

ProjectDox Online: A User's Guide

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Logging into the System

Overview

This section describes how to login to ProjectDox and how to setup a username and password.

Receiving Project Invitations

When you have been invited to a project, you will receive an email containing your login information and information about the project, including a link to the project.

1. Click the “Login to ProjectDox” link in your invitation email.
2. If you are a new user, your email will include a temporary password. Please make a note of it.
3. Continue to follow the steps in the next section, “Logging into the system.”

Invitation

Hello Test, Applicant:

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

Login:	dox.applicant@gmail.com
Temporary Password:	5FB67AD
Project:	Development Project (DSHAVER)
Group:	Applicant
Invited by:	Shaver, Debbie
Project Owner:	Shaver, Debbie
Owner's Email:	debbie.shaver@cincinnati-oh.gov
Login to ProjectDox	

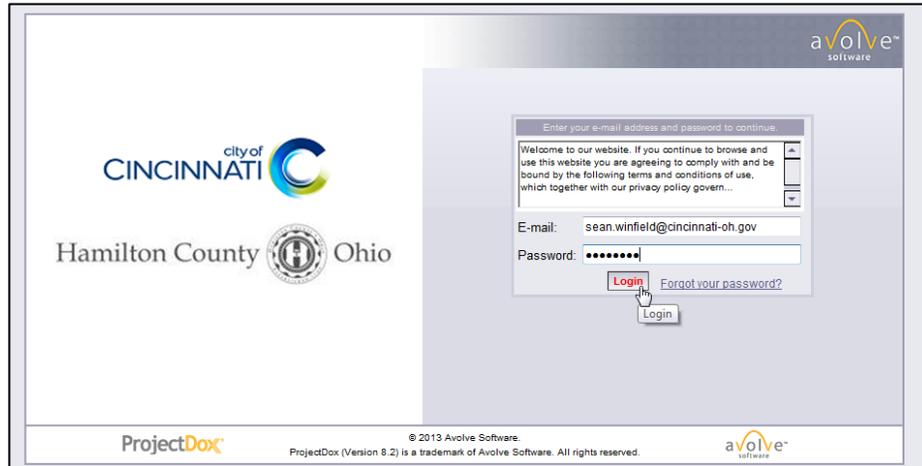
Contact the Project Owner or a Project Administrator if you have questions regarding this project. Please do not reply to this email.

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Logging into the System, Continued

Logging into the System

At the login screen, enter your email address and your password (or the temporary password from your email if this is your first time logging in to the system), then click the “Login” button.



First-time login

If this is the first time you have accessed the ProjectDox site, the user Profile Information screen displays. Enter all required fields including your new password, security question, and security answer as well as any other required fields with colored highlighting.

After entering all required information, click the “Save” button in the middle of the screen.

Profile Information

Contact Information | User Metadata | Project Membership | Group Membership

Save

* Required field

First Name: *	Test	Last Name: *	Applicant
Email: *	dox.applicant@gmail.com	<input checked="" type="checkbox"/> HTML format <i>i</i>	
Title:			
Company:			
Address 1:			
Address 2:			
City:			
State/Province: <i>v</i>	Postal Code:		
Phone:		Fax:	
Mobile:		Pager:	
Stamps:	<i>i</i>		
Language: *	en		

