



# **User Documentation**

(Includes Quick Start Guide)

Trivox Business Solutions

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# Introduction

## REPROGRAPHY (re-prah-grah-fee)

*Reprography 2.1* is part of a larger software package called the HIVE Supply System. HIVE is a website solution for businesses that need: Inventory Management, Online Customer Ordering with Credit Cards and a unique Supply Tree Pricing Management system. For more information about HIVE, please visit <http://poweredbyhive.com>.

*Reprography 2.1* was developed by Trivox Business Solutions, the developers of HIVE. Trivox Business Solutions offers graphic design, programming, consulting and an array of other internet related resources to assist you with your website. For more information about Trivox, please visit <http://trivox.net>, or call us at 937-428-7834

*Reprography 2.1* is an AEC project management software solution hosted by your local print house. Based on previous versions (1.0 & 2.0), enhancements and additions were implemented to improve this software, in part, due to the suggestions from Property Management firms, Architects, Engineers and Contractors. The concept behind *Reprography 2.1* was to make a simple yet powerful tool to help the AEC community manage and control their project correspondence and project drawing files as well as offer a simplified means of ordering prints from their preferred print house.

*Reprography 2.1* was also developed to enable a print house to market a system to its reprographic customers that is free of charge, easy to use and comprehensive enough in scope to enable the AEC community to manage projects in a simple to understand system.

The user documentation gives a thematic approach to helping you understand how *Reprography 2.1* works. This documentation goes into great detail on all the aspects of this software. However, understanding the concept is far more important than having to read every page in this documentation. The developers at Trivox have made every effort to make the software self explanatory with helpful on-line information.

As with any software and management tool, and in order to maintain any relative consistency of control, all users of the software must register. This includes everyone who uses the system and wants to gain access to any of the projects, whether creating projects or just having prints made of a project.

For those that just want to upload files and have them printed, the Quick Start Guide (*section 0*) goes thru the basics of registering, creating a project, uploading the files and then having the files printed. This is the most common practice of just getting files uploaded and printed.

Those that want to manage their projects should follow the outline listed below: from the creation of the project to its completion. This should get you through the basics with relative ease. **It is also recommended to read the Quick Start Guide (*section 0*) first.**

1. System Requirements (*section 1.1*)
2. Register (*section 1.2*). Registration is company based and all users are members of a company.
3. Request Authentication (*section 2.1*). Once authorized by the print house to upload files into the FTP site, the first registered member of a company can select from its members to give permission to create projects.
4. Add Employees (*section 1.3.1*). Add company employees to work on projects.
5. Create Projects (*section 2.3*). Any company member that is authorized to create projects will be able to do so.

6. Project Details, Options and Parties Involved (*section 3.2*). This is information about the project that will be listed in the Project Browser when potential bidders are looking for it to bid on.

7. Project Folders by Discipline (*section 3.3*). This allows the project creator to assign folders to different disciplines.

8. External Contacts (Outside Sources) (*section 2.2*). This lets the project creator assign personnel from different companies to work on a project.

9. Permissioning (*section 3.1*). This allows the project creator to assign permissions to the project and the project folders.

10. Uploading Files (*section 3.5*). Files are uploaded into a folder usually defined by discipline type.

11. File Naming (*section 3.5*). The system allows you to name and give a drawing number to the uploaded file.

12. File Organization and Display (*section 3.6*). Files can be moved from folder to folder (as long as the folder is at 0%) and checked on or off for display.

13. Issue Project Modifications (Folder Percentages) (*section 3.2.2.1*). Files within a folder can be issued for submittal at any percentage up to 100%.

14. Addendums / Drawings (*section 3.2.2.2*). Addendums are automatically initiated once any folder is issued at 100%. Drawings that are replaced in a folder that has been issued at 100% will be placed into a holding tank and privately labeled as an addendum until the addendum is issued.

15. Invitation to Bid (Correspondence) (*section 3.2.3.2*). Using the Email wizard allows one to send mailings to potential bidders.

16. Email Wizard – Grouping Invitees (*section 3.2.3*). This allows a company to generate a group of clients' emails.

17. Award Project (included in *section 3.2.2.3*). Once awarded, this list can be made available to the general public.

18. RFI's (Request for Information) (*section 3.2.2.3*). Only specific awarded bidders will be allowed to submit RFI's.

19. Proposal Request & Change Orders (*sections 3.2.2.4 & 3.2.2.5*). These folders will be created once the project has been awarded. Drawing files can be replaced with any change order.

Registration is company based and all users are members of a company. Every member of a company can also be an external member (contact) of other companies. This allows the project manager to assign different companies to the same project by giving them controls over specific pieces of the project.

When a project is created, that person (having the permissions too) will assign the company personnel, and if needed, external personnel to work on the project, giving them the necessary permissions required. These permissions can be project wide or based on folders and even files within folders. A folder is nothing more than a way to organize your files within it. As an example you could create folders for the Civil, Architectural, Structural, Mechanical, Electrical and Plumbing plans.

All drawing and specification folders created by the project manager are created at 0% completion and ultimately issued to 100%. This is an important concept in that all the files within any folder at 0% will immediately be replaced with any newer revisions. A record of this will show up in the file history of who replaced this file and when.

When a folder of a project is completed at 100%, the software will automatically create an Addenda folder within the project that may or may not be used depending on the scope of the work. When a project is awarded, additional functions will be unlocked, including: RFI's

(request for information), Proposal Requests and Change Orders. All of these folders exist because additional information is gathered and will be linked to other corresponding features of the software. Drawing, Specification and Shop Drawing folders are created by the project manager. These are the folders, other than the Specification folder, that actual drawing files are uploaded into.

All information pertaining to a project, from creation to manipulation to completion, is stored on-line. All information on drawing files is recorded. Records of Addendums, RFI's, Proposal Requests, Change Orders and any Correspondence are recorded and maintained.

If there are any questions at all feel free to call on us anytime at (937) 428-7834. We would also appreciate any comments, whether good or bad, about this software. Send us an email at [support@trivox.net](mailto:support@trivox.net). Our goal is to make the task of communicating between the AEC and the construction community as seamless as possible.

## 0 Quick Start Guide

This software was significantly enhanced from its previous versions to allow additional management controls over projects for the Architect, Engineer and Contractor, allowing him/her to:

1. Create project folders and organize files within those folders using a familiar drag and drop system.
2. Encompass a file management system including naming, order history, addendum history, email history and file replacement history.
3. Give permissions to individuals, whether part of your company or from other companies.
4. Give on-line information to bidders, reducing redundant phone conversations.

There are additional features that will be discussed in more depth beyond the Quick Start Guide. It is assumed that the files uploaded into the FTP site, for the purpose of using the Quick Start Guide, will be used for simple one time printing requirements only.

### 0.1 Getting Started

Before starting you will need to review the System Requirements in *section 1.1*.

After reviewing the system requirements you will first need to log onto the system and register (*sections 1.2 & 1.3*) at the web address given to you by your print house. If you are already registered, or after registering, log in and select the Reproduction Graphics link located on the gray bar shown in screen 0.1.



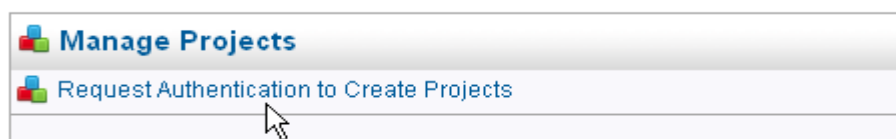
Screen 0.1

When selected, go to [Manage Projects](#) and click on it shown in screen 0.2.



Screen 0.2

If this is your first time entering [Manage Projects](#) you will need to be authorized from the print house to upload drawing plot files into their FTP website. To do this just click on the link shown in screen 0.3 and the request will be sent to the print house. For immediate access you may want to call the print house to let them know that you did this so they can authorize you immediately. Some print houses will automatically authorize you.



Screen 0.3

When authorized to create projects, screen 0.4 will be displayed, now allowing you to create projects.



Screen 0.4

By selecting the [Create Project](#) option in screen 0.4, screen 0.5 will display requesting you to fill in the name of the project. This name will be displayed to the general public (if the private option is unchecked) and is used in the search criteria to locate it for printing.



Screen 0.5

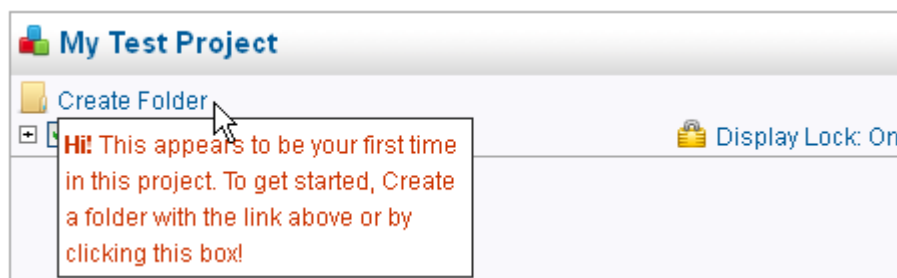
Selecting the [Accept](#) button shown in screen 0.5, will place the project created into your list of projects as shown in screen 0.6.



Screen 0.6

From the list of projects select the [Enter Project](#) link to the right shown in screen 0.6. When the file cabinet loads you will see the [Project Details](#) in the right pane. You should fill in the information at this time. These options are discussed further in this manual. You should note however that the project is Private (by default) and cannot be seen by anyone using the [Project Browser](#). If you want others to be able to order prints (other than yourself) you will need to unselect the [Private](#) option to make these plot files available to everyone. If you only want specific people to have access to the print files then you will need to give them a passcode by typing in alpha/numeric characters (32 max.) in the space provided and send them that information. Keep in mind that you must give them the numbers in front of the alpha/numeric characters you keyed in as well. The people requesting prints must also register on the site to access the plot files that will be uploaded.

The next step is to create a folder to put your plot files into as shown in screen 0.7.

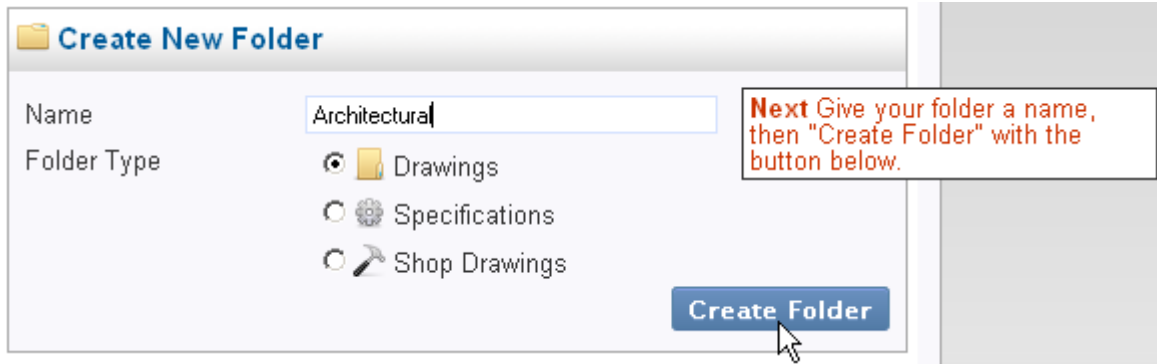


Screen 0.7



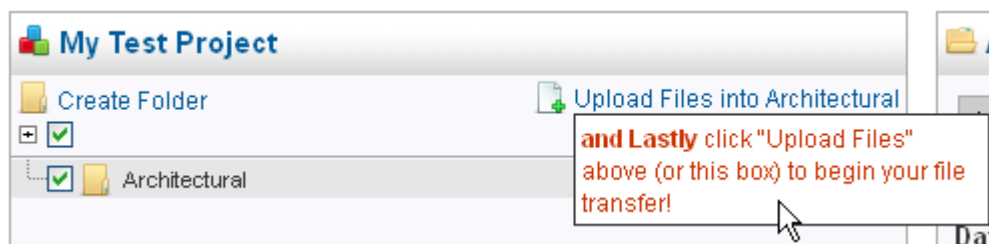
Keep in mind that you must create a folder in order to place files into them. Every project created will have project folders automatically created for each project. These are further outlined in *section 3* of this documentation.

By selecting the [Create Folder](#) option, as shown in screen 0.7, screen 0.8 will be displayed in the right pane. At this point you have the option to select what type of folder you want to create to place your files into and what you want to name it. In our example we will create a drawing folder (default) and name it Architectural. See *section 3.3* for further explanations of folders.



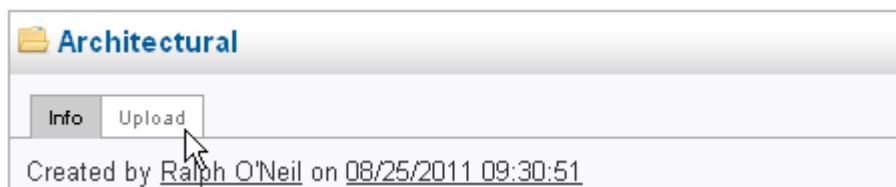
Screen 0.8

When you create the folder, screen 0.9 will display with the folder that was just created shown in it. You should note that to the right of the folder there is a percentage completion indicated in red at **0%**. This means that you have not issued the files in this folder yet and that those files within it can be replaced at any time without placing them in the holding tank. The holding tank, issue dates and addendum dates will be further outlined in *section 3.2.2.1*. However for this Quick Start Guide we are assuming that the project is complete and all addendums are part of the project plot files.



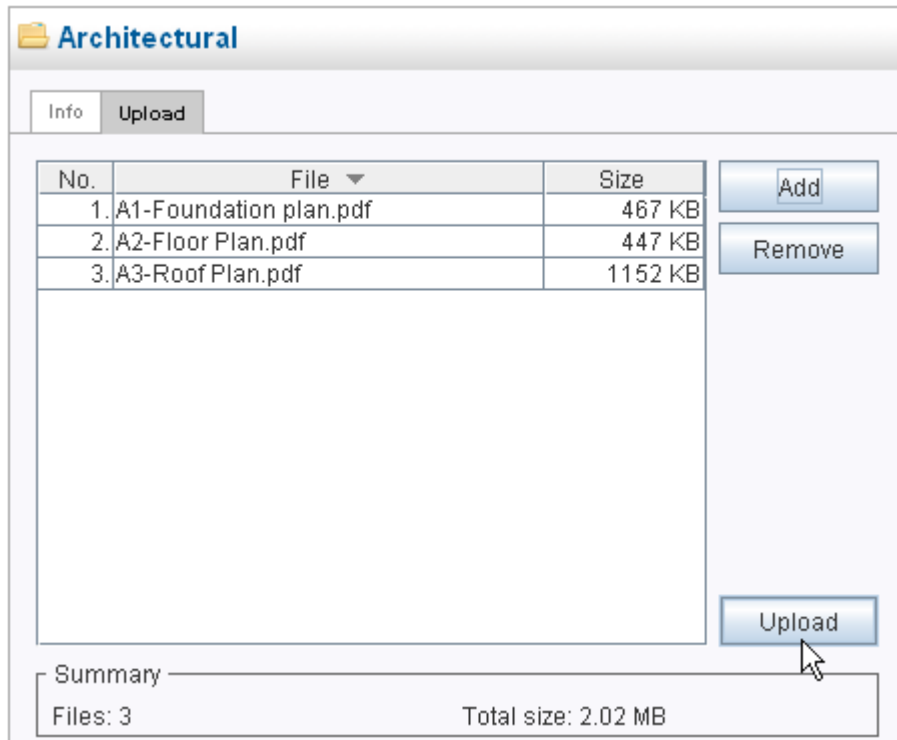
Screen 0.9

To upload any files into the project folders you must select the folder into which you want the plot files placed. You will note in screen 0.9 that the folder Architectural is highlighted with a gray bar thru it. This is the file folder that you will be uploading plot files into. To upload files into this folder you can select the [Upload Files into Architectural](#), shown in screen 0.9, or select the [Upload](#) tab in the right pane shown in screen 0.10.



Screen 0.10

In either case the following Java applet, seen in screen 0.11, will display for you to select the file(s) you want to load into the folder selected. Selecting the [Add](#) button will display your browser to input the file(s) into the Java applet shown in screen 0.11. 3 files were selected from the browser and added to the Java applet.



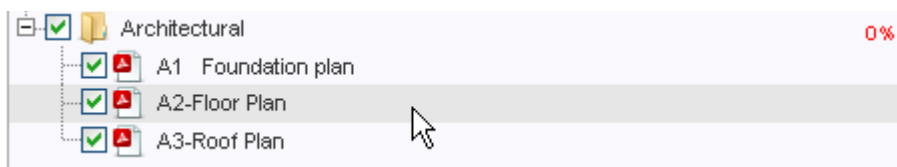
Screen 0.11

Once the files have been selected by clicking on the Upload button, you will see the list of those files shown in screen 0.12 (only one file is displayed). At this point you can rename the file(s) and add a file number(s) to them or leave the file number(s) blank. In the example below we entered A1 for this file's number. The File Name is the name that was in the upload File Name (we removed the A1- in front of the name). You can either edit the file number(s) and name(s) at this time or you can later go to each file individually and edit it once uploaded. If there are no changes to the name(s) you can upload the file(s) by selecting the Auto Process Files button, at the top of the page, or the Process Files button at the bottom of the page.



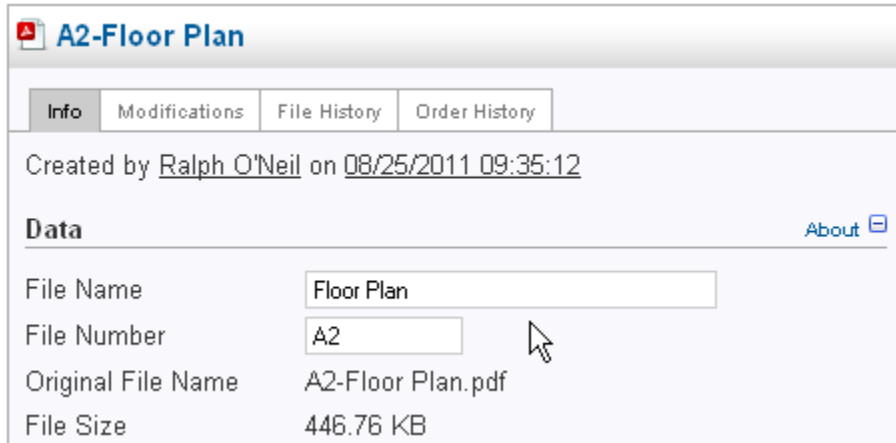
Screen 0.12

Either way, when processed, the files will display in the folder shown in screen 0.13.



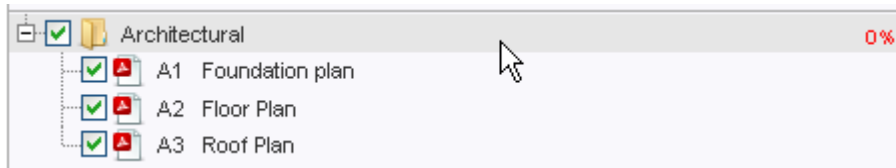
Screen 0.13

You will note that the Foundation Plan file was modified before it was processed (the file number was added). The other two files were not modified. To modify any file all you will need to do is highlight and click on the file you want to modify by selecting it as shown in screen 0.13. When you do this screen 0.14 will display in the right pane.



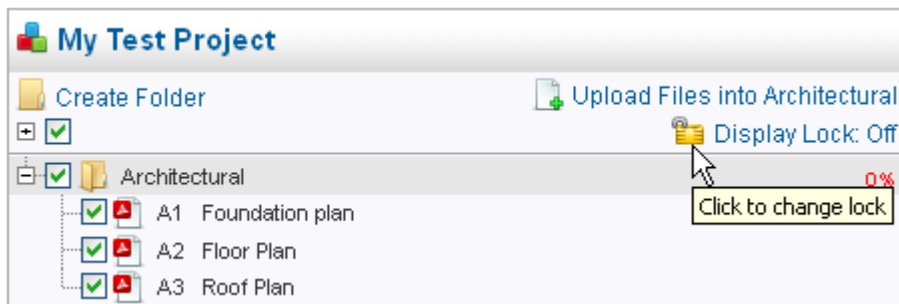
Screen 0.14

In screen 0.14 we added the File Number, A2, to the Floor Plan file as well as removed the A2- from the File Name. In like manner we also did this with the Roof Plan file. The results are shown in screen 0.15. **When you first upload files the [Display Lock](#) will be in the [On](#) position, shown in screen 0.16. You will need to toggle it to turn it to the [Off](#) position in order to display files on or off.**



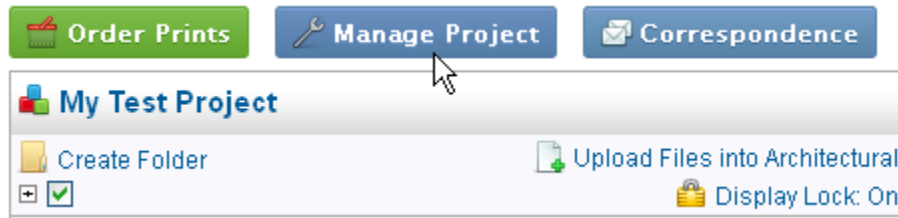
Screen 0.15

Folders, as well as files, can be placed in any order. To move a file you just select it by highlighting it and then drag it to its proper location, or press the up or down arrows. As a precaution, when a folder is issued beyond 0% (see section 3.3), the drag and drop will be deactivated to keep you from dragging files into other folders, only the up or down arrows will work. **Folders can only be moved by using the up or down arrows, the drag and drop is not a function of folders.**



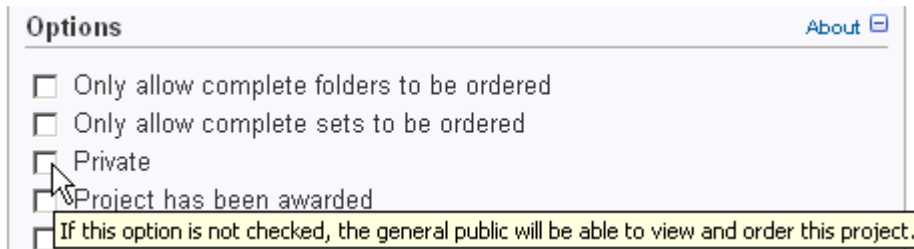
Screen 0.16

The next step would be to order prints of the files uploaded; however there are a few project options that must be considered. To get to the project option select the [Manage Project](#) shown in screen 0.17



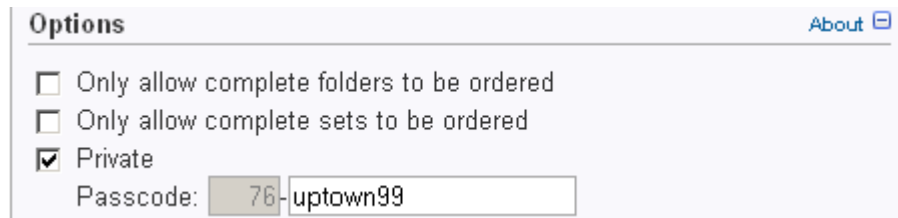
Screen 0.17

First you will need to decide whether or not you want to be the only one that can order these prints, or if you want to let anyone else order these prints. If you allow your drawings to be printed by anyone you will need to uncheck the Private option shown in screen 0.18.



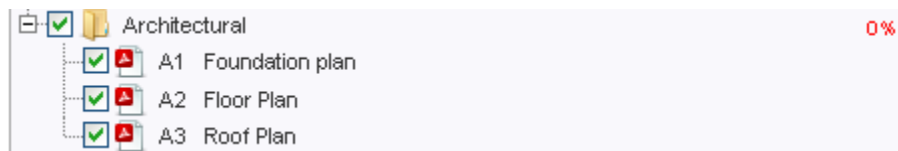
Screen 0.18

If you want to be the only one (or those that you may invite by giving them the passcode) to print these files then you must insert a passcode into the field shown in screen 0.19. **Do not confuse passcode with password; users will still need to register in order to gain access to the site.**



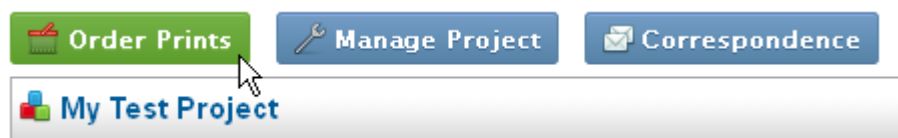
Screen 0.19

The second step would be to make sure the files are checked (displayable) for printing as shown in screen 0.20.



Screen 0.20

To personally order prints of your project you have two options. While in the project itself you can select the [Order Prints](#) button shown in screen 0.21 or you can select the [Project Browser](#) shown in screen 0.22.

