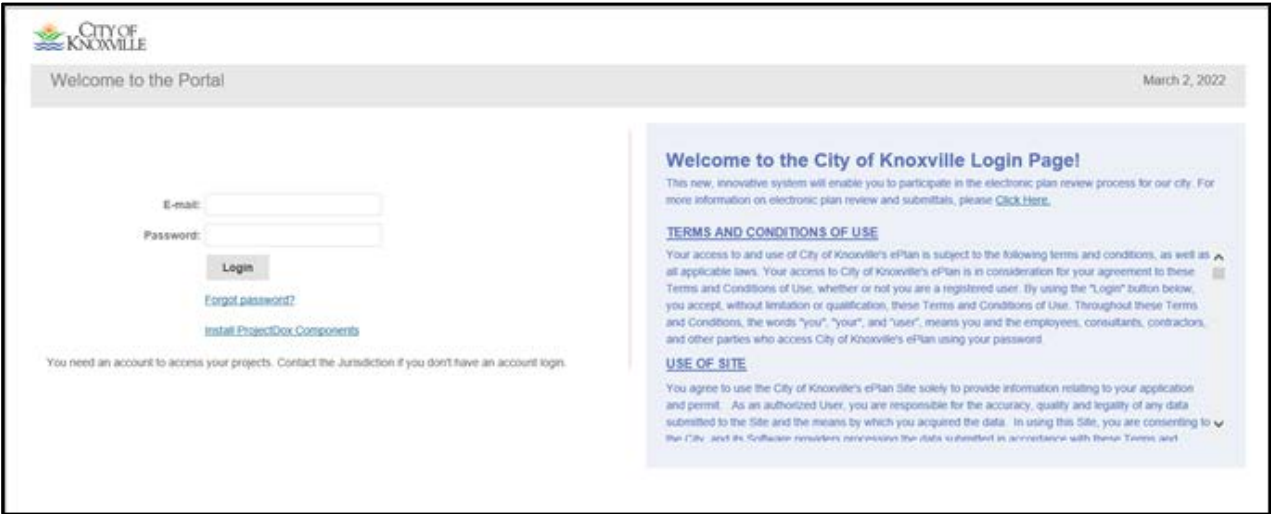


# KnoxPlans - New Features

## Version 9.2

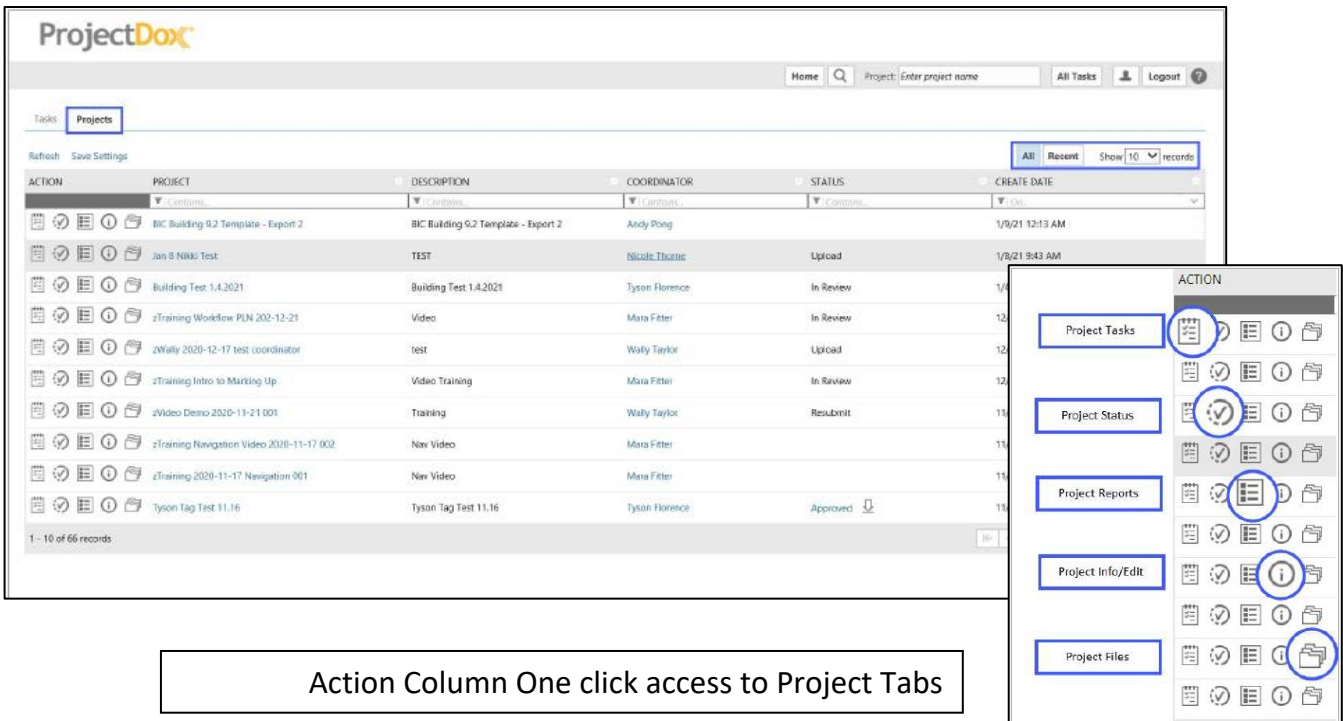
### Login Screen



### Home Page Navigation

#### Projects Tab

Site will return to the setting used last- All or Recent.



## Quick Project Search Tab

Search for Project by name or description. Allows movement from one project to another without returning to the Home page.



## Navigation Shortcuts

The shortcuts are not new; listed here for convenience. Windows based controls, not unique to ProjectDox.

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

## Grid View Configuration

A screenshot of the 'Projects' tab in the ProjectDox application. The interface shows a table with columns for ACTION, PROJECT, DESCRIPTION, COORDINATOR, STATUS, and CREATE DATE. The table contains 10 rows of project data. At the top, there are tabs for 'Tasks' and 'Projects', and buttons for 'Refresh' and 'Save Settings'. On the right, there are filters for 'All', 'Recent', and a 'Show 10 records' dropdown. At the bottom, there is a pagination bar showing '1 - 10 of 66 records' and navigation buttons like 'Previous', '1', '2', '3', '4', '5', 'Next', and 'End'.

Two items cannot be saved: Column widths and Number of records to show. The system adjusts these dynamically as it senses the available area for display.

**TIP** for filters: If you want to include a filter string when you save your settings, you need to first enter the string and press <return>.