Using the System – Viewing Project Folder and Files

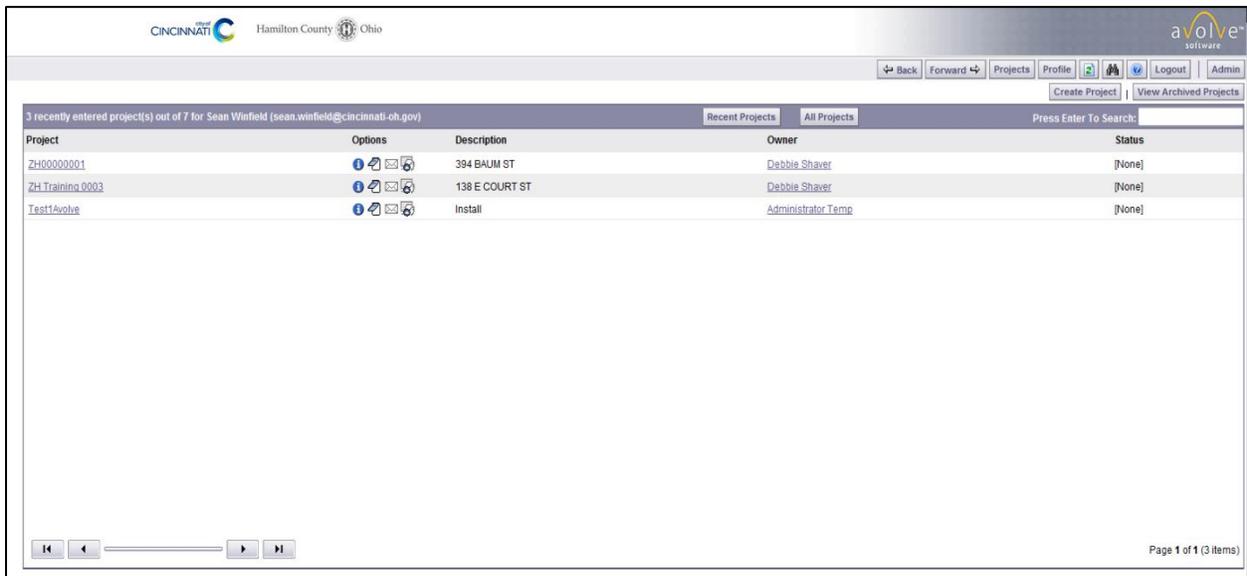
Overview

This section describes how you can access, view, download and upload documents related to a ProjectDox project file.

Viewing Project Folders

After a successful login, you will see the projects page which lists all of the projects to which you have access.

To access the files for a project, simply click the link of the project name. (ex. ZH0000001 in the following picture). If you do not see your project, you may search for it by entering the related case number in the “Press Enter To Search” box.



The screenshot displays the ProjectDox web application interface. At the top, there are logos for CINCINNATI, Hamilton County, and Ohio, along with the avolve software logo. The navigation bar includes links for Back, Forward, Projects, Profile, Logout, and Admin. Below the navigation bar, there is a search bar with the text "3 recently entered project(s) out of 7 for Sean Winfield (sean.winfield@cincinnati-oh.gov)" and a "Press Enter To Search:" prompt. The main content area shows a table with the following data:

Project	Options	Description	Owner	Status
ZH0000001	  	394 BAUM ST	Debbie Shaver	[None]
ZH Training 0003	  	138 E COURT ST	Debbie Shaver	[None]
Test1Avolve	  	Install	Administrator Temp	[None]

At the bottom of the page, there are navigation controls (Home, Previous, Next, End) and a page indicator "Page 1 of 1 (3 items)".

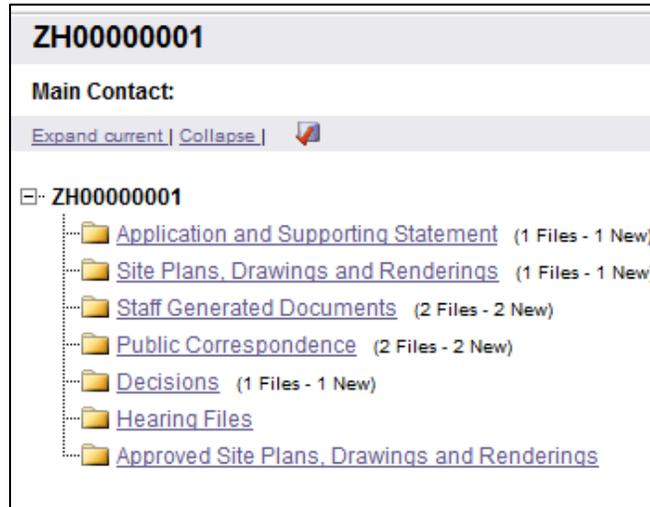
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Using the System – Viewing Project Folder and Files, Continued