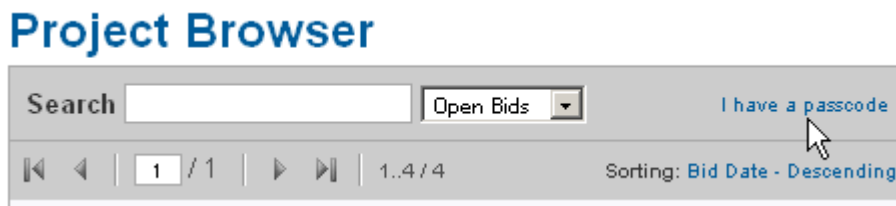


Screen 0.21



Screen 0.22

Assuming you decided to keep these files private, and printing from the [Project Browser](#); you will need to insert the passcode that you entered at the project management level. When you select the [Project Browser](#) you will get a list of all the public (non-private) projects. Since your project is private you will need to select the option [I have a passcode](#) shown in screen 0.23.



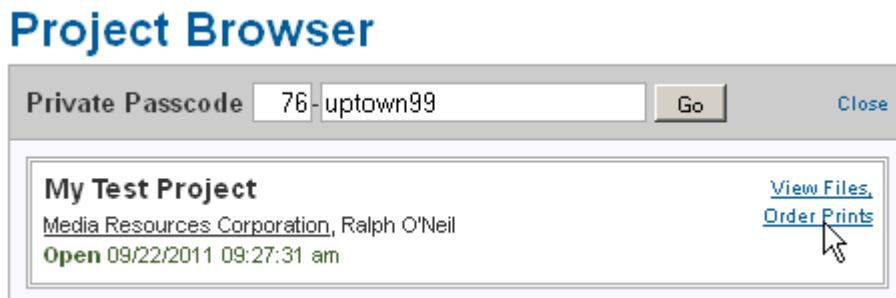
Screen 0.23

When you do this screen 0.24 will display asking you to insert the passcode. You will need to type in the project number and the passcode.



Screen 0.24

When you select the [Go](#) button in screen 0.24, screen 0.25 will display showing your private project.



Screen 0.25

Selecting the [View Files, Order Prints](#) option shown in screen 0.25 will get you to the files to view and order shown in screen 0.26. At this point you can select the [Check All](#) option to select all the files in the folder(s) that you want printed.

Below, check the files you want, and then "Order Prints"

 Order Prints

 View Project Details



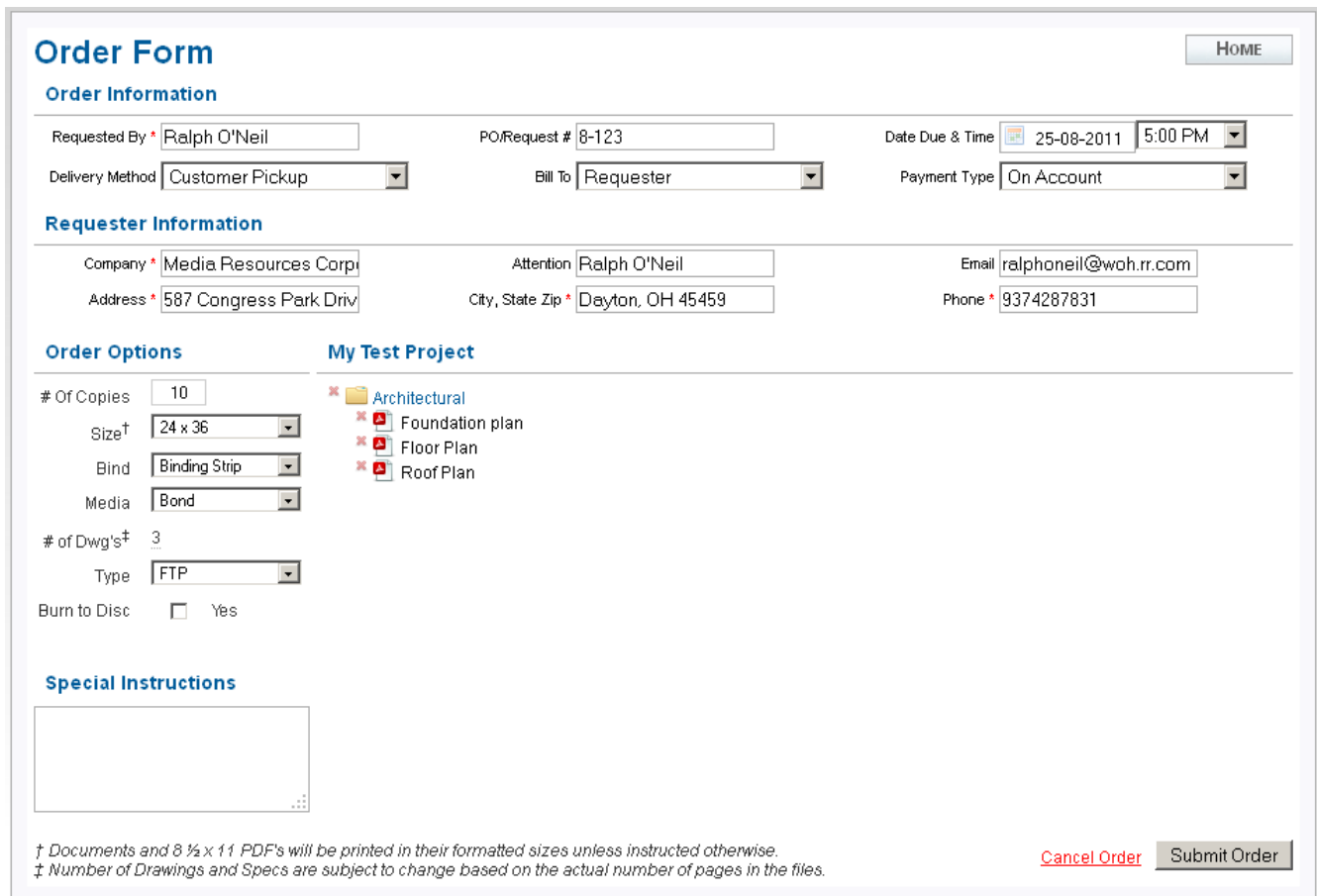
**My Test Project**

Check All

- Architectural
  - A1 Foundation plan
  - A2 Floor Plan
  - A3 Roof Plan

Screen 0.26

Clicking [Order Prints](#), shown in screen 0.26, will take you to the order form shown in screen 0.27. At this time fill in the appropriate information and select the [Submit Order](#) button at the bottom of the page.



**Order Form** HOME

**Order Information**

Requested By \*  PO/Request #  Date Due & Time

Delivery Method  Bill To  Payment Type

**Requester Information**

Company \*  Attention  Email

Address \*  City, State Zip \*  Phone \*

**Order Options** **My Test Project**

# Of Copies   Architectural

Size †   Foundation plan

Bind   Floor Plan

Media   Roof Plan

# of Dwg's ‡

Type

Burn to Disc  Yes

**Special Instructions**

† Documents and 8 1/2 x 11 PDF's will be printed in their formatted sizes unless instructed otherwise.  
‡ Number of Drawings and Specs are subject to change based on the actual number of pages in the files.

[Cancel Order](#)

Screen 0.27

**End of Quick Start Guide**

# 1 Prerequisites

## 1.1 System Requirements

A modern web browser ([Internet Explorer 8+](#), [Firefox 6.0+](#), and [Google Chrome 14.0+](#)) is required to effectively use this website. If your company plans on uploading files via the [Project Manager](#), an up to date version of [Java](#) is required as well.

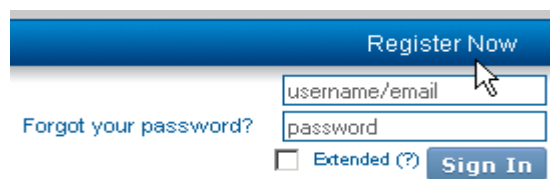
## 1.2 Account Registration

When you first log into the site that you have been directed to by your local print house you will have the following screen 1.0 displayed. In order to manage and/or view projects you must register. Every company interacting with the reprographics software is required to have an account; the information provided is shared with other account members or can remain private to only those companies you do projects with.



Screen 1.0

An account is created by selecting the [Register Now](#) link, shown in screen 1.1, located at the upper right corner of the website and then filling out the registration form.



Screen 1.1

When the [Register Now](#) link is selected you will be directed to a new page to fill in your personal information: email address, username and password. When finished, select the [Register New Account](#) button as shown in screen 1.2.



Screen 1.2

## 1.3 Personal & Company Information

After filling in your personal information and selecting the [Register New Account](#) button you will be directly taken to a new page to fill in your company profile. Your [Company Profile](#) must be completely filled out or you will not be able to order prints and/or create projects. If you do not fill in your company profile and log out, and later enter the site, you will still have to

complete your company profile. You can do this by selecting the second tab, entitled [Account Settings](#), shown in screen 1.3, and then selecting the [Profile](#) tab.



Screen 1.3

### 1.3.1 Company Control

If you are the first member of your company to register on the site, you will be required to fill in all your personal and company profile's information. You will also have the controls to invite other members of your company to participate in any design projects, whether yours or from another company. The individuals with company controls assign all permissioning to all its company members as well as to remove them from the company. The software does, however, allow you to relinquish control to other individuals of your company.

After saving your [Personal Profile](#) and [Company Profile](#), you are presented with a new options box to the right, entitled [Company Management](#), as shown in screen 1.4. This is where you will invite other employees of your company by keying in their email address. Once they have registered, their names will be removed from the [Pending Invitations](#) heading to the [Employees](#) heading. Once a member becomes registered they can now be granted, or not, control of the company by selecting the [Company Control](#) option next to their name. More than one user can control a company. **Giving another individual [Company Control](#) means that that individual could take away your control. [Company Control](#) is an important distinction because users who have [Company Control](#) also manage the [External Contact](#) list, which is outlined in [section 2.2](#).** In screen 1.4, Ralph O'Neil gave [Company Control](#) to John Henry. Company members can also be removed. When selecting the [Remove](#) option you will be asked to select another company member to take over the projects that are assigned to the member being removed shown in screen 1.4.

The [Options](#) heading asks if you want your company to be private from view of all the registered users of the software by checking the box. Being listed as private in no way inhibits your company from being part of other company's projects or you inviting other members of other companies to be part of your projects. If your company is not private then the individuals without the checked boxes, under the [Hide](#) option, will be displayed as your contacts for your company. In screen 1.4, both Ralph O'Neil and John Henry will be the only individuals that will be displayed as company contacts. **Keep in mind that any new member that has been invited will have their name hidden (by default) from the contact list when they register. The person with company control will have to uncheck them once they are listed under the [Employees](#) heading.**



## Company Management

### Employees

Name/Email	Hide	Company Control	Remove
<b>Ralph O'Neil</b> <i>ralphoneil@woh.rr.com</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>John Henry</b> <i>john.henry@trivox.net</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Tom DeLuise</b> <i>tom.deluise@trivox.net</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mary Hopps</b> <i>mary.hopps@trivox.net</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

You are removing this employee.  
Give their permissions to:

- Ralph O'Neil
- Ralph O'Neil
- John Henry
- Tom DeLuise
- Nick Wright

<b>Nick Wright</b> <i>nick@trivox.net</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	-------------------------------------	--------------------------	--------------------------

### Options

Company is Private

### Pending Invitations

Invite Member

Name/Email	Phone	Date	Revoke
<i>terrybuhl@mycompany.com</i>		07/19/2011	<input type="button" value="Revoke"/>

Screen 1.4

## 2 Project Management

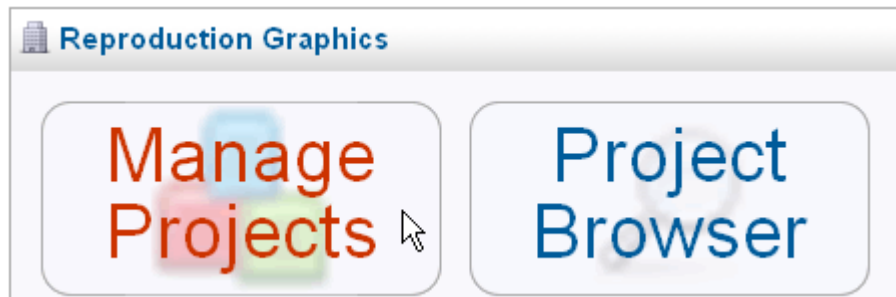
### 2.1 Manage Projects

There are two ways to gain access to the Reprographic Browser to [Manage Projects](#) depending on where you are in the registration process. If you have as yet to log out, and just completed your registration, you can select the [Reproduction Graphics](#) link as shown in screen 2.0 and you will reach the main page as shown in screen 2.1.



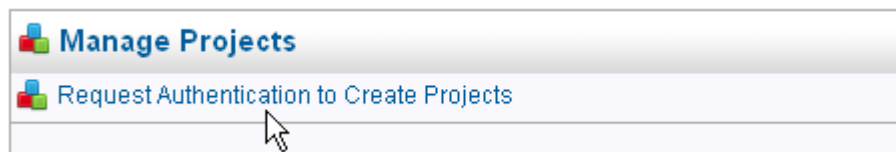
Screen 2.0

Or if you have completed your registration and logged out and then logged back in you will reach the main page, screen 2.1. Click [Manage Projects](#) from this screen.



Screen 2.1

If this is your first time to the Project Manager and you want your company to create projects you will need to be given permission to do so by the print house. (This is true of only the first person of a company that requests to create projects. Once you have been authorized it will be your responsibility to authorize any additional company personnel to create projects). Click on the [Request Authentication to Create Projects](#) link as shown in screen 2.2.



Screen 2.2

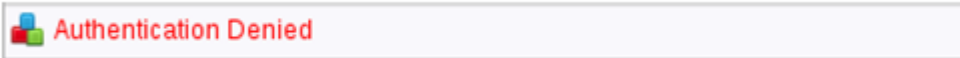
When you click on the request to create projects the prompt under the [Manage Projects](#) heading will display the following, [Authentication Pending](#), as shown in screen 2.3.



Screen 2.3

When the print house receives notification of your request, and after reviewing it, they can either allow or deny your request to create projects. Being denied does not prevent you from being part of existing projects and uploading files into them. For immediate authorization you may want to call the print house directly.

If you were denied the request to create projects then the prompt will display, [Authentication Denied](#), as shown in screen 2.4.



Screen 2.4

When you are authorized to create projects you will see the prompt to [Create Projects](#), as shown in screen 2.5.



Screen 2.5

Once you have been authorized to create projects you can now authorize other members of your company to create projects as well. To do this, select the [Manage Projects](#) link, as shown in screen 2.1, and then from the [Company Employees](#) heading select the [Can Create Projects](#) selection next to the names of the employees that are allowed to create projects, as shown in screen 2.6. Unselecting anyone from the list of creating projects has to be done by your local print house.

## 2.2 Contact List

When selecting the [Manage Projects](#) link (screen 2.1) your [Contacts](#) list will be displayed in the right pane. This is the list of people whom you will consider giving permissions to on any given project, either now or at a later time. Adding a person to your contact list does not give them any permission's in and of itself.

The first part of your list consists of your [Company Employees](#). These employees are invited as described in *section 1.3.1*. They are also displayed in the [Contacts](#) list (screen 2.6) when you first entered the [Manage Projects](#) link. The [Manage Employees](#) link is shown in screen 2.6 because this person has company control. This link would not appear to anyone logging in without company control permission. If you were the first person to register your company, or you had company control, than you can give the [Can Create Project](#) permissions to any other registered member of your company by checking the box next to the employee's name. **Unselecting anyone from the [Can Create Projects](#) list has to be done by your local print house.**

Also note the PiC (Principal in Charge) option. These are the employees that are responsible for any projects created. There can only be one principal in charge per project. More than one employee can be checked from the list shown in screen 2.6.

Company Employees		<a href="#">Manage Employees</a>	
	Phone	PiC	Can Create Projects
<b>Ralph O'Neil</b> <i>ralphoneil@woh.rr.com</i>	9374287831	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>John Henry</b> <i>john.henry@trivox.net</i>	9374287831	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Tom DeLuise</b> <i>tom.deluise@trivox.net</i>	9374287831	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mary Hopps</b> <i>mary.hopps@trivox.net</i>	9374287831	<input type="checkbox"/>	<input type="checkbox"/>
<b>Nick Wright</b> <i>nick@trivox.net</i>	9374287831	<input type="checkbox"/>	<input type="checkbox"/>

Screen 2.6

When selecting the [Manage Employees](#) link, screen 1.4 will display for you to enter the new members email address as outlined in *section 1.3.1*.

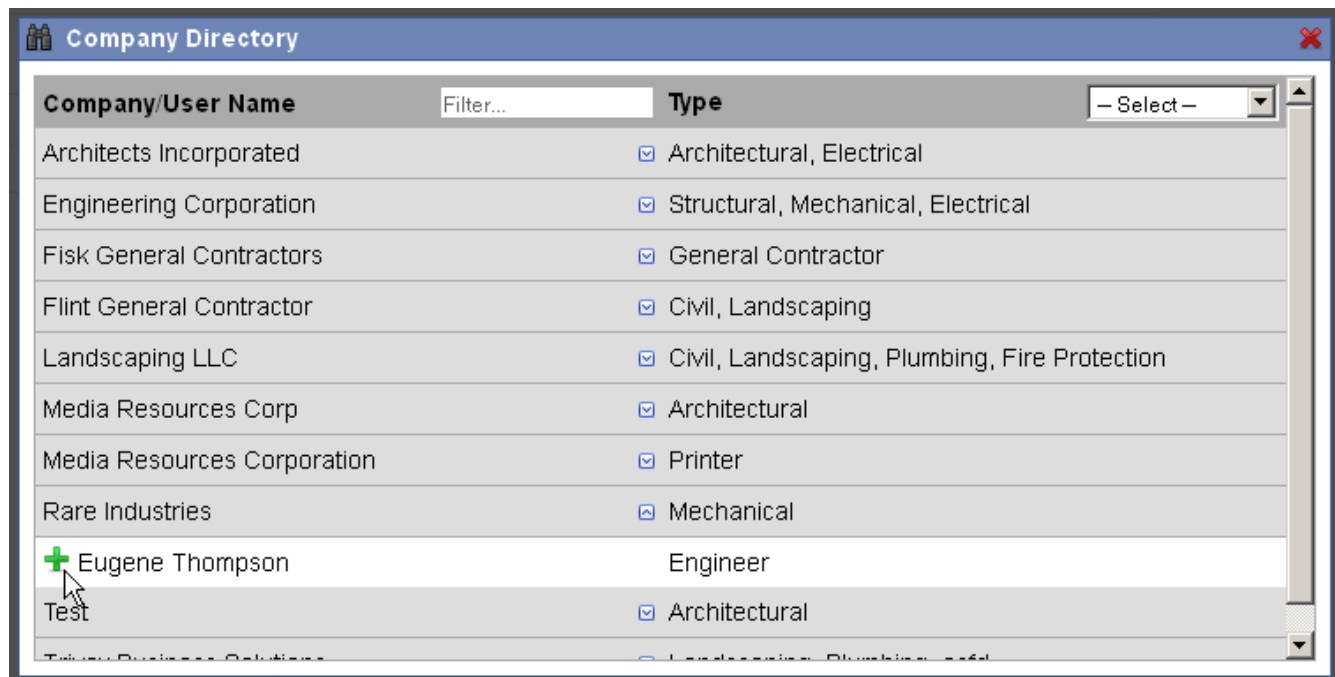
The second part of the list is your company's [External Contacts](#). These are registered users who have been added by any member with company controls. Anyone who can add [External Contacts](#), having company control, can also remove them as shown in screen 2.7.



Screen 2.7

Removing an external contact will not, by selecting the [remove](#) option, drop them from any projects your company has created and/or is working on. A list will be displayed of the projects that this person is attached to when you remove him/her from the [External Contacts](#) list. Any registered member can be added to the [External Contacts](#) list even though that person is not on the [Company Directory](#), as shown as hidden or not, as displayed on screen 1.4. All you would need is the registered email address of that person to add him/her.

The [Company Directory](#) will bring up a list of all the companies that are members and a list of all the people that have not been hidden for display. By selecting this option, screen 2.8 will display. From this directory you can select any external contacts to be added to your list by selecting the green plus icon next to the name of the person whom you want to add.



Screen 2.8

If you invite a registered member to be part of your external contact list then that person will receive an email telling them that you invited them. If you invite a person that is

not registered then that person will have to register.

Lastly, Contact Lists You Belong To, screen 2.8, is a cross reference to which companies are using you on their external contact list. The [disjoin](#) option, under the Control selection heading, will allow you to remove yourself from their list.



	Phone	Control
<b>Architects Incorporated</b> trivox_architectsincorporated@makemetheking.com	9375557898	<a href="#">disjoin</a>
<b>ABC Architects, Inc.</b> trivox_trivoxbusinessolutions@makemetheking.com	(937) 214-2129	<a href="#">disjoin</a>

Screen 2.8

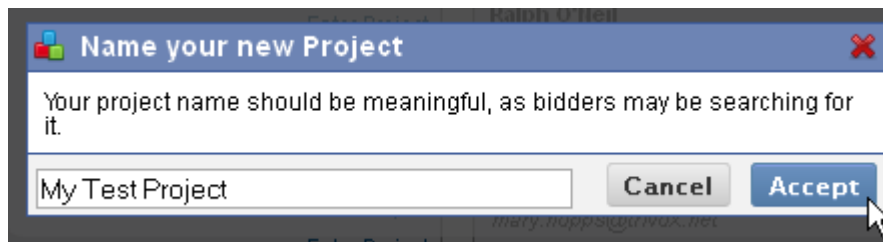
## 2.3 Project Creation

Click [Manage Projects](#), screen 2.1, from the main screen as outlined in *section 2.1*. When you are authorized to create projects you will see the heading [Create Projects](#) (screen 2.9); now allowing you to do so. The list, shown beneath the [Mange Projects](#) heading (none shown), identifies projects you have created and projects that you are a party to.



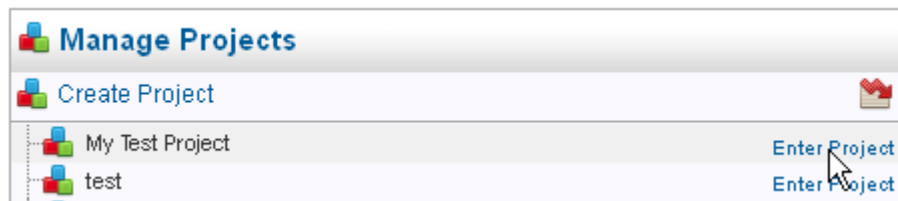
Screen 2.9

When you select the [Create Project](#) option (screen 2.9) you will enter the name of the project as shown in screen 2.10. This name will be displayed to the general public, if the private option (by default) is not checked, and is used in the search criteria to locate it for printing.



Screen 2.10

Once you select the [Accept](#) button the name of the project created will appear in the list shown in screen 2.11 as well as all the other projects you are a part of.



Screen 2.11

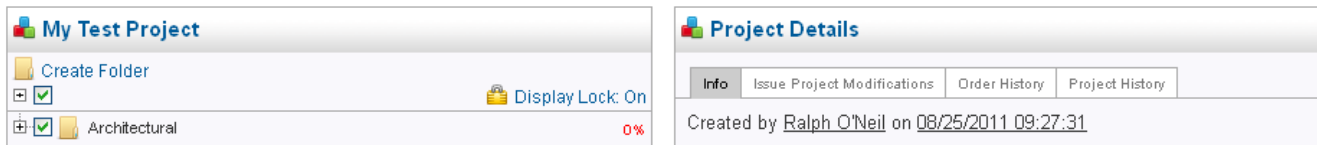
The icon shown in screen 2.12 will switch you between active and archived projects. This icon will not appear until you have archived a project. Archived projects are outlined in section 3.2.1.3 of this manual.



Screen 2.12

### 3 The File Cabinet

After clicking [Enter Project](#), shown in screen 2.11, located at the right side of any project name, you will enter the file cabinet of that project. On the right pane you will see the [Project Details](#) and the project tabs as shown in screen 3.0. All users will see the tabs, however the information displayed under the tabs depends on the project permissions, as outlined in *section 3.1*, given to the person logged in. In the left pane you will see the folders and files listed for the project entered as shown in screen 3.0.



Screen 3.0

#### 3.1 Permissions

Permissioning is an important concept when controlling your projects. Just as you have internal controls as to who can work on drawing files; this software has the same controls as to who can upload, modify, select issue dates, add addenda's, reply to RFI's, add proposal requests, add change orders, send emails and notifications, delete, create and add to the project folders and print files. In the screen 3.1, Ralph O'Neil is shown because he is the one that created this project. Also note that by selecting the drop down (Add permissioning exception) shown in screen 3.2, you will get a list of your company employees and all your external (non-company) contacts. Note that in the drop down that Ralph O'Neil is not listed, this is because he has already been added (by default – he created the project) to the project.

