

Banner settings ✕

Location	Top left
Opacity	
Text	
Font	Arial
Style	B *i* U
Size	12
Color	■

| Reset | OK |
| Help | |
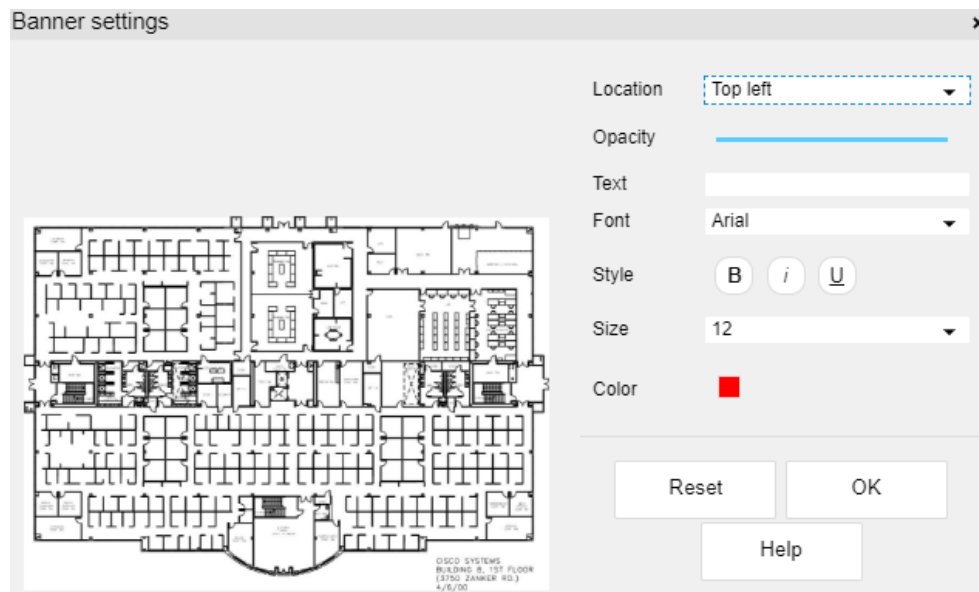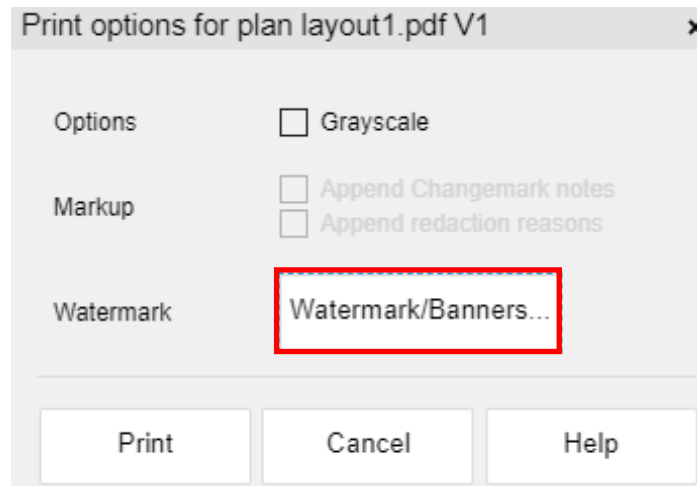
NOTE: Banner Settings works from either the **Print** or **Publish Menu**. Users can use tokens with %.

B. Publish Menu

Annotate ▾   Review ▾   Redact ▾   Measure ▾   Publish ▾

PDF publish options for plan layout1.pdf V1   ✕

○ Designated pages

○ Burn-in current markups
○ Markup as comments
☐ Append Changemark notes
☐ Append redaction reasons

Markup

Coloring   Original colors ▾

Create   PDF Standard ▾   ☐ Fast Web View

Watermark   Watermark/Banners...

Publish   Cancel   Help

PDF publish options for plan layout1.pdf V1   ✕

○ Designated pages

○ Burn-in current markups
○ Markup as comments
☐ Append Changemark notes
☐ Append redaction reasons

Markup

Coloring   Original colors ▾

Create   PDF Standard ▾   ☐ Fast Web View

PDF Standard
PDF/A-1b compatible
PDF/A-2b compatible
PDF/E compatible

Watermark

Publish   Cancel   Help