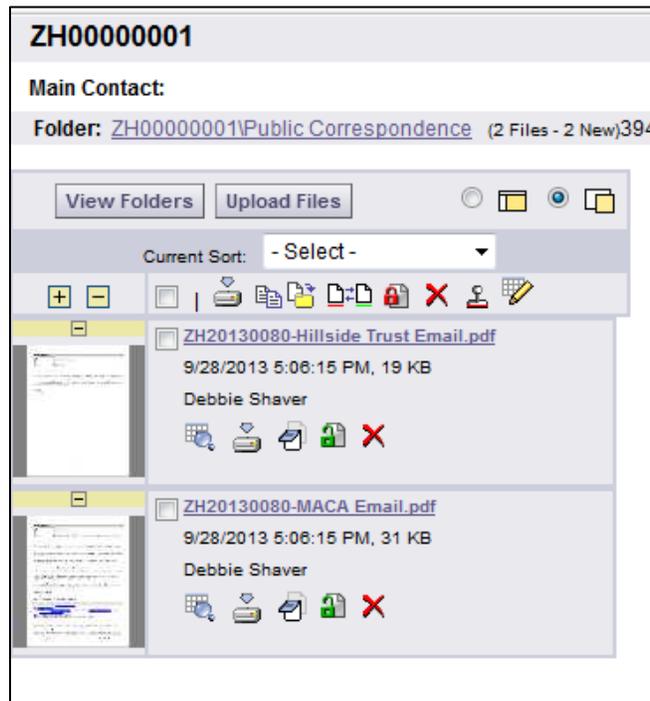
Viewing Project Files

After clicking a project link, you will see all the folders in the project you selected.

If there are files within a folder, you will see the number of files and new files within a folder just to the right of the folder name (e.g. 2 Files – 2 New). In order to view the files in the project folder, click on the folder hyperlink.



You can then view thumbnails of all files located in the folder.