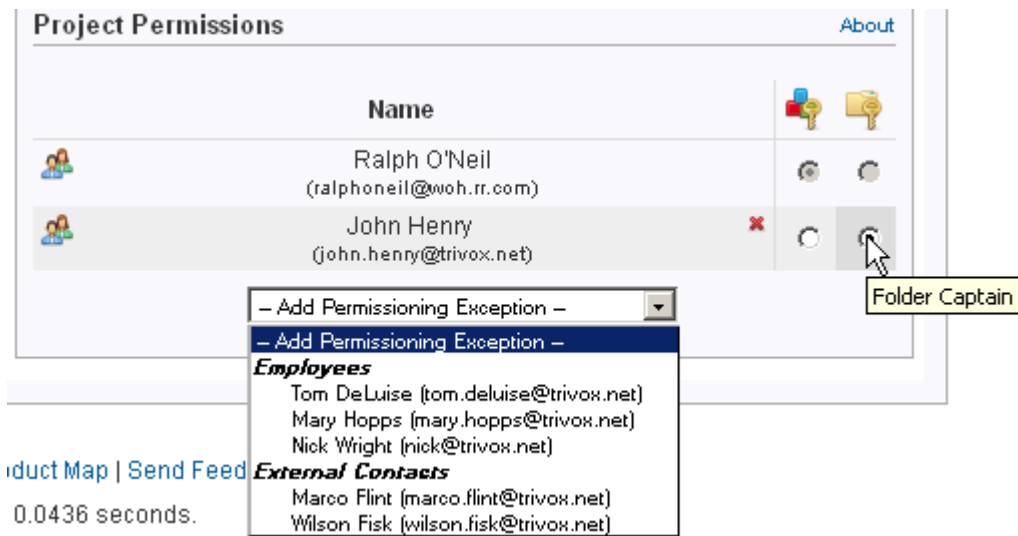


Screen 3.1

The instructions on permissions are universal and apply to every aspect of any single project including its folders and files. There are five levels of control, they are; (1) Project Captain, (2) Folder Captain, (3) Folder Worker, (4) File Captain and (5) File Worker.

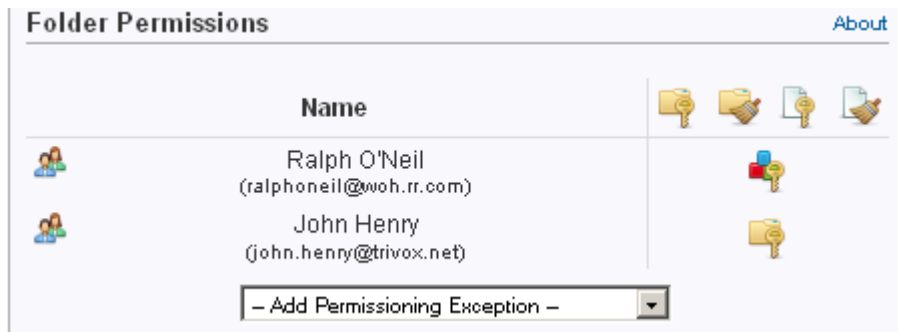
The types of permissions available are based on the level of each individual. For example, as the Project Creator you are already granted (1) Project Captain rights. You cannot remove yourself from the project; however a different user with (1) Project Captain rights can; so it is very important to only give permissions to trusted individuals. When you are giving permissions within the project (under the [Manage Project](#) button), you will only be able to assign the (1) Project Captain(s) and (2) Folder Captain(s). In screen 3.2 we added John Henry as the (2) Folder Captain. Note that once we assigned John Henry, then selected the drop down, his name does not appear in the list anymore. This is because John Henry was given universal access rights to all the folders within the project selected. If you wanted John Henry to create additional folders within this project then he would have to have (1) Project Captain permissions. Selecting the red X next to the name will remove this individual from

project control as shown in screen 3.2.



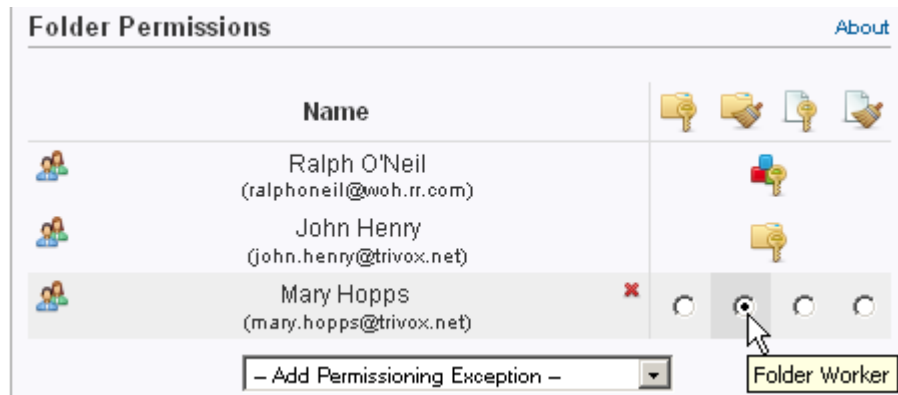
Screen 3.2

When selecting any folder in a project, by clicking on it, you will note that within the folder selected, every person selected within the Project Permissions, as shown in screen 3.2, will be displayed in the Folder Permissions shown in screen 3.3. These people will be displayed in all folders created.



Screen 3.3

To add additional people to work on the files within the folder just select the drop down and choose those individuals that will be working on this project. In screen 3.4 we added Mary Hopps and selected her to be a (3) Folder Worker.



Screen 3.4

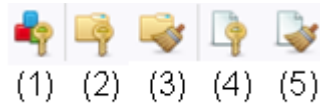
This means that she has the permissions to work on all the files within the selected folder.



Keep in mind, as we have illustrated, that permissions are hierarchal in that whatever permissions are given at the project level are also given at the folder and file levels. And whatever permissions are given at the folder level is also given at the file level.

As an example you may create a folder and have an external contact, from an outside firm, control only this folder by making that person a (2) Folder Captain.

Shown in screen 3.5 are the 5 icons used for the different permissions given within any given project.



Screen 3.5

**(1) Project Captain:** Giving a person these permissions will give them ultimate control of the project. Assigned only at the [Manage Project](#) level, a (1) Project Captain can modify project data, options and permissions, view order history, send addendums, RFI's, Proposal Requests, Change Orders, emails and organize the folder/file structure. By extension the (1) Project Captain is also considered a (2) Folder Captain and (4) File Captain of every folder and file in the project.

**(2) Folder Captain:** Assigned at the [Manage Project](#) or Folder level, a (2) Folder Captain can upload files, modify the folder name and permissions, delete the folder and organize the file structure within that folder. By extension the (2) Folder Captain is also considered a (4) File Captain of every file in the folder.

**(3) Folder Worker:** Assigned at the Folder level, a (3) Folder Worker can upload files into that specific folder. By extension the (3) Folder Worker is also considered a (4) File Captain for every file within the folder.

**(4) File Captain:** Assigned at the Folder level or at the individual File level, a (4) File Captain can rename, delete, change options and permissions, view an order history, modify addendums, and preview the file.

**(5) File Worker:** Assigned at the Folder level or at the individual File level, a (5) File Worker can preview the file and modify addendums.

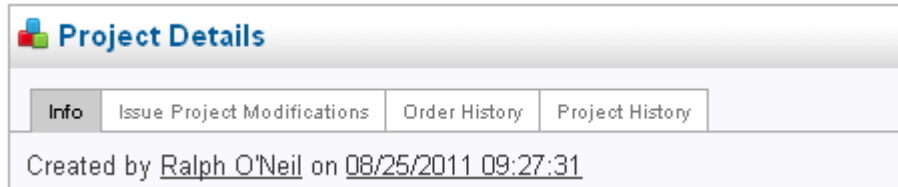
### 3.2 Project Details

To manage any detail of a project just select the [Enter Project](#) located at the far right side of the project name as shown in screen 3.6.



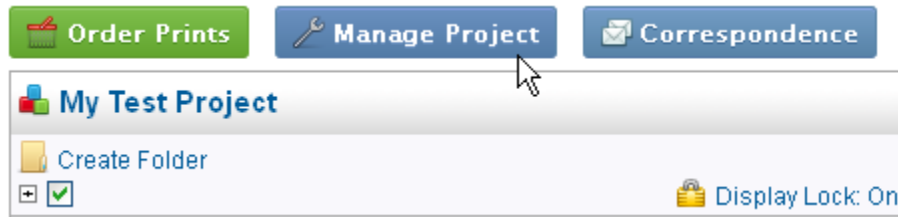
Screen 3.6

The details of the project selected will display on the right pane as shown in screen 3.7. Clicking on any other file or folder within the given project selected will clear this pane and bring up the details of the folder or file selected.



Screen 3.7

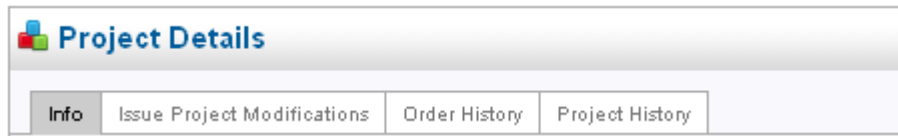
You can get back to the [Project Details](#) pane whenever you are within a folder or file by selecting the button entitled [Manage Project](#) as shown in screen 3.8.



Screen 3.8

### 3.2.1 Info Tab


The [Info](#) tab is the default tab when selecting the [Manage Project](#) button as shown in screen 3.8. The [Info](#) tab headings are; [Data](#), [Options](#), [Control](#) and [Project Permissions](#).



Screen 3.9

#### 3.2.1.1 Data

The fields under the [Data](#) heading, screen 3.10, are fairly straightforward and exist to give potential bidders information about your project. Filling in all fields will help the bidder make better decisions.

Data		About 
Project Name	<input type="text" value="My Test Project"/>	
Project Description	<input type="text" value="MRC - New Building Location"/>	
Project Size	4.13 MB	
Location/Address	<input type="text" value="587 Congress Park Drive"/>	
City, State Zip	<input type="text" value="Dayton, Ohio 45459"/>	
County	<input type="text" value="Montgomery"/>	
Company	<input type="text" value="Media Resources Corporation"/>	
Principal In Charge	<input type="text" value="Ralph O'Neil"/>	
Bids Due	<input type="text" value="09/22/2011 9:27 am"/>	
Completion Date	<input type="text" value="10/27/2012"/>	
Project Drawing Size	<input type="text" value="24 x 36"/>	
Specification Size	<input type="text" value="8.5 x 11"/>	
Search Keywords	<input type="text" value="MRC"/>	



Screen 3.10

The Bids Due field will determine how your project shows up in the Project Browser. If the current date is past the given date, it will display as "Bidding Closed".

If your project is public, entering any Search Keywords will help potential bidders find your project. Keywords should be separated by spaces or commas.

### 3.2.1.2 Options

The Options heading, shown in screen 3.11, controls the output of your files to the general and/or private audience. It is important to understand each option and the results of checking or un-checking those options.

Options		About 
<input type="checkbox"/>	Only allow complete folders to be ordered	
<input checked="" type="checkbox"/>	Only allow complete sets to be ordered	
	 Exemptions	
<input checked="" type="checkbox"/>	Private	
	Passcode: <input type="text" value="73-uptown99"/>	
<input type="checkbox"/>	Project has been awarded	
<input type="checkbox"/>	Hide Contractors/Sub Contractors	
<input type="checkbox"/>	Hide Parties Involved	
<input type="checkbox"/>	Disable downloading all files in Addendum folders	
<input type="checkbox"/>	Disable downloading all files in Proposal Request folders	
<input type="checkbox"/>	Disable downloading all files in Change Order folders	
<input type="checkbox"/>	Enable "Preview" Links on all files in Drawing and Spec folders	
<input type="checkbox"/>	Enable "Preview" Links on all files in Shop Drawing folders	
<input type="checkbox"/>	Disable watermark on "quick preview" files	
<input type="checkbox"/>	Prevent the Print House from modifying this project	

Screen 3.11

Only allow complete folders to be ordered - By selecting this option, bidders will be forced to order all the files within any given folder(s) of their choice. If checked the

[Exemptions](#) option will display, that option is the same as outlined in the next paragraph as if complete sets were checked. The checked box will toggle between complete folders and complete sets. If one is checked, and you check the box of the other, it will uncheck it.

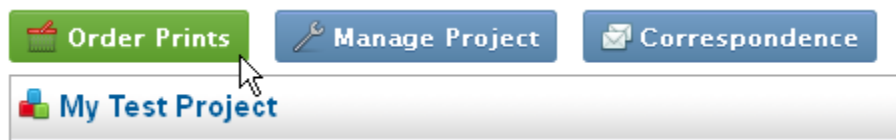
Only allow complete sets to be ordered - By selecting this option, bidders will be forced to order complete sets of drawing and specs of every checked file in your project. If you select this option it would be wise to let the print house know so they can display a price on full sets that are ordered; so when a customer orders prints that price will be displayed for them in the [Project Browser](#). When this option is checked you will have the option to allow partial sets, (exemptions from full sets), to be ordered for certain registered users. By selecting the [Exemptions](#) option, the following screen 3.12, will display. With this option you can allow any company to order any displayed file they want to. At this point you can search or enter a person's email address or select a user from those that have already ordered or opted into the email list. In screen 3.12 an individuals name was entered from a company which placed that company, Media Resources Corp, on the exemption list. The options to exempt any company employee or any external contact that is part of this project should be checked if you wish to print partial sets. By checking the exemption boxes will alleviate the need to put your company in the exemption list. The checked box will toggle between complete folders and complete sets. If one is checked, and you check the box of the other, it will uncheck it.



Screen 3.12

Private and Passcode - This option makes your project Private (default), and only the customers who know the passcode will be allowed to place orders. When giving the passcode to a potential bidder, be sure to include the digits in the first box as it is your project identification number. The second field should contain a keyword or phrase (Alpha/Numeric – up to 32 characters) that you will hand out to them as well. See screen 0.19 under the Quick Start Guide section of this manual.

If you are still working on the files, and the project is not yet complete for the general public, it would be wise to keep the project as Private until such time as you are ready to release the files for printing. Having an empty passcode will make this project inaccessible from displaying in the Browser. As a project member you can still have the files printed by clicking the Order Prints button from the [Project Manager](#) as shown in screen 3.13.



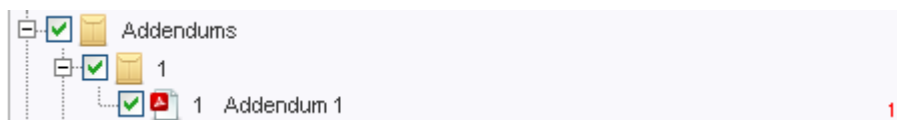
Screen 3.13

Project has been awarded - By selecting this option any user bringing up the [Project Browser](#) of this project will see displayed that this project has been awarded. You should note that in the Control heading that there is an option to [Configure Awarded Bidder\(s\)](#). If you want people to know who the awarded bidders are you should fill in the information and make sure the option to Hide Contractors/Sub Contractors is not checked.

Hide Contractors/Sub-Contractors – This option, if checked, will not display any parties involved in the bidding and construction of the project. If this option is not checked then it would be wise to select the [Configure Awarded Bidders](#) in the Control heading and enter the contractors.

Hide Parties Involved - This option, if checked, will not display any parties involved in the creation of this project. If this option is not checked then it would be wise to select the [Configure Parties Involved](#) in the Control heading and enter the parties.

Disable downloading all files in Addendum folders - By default all files in the Addendum folders, as shown in screen 3.14, will be available for download. Use this option to disable downloading. The Addendum folders consist of 8-1/2"x11" files that are usually snippets of larger prints and/or specification sheets. In all cases these files are either PDF's or Doc's, and printable at most contractors and sub-contractors offices. An Addendum folder will automatically be created when any given folder within a project is issued at 100%. Once the Addendum is issued those files within the Addenda cannot be replaced, and the folder will no longer be able to be renamed. When a file within a folder is issued a new sequential numbered folder will be created. Addendum numbers are sequential and cannot be modified.

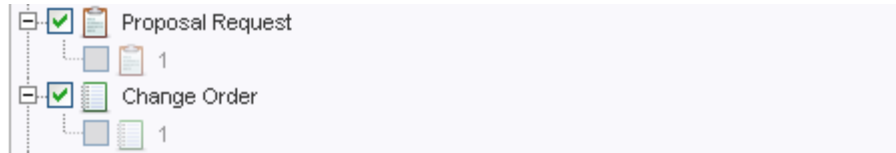


Screen 3.14

Disable downloading all files in Proposal Request folders - By default all files in the Proposal Request folders, as shown in screen 3.15, will be available for download. Use this option to disable downloading. The Proposal Request folders consist of 8-1/2"x11" files that are usually snippets of larger prints and/or specification sheets. In all cases these files are either PDF's or Doc's, and printable at most contractors and sub-contractors offices. **A Proposal Request folder will automatically be created when a project is awarded.** Once the Proposal Request is issued those files within the Proposal Request cannot be replaced, and the folder will no longer be able to be renamed. Files, that have as yet to be issued, will display to the right of the file name with a blue in color number and a red flag next to it. This indicates that the file is in a file (holding) tank until it is issued. Files within any file (holding) tank can be replaced at any time until they are issued. When a file within a folder is issued a new sequential numbered folder will be created and the red flag will disappear. Only one Proposal Request folder can be active at any given time, it must be issued before a new one can be created. Keep in mind that you can prepare multiple Proposal Requests and send all of them out by email at the same time. The Proposal Request Folders will not display unless the Project has been awarded option is checked.

Disable downloading all files in Change Order folders - By default all files in the

Change Order folders, as shown in screen 3.15, will be available for download. Use this option to disable downloading. The Change Order folders consist of 8-1/2"x11" files that are usually snippets of larger prints and/or specification sheets. In all cases these files are either PDF's or Doc's, and printable at most contractors and sub-contractors offices. **A Change Order folder will automatically be created when a project is awarded.** Once the Change Order is issued those files, marked with a green number and red flag next to it, within the Change Order cannot be replaced, and the folder will no longer be able to be renamed. When a file within a folder is issued a new sequential numbered folder will be created. The Change Order Folders will not display unless the Project has been awarded option is checked.



Screen 3.15

Enable "Preview" Links on all files in Drawing and Spec folders - Enabling this option will allow anyone to view a smaller sized version and/or a watermarked preview file. This option only works for PDF files and to a lesser extent TIF files. Enabling this will allow anyone to download the file, however it will be displayed at 150dpi, making it hard to read when enlarged.

Enable "Preview" Links on all files in Shop Drawing folders - Enabling this option will allow anyone to view a smaller sized version and/or a watermarked preview file. This option only works for PDF files and to a lesser extent TIF files. Enabling this will allow anyone to download the file, however it will be displayed at 150dpi, making it hard to read when enlarged.

Disable watermark on "quick preview" files - This option will prevent the smaller preview from having a watermark; however the full size previews will always have a watermark.

Prevent the Print House from modifying this project - This option will prevent the Print House from modifying your files. This is usually checked unless you feel you require assistance from the Print House.

### 3.2.1.3 Control

The Control heading, shown in screen 3.16, requires input data to give information about a project to your potential bidders.



Screen 3.16

By selecting the [Configure Parties Involved](#) link, as shown in screen 3.16, you will be able to add all the parties involved in the project. This list will be public to all potential bidders. Checking the Hide Parties Involved option will prevent this list from being displayed.

**Parties Involved**

**Parties Involved**

**Bidders**

**New Party**  
*Type and Company Name are required.*

Type

Contact

Location

Screen 3.17

By selecting the [Configure Awarded Bidders](#) link, as shown in screen 3.16, you will be able to add as many awardees as you wish (contractors, sub contractors, etc). The list of bidders will display under the Bidders as shown in screen 3.18 (no bidders shown). You will be able to select from this list and the data will be entered into the New Awardees list. All you will need to do is enter the Type of contractor. This list will be public to all viewing this project. Checking [Hide Contractors/Sub Contractors](#) option will prevent this list from being public.

**Awarded Bidders**

**Parties Involved**

**Bidders**

**New Awardee**  
*Type and Company Name are required.*

Type

Contact

Location

Screen 3.18

The [Archive Project](#) link, as shown in screen 3.16, will remove the project from your current active projects list. By selecting this link you will be asked to confirm your request by selecting the Accept or Cancel button as shown in screen 3.19.

**Archive this Project?**

This cannot be undone.

Screen 3.19

One thing you should note is that all the data of the project being archived will be stored and available for retrieving at any given time. However, all the physical files will be deleted permanently and cannot be restored. By selecting the Accept button you will be asked if you would like to proceed to download the files by selecting the [Yes](#) or [No](#) button as shown in screen 3.20.

**Download Files?**

Data and Structure will be kept, however the physical files will be deleted from our server. Would you like to download your files before they are deleted?

Screen 3.20

If you selected the [Yes](#) button then you will be prompted, as shown in screen 3.21, to

download the files [with this link](#) option.



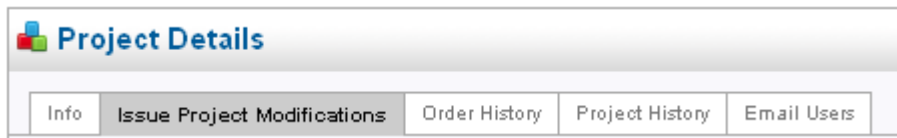
Screen 3.21

To retrieve any archived projects data just select the icon shown in screen 3.22. This icon will change to the Archived icon and display those projects.



Screen 3.22

### 3.2.2 Issue Project Modifications Tab



Screen 3.23

The Issue Project Modifications tab, screen 3.23, encompasses the Folders of drawing files (consisting of drawings, specifications and shop drawings), Addenda, Proposal Requests and Change Orders.

The Issue Project options organize the project modifications by informing participants of any changes to the project. Once a modification is made the software requires that the modification be issued in order for that change to take effect. Keep in mind that if a folder is at 0% then all files that are uploaded will replace the existing file immediately.

The Drawing File folders, which are created by the project captain(s), require that at least one folder(s) be issued up to 100% in order for the Addenda folder to be displayed and take effect. Any files that replace an existing file within a folder beyond 1% will be placed into a holding tank until that folder is issued. By rule, when issued, any file uploaded from the holding tank will replace the current file when issued.

#### 3.2.2.1 Issue Project Folders

The first step to issuing a projects file(s) involves Submittal (completed) Percentages for the folders within any given project. **Individual files within a folder cannot be separately issued, only the folders that the files are located in can be issued.** For most projects issuing folders to 100% (default) will be the norm; however more complicated projects, such as government work, sometime use Issue Dates (% completed). Files within a folder that have not been issued (beyond 0%) will at all times be replaced without submitting an issue date.

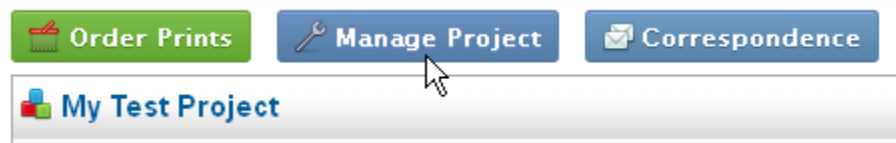
**Before issuing any folder an important concept to keep in mind is that files within folders can be interchanged with each other before the folder(s) are issued beyond 0%.** Once a folder is issued, files cannot be drug into or from that folder. Also once a folder is issued the drag and drop function within that folder is disabled and you will have to use the up/down arrows to move any highlighted file. Folders themselves can only be moved by holding down the control key and using the up/down arrows.

As an example, if your project is complete and ready for printing, you can create one



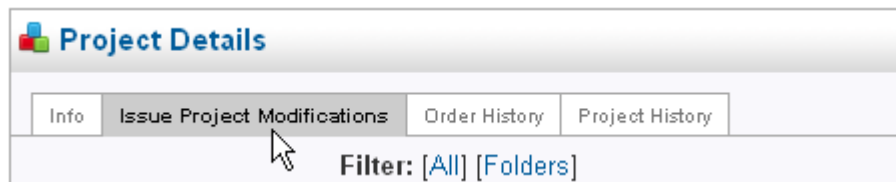
folder and upload all the files into that folder. Then you can create all the folders necessary and drag the appropriate files to the correct folders before issuing. Another important concept to keep in mind is that the folders and files within them should be in the order as indicated on the index sheet of your project. In other words, the first folder will more than likely be a folder named Title Sheet with only the one file in it, to be followed by the civil folder, etc.

To issue any modification select the Manage Project button as shown in screen 3.24.



Screen 3.24

Next select the Issue Project Modifications tab as shown in screen 3.25.



Screen 3.25





When the Issue Project Modifications tab is selected screen 3.26 will display. To submit any folder(s) use the checkbox next to each folder to include it in this issue, and then enter the submittal percentage, which defaults to 100%, for each folder. This is shown in screen 3.26. If all the folders are to be submitted select the Check All option and all the folders will be checked with the 100% default percentage. At this time you can uncheck any folder or change the issue percentage. When this is done, after making sure your date is correct, you need only select the Issue Project Folders button and each selected folder, along with all the files in the folder(s), will be issued. Once a folder reaches 100% then all modifications to any of the files within the folder will now take on addendums. Also once any one folder is issued to 100% the Addendum folder will be created automatically.



Screen 3.26

Let's assume that this is a fast track project and the Civil drawings are complete and the rest of the project is only half done (50%). The contractor wants to start the site work immediately and needs the drawings printed. In this case you would enter 100% in the Civil folder and 50% in the remaining folders (assuming the remainders of the AEC files within the

folders are half done) as shown in screen 3.27. Any changes to any of the files within any folder that has an issue percentage would then be placed in a file tank (*section 3.5.5*) until the folder is issued with a new higher percentage and date. Only the folders that are checked will be issued. Selecting the Issue Project Folders button, screen 3.26, will issue the percentages indicated in screen 3.27.

