

ProjectDox New Features 8.3 to 9.x

End-user

Jacksonville NC



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1

Overview

- Navigation
- Reports
- Viewer Updates
- HTML Enhancements
- Other

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Navigation

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All

3

New Home Page – Projects Tab

The screenshot shows the ProjectDox application interface. At the top, there is a navigation bar with 'Home', 'All Tasks', 'Profile', and 'Logout'. Below this, there are tabs for 'Tasks' and 'Projects', with 'Projects' being the active tab. The main content area displays 'All Projects' with a 'Refresh' button and 'Save Settings' option. A table lists project records with columns for PROJECT, OPTIONS, DESCRIPTION, OWNER, STATUS, and CREATE DATE. The table shows 4 records, with the first one highlighted. The footer of the table indicates '1 - 4 of 4 records' and includes pagination controls.

PROJECT	OPTIONS	DESCRIPTION	OWNER	STATUS	CREATE DATE
BU-2018-001	🔍 📄 🗑️	BIC Applicant Training	Wally Taylor	Applicant Upload	4/11/2018 10:11:34 AM
BU-2018-07-19-005	🔍 📄 🗑️	Enterprise High Rise	Wally Taylor	Applicant Upload	8/15/2018 12:24:01 PM
BU-2018-07-19-015	🔍 📄 🗑️	Enterprise High Rise	Wally Taylor	Applicant Upload	8/8/2018 7:18:31 PM
zMaWa Reassignment Test	🔍 📄 🗑️	Testing	Wally Taylor	Applicant Upload	4/23/2018 1:07:40 PM

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9.X

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New Home Page – Tasks Tab

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNM...	STATUS	PRIORITY	DUE DATE	CREATED
<input type="checkbox"/>	Applicant Upload Task	BU-2018-001	MaWa	Applicant	FirstInGroup	Pending	Medium	4/11/2018 10:11:52 AM	
<input type="checkbox"/>	Applicant Upload Task	sMaWa Reassignment Task	FF BIC Building U	Applicant	FirstInGroup	Pending	Medium	7/24/2018 11:08:37 AM	
<input type="checkbox"/>	Applicant Upload Task	BU-2018-07-19-005	BU-2018-07-19-005 - Building Plan Check Review	Applicant	FirstInGroup	Accepted	Medium	8/17/2018 11:08:36 AM	

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9.X Separate tabs for Tasks, and Projects

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Main Navigation Buttons - Old



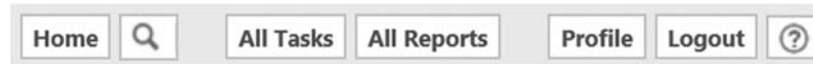
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9.x

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Main Navigation Buttons - New



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9.X Back, Forward, Refresh are now performed using browser or other controls. Home – to Home page with Tasks and Projects tabs.
All Tasks – New window with global task list.

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In-project Navigation Buttons - Old



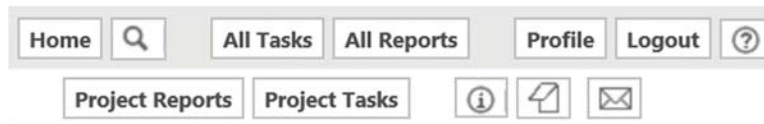
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9.x

8

In-project Navigation Buttons - New



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9

Name changes - Buttons:

Old Name	New Name
Projects	Home
Site-wide Reports	All Reports
Workflow Portals	Project Tasks

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Navigation Shortcuts

Keyboard Combination	Action
Ctrl + plus (+) or Ctrl + minus (-)	Zoom in or zoom out
Ctrl + scroll wheel	Zoom in or out
Alt + Left arrow	Back
Alt + Right arrow	Forward
Alt + Tab	Task Switcher
F5	Refresh active window

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9.x The shortcuts are not new; listed here for convenience.