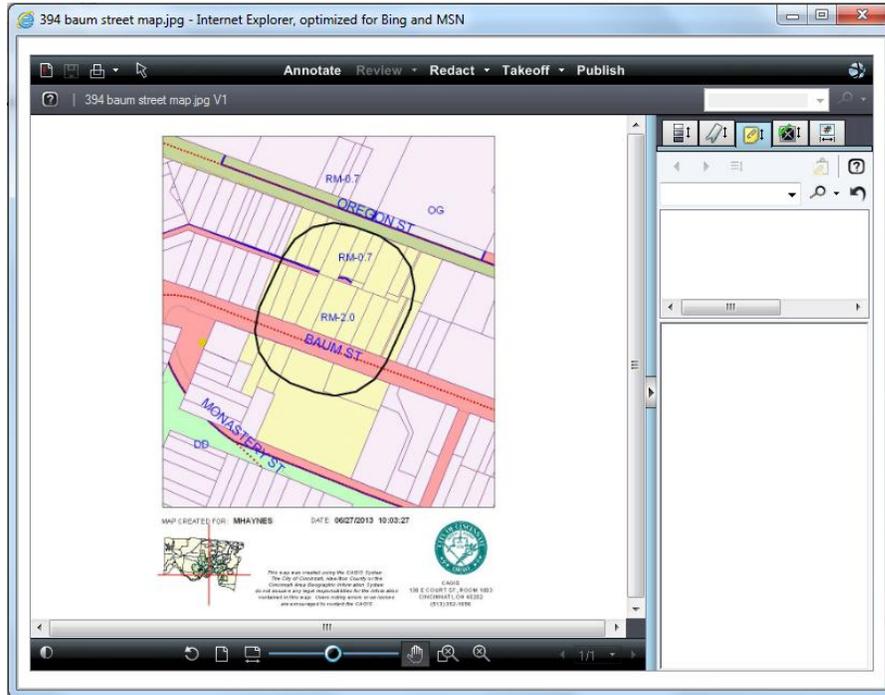


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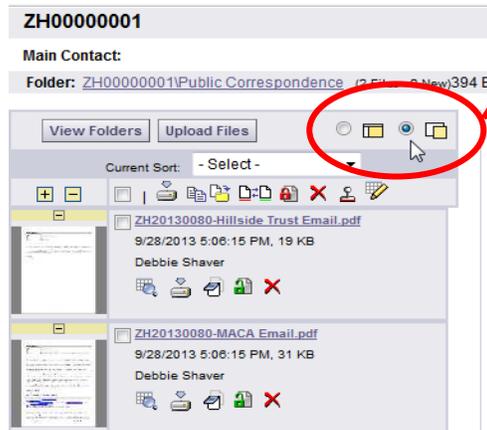
Using the System – Viewing Project Folder and Files, Continued

Viewing Project Files – cont'd

In order to view a thumbnail file in a larger view, either click on the thumbnail or click on the hyperlink of the filename. After clicking the file, a larger view will open up in either the right pane or a separate window.



It is recommended that you change the following setting to allow files to open in a separate window:

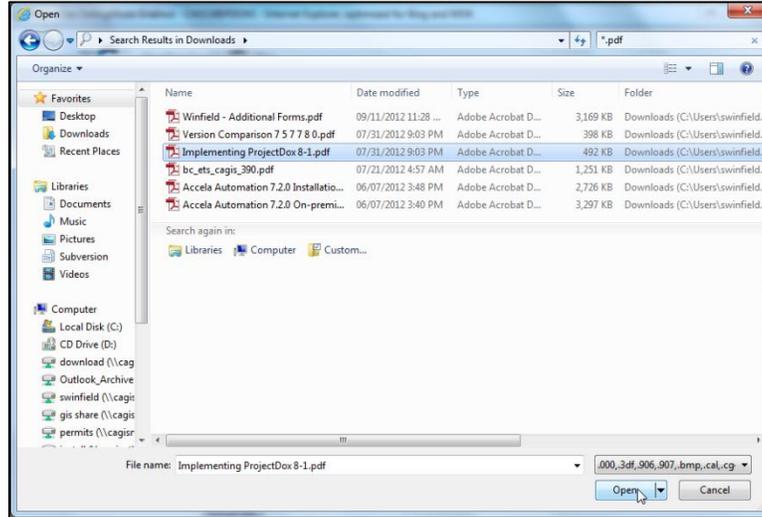


This option opens allows files to open in a separate window.

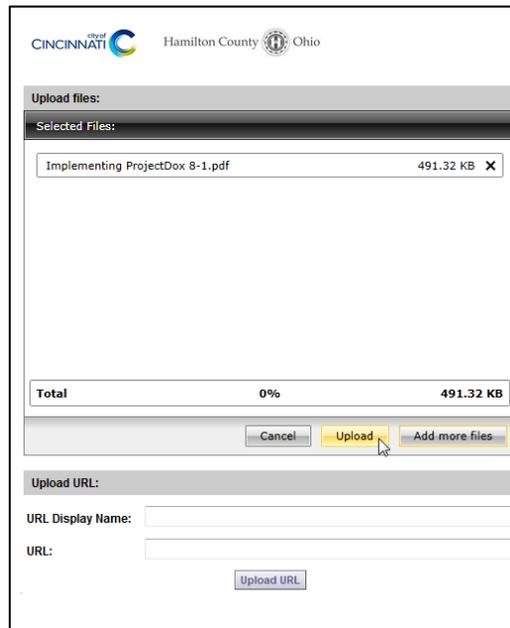
Using the System – Uploading Files

Uploading Files

To upload a file to the system, click the “Upload Files” button. After hitting the button, the browse files window will appear. Navigate to and click the file to select it. Then click the “Open” button.