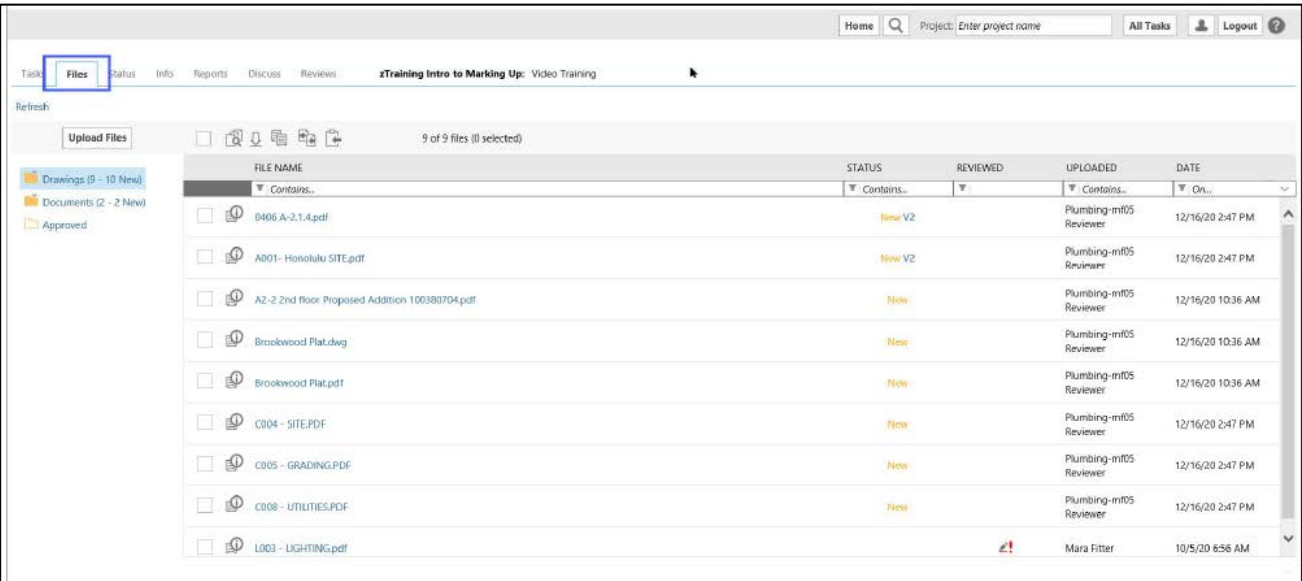
# Project Navigation – Tabs



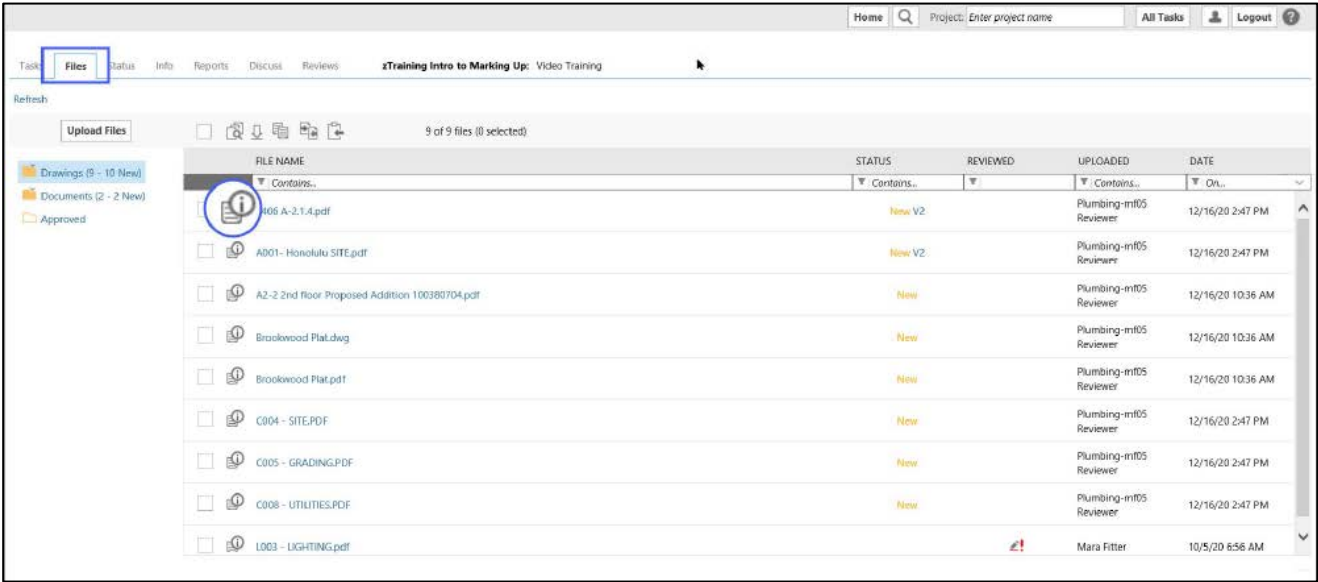
In project buttons have been replaced with tabs. When entering a project, the selected tab will be the last tab used in the prior opened project.