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Grid View Configuration

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	PRIORITY	STATUS	DUE DATE	CREATED
<input type="checkbox"/>	Applicant Upload Task	iMaWa Reassignment Test	iMaWa Reassignment Test - SF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Medium	Pending		4/23/2018 11:24 PM
<input type="checkbox"/>	Assign Reviewers Task	iMaWa 001	iMaWa 001 - SF_BIC_Building_LAB - 4/20/2018 4:54:07 PM	Review Coordinator	FirstInGroup	Medium	Accepted		4/24/2018 8:04:57 AM
<input type="checkbox"/>	Review Complete Task	BU-2018-PA Mara	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:43 AM	Review Coordinator	FirstInGroup	Medium	Pending		4/25/2018 12:16:57 PM
<input type="checkbox"/>	Mechanical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	Low	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<input type="checkbox"/>	Electrical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	Low	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<input type="checkbox"/>	Plumbing Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	Low	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<input type="checkbox"/>	Electrical Department Review cycle #1	Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Electrical	FirstInGroup	Low	Accepted		4/23/2018 3:27:22 PM
<input type="checkbox"/>	Mechanical Department Review cycle #1	Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Mechanical	Individual	Low	Accepted		4/23/2018 3:27:22 PM

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9.X New configurable Tasks and Projects grids. Users can move, hide, sort, and filter to display the items they wish to view. Grid layouts and configurations can be saved.

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Column Filter

- Click filter icon and select criterion from dropdown.

PROJECT	INSTANCE	GROUP	STATUS	PRIORITY	DUE DATE	CREATED
Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Review C	Pending	Medium		
Training for Mara - Plan Reviewers	Training for Mara - Plan Reviewers - Building Plan Check Review - 5/18/2018 5:35:00 AM	Review f	Pending	Medium		
MaWa Reassignment Test	MaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	Pending	Medium		
BU-2018-001	MaWa	Review Coordin	Pending	Medium		
BUnderTest 01 2018-07-10	BUnderTest 01 2018-07-10 - Building Plan Check Review - 7/10/2018 6:39:06 PM	Plumbing	Pending	Low		

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Column Filter

- Type string in field. Filtering occurs in real time.

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT	STATUS	PRIORITY	DUE DATE	CREATED
<input type="checkbox"/>	Applicant Upload Task	MaWa Reassignment Test	MaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Pending	Medium		4/23/2018 1:18:24 PM
<input type="checkbox"/>	Review Complete Task	BU-2018-PA Mara	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:42 AM	Review Coordinator	FirstInGroup	Pending	Medium		4/25/2018 12:16:57 PM
<input type="checkbox"/>	Mechanical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<input type="checkbox"/>	Electrical Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<input type="checkbox"/>	Plumbing Department Review cycle #1	BU-2018-PA Wally	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM

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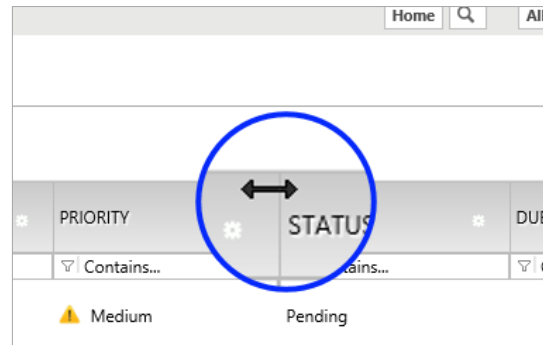


9.X

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Column Width Control

- Click and drag on column border to adjust width.



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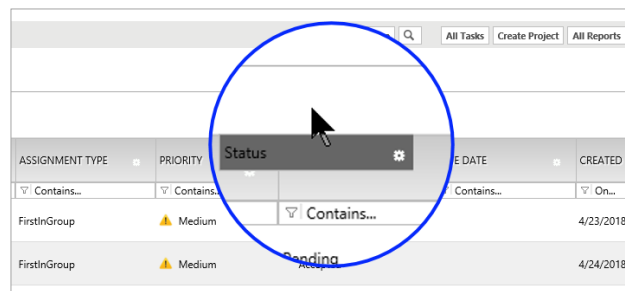


9.x

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Column Reorder

- Click and drag header to move column.