 Title Sheet	1/0	<input checked="" type="checkbox"/>	50	%
 Civil	2/0	<input checked="" type="checkbox"/>	100	%
 Structural	3/0	<input checked="" type="checkbox"/>	50	%
 Architectural	3/0	<input checked="" type="checkbox"/>	50	%

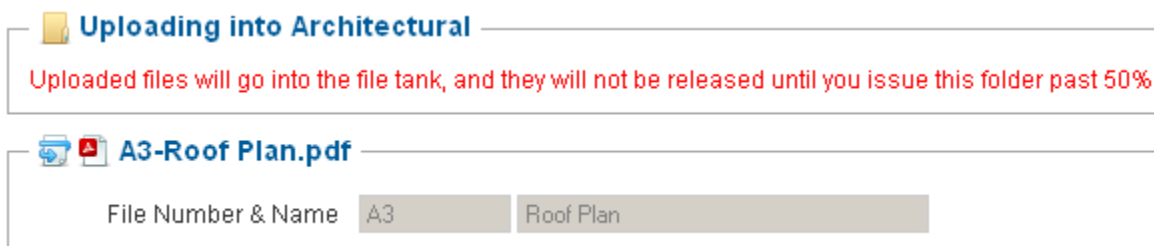
Screen 3.27

Once you submit a folder the percentage will then display to the right of the folder name, in the left pane, under the project heading as shown in screen 3.28. Also note that the Addenda folder was also created because one of the folders was issued at the 100% submittal percentage and any files replaced within that folder will now take on addendums.



Screen 3.28

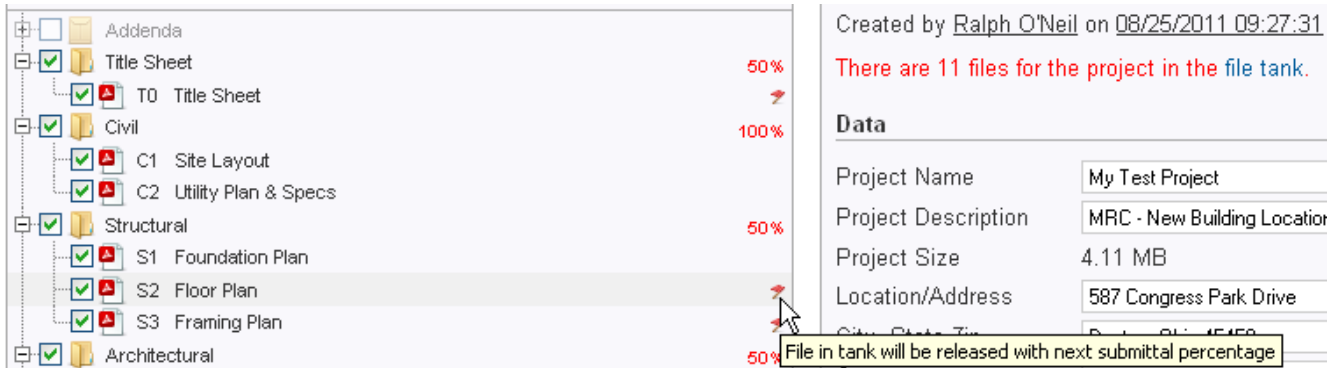
As work progresses, files (working drawings) are updated and eventually replaced. **It is assumed that the original file creation name has not changed within your system. This software looks at the original name to know what file(s) it is replacing. If you change the original name of the file then this software will think it is a new file, thus defeating the intent of project control. However, if you do change the original file name you will have the option to replace this file with the original by selecting the file and then, under the Options heading in the right pane, select the, this file should have replaced... option.** When a file is replaced the following is displayed as shown in screen 3.29. Note that the file we are uploading into the Architectural Folder is at 50% and that this file will go into the file tank until the folder is issued beyond 50%. **Another important issue to keep in mind is that you can only upload multiple files into any one folder at any given time.**



Screen 3.29

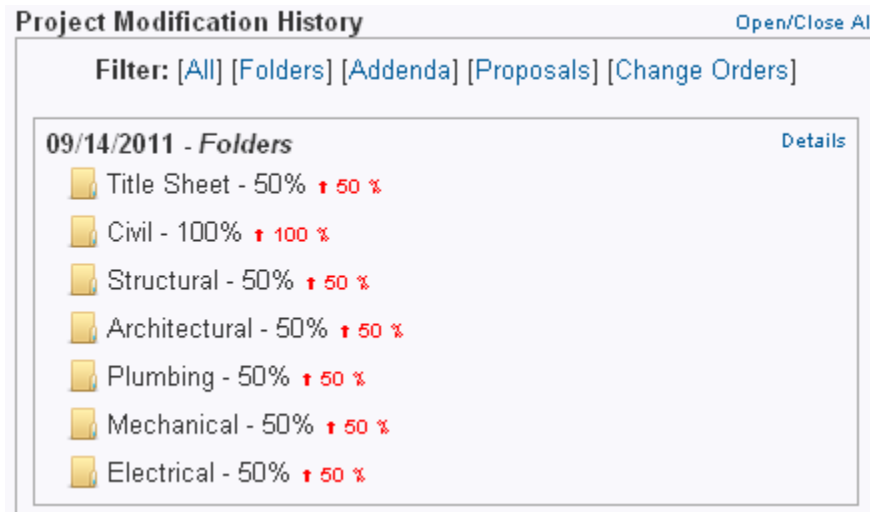
Once all the files have been uploaded you will note, as seen in screen 3.30, that next to each file there is a red flag that indicates that this updated file is in the file tank and will be

released with the next submittal percentage. You should also note that there are a total of 11 files that have been updated in this project that are in the file tank. Screen 3.30 is accessed from the [Manage Project](#) button, screen 3.24, and located under the [Info](#) tab.



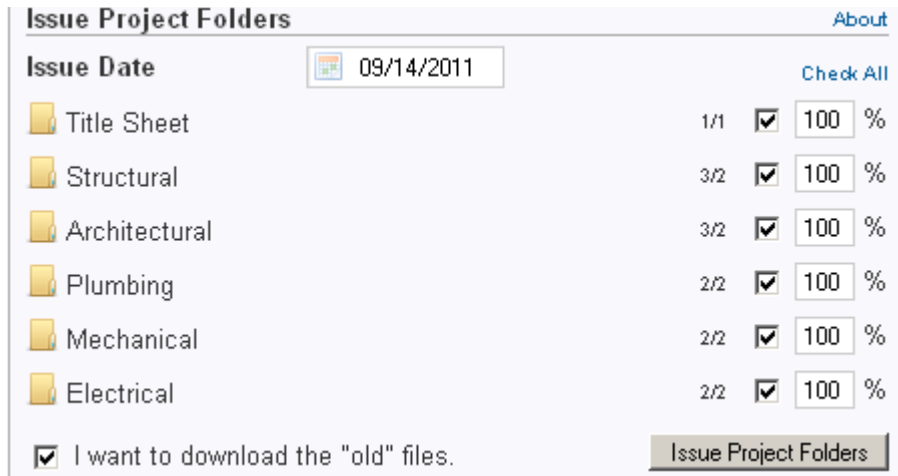
Screen 3.30

As construction work progresses so does the work on the drawing files. As was mentioned previously any uploaded updates to the files will be placed in the file tank until the next issue and/or addendum date. In this example we will be issuing an increased percentage completion on some of the folders. When selecting the [Issue Project Modifications](#) tab, you will note, as shown in screen 3.31, the [Project Modification History](#) heading shows the previous project upload. It also shows the current folder(s) percentages in black and the red displays the percentage it increased by.



Screen 3.31

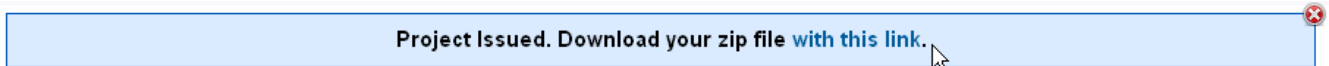
If you recall there are 11 files in the file tank that will be replacing the existing files. **Please note that if you added a new file to any folder, previously issued, then that file would be in the file tank until the folder was issued again with a new issue date and a greater issue percentage.** Shown in screen 3.32 are the folders that have files in the tank. Notice the numbers next to the checked box. The first number indicates the number of files in the folder and the second number indicates the number of files in the tank. In screen 3.32, note that the Architectural folder has 3 files in it and there are 2 of those files that will be replaced when the folder is issued.



Screen 3.32

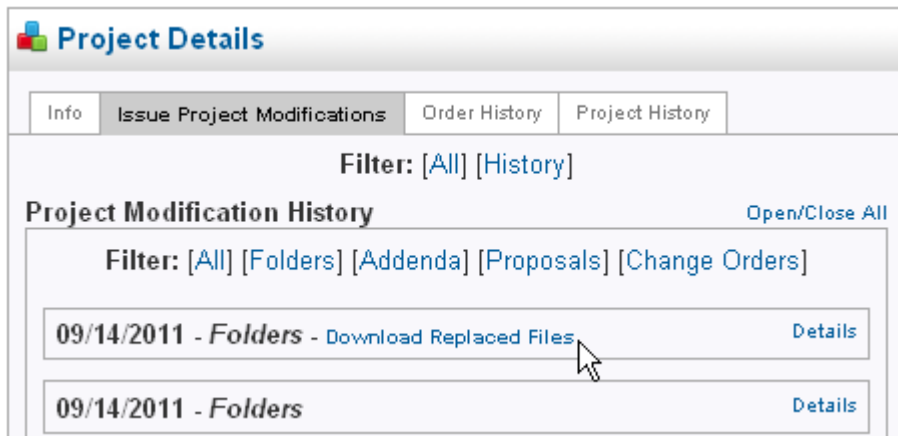
You should also note that the Civil folder is not displayed as shown in screen 3.32, this is because the folder has already been issued at 100%; And once it is issued at 100% any files that are replaced will take on addendums or change orders. Other than fast track projects most other projects will be completely submitted at 100% and sent out for bids. It is during the bidding process that most of the addendums are created. Section 3.2.2.2 deals with addendums but before we discuss addendums we will complete all the folders to 100%.

You will note that whenever you issue a folder or an addendum that you can download the current status of the replaced files by checking the box indicated as I want to download the “old files”. This will create a zip file for you to download onto your system. **The print house does not keep a history of the old files beyond 48 hours.** If you checked the download box the following screen will display as shown in screen 3.33.



Screen 3.33

If you do not wish to download the replaced files at this time you will be able to access the link in the Issue Project Modifications tab, as shown in screen 3.34. **You will have 48 hours to download this zip file.**

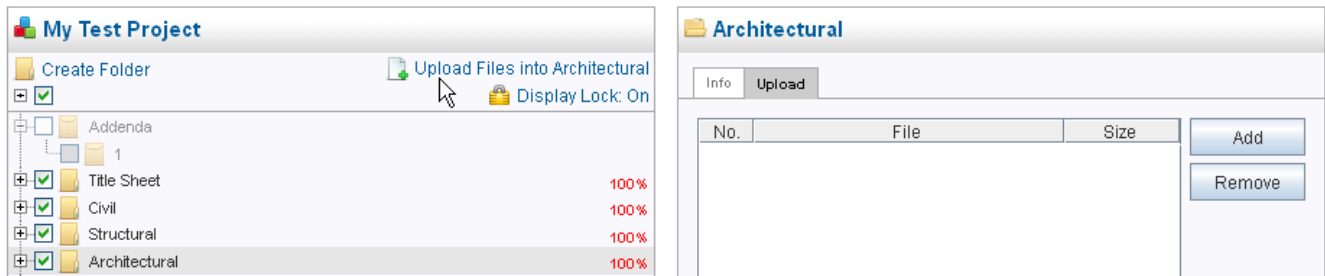


Screen 3.34

### 3.2.2.2 Issue Addendum (files)

Now that all the folders have been issued to 100% any additional uploads of files will have an addendum attached to them. As was previously mentioned you can only upload files

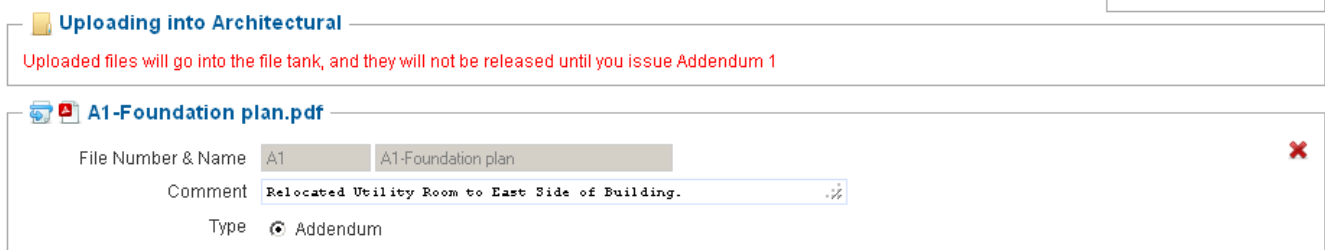
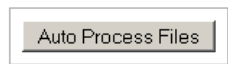
into one folder at a time. In order to upload multiple files, the ones that are modified, into the Architectural folder, select and highlight the Architectural folder in the left pane and then select the [Upload Files into Architectural](#) link or select the [Upload](#) tab in the right pane, as shown in screen 3.35. By selecting the [Add](#) button on the Java Applet, you will bring up your browser to select the files you want to replace or add.



Screen 3.35

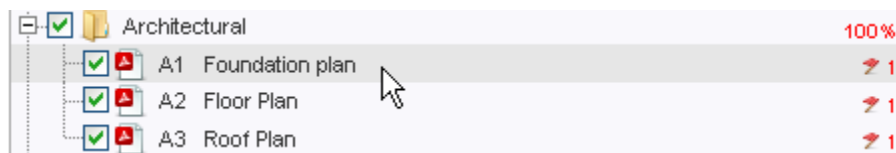
In screen 3.36 we will be replacing all 3 of the files (only showing one) in the Architectural folder. You will note that this will be addendum 1 and that the files will be placed in the file tank until this addendum is submitted. Also note that you can place a comment into each of the 3 files as to what has been modified on the drawing in the [Comment](#) field.

### Uploaded File Processing



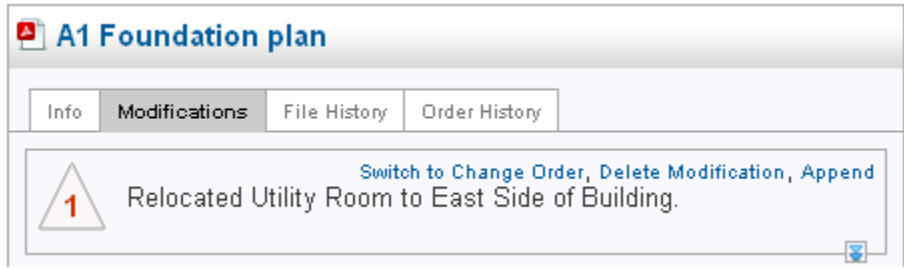
Screen 3.36

The comments entered for each file will be listed on the emails sent out for all addendums. If you do not place a comment on the files that are being uploaded, before submittal, you will still be able to insert any comments by selecting the file in the left pane as shown in screen 3.40.



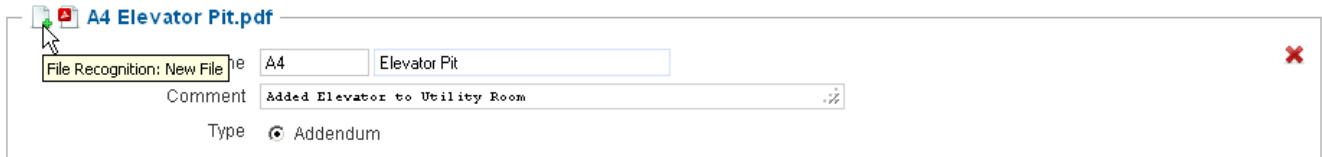
Screen 3.37

Then select the [Modifications](#) tab in the right pane, shown in screen 3.38, and add or edit your comments by selecting the [Append](#) link. Once the Addendum is issued, these comments cannot be changed, and any files in the [tank](#) will be released for public viewing. The file tank is explained more in [section 3.5.5](#). Also note that you can delete this file before issuing the addendum by selecting the [Delete Modification](#) link. If this file was meant to be a Change Order, or vice versa, you can do this by selecting the [Switch to Change Order](#) link as shown on screen 3.38.



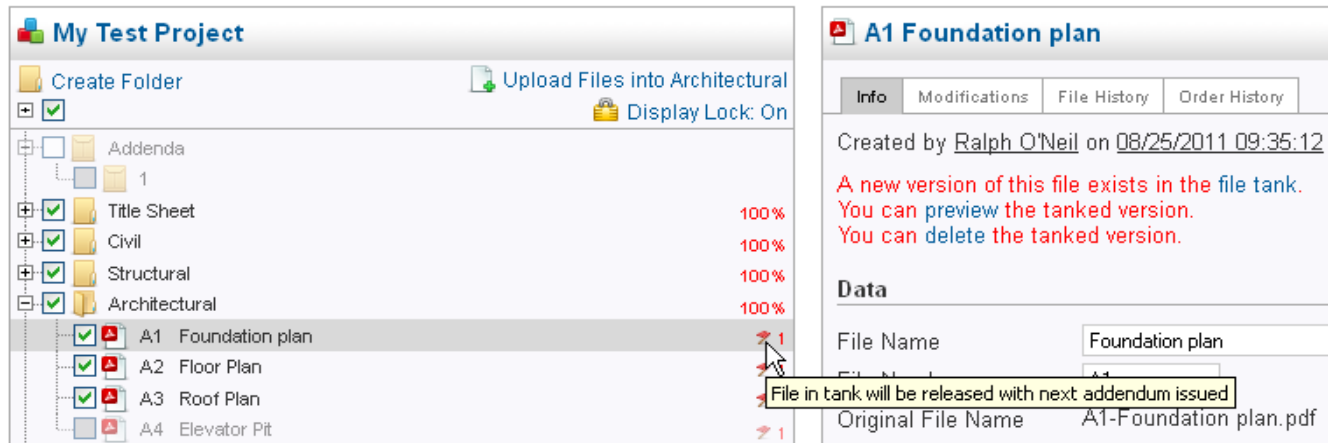
Screen 3.38

You should also note that we added a new file, A4, to the Architectural folder as shown in screen 3.39. You will know that this is a new file because in the upper left corner the icon displays a new sheet with a plus sign on it. Hovering over it will also indicate that this is a new drawing.



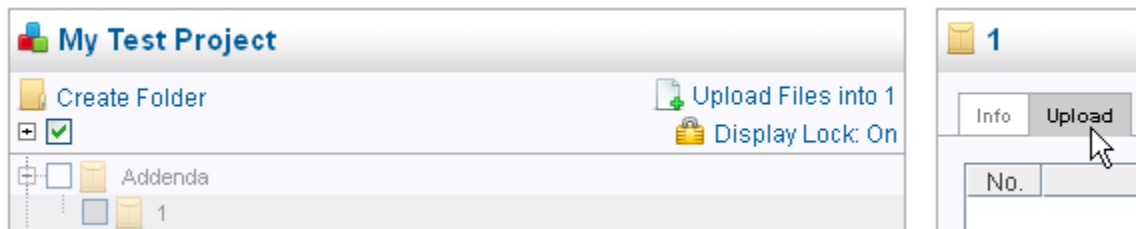
Screen 3.39

Even though it is a new drawing it is also considered an addendum and will be placed in the file tank until the addendum is submitted. You will note, in screen 3.40, that the files that were uploaded now show a red flag with the addendum number 1 next to it. Also note that the new file, A4, is at half-tone and turned off (unchecked). This is because it is part of addendum 1 and will not be accessible until addendum 1 is issued.



Screen 3.40

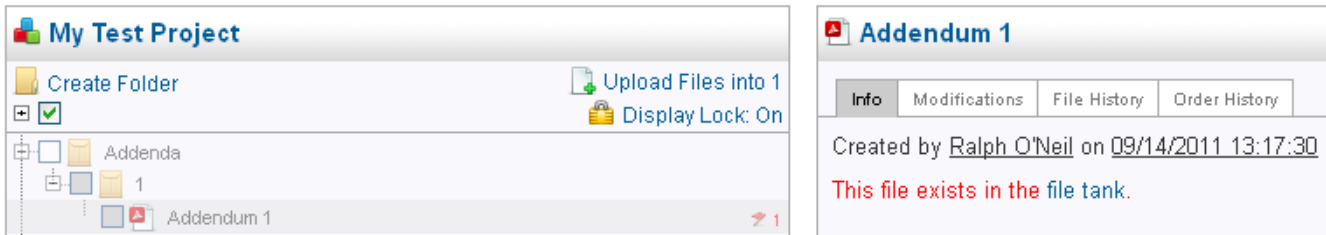
The next step would be to add the addendum file (in 8.5x11 PDF or DOC format) to the Addendum 1 folder. To do this select folder 1 as shown in screen 3.41 and upload the file as previously outlined.



Screen 3.41

When you are finished uploading the file will be displayed under the Addendum 1 folder

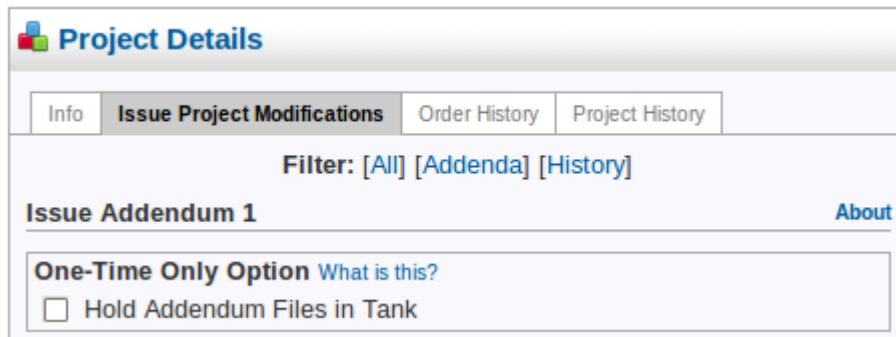
as shown in screen 3.42. As a precaution, if you do not place a file in this folder and you proceed to issue the addendum you will be warned of such but still be able to proceed.



Screen 3.42

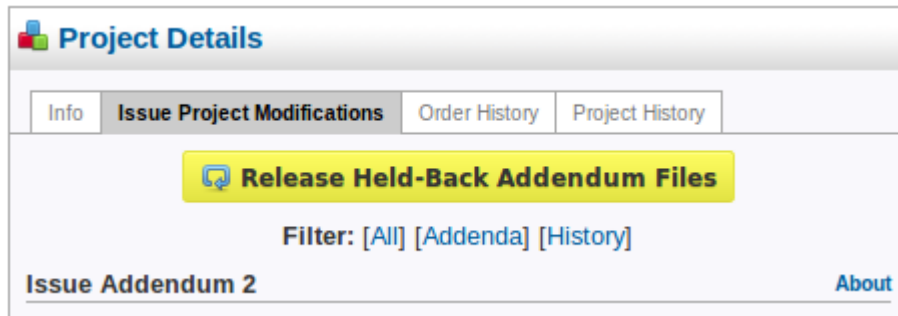
Before any addendums are issued you have the choice to either issue the drawings with the addendums or hold back the drawings until a later date. In other words the set of drawings that are out for bids will remain in tack without any addendums on them. The only addendums will be the ones submitted on the addendum documents and issued under the Addenda folders. It is common practice to take snippets of drawings and attach them to the addendum documents. It is also assumed that the drawings will be updated with the addendum change on it and that snippet will be cut and pasted on the addendum document. It is also recommended that if you do not want to release the drawing files and replace them that you still upload them so the addendum number will display for viewers to see. If you do not do this then there will be no way to indicate what addendums have been attached to any of the drawing files.

When the first addendum is ready to be issued you will have the one time option to decide which way you want to go. This option is shown in screen 3.43. By checking the box to Hold Addendum Files in Tank the drawing(s) will not replace the existing one(s) and will remain in the tank with the addendum number attached to the file. If any file has addendum 1 attached to it and it is replaced after addendum 1 is issued then it will be replaced with the addendum 2 file and the file will indicate both addendums 1 and 2.



Screen 3.43

If you chose to hold back the drawing files, and issued addendum 1, then all consecutive addendums will display the button, Release Held-Back Addendum Files, as shown in screen 3.44. This option is usually chosen when all other sets are no longer binding and construction sets are issued with all the addendums attached to all the drawings.