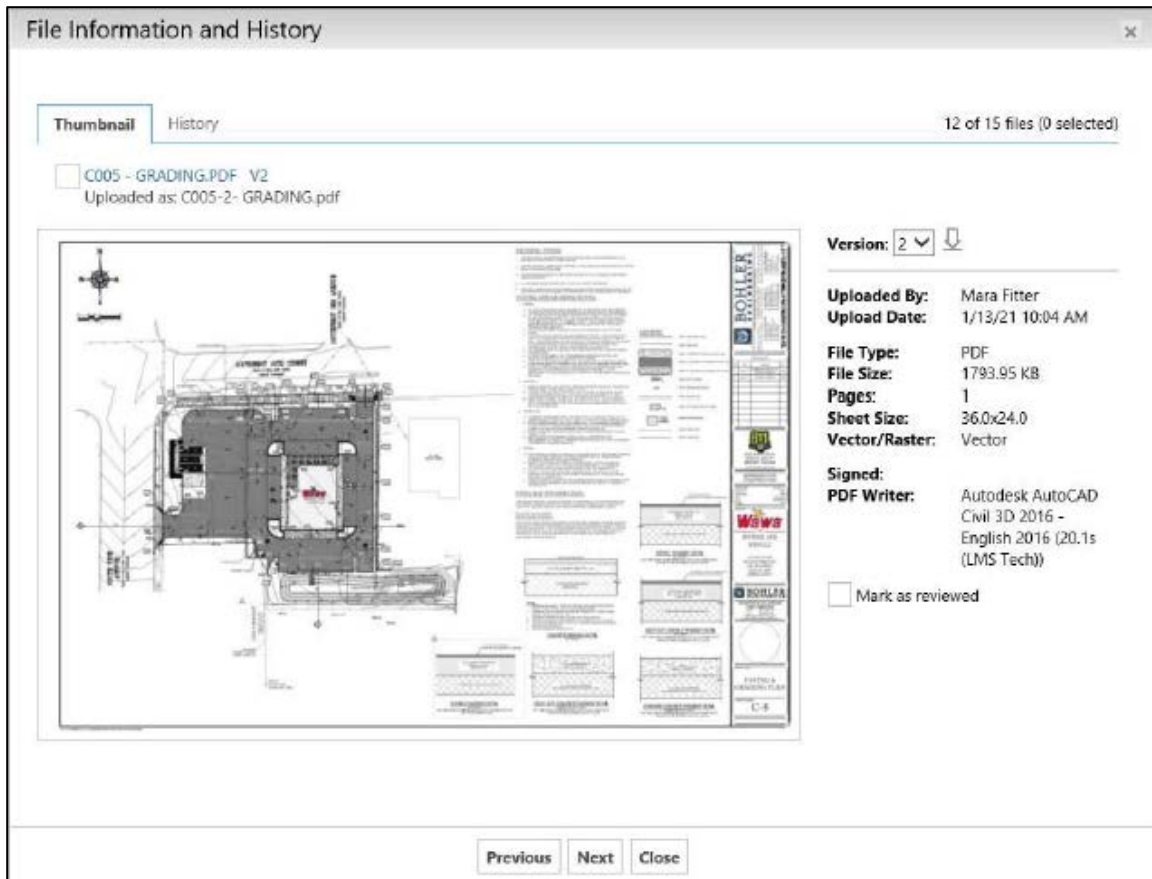
## Files Tab

Files Tab provides access to folders. When opened the folders will display uploaded files.



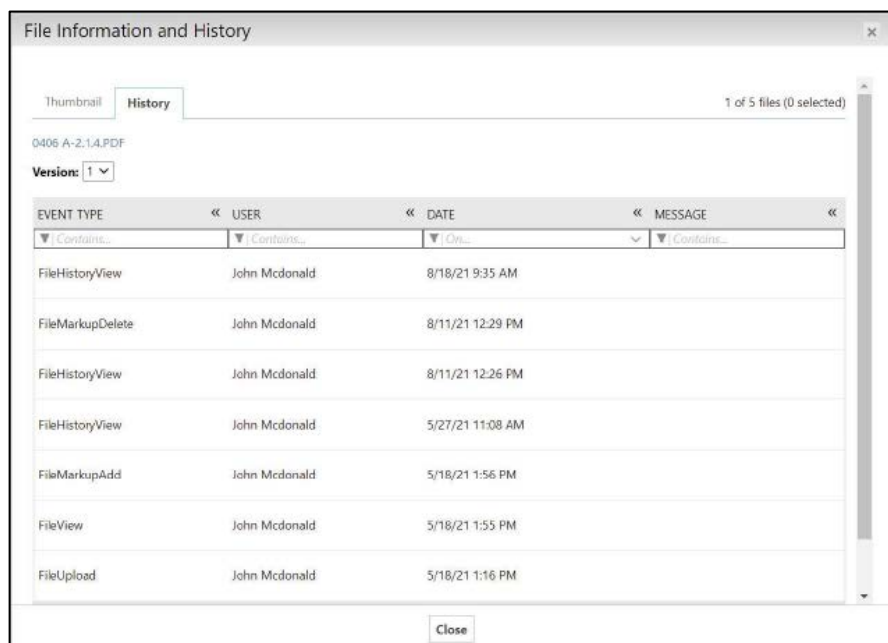
## File Info/History





File Thumbnail and Information

## In-project Navigation - Files Tab



File History

Home

Q

Project: Enter project name

All Tasks

Logout

Task

Files

Status

Info

Reports

Discuss

Reviews

zTraining Intro to Marking Up: Video Training

Refresh

Upload Files

9 of 9 files (0 selected)

Drawings (9 - 10 New)

Documents (2 - 2 New)

Approved

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
▼ Contains...	▼ Contains...	▼	▼ Contains...	▼ On...
<input type="checkbox"/> B406 A-2.1.4.pdf	<div>New V2</div>		Plumbing-mf05 Reviewer	12/16/20 2:47 PM
<input type="checkbox"/> A001- Honolulu SITE.pdf			Plumbing-mf05 Reviewer	12/16/20 2:47 PM
<input type="checkbox"/> A2-2 2nd floor Proposed Addition 100380704.pdf			Plumbing-mf05 Reviewer	12/16/20 10:36 AM
<input type="checkbox"/> Brookwood Plat.dwg	New		Plumbing-mf05 Reviewer	12/16/20 10:36 AM
<input type="checkbox"/> Brookwood Plat.pdf	New		Plumbing-mf05 Reviewer	12/16/20 10:36 AM
<input type="checkbox"/> C004 - SITE.PDF	New		Plumbing-mf05 Reviewer	12/16/20 2:47 PM
<input type="checkbox"/> C005 - GRADING.PDF	New		Plumbing-mf05 Reviewer	12/16/20 2:47 PM
<input type="checkbox"/> C006 - UTILITIES.PDF	New		Plumbing-mf05 Reviewer	12/16/20 2:47 PM
<input type="checkbox"/> L003 - LIGHTING.pdf		<div></div>	Mara Fitter	10/5/20 6:56 AM

## Status and Version

Home

Project:

All Tasks

Logout

Tasks

Files

Status

Info

Reports

Discuss

Reviews

zTraining Intro to Marking Up: Video Training

Refresh

Upload Files

9 of 9 files (0 selected)

Drawings (9 - 10 New)

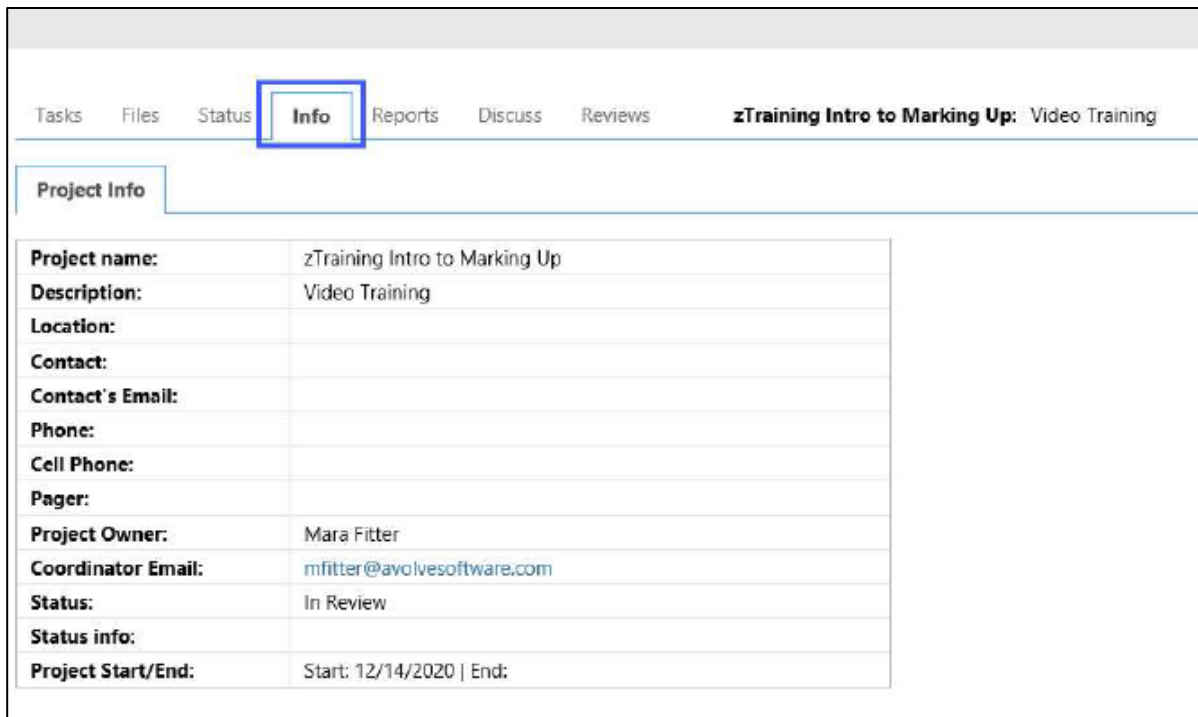
Documents (2 - 2 New)