After selecting the file, it will appear in the upload window. Click the “Upload” button to upload the file to the system.

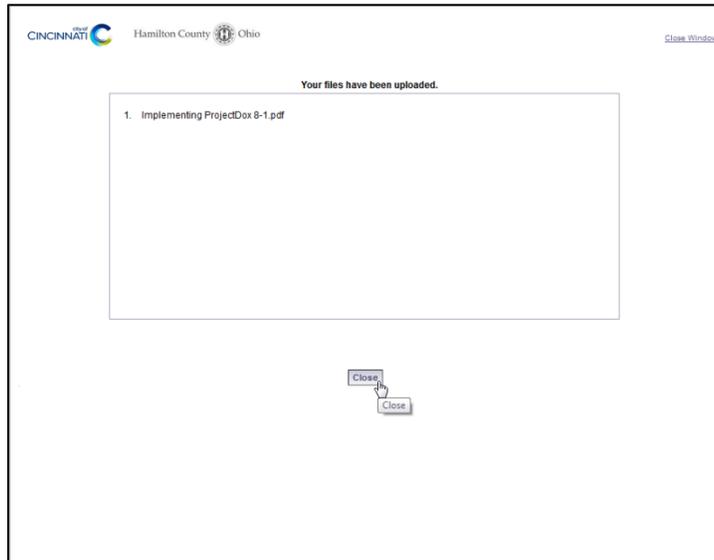


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Using the System – Uploading Files, Continued

Uploading files – cont'd

Once a file is successfully uploaded, you will see a confirmation screen. Click the “Close” button to continue.

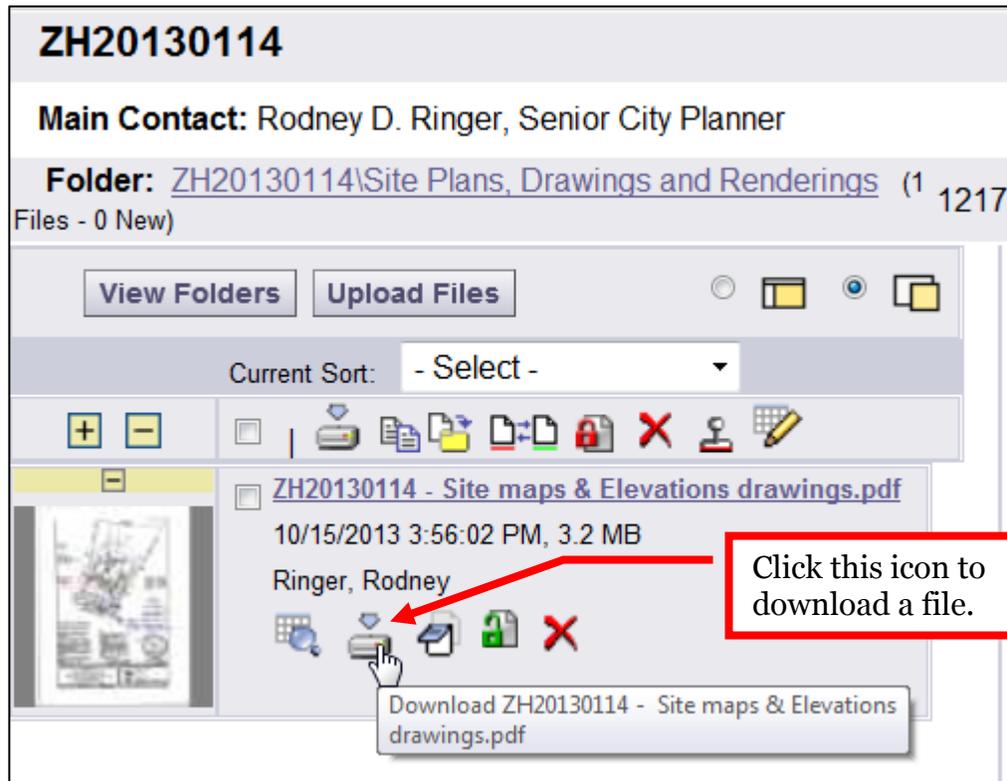


After the system has processed the upload, your new file will appear in the thumbnail view.