Screen 3.44

Either way the next step would be to issue addendum 1. To do this, select the [Manage Project](#) link (screen 3.24) from the left pane, and then select [Issue Project Modifications](#) from the right pane as shown in screen 3.46. You will note that there are 5 files that will be a part of addendum 1. Also note that if any information in the comment fields are blank you can fill them in at this time. Remember that the comments you fill in will be shown on the email that you send out, and that you can download the old files by checking the box in the lower left corner. Also make note that when you fill in any comments that you must select the [Issue Addendum](#) button or the comments will not be saved if you leave this screen. You can make any comments permanent by selecting the file and then selecting the [Modification](#) tab and adding a comment by selecting the [Append](#) link. The next option, once you verify the issue date, will be to select the [Issue Addendum](#) button in the lower right corner. **In almost all cases there should be a modified file attached to the addendum folder. If for any reason a file is not attached then you will be warned of such even though you will still be able to issue the addendum as shown in screen 3.45. If there is no file in the folder the folder will be deleted.**



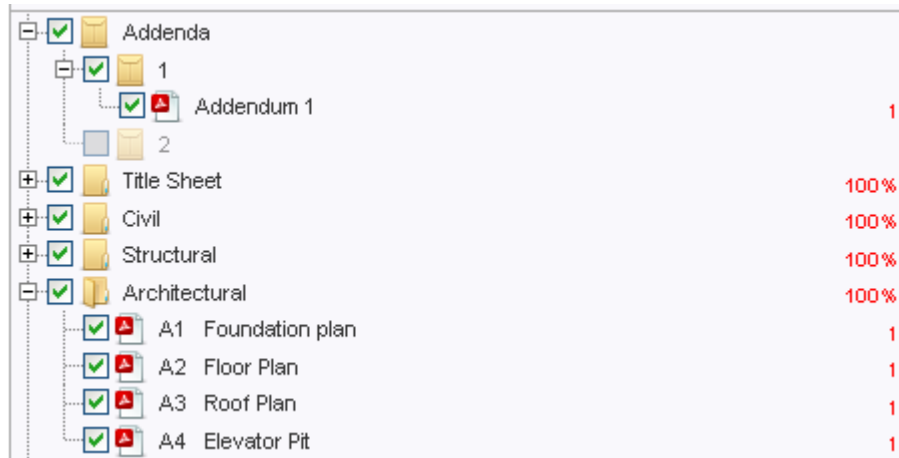
Screen 3.45



Screen 3.46



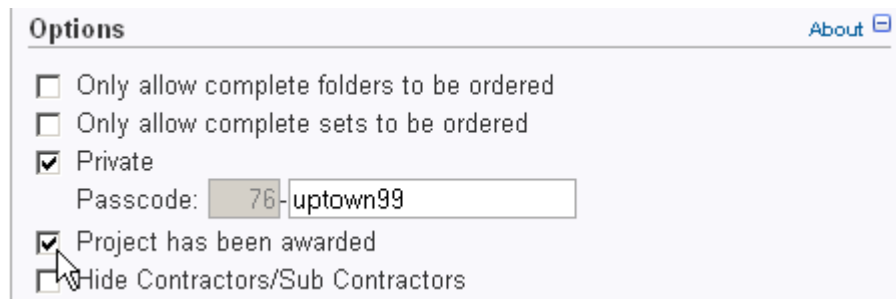
Once you select the [Issue Addendum](#) button the files will be replaced and accessible to the general public. After issuing, shown in screen 3.46, note that the red flags are removed and the addendum 1 is displayed to the right of the files. This also enabled sheet A4 to be displayed. At the same time the first addendum was issued a folder was created for addendum 2 as shown in screen 3.47.



Screen 3.47

### 3.2.2.3 Issue Project RFI's (Request For Information)

Once the bids are in and the project has been awarded the RFI's (Request for Information) come into play. To award the contract you will first have to select the [Manage Project](#) button and then from the [Option](#) heading select the box; [Project has been awarded](#), by checking it, as shown in screen 3.48



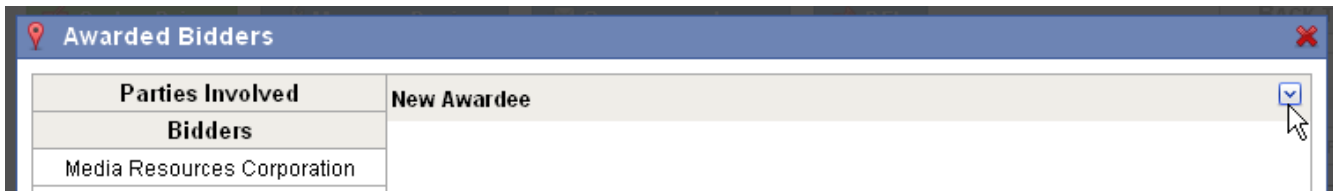
Screen 3.48

The next step would be to select the awarded bidders. Again, from the [Manage Project](#) button, and then from the [Control](#) heading, select the [Configure Awarded Bidder\(s\)](#) link as shown in screen 3.49.



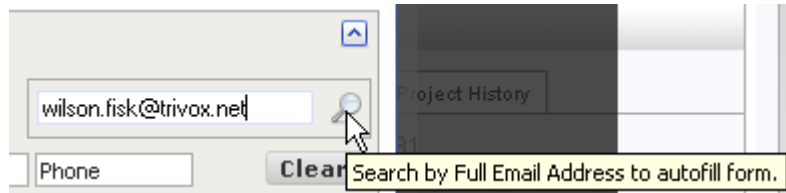
Screen 3.49

This will get you to a screen to enter the awarded bidders. In almost all cases the bidders will be listed on the left side of the screen, under the [Parties Involved](#) and [Bidders](#) heading as shown in screen 3.50. This list would consist of all parties that have ordered prints or opted-in.



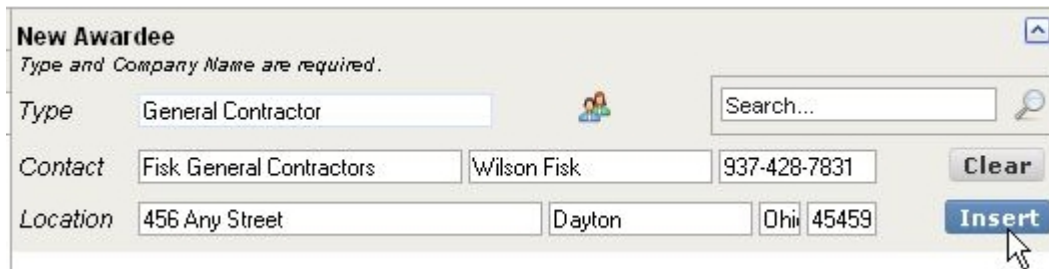
Screen 3.50

If any party did not order prints you would then have to input or select their email address to get them listed. However any party that is selected must be registered. To input Email addresses select the blue down arrow to the right of the New Awardee as shown in screen 3.50. And then enter the Email address of a registered user or select the search button, either way you will have to click on the search button as shown in screen 3.51 to load the awardee.



Screen 3.51

Once selected screen 3.52 will display with the address and name in it. The only requirement left would be to fill in the type of contractor and then select the [Insert](#) button.



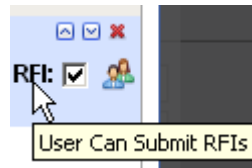
Screen 3.52

When the [Insert](#) button is selected the company will be displayed in your list of awardees as shown in screen 3.53.



Screen 3.53

You will note that to the right of the awardees name is an RFI box. If you allow RFI's (Request for Information) from this company you will need to check it as shown in screen 3.54. The blue arrows will move this company up or down in the list of awardees.



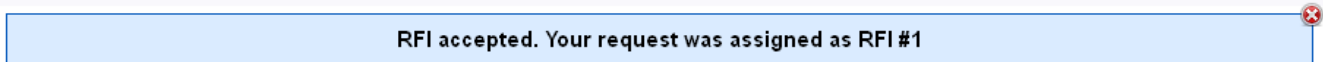
Screen 3.54

Let's assume that the Architect and Contractor were discussing what it would cost for the window treatment by making it colored. The Contractor would investigate the cost and submit an RFI to the Architect. To do this, the Contractor would log into the site and select the project from the [Project Browser](#). When he does this there will be a [RFI](#) button on his site. This is because the Architect has allowed him to submit RFI's as indicated in screen 3.54 by checking the [RFI](#) box. In most cases the Architect will submit an RFI form for the Contractor to fill in; in either case the Contractor will fill in or create a PDF or DOC file and attach it.

To generate the RFI, the Contractor would select the [RFI](#) button as shown in screen 3.55. When the right pane fills in he would then enter the Subject of the RFI and then select his Browser to attach the file. And lastly he would select the [Submit](#) button. When this is done it will send notification, by Email, that an RFI has been submitted to the Project Captain.

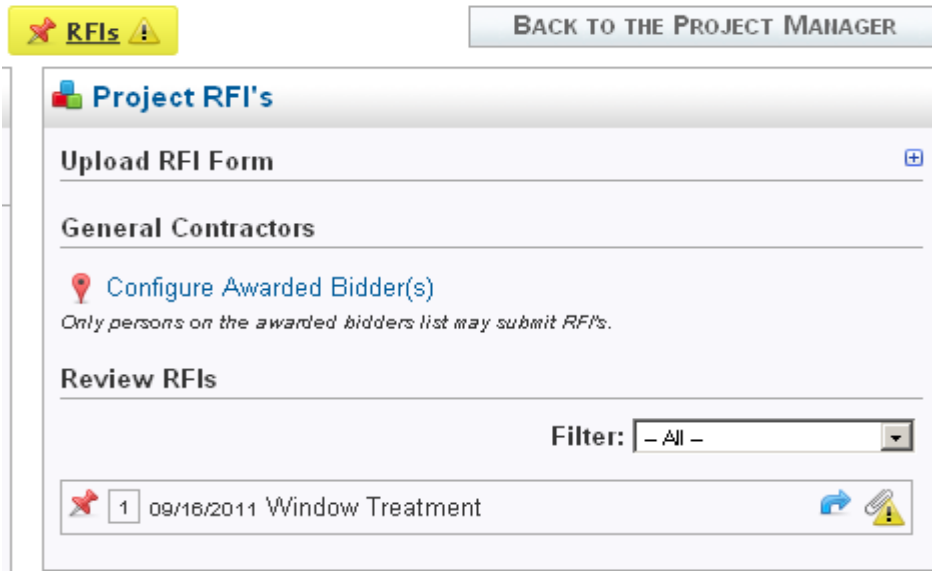
Screen 3.55

When the information has been sent the Contractor will get a prompt indicating that his request has been sent and assigned an RFI number as shown in screen 3.56



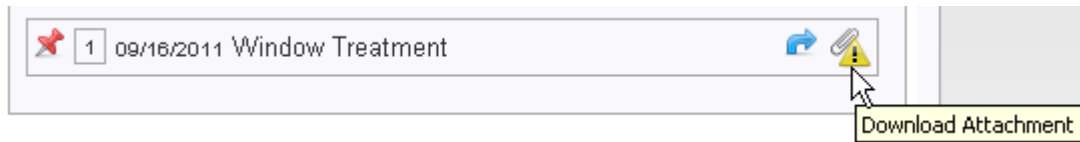
Screen 3.56

The Architect will get an Email indicating that there is an RFI sent to him. By logging into the project you will note that the [RFI](#) button is now yellow indicating that there is an RFI that has not been viewed, and is ready to be downloaded as shown in screen 3.57.



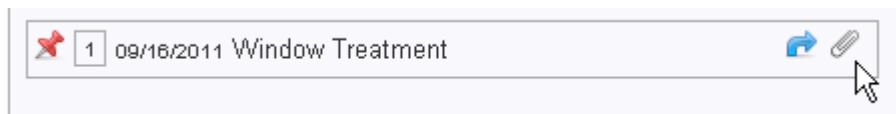
Screen 3.57

To download the attachment, select the icon as shown in screen 3.58.



Screen 3.58

If one or more RFI's have not been opened then the [RFI](#) button will remain with a yellow background. Once all the RFI's have been opened the [RFI](#) button will turn blue (you will have to refresh your screen if all RFI's were opened to see the color change). Also note that the unread symbol has been removed as shown in screen 3.59.



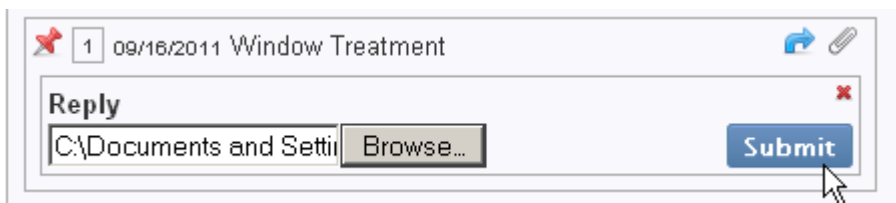
Screen 3.59

The next step would be to reply to contractor in regards to the RFI. To do this create the PDF or DOC file and then select the [Reply](#) option as shown in screen 3.60.



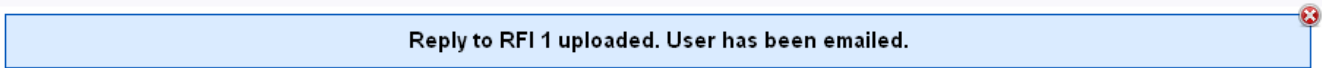
Screen 3.60

When the [Reply](#) option is selected attach the file by selecting your browser. Once attached select the [Submit](#) button as shown in screen 3.61.



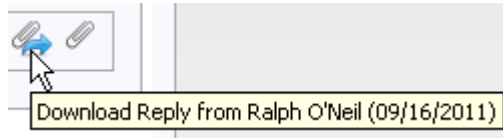
Screen 3.61

When the [Submit](#) button is selected you will receive a notice that the RFI has been sent as shown in screen 3.62.



Screen 3.62

You will also note that the RFI reply option has changed indicating who sent it and when as shown in screen 3.63.



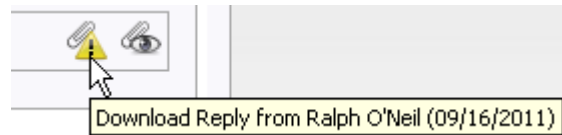
Screen 3.63

The contractor will receive an Email indicating that the RFI has been responded too and to log into the site to retrieve it. When the contractor logs in the [RFI](#) button will have a yellow background indicating that there are messages unread. Once he reads them the [RFI](#) button will retain its original blue background color.

Screen 3.64 and 3.65 show what the contractor will see when he logs onto the site in reference to the RFI's.



Screen 3.64



Screen 3.65

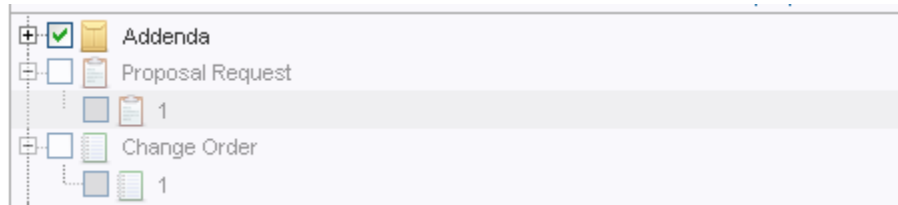
When the contractor reads the RFI the download reply will be displayed as shown in screen 3.66.



Screen 3.66

#### 3.2.2.4 Issue Project Proposal Requests

Proposal Requests are created and issued in similar manner as the Addendum folders except for the fact that no drawing files can be created and submitted along with any Proposal Request document. The files are considered as individual PDF or DOC files. Once any file folder has been issued to 100% the system will create both the Proposal Request and Change Order folders as shown in screen 3.67.



Screen 3.67

Most Proposal Requests created are simple documents asking the contractors to submit information that will lead to change orders. This system allows you to have documentation on-line for reference purposes only.

All Proposal Requests are generated in numerical order. By selecting the file you have the option to change the name. This name can change anytime prior to issuing it. To generate a Proposal Request you must select the folder and upload the file into it. Once loaded you then go to the [Correspondence](#) button and submit the Proposal Request in like manner as previously outlined in submitting Addendums (*section 3.2.2.2*).

### 3.2.2.5 Issue Project Change Order

Change Orders are created and issued in similar manner as the Addendum folders. Once any file folder has been issued to 100% the system will create both the Proposal Request and Change Order folders as shown in screen 3.67.

All Change Orders are generated in numerical order. By selecting the file you have the option to change the name. This name can change anytime prior to issuing it. To generate a Change Order you must select the folder and upload the file into it. Once loaded you then go to the [Correspondence](#) button and submit the Change Order in like manner as previously outlined in submitting Addendums (*section 3.2.2.2*).

When replacing a file with you will have the option to select whether the file is an Addendum or a Change Order as shown in screen 3.68.

## Uploaded File Processing

Auto Process Files

### Uploading into Civil

Uploaded files will go into the file tank, and they will not be released until you issue Change Order 1 or Addendum 3

Mark All As:

Addendum

Change Order

### C-1 Site Plan.pdf

File Number & Name C1 Site Layout

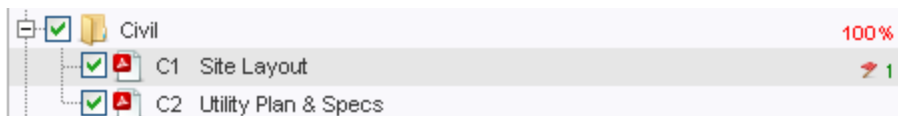
Comment Modified Tree Types

Type  Addendum  Change Order

Process Files

Screen 3.68

As a Change Order the file will display a green number with a red flag next to it as shown in screen 3.69. Once issued, the flag will go away, but the number will remain green.



Screen 3.69

### 3.2.2.6 Issue Project Modification Tab

Once the files of a project have been issued, either from a Folder or as an Addendum, Proposal Request or Change Order, the software will create a [Project Modification History](#) link as shown in screen 3.70. This is accessed from the [Manage Project](#) button and then selecting the [Issue Project Modifications](#) tab.

This informational pane lists all issue dates of Folders, Addendums, Proposals Requests and Change Orders that have been released. If an email is sent that involves any issue it will be listed here. The emails are explained in more detail in *section 3.2.4*. In screen 3.70 the details of Addendum 1 are shown open and displayed by selecting the [Details](#) link next to Addendum 1.

The screenshot shows a web application window titled "Project Details". It has four tabs: "Info", "Issue Project Modifications" (which is selected), "Order History", and "Project History". Below the tabs, there is a filter section with "Filter: [All] [History]". The main content area is titled "Project Modification History" and has a sub-filter "Filter: [All] [Folders] [Addenda] [Proposals] [Change Orders]". There are three entries in the list:

- 09/19/2011 - Change Order 1 (Details)
- 09/17/2011 - Addendum 2 (Details)
- 09/14/2011 - Addendum 1 (Details)

The details for "09/14/2011 - Addendum 1" are expanded, showing a list of files:

- A1 Foundation plan - Relocated Utility Room to East Side of Building
- A2 Floor Plan - Relocated Utility Room to East Side of Building.
- A3 Roof Plan - Added Roof Section Above Elevator.
- A4 Elevator Pit - Added Elevator to Utility Room.
- Addendum 1 - Added Elevator Pit to Utility Room.

Below the files, there is an email notification:

- Email sent on 09/15/2011 (Details)

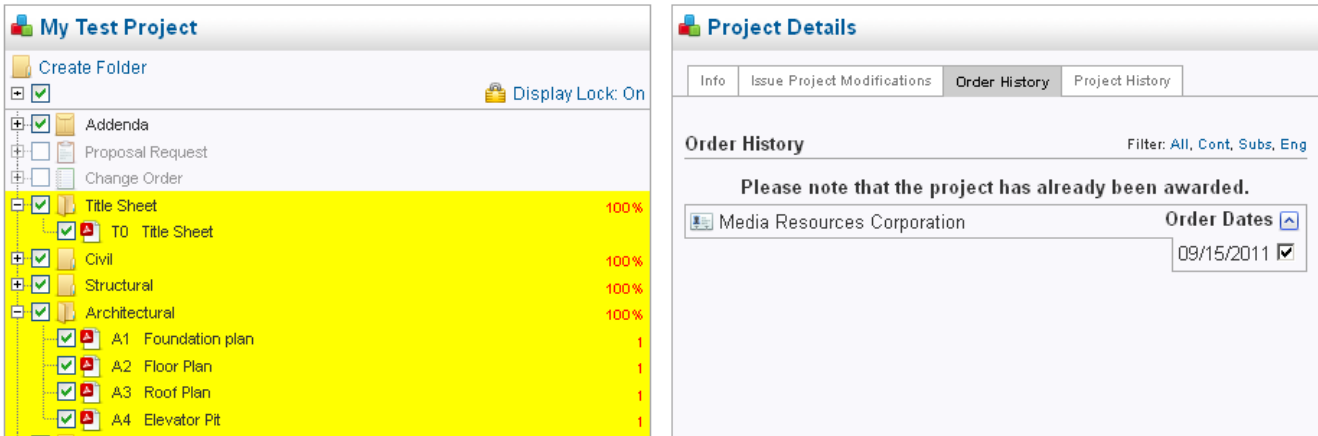
The email details include:

- Sent by [Ralph O'Neil](#)
- Comment:** Addendum 1 has been issued. The files are ready for your review. The submittal date for bids has not changed.
- Sent To:** [A warning about Web Beacons](#)
- Ralph O'Neil <ralphoneil@woh.rr.com>
- Media Resources Corporation <admin@mrcsupplies.com>
- John Henry <john.henry@trivox.net>
- Mary Hopps <mary.hopps@trivox.net>

Screen 3.70

### 3.2.2.7 Order History Tab

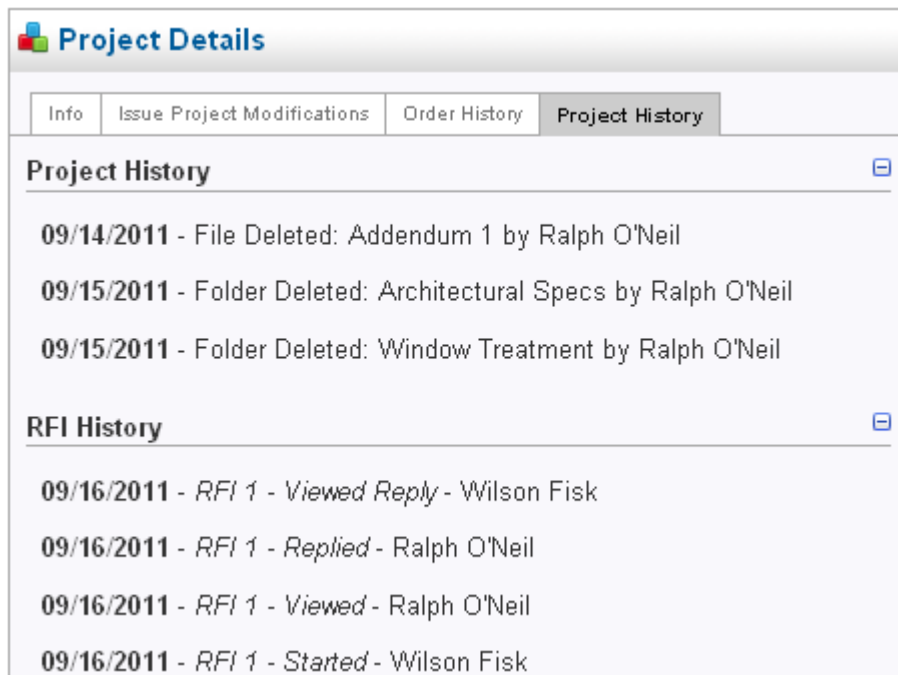
The [Order History](#) tab shows who have ordered at least one file from the project. Shown in screen 3.71 we selected the filter to display the [Engineers](#). We then selected the drop down and checked the box next to the date to view what files were ordered on that specified date. Doing this, the files that were ordered, shown in the left pane, will display with a yellow background color.



Screen 3.71

### 3.2.2.8 Project History Tab

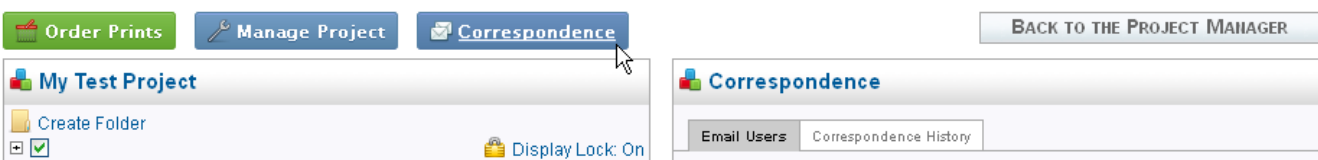
The Project History tab shown in screen 3.72 will display information about the project and the RFI's.



Screen 3.72

### 3.2.3 Correspondence Button

The [Correspondence](#) button, shown in screen 3.73, is used to send the Notice of Issue Releases, General Emails and Invitation to Bid to individuals involved with the project. A history will be kept on all Emails sent from this application. That history is located in the [Correspondence History](#) tab as shown in screen 3.73.