Approved

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
<div>▼ Contains...</div>	<div>▼ Contains...</div>	<div>▼</div>	<div>▼ Contains...</div>	<div>▼ On...</div>
<div><input type="checkbox"/></div> <div></div> <div>0406 A-2.1.4.pdf</div>	<div>New</div> <div>V2</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 2:47 PM</div>
<div><input type="checkbox"/></div> <div></div> <div>A001- Honolulu SITE.pdf</div>	<div>New</div> <div>V2</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 2:47 PM</div>
<div><input type="checkbox"/></div> <div></div> <div>A2-2 2nd floor Proposed Addition 100380704.pdf</div>	<div>New</div>	<div>QV</div> <div></div>	<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 10:36 AM</div>
<div><input type="checkbox"/></div> <div></div> <div>Brookwood Plat.dwg</div>	<div>New</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 10:36 AM</div>
<div><input type="checkbox"/></div> <div></div> <div>Brookwood Plat.pdf</div>	<div>New</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 10:36 AM</div>
<div><input type="checkbox"/></div> <div></div> <div>C004 - SITE.PDF</div>	<div>New</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 2:47 PM</div>
<div><input type="checkbox"/></div> <div></div> <div>C005 - GRADING.PDF</div>	<div>New</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 2:47 PM</div>
<div><input type="checkbox"/></div> <div></div> <div>C006 - UTILITIES.PDF</div>	<div>New</div>		<div>Plumbing-mf05</div> <div>Reviewer</div>	<div>12/16/20 2:47 PM</div>
<div><input type="checkbox"/></div> <div></div> <div>L003 - LIGHTING.pdf</div>			<div>Mara Fitter</div>	<div>10/5/20 6:56 AM</div>

## Reviewed

## Info Tab

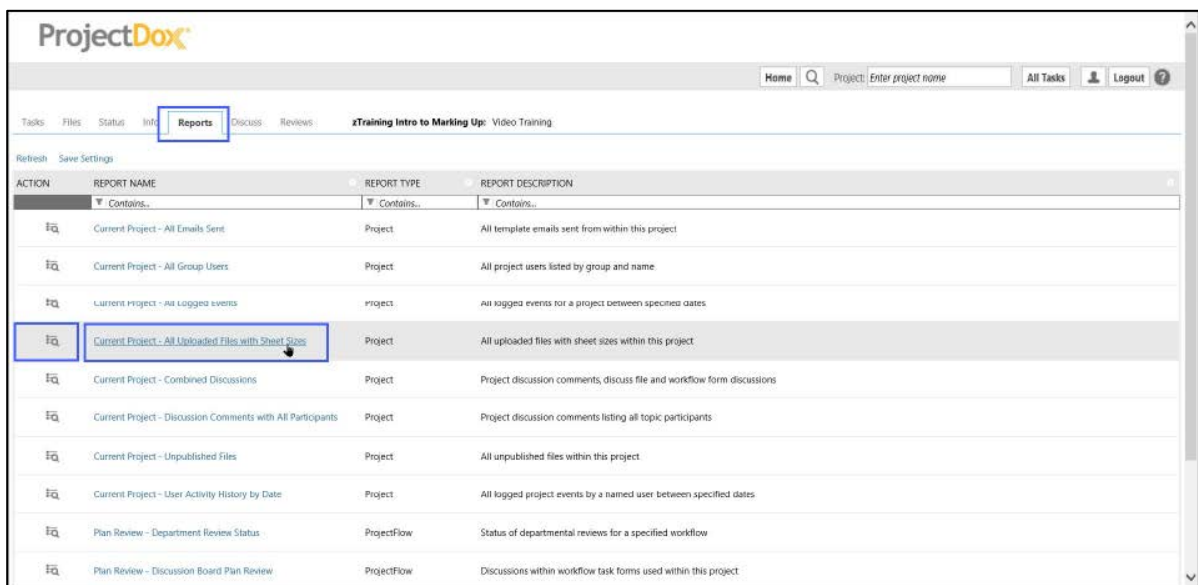


The screenshot shows the 'Info' tab selected in the top navigation bar. Below it, the 'Project Info' section is active. It contains a form with the following fields and values:

Project name:	zTraining Intro to Marking Up
Description:	Video Training
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Mara Fitter
Coordinator Email:	<a href="mailto:mfitter@avolvesoftware.com">mfitter@avolvesoftware.com</a>
Status:	In Review
Status info:	
Project Start/End:	Start: 12/14/2020   End:

Provides Project Information

## Reports Tab



The screenshot shows the 'Reports' tab selected in the top navigation bar. Below it, a table lists various reports. The table has four columns: ACTION, REPORT NAME, REPORT TYPE, and REPORT DESCRIPTION. The report 'Current Project - All Uploaded Files with Sheet Sizes' is highlighted with a blue box, and a mouse cursor is pointing at its icon.

ACTION	REPORT NAME	REPORT TYPE	REPORT DESCRIPTION
Contains...	Contains...	Contains...	Contains...
Icon	Current Project - All Emails Sent	Project	All template emails sent from within this project
Icon	Current Project - All Group Users	Project	All project users listed by group and name
Icon	Current Project - All Logged events	Project	All logged events for a project between specified dates
Icon	Current Project - All Uploaded Files with Sheet Sizes	Project	All uploaded files with sheet sizes within this project
Icon	Current Project - Combined Discussions	Project	Project discussion comments, discuss file and workflow form discussions
Icon	Current Project - Discussion Comments with All Participants	Project	Project discussion comments listing all topic participants
Icon	Current Project - Unpublished Files	Project	All unpublished files within this project
Icon	Current Project - User Activity History by Date	Project	All logged project events by a named user between specified dates
Icon	Plan Review - Department Review Status	ProjectFlow	Status of departmental reviews for a specified workflow
Icon	Plan Review - Discussion Board Plan Review	ProjectFlow	Discussions within workflow task forms used within this project

Reports can be opened by clicking on the icon or the file name.