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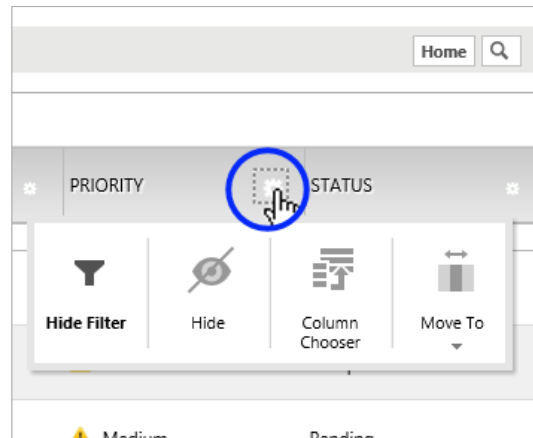


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Column Control

- Click gear icon to access: Hide Filter, Hide, Column Chooser, and Move To.



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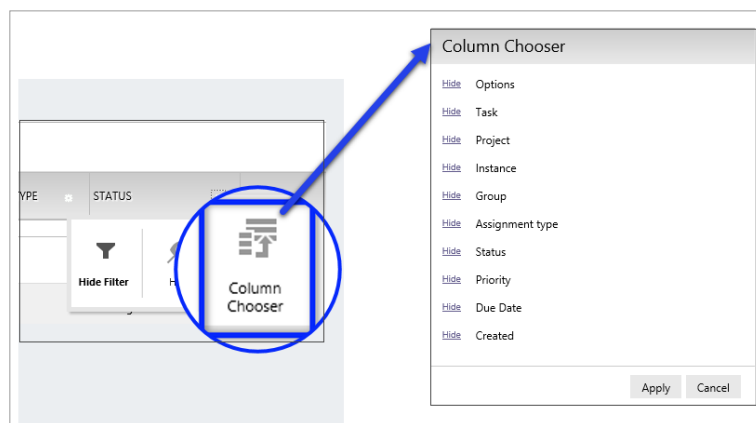


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Column Chooser

- Easy show/hide columns control.



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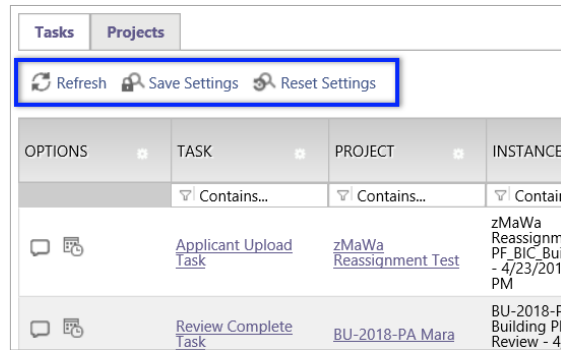


9.x

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Save Settings

- Refresh updates the data in the grid.
- Save settings is persistent.
- Reset settings button only appears if there have been changes.
- Reset restores default settings.



OPTIONS	TASK	PROJECT	INSTANCE
	Contains...	Contains...	Contain...
	Applicant Upload Task	zMaWa Reassignment Test	zMaWa Reassignm PF_BIC_Bui - 4/23/201 PM
	Review Complete Task	BU-2018-PA Mara	BU-2018-P Building Pl Review - 4/

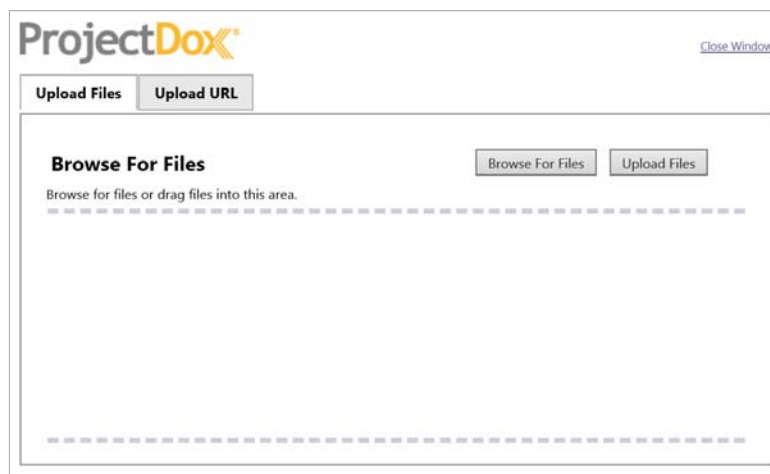
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9.X All column settings are saved except number of records to display

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New HTML5 Uploader (Replaces Silverlight)