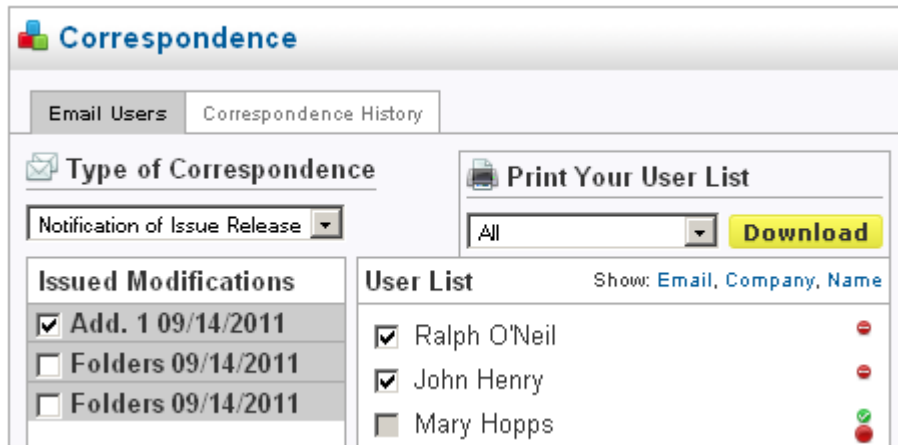


Screen 3.73



### 3.2.3.1 Email Users tab (Notification of Issue Release, General Emails and Invitation to Bid)

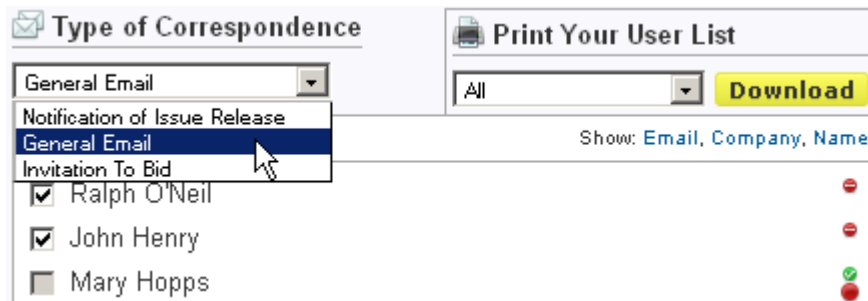
On the left side of the right pane is a list of every issued modification for this project. Clicking the top listed box, as shown in screen 3.74, will automatically select every user in the user list. Clicking on any other box will select none from the list. Clicking on any Notification of Issue Release will include information about it when the Email is generated and sent. This Email list is further defined as outlined in *section 3.2.3.2* and *section 3.2.3.3*.



Screen 3.74

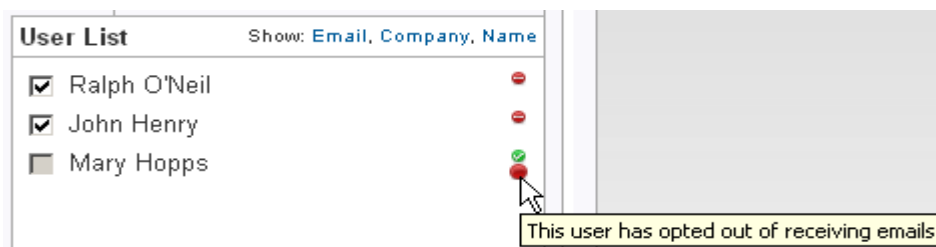
### 3.2.3.2 General Email List

To send a general informational Email just select the General Email dropdown option as shown in screen 3.75. By doing this the User List will display for you to select to whom you want to send this Email to.



Screen 3.75

If you notice in screen 3.76, that Mary Hopps has opted out of receiving any Emails pertaining to this project. If you want to send this person any additional information you need only select the green circled check marked icon above the red circle icon, as shown in screen 3.77, to force this person into receiving continued correspondence.

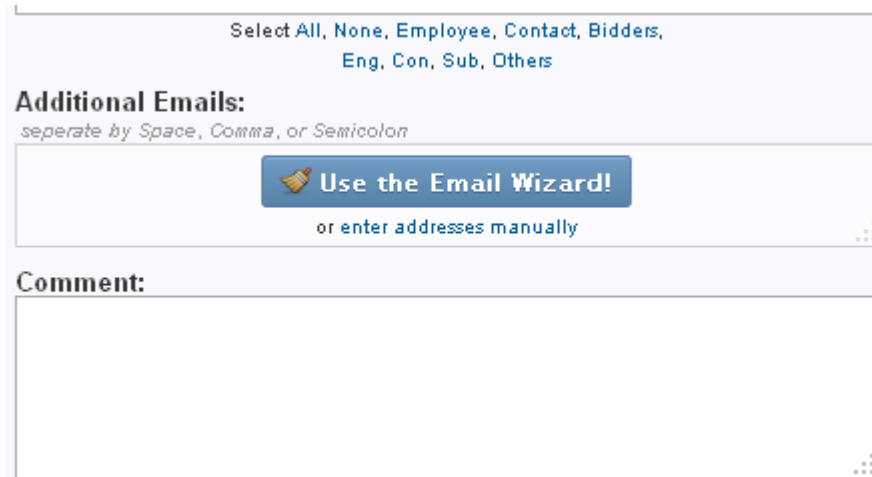


Screen 3.76



Screen 3.77

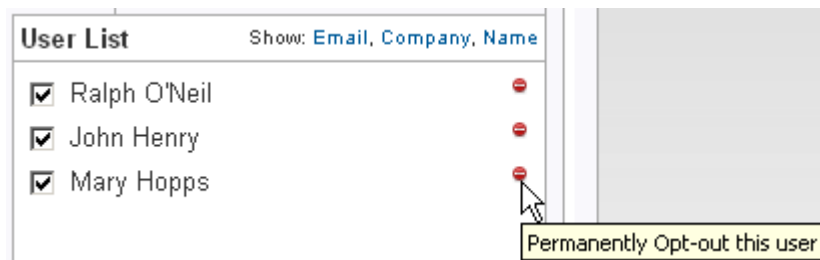
Whether sending a Notice of Issue Release, General Email or an Invitation to Bid to individuals, you have the option to filter your selections, add additional Emails to your list and input your comments as shown in screen 3.78. See *section 3.2.3.3* for information on the Email Wizard.



Screen 3.78

### 3.2.3.3 User & Email Wizard List

On the right side of the right pane, shown in screen 3.79, is a list of every user involved with the project; whether a bidder, an employee, an invitee or any user who has “opted in” to receive emails. How a user opts in is explained in *section 4.2*.



Screen 3.79

Selecting a user will prompt the generated email to be sent to both them and their secondary company email address.

You may permanently opt out a user if you feel they should no longer receive emails by selecting the small red circle to the right of any user, shown in screen 3.79. A green circle indicates that they have opted in, a red circle indicates that they have opted out, and a green checkmark, if clicked, will force opted out users to opt back in. Hovering over any icon will display its meaning.

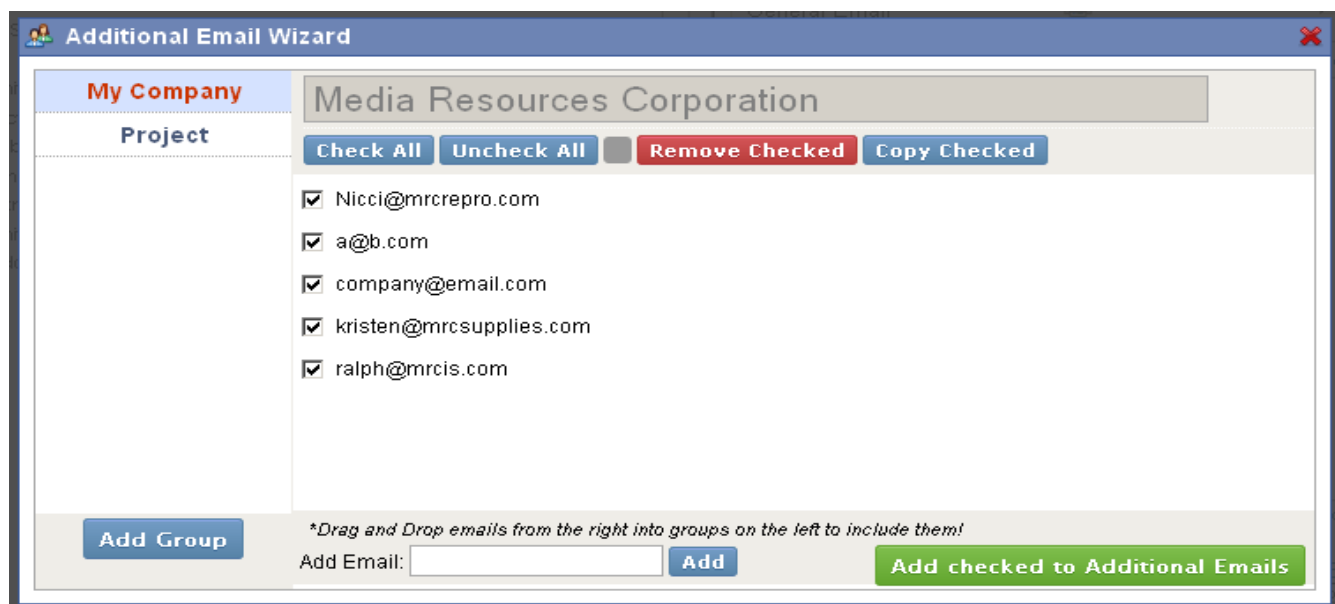
Below the User List heading are selectors, as shown in screen 3.80. You can select all

of the Engineers, Contractors, etc in this manner if you want the generated email to be directed to a specific group of people from the [User List](#). There is also a space to add additional Emails by inputting them manually or by selecting the [Email Wizard](#) button which includes your address book of commonly used Emails. **Emails sent are transmitted individually. None of your users will see anyone else's email address.**



Screen 3.80

Selecting the [Email Wizard](#) option will display screen 3.81.



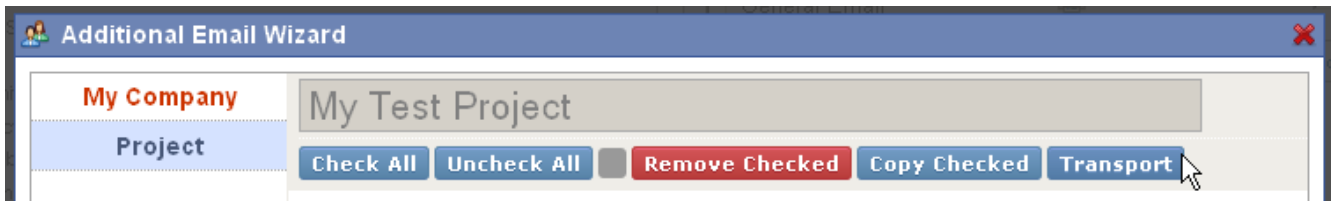
Screen 3.81

The Email Wizard keeps records of commonly used additional emails addresses. Persons who do not wish to register on the site and “opt-in” to the project can be added here by the Project Captain.

This functionality is one of the few things that a Folder Captain (of any folder) can access from the [Correspondence](#) button. It also allows them to see any correspondence from the [Correspondence History](#) tab.

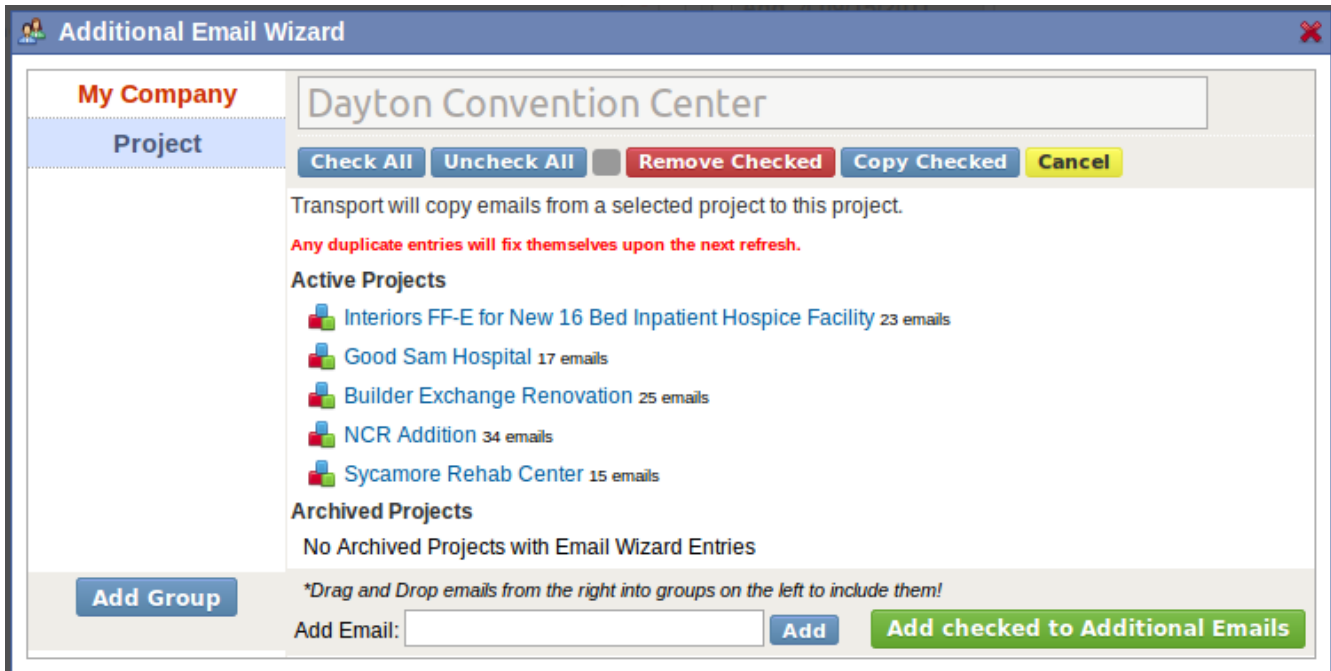
When you first load the Email Wizard, two groups already exist. The first one, “My Company”, is a list of users that your company uses, shown in screen 3.82. This list will stay with you (and the rest of the employees in your company) from project to project. The second group, “Project”, is the Email list for this specific project.

Selecting the Project group will bring up the list of Emails within in. This list can be added to by copying it from any other existing project group. When the Project group is selected as shown in screen 3.82, you will be able to copy (transport) any other project group to the active project by selecting the [Transport](#) button.



Screen 3.82

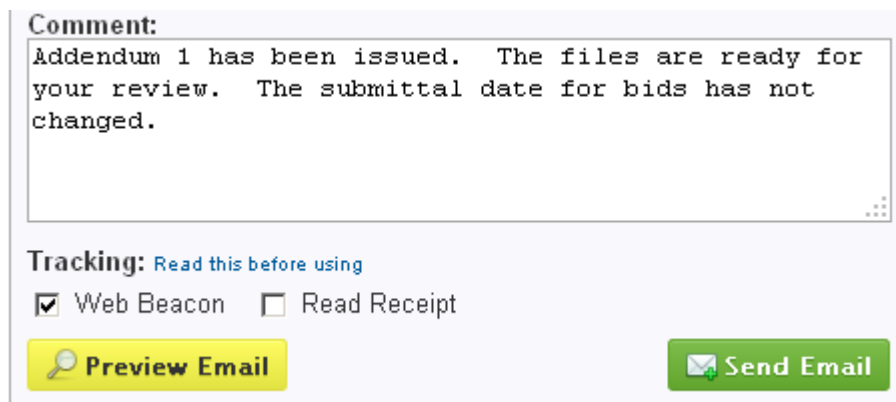
When you select the Transport button, screen 3.83 will display giving you the option to select the project from whom you wish to transport (copy) the Email list from. The entire list will transport (copy) over. If you did not want the entire list you will be able to delete the Emails you don't want by selecting the red X to the right of the name(s).



Screen 3.83

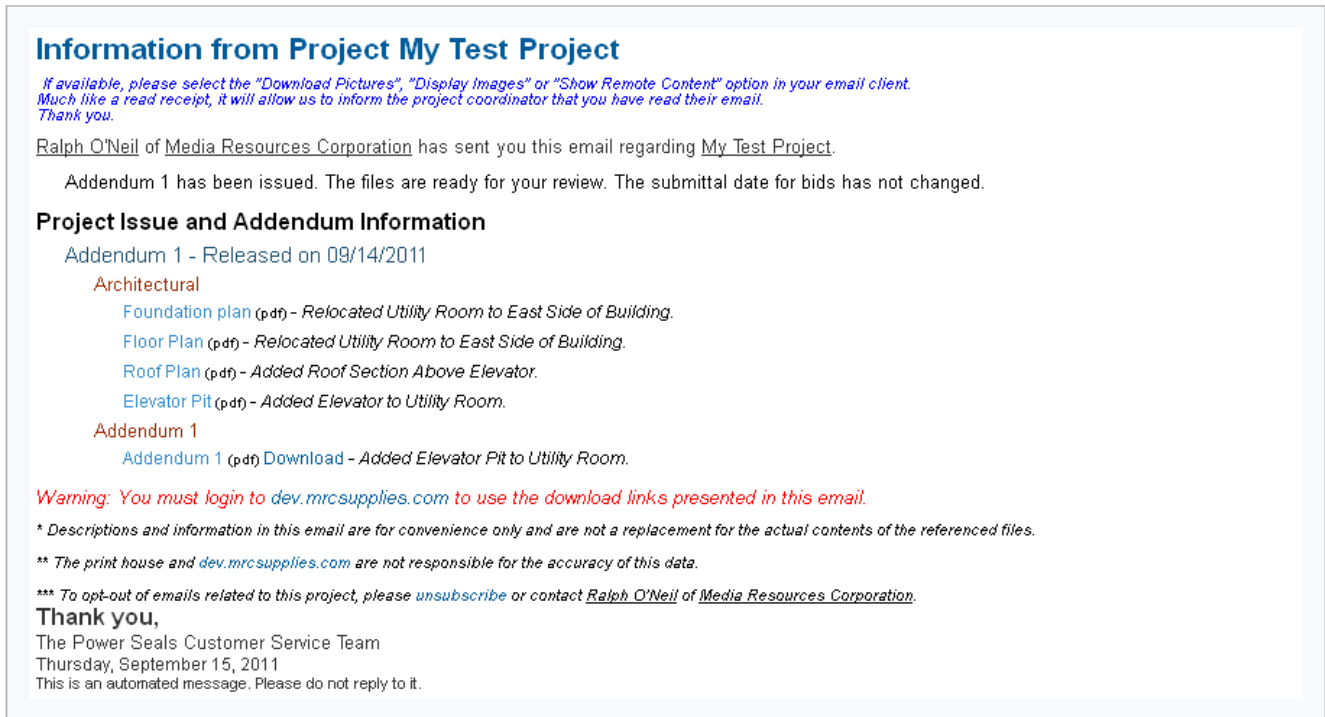
### 3.2.3.4 Sending an Email

Once you select to send a Notification of Issue Release, General Email or an Invitation to Bid by Email, to the User List you have compiled, either from manually inputting Email addresses or selecting them from the Email Wizard, you can fill in any additional comments that will become part of the Email as shown in screen 3.84.



Screen 3.84

In the example we have been using, Addendum 1 was issued, however we now need to send it out the people involved in the project, to do this, as shown in screen 3.74, select the Addendum 1 box to select the people you will be sending the Email notification to. Once you have selected the people you can preview the email by selecting the button entitled Preview Email. This will generate a simulated email, as shown in screen 3.85, that you can view before sending. There will also be displayed, below the preview, a list of all the people that will receive this email. At this time you can send the email by selecting the Send Email button or exit out of it. If you choose to exit out of this screen the information that was entered into the comment field will be lost.



Screen 3.85

If you recall we issued all the folders to 100%, before submitting addendum 1. Sending an Email will display the following information as shown in screen 3.86.

**Project Issue and Addendum Information**

Project Issue Released on 09/14/2011

- Title Sheet** issued to 100% (Up 50% from 50%)
- Structural** issued to 100% (Up 50% from 50%)
- Architectural** issued to 100% (Up 50% from 50%)
- Plumbing** issued to 100% (Up 50% from 50%)
- Mechanical** issued to 100% (Up 50% from 50%)
- Electrical** issued to 100% (Up 50% from 50%)

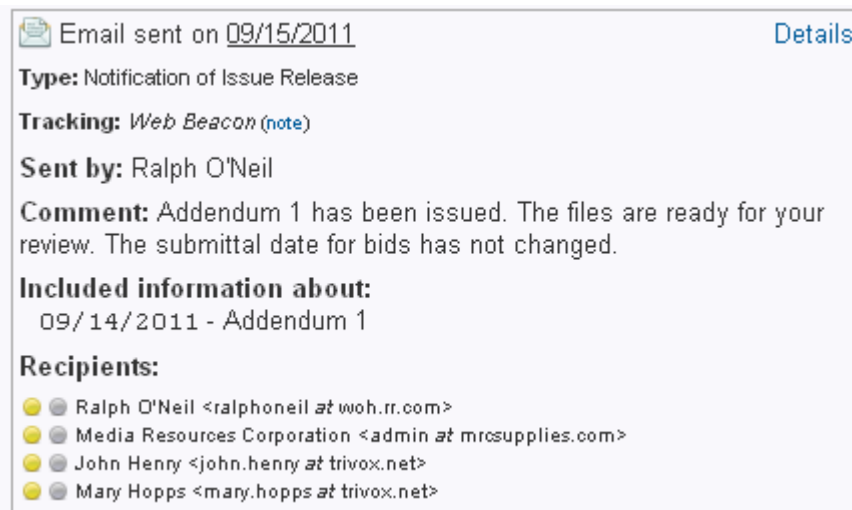
Screen 3.86

After sending the email, a record of it will be saved and can be viewed from the Correspondence History tab, shown in screen 3.87, accessed from the Correspondence button.



Screen 3.87

Emails can be further categorized by selecting any of the icons next to the Only Show: option. Hovering over any icon will display the particular group of Email. By selecting the [Details](#) to the right of any Email will display the information that pertains to the Email selected as shown in screen 3.88.



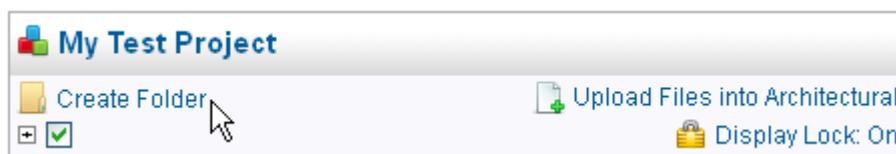
Screen 3.88

### 3.3 Folder Creation

Folder(s) within a project is where you will be placing the plot files. **Folders are only one level deep, the software does not allow for sub-folders of folders.** Folders are used for organization of files by discipline and for permissioning requirements. A folder must be created even if you place the entire projects files into one file. Folders are also used when outside companies are part of your project and you wish to include their files within your project. Remember outside companies cannot touch your files unless you give them permissioning rights.

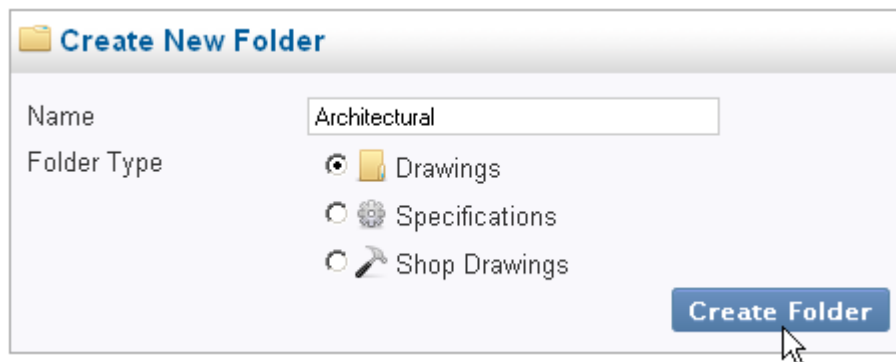
#### 3.3.1 Folder Types

To create a folder, just select the [Create Folder](#) link as shown in screen 3.89.



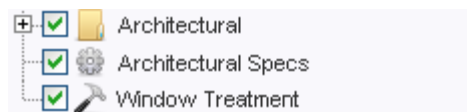
Screen 3.89

Clicking the [Create Folder](#) link will open the folder creation window in the right pane as shown in screen 3.90. A folder name is required. All new folders are placed at the bottom of your list under the project and can be moved once created. Folders can be moved by highlighting the folder and selecting the up or down arrows.



Screen 3.90

When creating a folder you have a choice between Drawings, Specifications and Shop Drawings. Beyond organizational purposes, the only real difference is that the Specifications folder uses a Gear icon, while the Drawings folder uses a normal folder icon and the Shop Drawings folders uses a hammer as shown in screen 3.91.



Screen 3.91

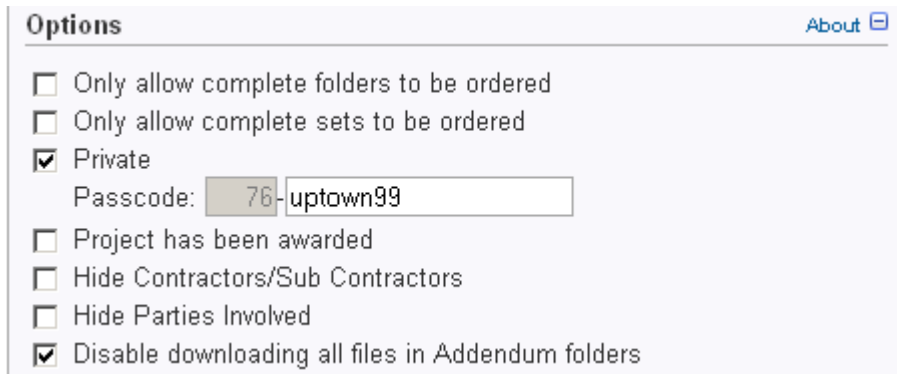
### 3.3.2 Addendums Folder

When creating a project, the Addendum folder is automatically created once any file folder has been issued beyond 100%, as well as the Addendum 1 folder inside of it, as shown in screen 3.92. Also shown is that Addendum 1 has been issued and by doing so will automatically create an Addendum 2 folder.