## Discuss Tab

The screenshot shows the 'Discuss' tab selected in a navigation bar. Below the navigation bar, there is a button labeled 'Add Topic'. Below the button, there is a table header with columns: 'DISCUSSION TOPIC', 'CATEGORY', and 'LEADER'. Below the header, there is a row indicating '0 - 0 of 0 records'.

Discuss Tab - Add Topic

## Discussion Board – Create Topic

The screenshot shows the 'Create Topic' form in the 'Discuss' tab. The form has the following elements:

- 1** Topic: \* (Text input field containing 'Specifications')
- 2** Category: \* (Dropdown menu showing 'Review Collaboration')
- 3** Comment: (Text area containing 'Who determines the applicable specs in this instance?')
- 4** Action buttons: 'Save', 'Save and Prepare Email', 'Manage Participants', and 'Cancel'.

Below the form, there is a table header with columns: 'DISCUSSION TOPIC', 'CATEGORY', 'LEADER', and 'DISCUSSION STA'. Below the header, there is a row indicating '0 - 0 of 0 records'.

Provide Topic name; 2. Select Category from dropdown; 3. (optional) Enter comment; 4. Select action.



# Discussion Board – Additional Actions

The screenshot shows a web application interface for a discussion board. At the top, there are tabs for 'Tasks', 'Files', 'Status', 'Info', 'Reports', 'Discuss', and 'Reviews'. The 'Discuss' tab is active, showing a list of discussion topics. The first topic is 'Specifications' under the category 'Review Collaboration', led by 'Plumbing-mt05 Reviewer'. It is currently 'Active' and was created on '1/11/21 8:59 AM'. To the right of the topic, there is a 'Close Topic' button. Below the topic list, there is a 'COMMENTS' section. The first comment is 'Who determines the applicable specs in this instance?' by 'Plumbing-mt05 Reviewer' on '1/11/21 8:59 AM'. To the right of the comment, there are two buttons: 'Prepare Email' and 'Manage Participants'. Below the comment, there is a text area for adding a new comment, followed by 'Save' and 'Save and Prepare Email' buttons. At the bottom, there is a pagination bar showing '1 - 1 of 1 records' and navigation buttons for 'Prev', '1', 'Next', and 'End'.

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

## Discussion Board – Manage Participants

Only topic owner (leader) or Administrator can manage participants. Select groups or users to exclude them from the topic. Once excluded they cannot be selected to receive email for the topic. An Admin can disallow a group from all discussions in a project. Disallowed groups cannot be included in any project discussions.

The screenshot shows a 'Manage Participants' dialog box. At the top, there is a title bar with the text 'Manage Participants'. Below the title bar, there is a section titled 'Groups/Users for Exclusion'. Under this section, there is a list of groups/users with checkboxes next to them: 'Non-Group members', 'Applicant', 'Applicant View Only', 'Coordinator', and 'Electrical'. Below the list, there is a pagination bar showing '1 - 5 of 12 records' and navigation buttons for 'Prev', '1', '2', '3', 'Next', and 'End'. At the bottom of the dialog box, there are 'Save' and 'Close' buttons.



# Discussion Board – Email

Home

Project: Enter project name

All Tasks

Logout

TasksFilesStatusInfoReportsDiscussReviewsxTraining Intro to Marking Up: Video Training

Add Topic

Show 5 records

DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	CREATED	COMMENT	OPTIONS
Specifications	Review Collaboration	Plumbing-mf05 Reviewer	Active	1/11/21 8:59 AM	1/11/21 8:59 AM	Close Topic

COMMENTS

Who determines the applicable specs in this instance?

Participant: Plumbing-mf05 ReviewerCreated: 1/11/21 8:59 AMOptions: Prepare Email

Comment: The city, because...

SaveSave and Prepare EmailManage Participants

1 - 1 of 1 records

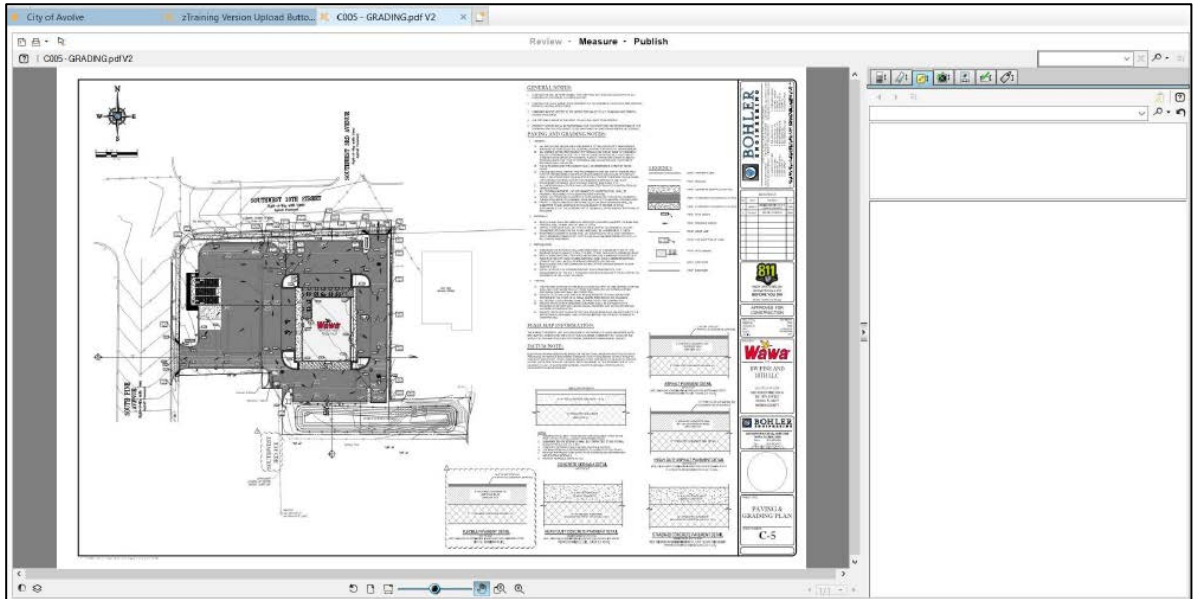
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## Viewer Updates

### ProjectDox Viewer

- HTML5 Viewer (Chrome, Edge, Firefox, Safari)
- ActiveX Viewer (Internet Explorer, Edge (running in IE Mode))
- Files open in a new browser tab.