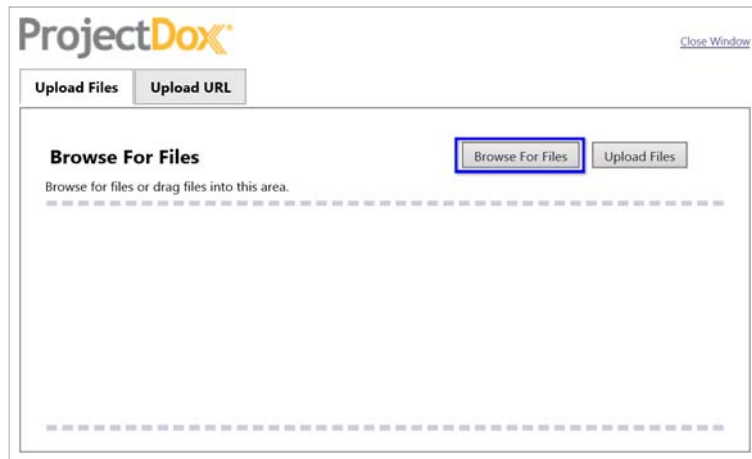
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8.3.8.8
Silverlight is no longer needed for file uploading. Silverlight continues to support GStream functionality.

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New Uploader - Browse



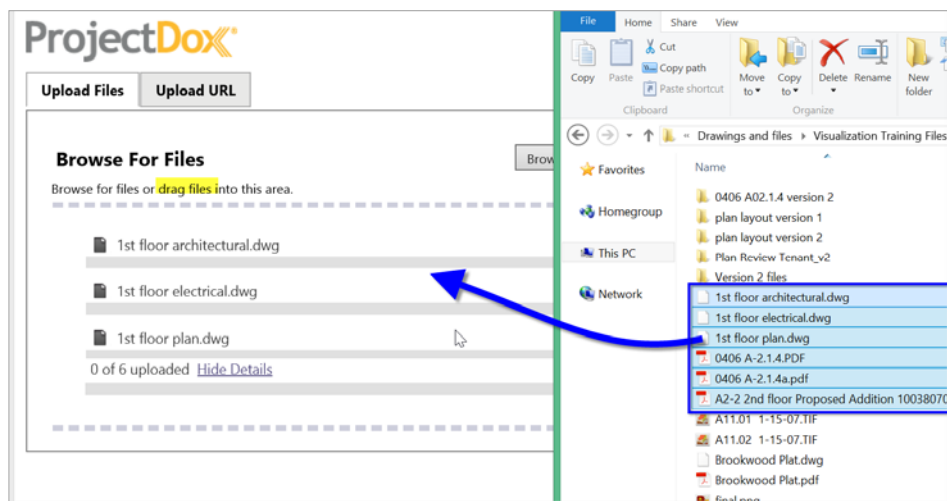
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8.3.8.8 Explorer window will appear.

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New Uploader – Drag and Drop



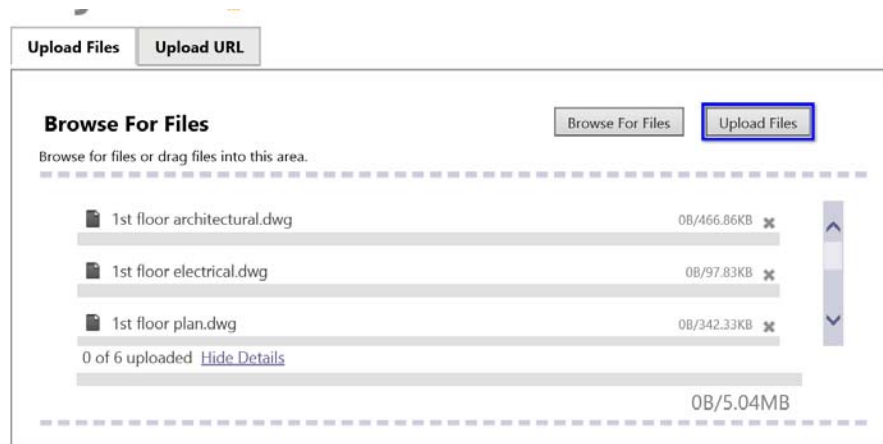
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8.3.8.8