Using the System – Downloading Files

Downloading a Single File

To download a file from the system, click on the download button  located in to the right of the thumbnail of the file you wish to download.



Depending on your browser, you should receive a download notification. Save the file to your desired location. Once the file is saved, double-click the file to open it and view it.

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Using the System – Downloading Files, Continued

Overview

If you want to download files within a folder, you have two options:

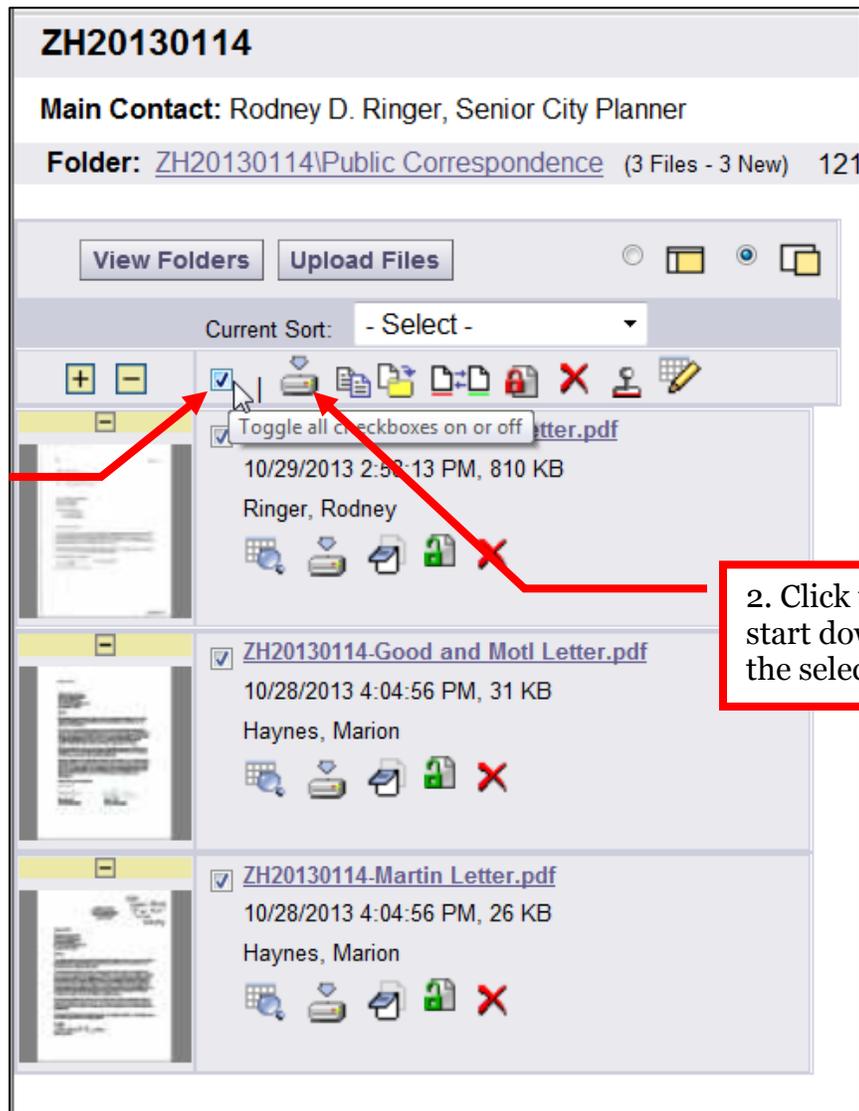
- Download all files at once
- Download specific files

This section outlines both methods.