Screen 3.92

The purpose of the Addendum Folders is to house 8 ½ x 11 documents and/or drawings that are snippets and corrections of your larger files and/or documents. By default all files in these folders are available to be downloaded by anyone and alternatively can be ordered for prints by a customer. To disable any downloading of addendum files you can check the box in the Options heading as shown in screen 3.93. This is also discussed in *section 3.2.2.2*. If there are no addendums added to the addendum 1 folder when it is issued, then it will be removed and an addendum 2 folder will be created. If you added files to the addendum 1 folder it will remain with the addendum file attached and when issued the software will then create an addendum 2 folder.



Screen 3.93

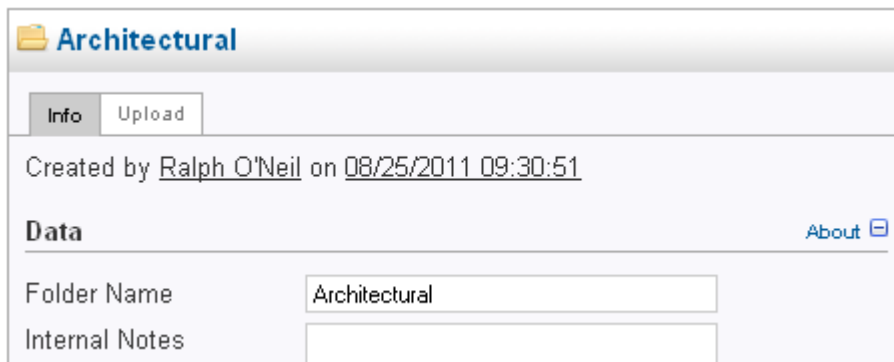
**This software is not a file sharing program. Please do not abuse the addendum folders to distribute any files.**

### 3.4 Folder Details

After creating a folder, it will appear in the left pane. Clicking on any folder in the left pane will automatically load the folder details in the right pane.

#### 3.4.1 Info Tab

The Info tab, shown in screen 3.94, will display the creator's name, date and time of this folder. In the Data heading the Folder Name can also be changed here by keying in any new folder name. Data entry into the Internal Notes will only display for those users working on the project, and will not display to the general population.



Screen 3.94

In the Control heading, shown in screen 3.95, the folder can also be deleted by only those that have (2) Folder Captain permissions (see section 3.1). The delete option will not be displayed to anyone not having this permission.



Screen 3.95

The Folder Permissions heading is where the (1) Project Captain or the (2) Folder Captain will add the personnel assigned to the files within this folder and give them the associated permissions. In screen 3.96, Mary Hopps was given (3) Folder Worker permissions. Since this permission was given at the folder level, Mary will have access to all the files within this folder. Keep in mind that permissions can also be given at the file level.



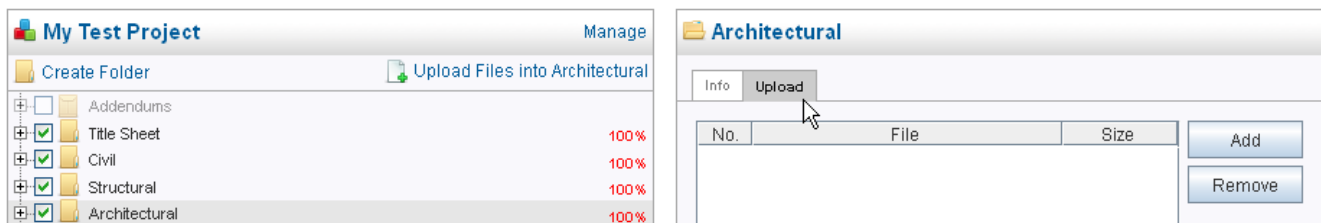


Screen 3.96

### 3.4.2 Upload Tab

As mentioned in the requirements, an up to date version of [Java](#) is required to upload print files. Only files within any one selected folder can be uploaded at one time.

To add files to any folder, within a given project, select the folder in the left pane. In screen 3.97, the Architectural folder was selected by highlighting it from which you will be adding files into it. Next select the [Upload Files into Architectural](#) link or select the [Upload](#) tab.

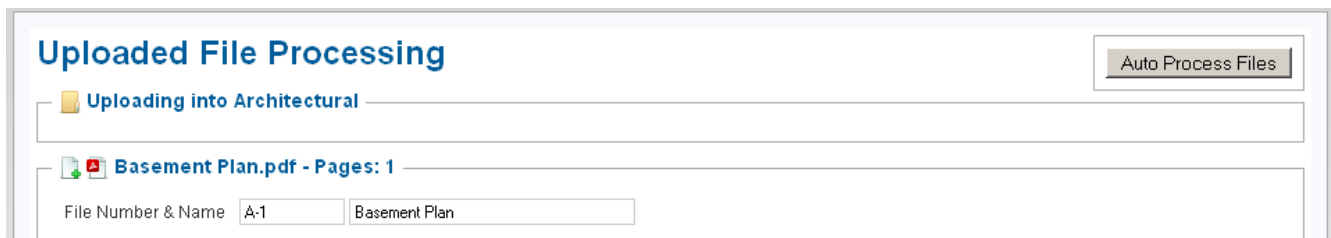


Screen 3.97

When selecting the [Add](#) button your browser will display for you to choose the files that you will be uploading. Once you have added all of the files you want to upload, click [Upload](#) and you will be taken to the [File Processing](#) screen covered in [section 3.5](#).

### 3.5 Upload File Processing

After you click the [Upload](#) button in the Java applet, you are taken to the display as shown in screen 3.98 to process your file(s). It is at this time that you can add the file number, if you choose to do so, or modify the file name. In all cases any changes made will be saved when you select either the [Auto Process Files](#) or the [Process Files](#) button.



Screen 3.98

Keep in mind that changes can still be made even after you process the files by selecting the file itself from the file cabinet. Files will not appear in your project until either the [Auto Process Files](#) or the [Process Files](#) button is selected.

### 3.5.1 Folder Information

The folder you are uploading into is listed up top as well as any potential warnings as shown in screen 3.99.



Screen 3.99

### 3.5.2 Forbidden Files

Any files that you are uploading that the system does not support will be listed at the bottom of all the files. These files are deleted right away and will not process.

Common file types that are acceptable include PDFs, TIFs, DOCs and DWGs. This list is subject to change and a full up to date list is given when a forbidden file is uploaded. An icon for the type of file uploaded will be displayed next to the file name shown in screen 3.100.



Screen 3.100

### 3.5.3 File Options

Depending on the issue state of the folders, and if the system recognizes your file as a replacement, several different options appear. All files uploaded into the software depend on the original naming format of the files uploaded. If the original file name of an uploaded file is changed the software will not recognize it as a replacement file. However you will have the option to select the prompt to; [this file should have replaced..](#), in the Options heading when selecting the file.

#### 3.5.3.1 New File

When adding a file to a folder the software will recognize if this is a new file placed into this folder. Files are folder specific. Adding the same file to another folder will recognize it as a new file as well. Shown in screen 3.101 is the icon identifier for a new file. Hovering over the icon will display what type of file it is.

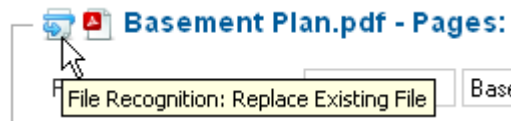


Screen 3.101

#### 3.5.3.2 Replace Uploaded File

The software bases its file recognition based solely on the original filename. Even if you give a file a new name in the software, it remembers the name that was originally uploaded. Shown in screen 3.102 is the icon identifier for replacing an existing file. Hovering over the icon will display what type of file it is. Replacing a file depends on the folders issue percentage. If the folder is at 0% then the file will automatically be replaced. If the folder is at any percentage above 0% then the file will be placed in the file tank until the folder is further issued. If the folder is at 100% then an addendum will need to be issued for the file to be

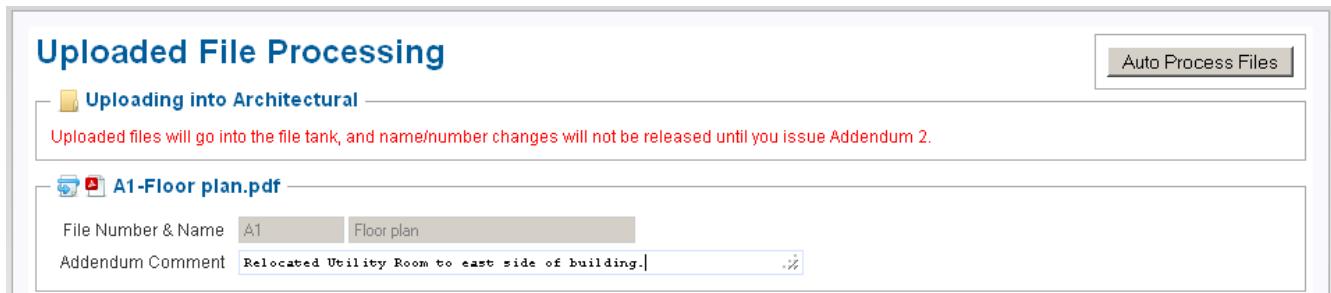
replaced.



Screen 3.102

### 3.5.3.3 Addendum Comment

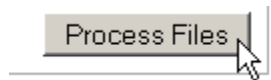
The file's addendum comment can be added when you upload the file, as shown in screen 3.103. However it can later be changed in the files Modifications tab when you select the file from the file cabinet as described in *section 3.2.2.2*.



Screen 3.103

### 3.5.4 Process Uploaded Files

To accept any changes you've made, click on either the Auto Process Files located at the top right of the screen or the Process Files in the lower right of the screen shown in screen 3.104.



Screen 3.104

### 3.5.5 The File Tank

While a folder remains un-issued (i.e. has a 0% submittal percentage) new files and replacement files are swapped and ready for public display immediately.

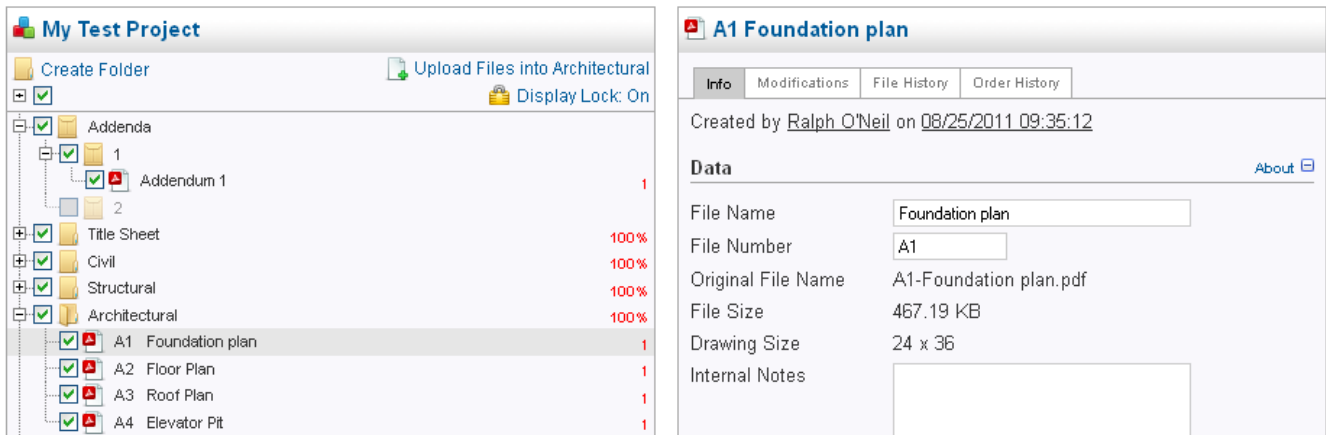
When a folder is issued in any manner, new and replacement files enter the file tank. The file tank will not release the files it holds until the folder is issued or an addendum is made. Issuing an addendum only affects folders with a 100% submittal percentage. When viewing the file cabinet, a tiny red flag indicates that the file has a replacement waiting in the file tank as shown in screen 3.105.



Screen 3.105

### 3.6 File Details

Selecting any file in the left pane will load its details on the right pane as shown in screen 3.106.



Screen 3.106

### 3.6.1 File Info Tab

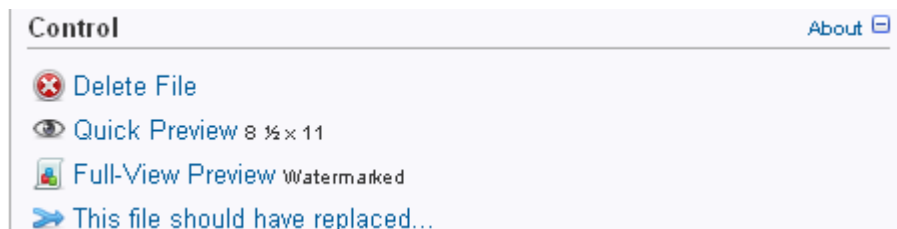
When the [Info](#) tab of a file is selected, as shown in screen 3.106, the creator of this file, as well as the date and time, will be displayed.

#### 3.6.1.1 Data

This is the information that was keyed in when the original file was uploaded. It is here, in the [Data](#) heading, that you can modify the files name and number. This is the information that will be displayed to the general public. Internal notes can also be included here for this specific file which is shown in screen 3.106. Internal notes are not displayed to the public.

#### 3.6.1.2 Control

The [Control](#) heading is only displayed to those that have permissions to use those functions as shown in screen 3.107.



Screen 3.107

The [Delete File](#) is displayed if the person viewing this file has permissions to do so.

The [Quick Preview](#) forces the file down to a normal 8 ½ x 11 size. Depending on the settings at the project level, this file may or may not be watermarked. You can select this option here to view this file.

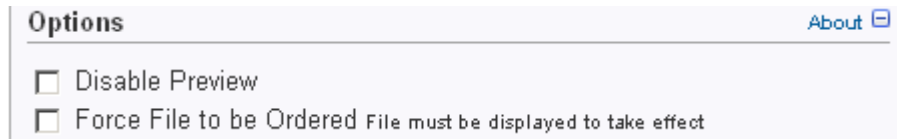
The [Full-View Preview](#) will display the whole file; however it will always be watermarked.

The [This file should have replaced...](#), option is for files that were downloaded into the folder that should have replaced an already existing one. This happens when the original file name was modified from the original downloaded name.

#### 3.6.1.3 Options

In the [Options](#) heading, shown in screen 3.108, the [Disable Preview](#) can disable this or

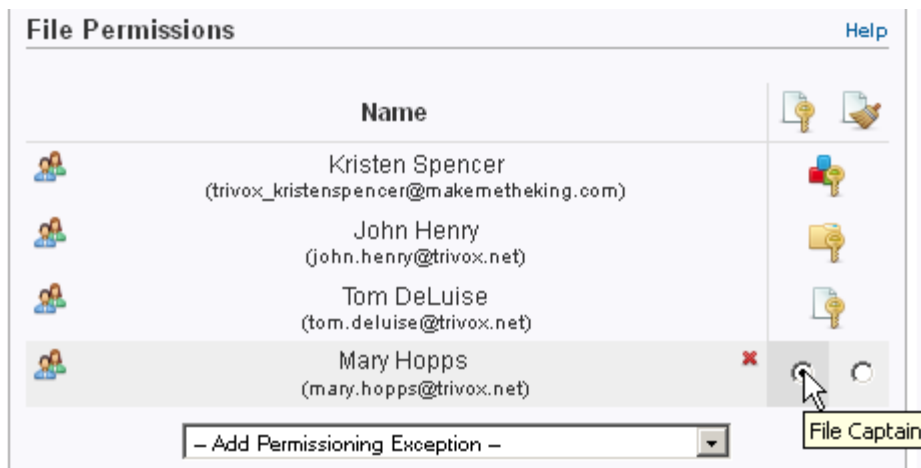
any specific file from being viewable while the enable preview link is turned on in the Manage Project Options heading. This option will only appear if the project Option heading, Enable “Preview” Links on all files in drawing and spec folders, has been turned on. The Force File to be Ordered option allows one to make sure this file is included in every set that is ordered. This is usually the title sheet.



Screen 3.108

### 3.6.1.4 File Permissions

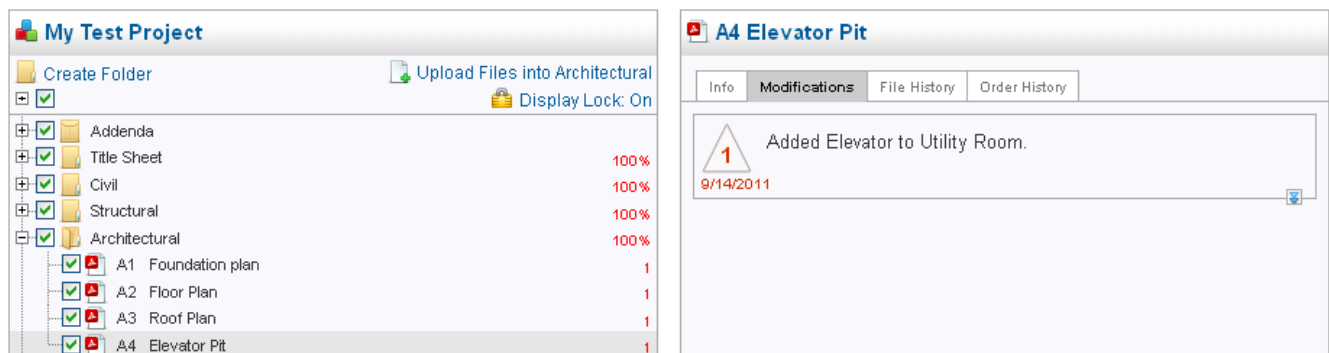
See *section 3.1* for further explanations of the folder and file permissions. As shown in screen 3.109 we have further defined the permissions at the file level in that we added Mary Hopps to have permission to work on this file at the (4) File Captain level.



Screen 3.109

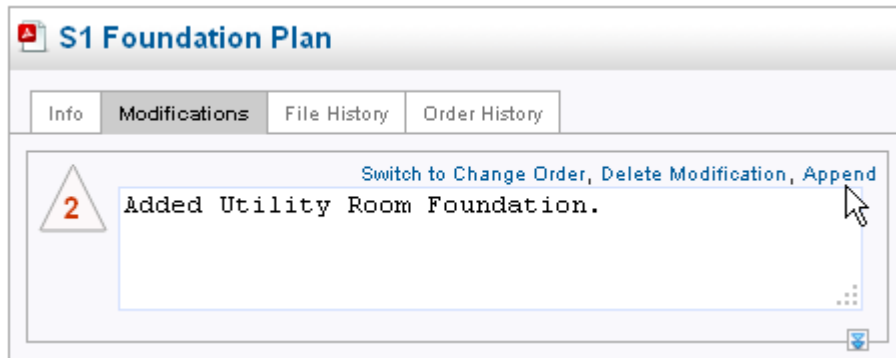
### 3.6.2 Addendums Tab

Addendums to a file will be displayed here when selecting the Addendums tab. The comment associated with an addendum will be editable, but will lose that feature once the addendum has been issued and released. In screen 3.110 addendum 1 has been issued for sheet A4 on 9/14/2011.



Screen 3.110

If the addendum has not been issued the screen 3.111 will display allowing you to append (edit) the addendum before it is issued. Also note that the date is not displayed.

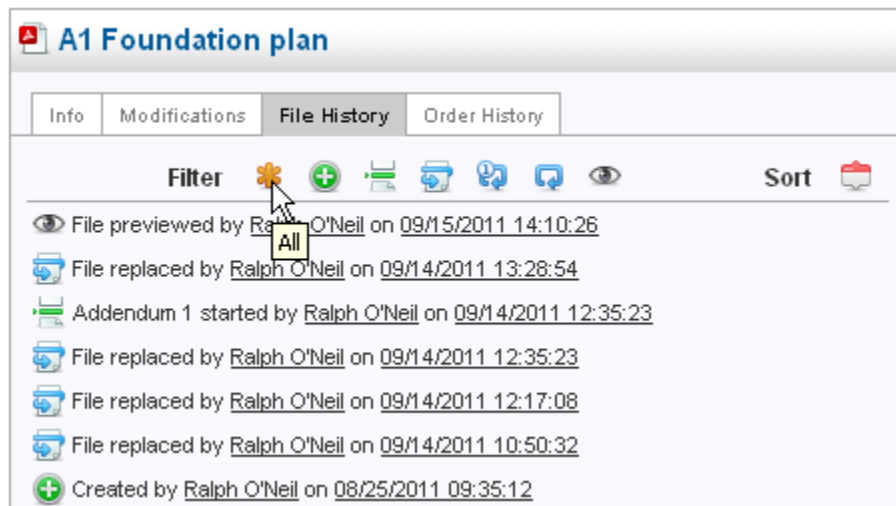


Screen 3.111

For more information on addendums see [section 3.2.2.2](#).

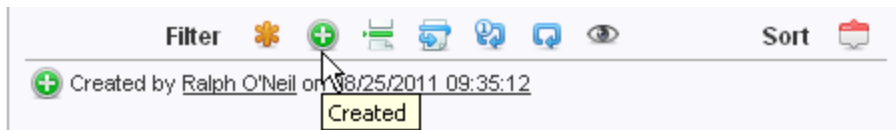
### 3.6.3 File History

The File History tab will show you when an action was taken against any file. In screen 3.112 we selected the Foundation Plan and showed All the actions of this file. Hovering over any icon will display that options function. The sort options will sort first to last and last to first.

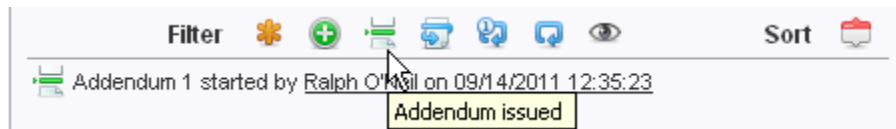


Screen 3.112

Shown below is the file Created icon indicating when the file was created.



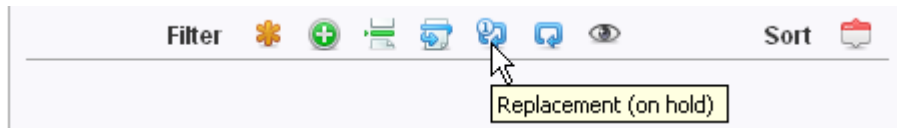
The next icon shows when Addendums were issued.



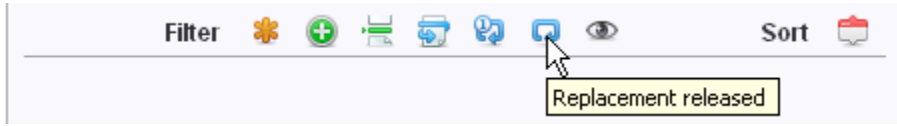
The next icon indicates when this file Replaced the existing file.



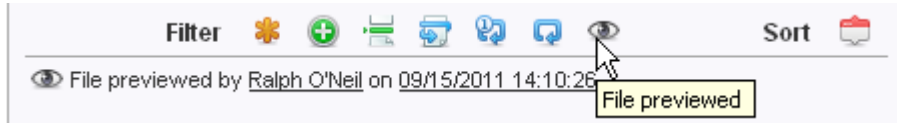
The next icon indicates if the file has been replaced but is on hold until released.



The next icon indicates when the replacement file was released.

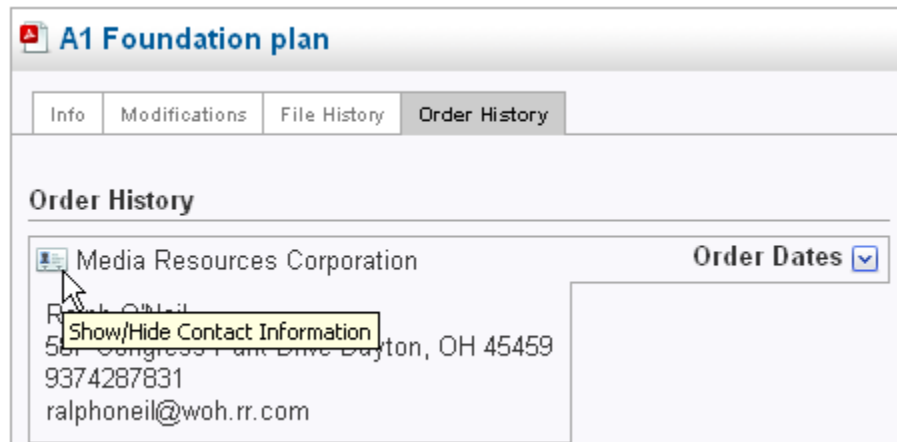


The last icon shown every time this file was Previewed and by whom.