### Viewer Updates – View Only, No Wrapper

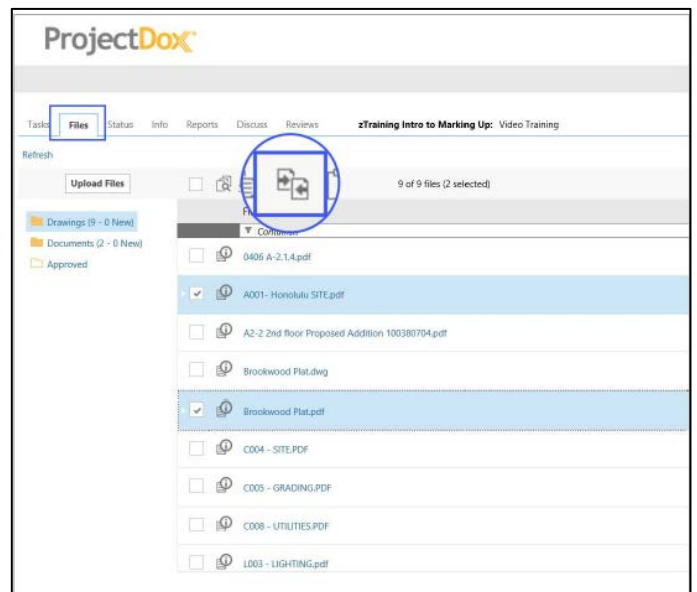


View Only - No Task Accepted

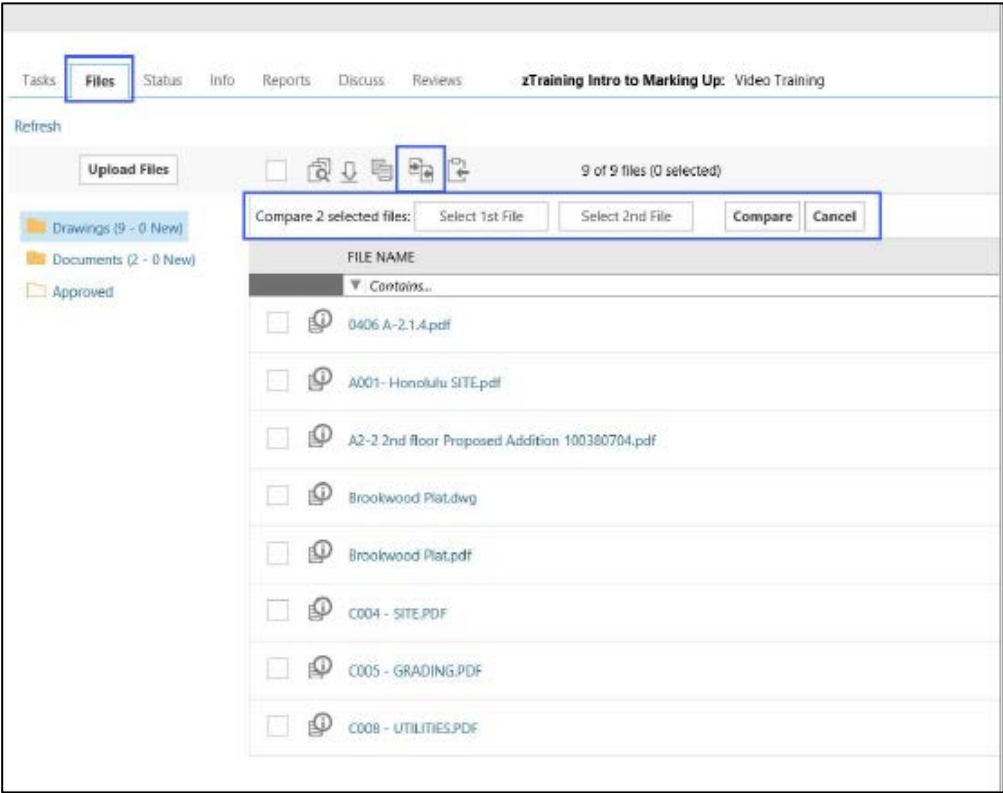
### Viewer Updates – File Compare

#### Compare Files from Within the Same Folder

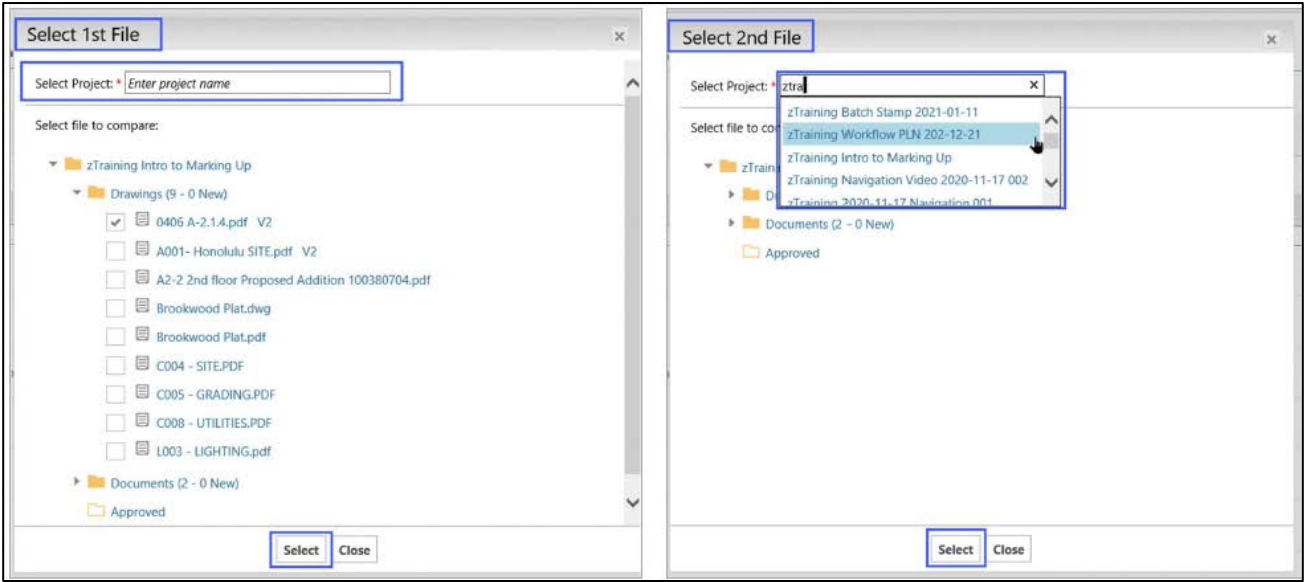
Compare two checked files allows for comparing from the same folder and Global File Compare. User may select files from any folder in any project.