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New Uploader - Upload



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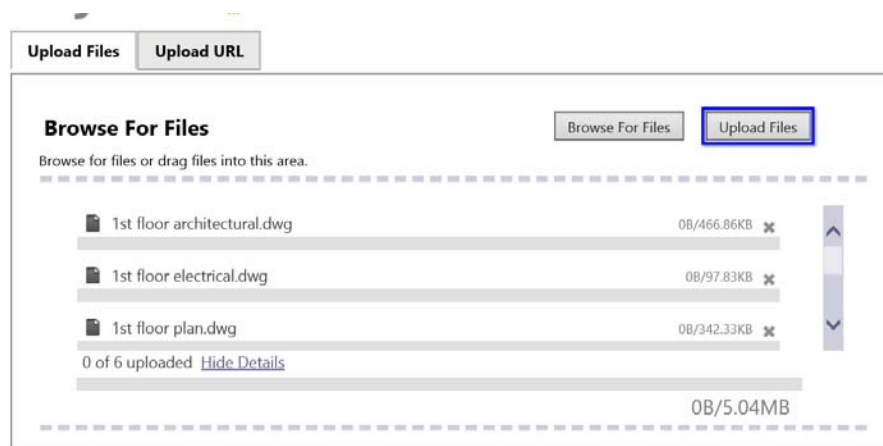


8.3.8.8

Additional files can be selected for upload, and files can be deleted from group (click on x) before clicking Upload Files.

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New Uploader - Upload



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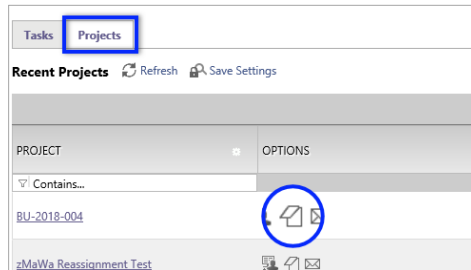
8.3.8.8

Additional files can be selected for upload, and files can be deleted from group (click on x) before clicking Upload Files.

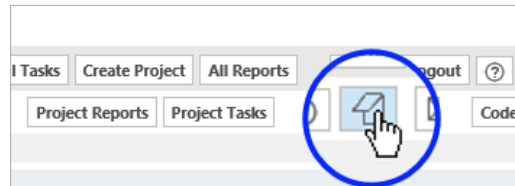
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Discussion Board – Project Level

Access from Home page:



Access from inside the project:



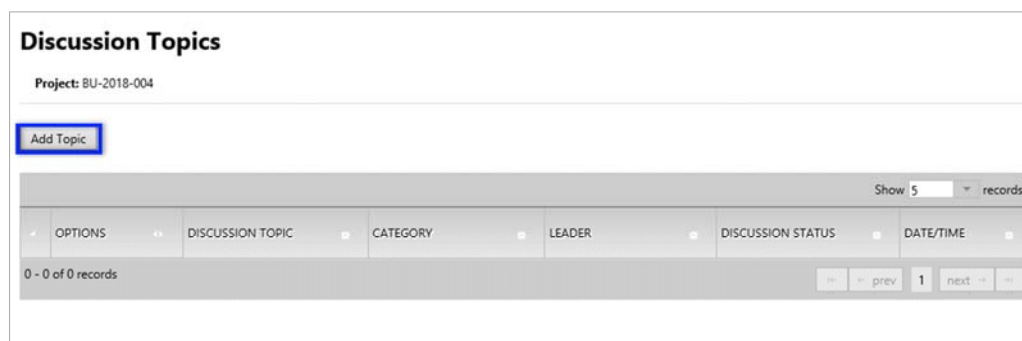
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9.X

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Discussion Board – Add Topic



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9.X

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Discussion Board – Create Topic

Discussion Topics

Project: BU-2018-004

Topic* Category:
Notification of Update or Availability
ProjectFlow
Request for Information

Comment:

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

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9.X

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Discussion Board – Additional Actions

Discussion Topics

Project: BU-2018-004

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
<input type="button" value="Manage Participants"/> <input type="button" value="Close Topic"/> <input type="button" value="Add Comment"/>	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

1 - 1 of 1 records

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9.X Add Topic, Manage Participants, Close Topic, Add Comment to topic.

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