### 3.6.4 Order History

Similar to the order history displayed at the project level (*section 3.2.2.7*), this Order History tab will list only the specific history of the file selected as shown in screen 3.113.



Screen 3.113

## 3.7 File Organization

A familiar drag and drop system is in place in the file cabinet. This will allow you to organize your files within your folders. Permissioning does apply here, see *section 3.1*.

Some users may have trouble dragging in precise movements, so keyboard shortcuts are available. First, select the file you wish to move (it will gain the gray background and then press the Up or Down arrows on the keyboard. This will move your file one space up or down within the confines of its parent folder.

Another thing to remember is that the drag and drop will not function if a folder is issued beyond 0%. Files can be interchanged (drag and dropped) between folders if they are at 0% and have not as yet been issued. See *section 3.2.2.1*.

The checkboxes next to each file denotes visibility as shown in screen 3.106. If you want a file or folder to be invisible to the general population, uncheck it. Also note that some files do not have the ability to be checked as yet. They will become visible once a relative issue or addendum is released.

## 4 Project Browser

To order prints you have two ways to get to the [Project Browser](#) when you first log in depending on whether you log into the supply side or the reprographic side. In the first scenario you may have to select the Reproduction Graphics link as shown in screen 4.0.



Screen 4.0

Or you may go directly to the [Project Browser](#) as displayed in screen 4.1. To get to the list of projects select the [Project Browser](#).



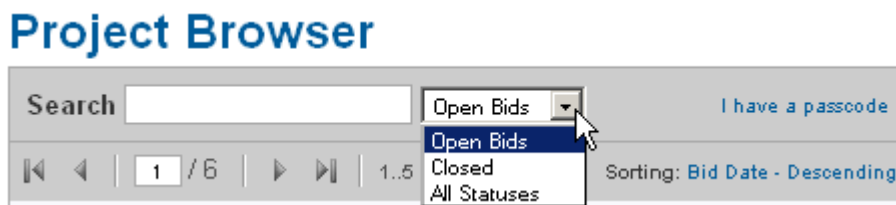
Screen 4.1

### 4.1 Filtering

If you are looking for a specific project, more than likely it may not be in the first 5 projects listed by default. Searching and sorting will help you find the project you are looking for.

#### 4.1.1 Searching

The text entered in the search box, shown in screen 4.2, will search against a project's name or the Engineers name as well as any other data set by the project's manager, including any search terms that may have been entered.



Screen 4.2

The drop down, shown in screen 4.2, which defaults to Open Bids, will filter your search based on the selected value. Open Bids will list all projects whose Bids Due date has not passed. Closed Bids will list all projects whose Bids Due date has passed. And of course, All Statuses will list every project, regardless of the Bids Due date.

#### 4.1.2 Private Passcode

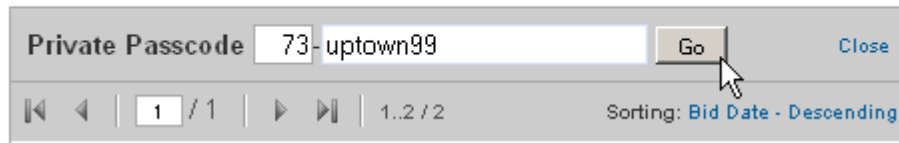
If the project is private, by invitation only, then the project manager will give you a passcode. As an example we will use *73-uptown99*. The first part of the passcode will



always be purely numerical and cannot be changed by the project manager. The second part is set by the project manager. This screen is accessed by selecting the, [I have a passcode](#), link located to the right of the search box, as shown in screen 4.2, when you first entered the [Project Browser](#).

When selecting the link, [I have a passcode](#), screen 4.3 will display for you to enter the passcode given to you. The first box is where the numerical digits go. Per our example, we would place 73 here. The second box will be the portion after the dash, the passcode phrase. Per our example we would place the word uptown99 here.

## Project Browser

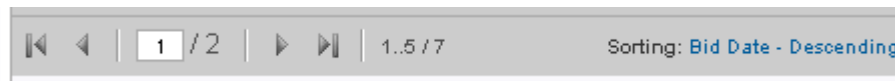


Screen 4.3

After pressing the Go button the project list will filter to display your project, assuming the values you input are correct. To go back to the regular search, just click [Close](#) to the right of the Go button. Also note that a blank passcode will never display the desired project, but will only return the public projects.

### 4.1.3 Sorting

If your search lists more than 5 projects, pagination comes in to play. The pages can be navigated with the [First](#), [Previous](#), [Next](#) and [Last](#) buttons, as well as a manual page switch field for convenience. This is shown in screen 4.4.

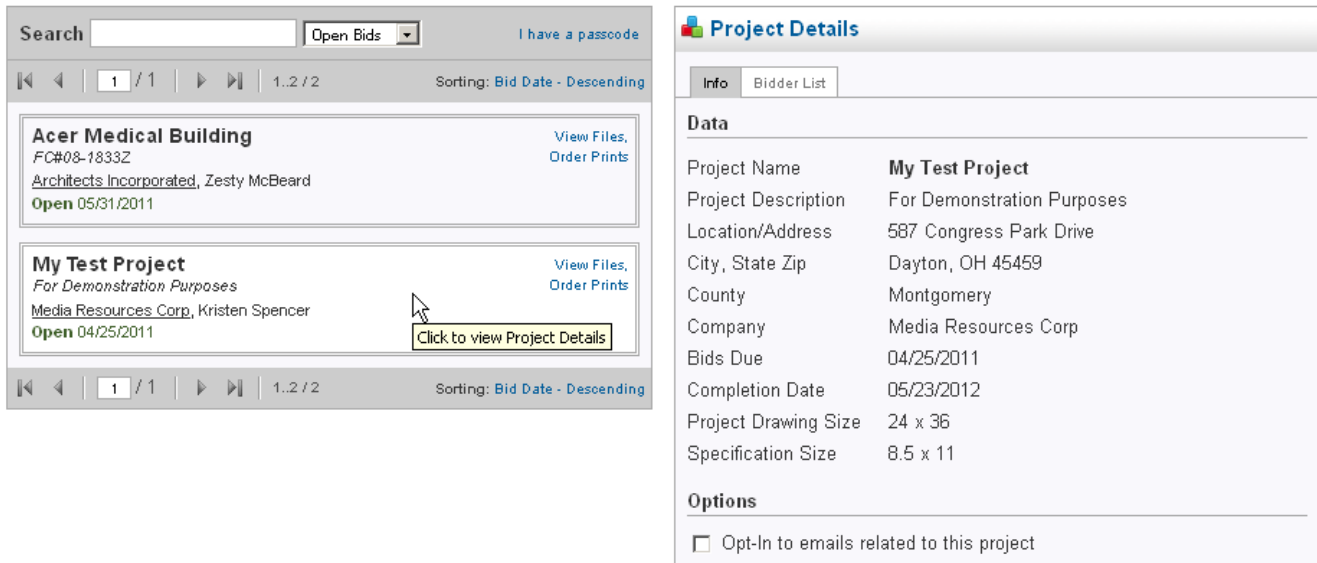


Screen 4.4

You can then sort based on the bid date. [Bid Date – Descending](#) will list the project in a “Last in, First out” manner. Clicking on this link will filter the list again, but this time into a “First in, First out” manner, entitled [Bid Date – Ascending](#).

## 4.2 Project Details

Assuming your search has returned results, you are presented with any number of projects to choose from. Clicking anywhere in the box will load a more detailed result in the right pane as shown in screen 4.5. This will default to the [Info](#) tab and the [Data](#) and [Options](#) headings when selected.

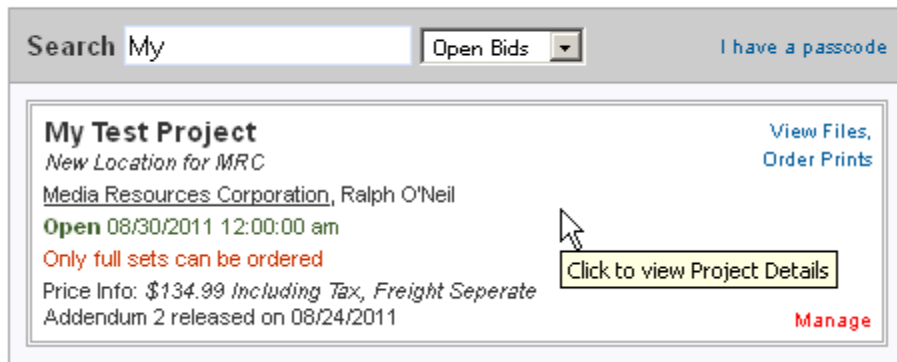


Screen 4.5

If you order files, you will automatically be added to a list to receive emails about the project (addendums, correspondence, etc.) sent by a project manager. If you wish to receive such emails, without ordering any prints, you may do so by checking the box next to the Opt-In to emails related to this project option shown in the screen 4.5 located at the bottom of the right pane under the Options heading.

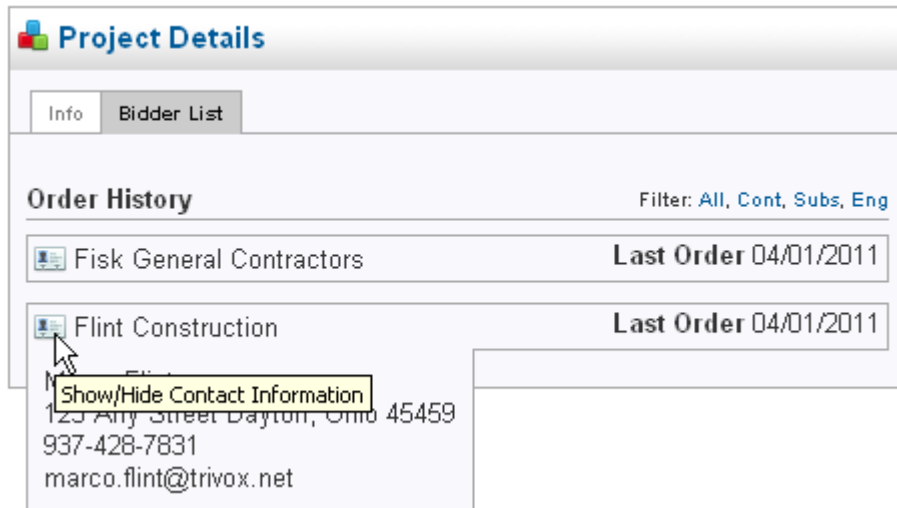
If the print house has given a project any special pricing information, as shown in screen 4.6, it will display at the bottom of its entry.

## Project Browser



Screen 4.6

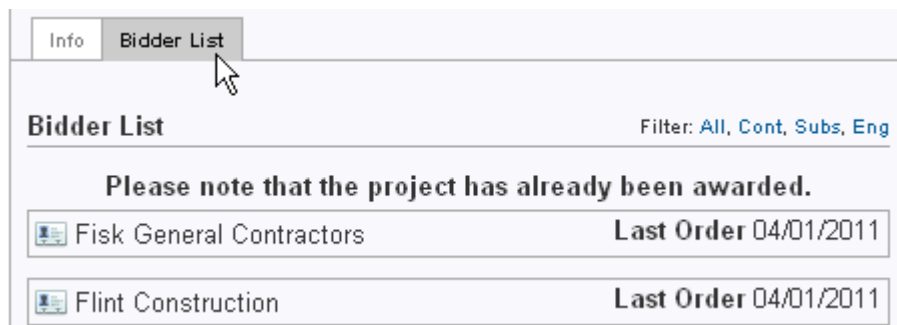
To view a list of bidders select the Bidder List tab and the list will display, shown in the right pane of screen 4.5. You can filter the list by selecting All, Contractors, Sub-Contractors or Engineers. **If you order prints you will be added to this list under the heading listed in your profile when you registered.** To view the profile of any bidder, select the icon next to the name as shown in screen 4.7. Select it again to un-display the information.



Screen 4.7

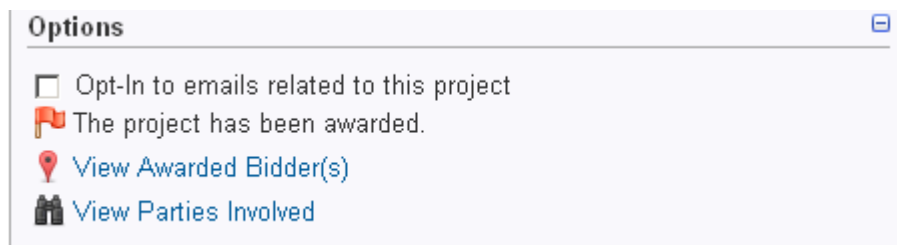
The Bidder List tab will only display if the project manager did not select the option to Hide Contractors/Sub-Contractors.

If the project has been awarded, as shown in screen 4.8, you will see the prompt; “Please note that the project has already been awarded.”



Screen 4.8

To view the List of Awarded Bidder(s) select the Info tab (as seen in screen 4.9) and then select the link to [View Awarded Bidder\(s\)](#), under the Options heading shown in screen 4.9.



Screen 4.9

When you select the [View Awarded Bidder\(s\)](#) screen 4.10 will display the awardees.



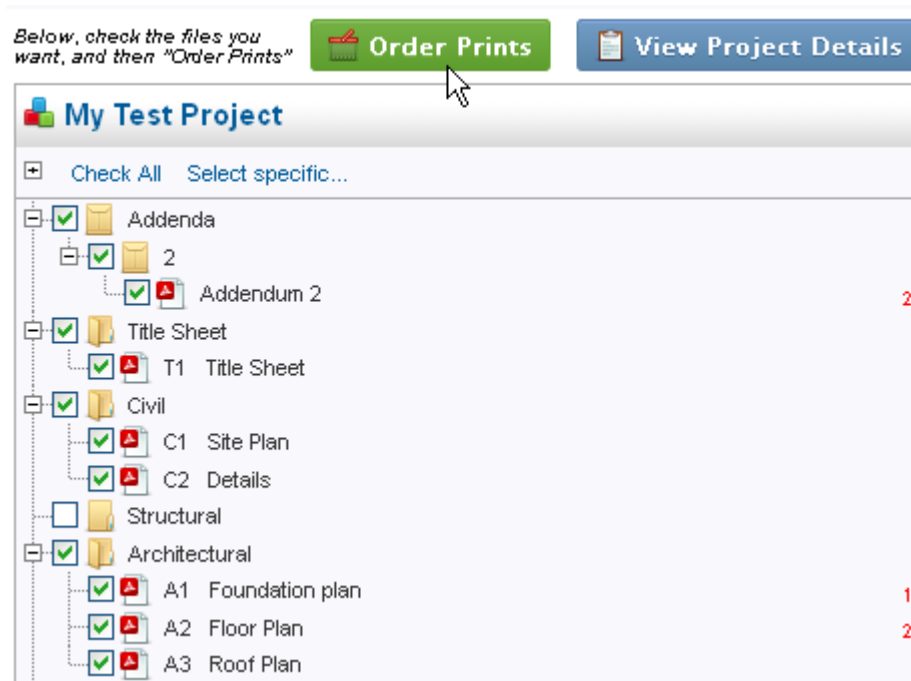
Screen 4.10

To load a project's files, click on the [View Files, Order Prints](#) link, shown in screen 4.11.



Screen 4.11

When this is done the browser (left pane) is replaced with the Project File Cabinet as shown in screen 4.12.



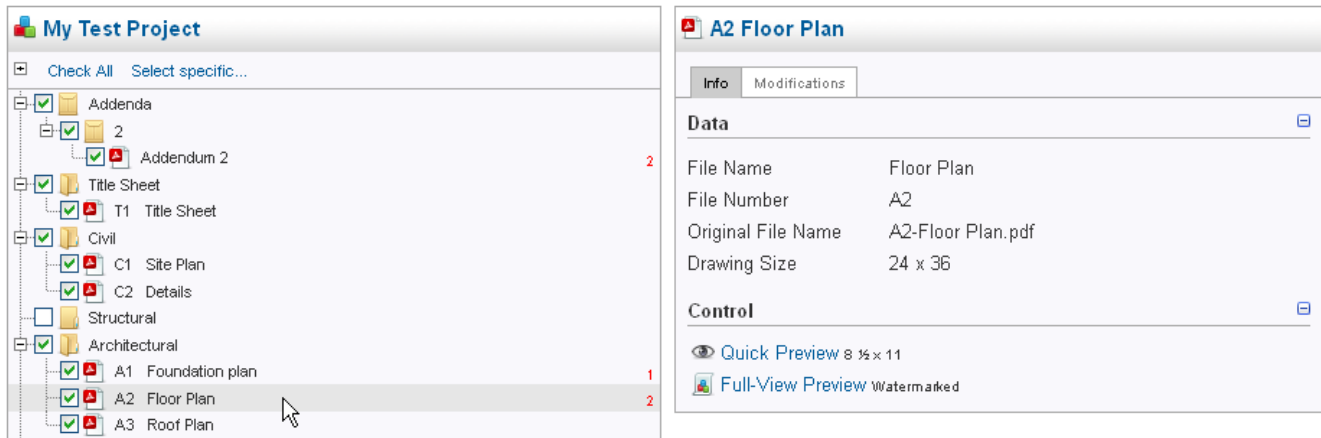
Screen 4.12

### 4.3 Project File Cabinet

After clicking on [View Files, Order Prints](#), as shown in screen 4.12, you can begin to use the checkboxes to the left of each file and folder to specify which files you would like to order. However, if the project manager specifies that only full sets can be ordered, every file will be checked by default, and permanently so.

Red numbers to the right of a file indicate that an addendum has been released involving that file as shown in screen 4.12 and 4.13.

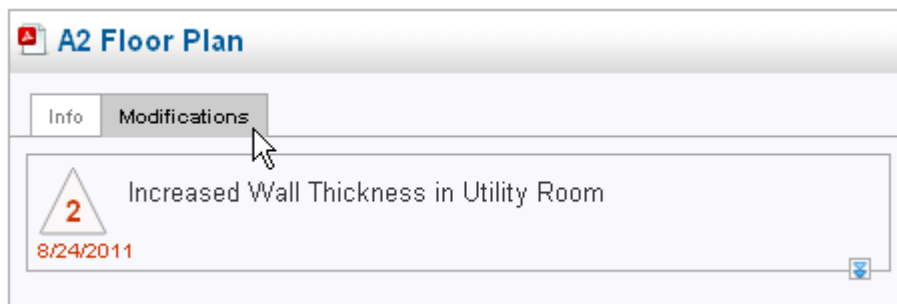
Clicking on any file name in the left pane will display a detailed look at the file in the right pane, as shown in screen 4.13, under the Info tab.



Screen 4.13

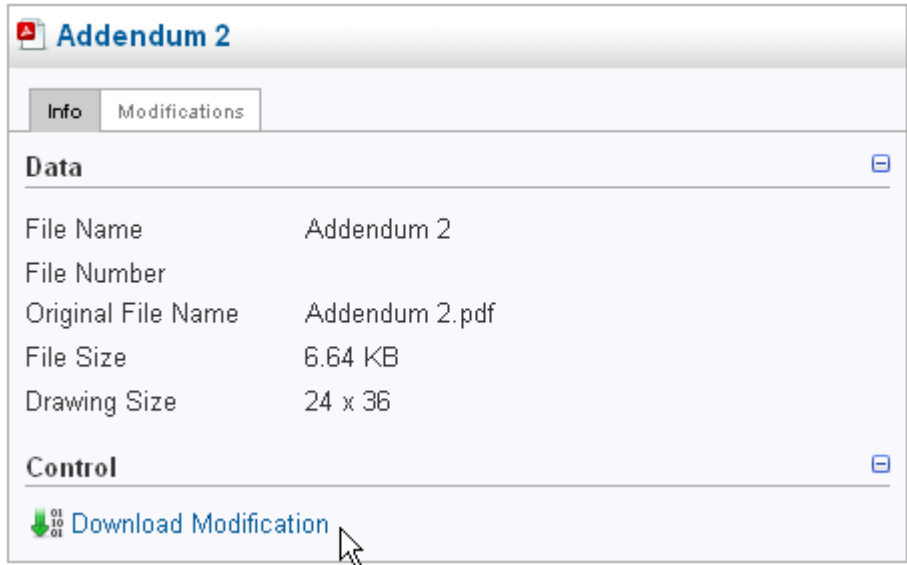
In some cases you will be able to Preview a file, located under the Control heading. The types of files that can be previewed are limited. Only PDFs, and in some instances TIFs, can be previewed.

The Modifications tab will also inform you of any modifications made to the file and its related comments as shown in screen 4.14.



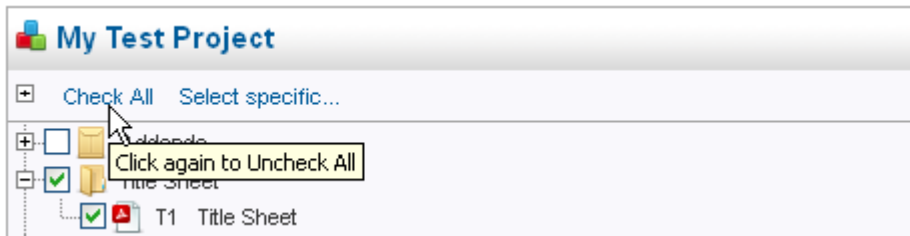
Screen 4.14

Files in the Addendum folder can always be downloaded at your leisure and shouldn't need to be ordered. If you ordered prints or selected the opt-in option you will receive an email informing you of all addendums related to any given project. The project manager, however, has the ability to disable downloading and it may require you to order prints of these files. This downloading of addendum files is located under the Control option as shown in screen 4.15.



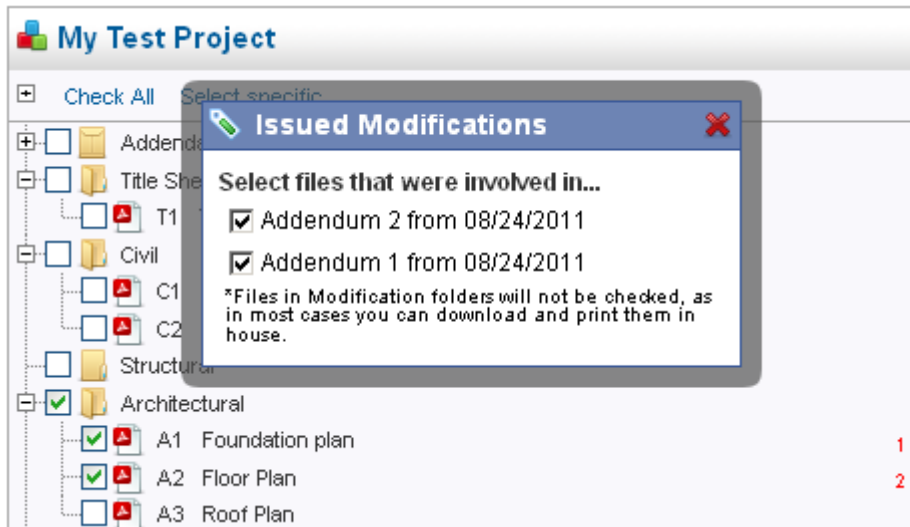
Screen 4.15

If the project manager allowed individual files to be ordered you can select them individually or if you wanted all the files printed then you could select the [Check All](#) option as shown in screen 4.16.



Screen 4.16

If you only wanted specific files to print that were modified by addenda or other specific modifications then you could select the [Select specific...](#) option and check the modification that you want the prints of. Keep in mind that you can select more than one of the modifications. This is shown in screen 4.17.



Screen 4.17

## 5 Order Form

When the files that you want printed are checked select the [Order Prints](#) button as shown in screen 4.12. When this is done screen 5.0 will display.

The order form will display with the majority of the information pre-populated based on known data when selected.

### Order Form

HOME

#### Order Information

Requested By \*  PO:Request #  Date Due & Time

Delivery Method  Bill To  Payment Type

#### Requester Information

Company \*  Attention  Email

Address \*  City, State Zip \*  Phone \*

#### Order Options

# Of Copies

Size †

Spec Size †

Bind

Spec Bind

Media

# of Dwg's ‡

# of Spec's ‡

Type

Burn to Disc  Yes

#### My Test Project

- ✖ Title Sheet
  - ✖ Title Sheet
- ✖ Civil
  - ✖ Site Plan
  - ✖ Details
- ✖ Structural
  - ✖ Foundation plan
  - ✖ Floor Plan
  - ✖ Roof Plan
- ✖ Plumbing
- ✖ Mechanical
- ✖ Electrical
- ✖ Architectural Specs

#### Special Instructions

† Documents and 8 1/2 x 11 PDF's will be printed in their formatted sizes unless instructed otherwise.

‡ Number of Drawings and Specs are subject to change based on the actual number of pages in the files.

[Cancel Order](#)

Screen 5.0

If the project is not set to full sets only, you may remove individual files if you decide not to print them using the small red **x** to the left of the folder and file icons.

Also you need to fill in the [Order Options](#) prior to submitting the order.

## End of User Documentation

\* \* \* \* \*