# Global File Compare Across Projects and Folders



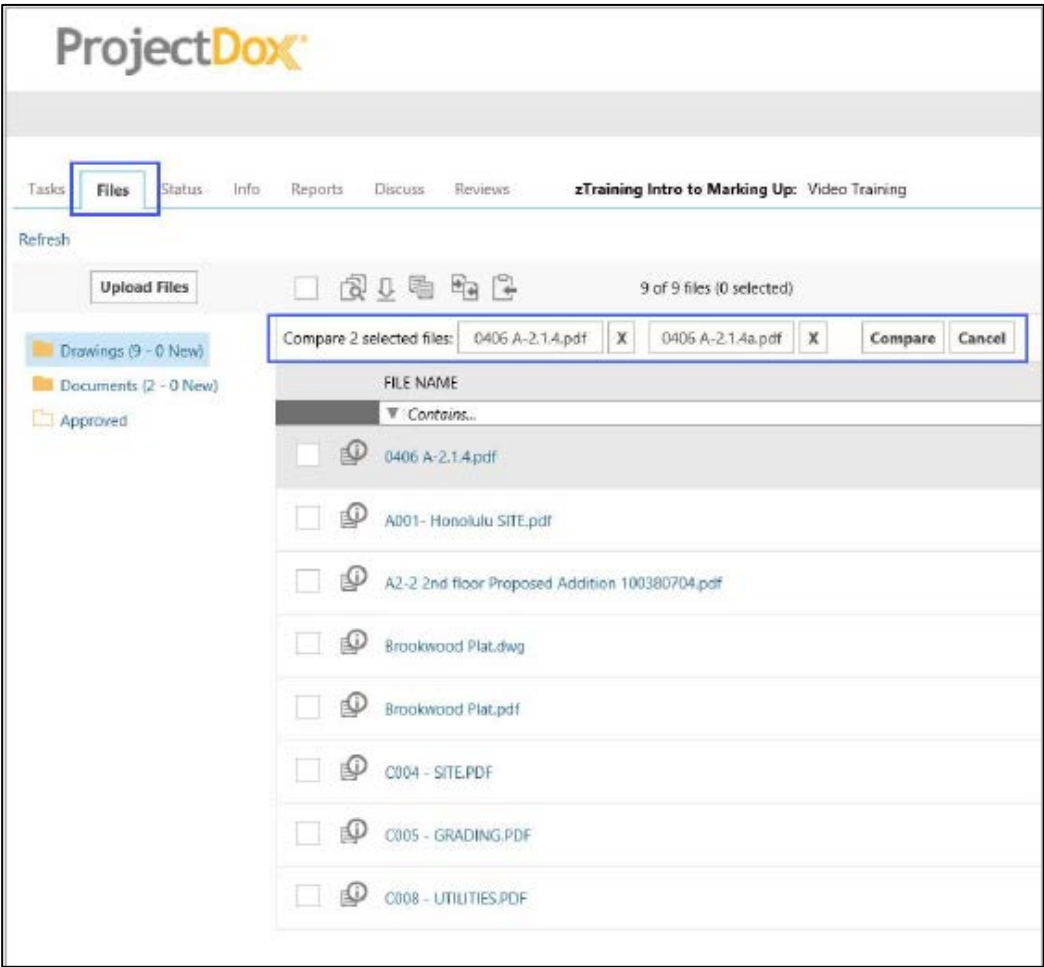
Compare two checked files allows for Global File Compare. User may select files from any folder in any project.



Compare two checked files allows for Global File Compare. User may select files from any folder in any project. Default selection is current Project.

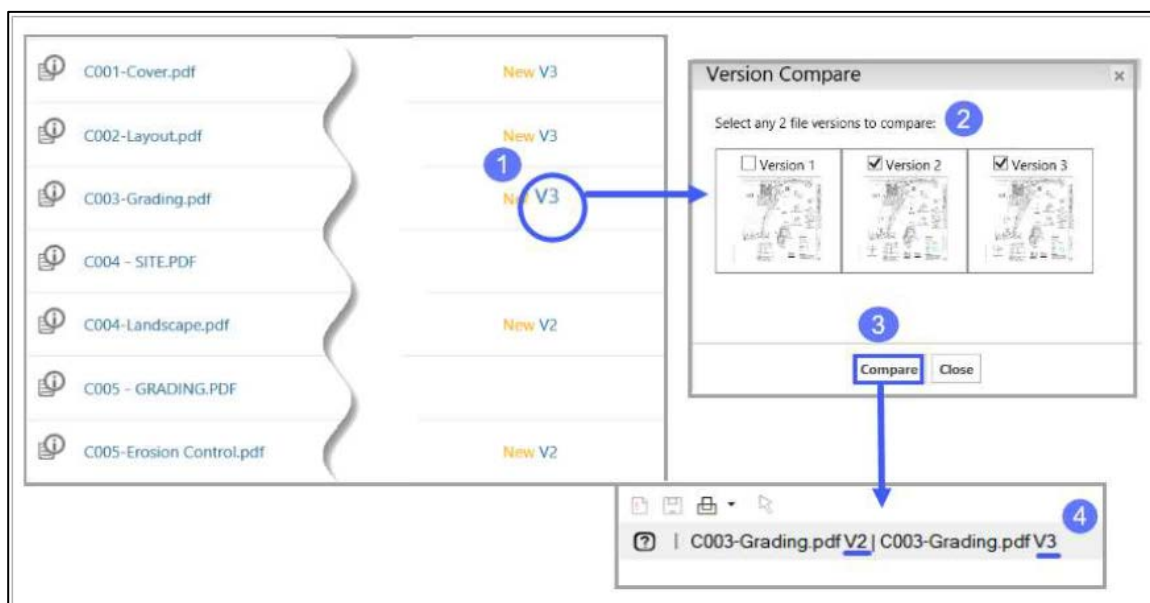
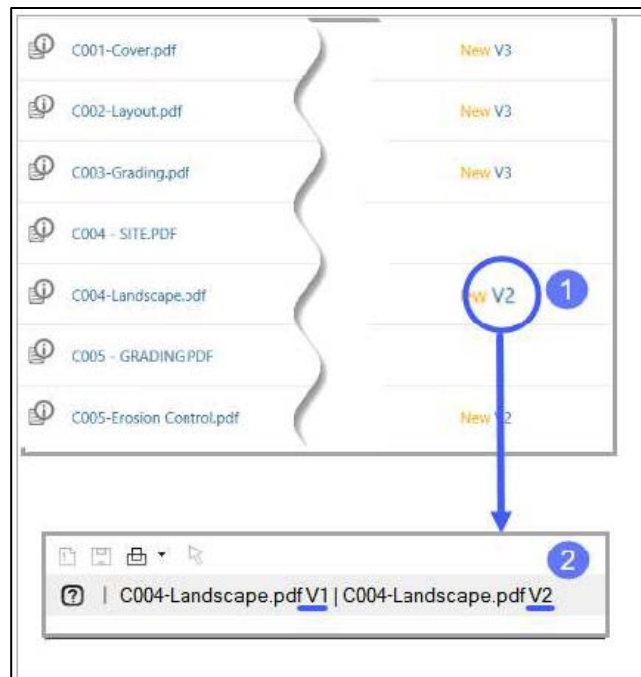
# Viewer Updates – File Compare

Compare two checked files allows for Global File Compare. User may select files from any folder in any project. Default selection is current Project.



## Versioned File Compare

Compare versions of the same file. Click on the Version number. If there are only two versions then the viewer will open to compare V1 and V2.



Compare versions of the same file. Click on the Version number. If more than 2 versions, window opens for version selection, select 2 versions, click compare.

## Other Improvements

### Batch Stamping

- Batch stamp templates show approval stamps for appropriate project type (if categories are configured).
- Building projects will only have Building Stamp templates to choose from, same for Planning, etc.

Batch Stamp Categories are defined and configured by a System Administrator.

## Applicant Experience

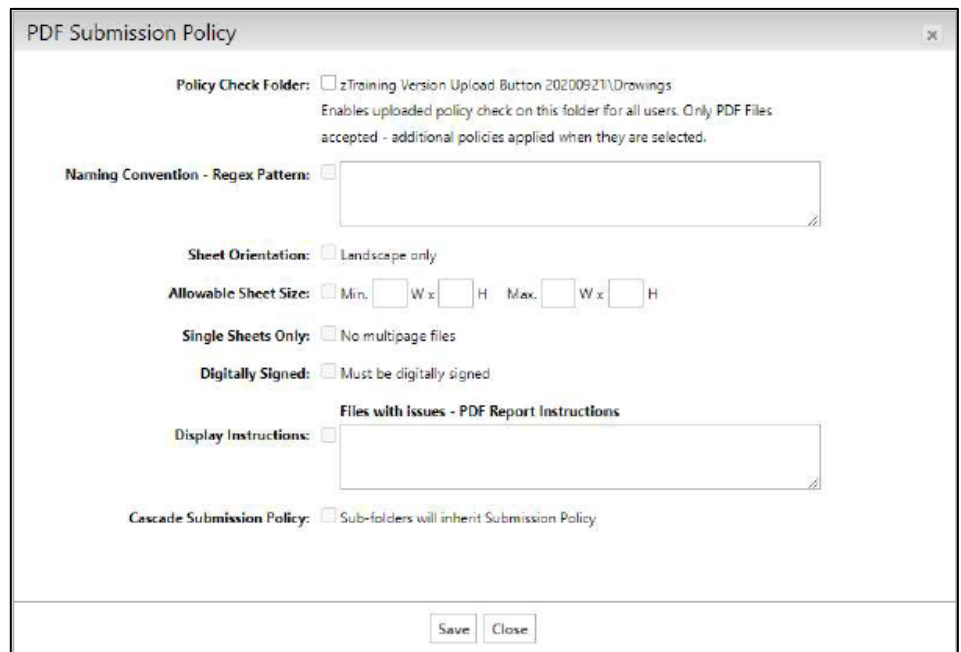
### PDF File Verification Submission Policy

- Project Template Folder Setting
- Naming Convention
- Sheet Size
- Single Sheets Only
- Digital Signature

Optional feature

Set at Template level or in individual project Folder specific

For PDF files only

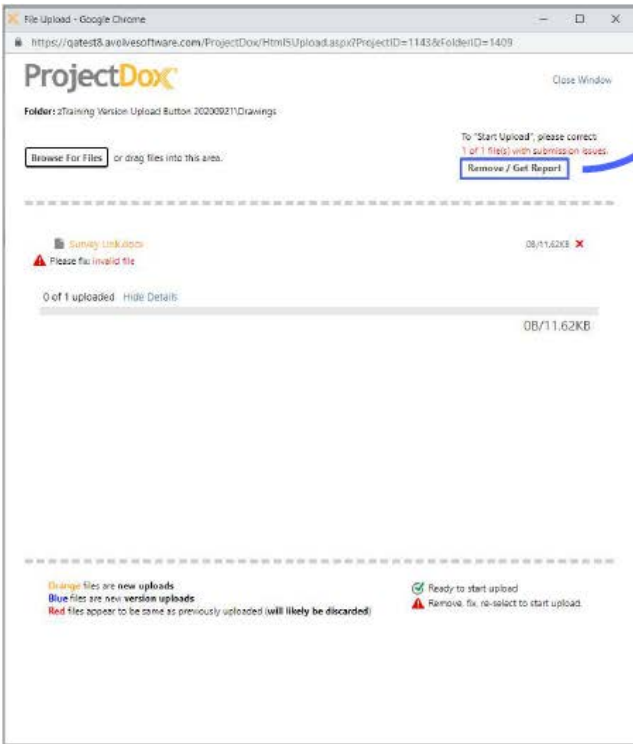


The screenshot shows a dialog box titled "PDF Submission Policy". It contains several configuration options:

- Policy Check Folder:** A checkbox labeled "zTraining Version Upload Button 20200921\Drawings". Below it, a note states: "Enables uploaded policy check on this folder for all users. Only PDF Files accepted - additional policies applied when they are selected."
- Naming Convention - Regex Pattern:** A checkbox followed by a text input field.
- Sheet Orientation:** A checkbox labeled "Landscape only".
- Allowable Sheet Size:** A checkbox followed by input fields for "Min. W x H" and "Max. W x H".
- Single Sheets Only:** A checkbox labeled "No multipage files".
- Digitally Signed:** A checkbox labeled "Must be digitally signed".
- Files with Issues - PDF Report Instructions:** A checkbox followed by a text input field.
- Cascade Submission Policy:** A checkbox labeled "Sub-folders will inherit Submission Policy".

At the bottom right of the dialog box are "Save" and "Close" buttons.

Optional File Verification for PDF Files  
Report is generated for denied files.



**FILES WITH SUBMISSION POLICY ISSUES REPORT**

Project: zTraining Version Upload Button 20200921 - Videos  
Report Date: 3/2/21 3:53 PM

Unfortunately, these files cannot be uploaded into your plan review project because they do not satisfy one or more of the jurisdictional PDF submission policies.

To resolve, please follow the steps below:

**Step 1 of 2: Correct the issues**

Please review the file list below with submission policy issues that were NOT successfully uploaded. Correct the issues denoted which may be any of the following:

<b>invalid file</b>	file cannot be read or the file may not be a PDF file
<b>password</b>	file appears to be password protect, please remove the file without password protection
<b>file naming</b>	file naming does is incorrect, check submission policy for acceptable file naming convention
<b>sheet rotated</b>	recreate this PDF file in landscape orientation (sheet height less than sheet width)
<b>sheet size</b>	recreate this PDF file to meet the minimum or maximum sheet/page size requirements
<b>multi-page</b>	only single page PDF files allowed, split this multi-page PDF file into one page/sheet per PDF file
<b>not signed</b>	file is required to be digitally signed, check submission policy for accepted digital signing methods

**Files to be corrected - issues as submitted to folder: zTraining Version Upload Button 20200921\Drawings (1 total)**

<b>Survey Link.docx</b>
Please fix: <b>invalid file</b>

**Step 2 of 2: Upload corrected files**

Return to your assigned submission task to select your corrected files. They will be rescanned for submission policies and if there are no issues, you will be able to upload these files to your plan review project and complete your submission task.