Selecting All Files in a Folder for Download

If you want to select all the files in a folder for download with a single click, place a checkmark in the toggle box at the top of the file list.

1. Click this toggle box to select all the files within the folder for download.



2. Click this icon to start downloading the selected files.

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Using the System – Downloading Files, Continued

Selecting specific files in a Folder for Download

If you want to select specific files in a folder for download, place a checkmark in the toggle box next to each file. , then click the download button at the top of the file list.

ZH20130114

Main Contact: Rodney D. Ringer, Senior City Planner

Folder: [ZH20130114\Public Correspondence](#) (3 Files - 3 New) 1217

View Folders Upload Files

Current Sort: - Select -

File Name	Date	Time	Size	Sender
<input checked="" type="checkbox"/> ZH20130114-Association Letter.pdf	10/29/2013	2:58:13 PM	810 KB	Ringer, Rodney
<input type="checkbox"/> ZH20130114-Good and Motl Letter.pdf	10/28/2013	4:04:56 PM	31 KB	Haynes, Marion
<input checked="" type="checkbox"/> ZH20130114-Martin Letter.pdf	10/28/2013	4:04:56 PM	26 KB	Haynes, Marion

1. Place a checkmark in the boxes next to the files if you want to select specific files to download.

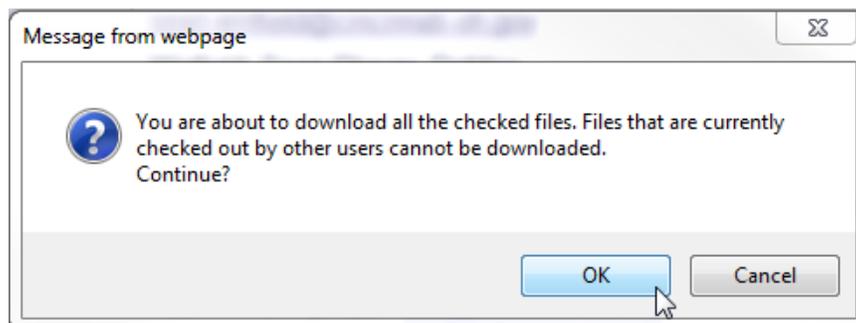
2. Click this icon to start downloading the selected files.

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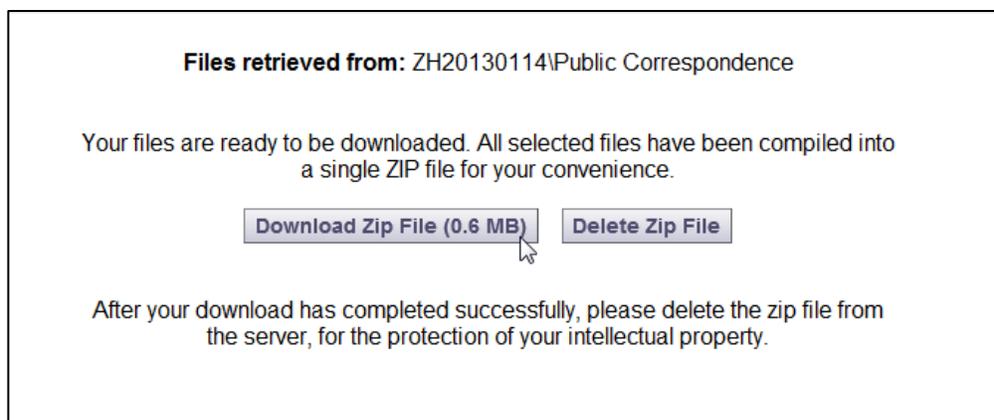
Using the System – Downloading Files, Continued

Finishing the Download

After selecting the files for download and clicking the download button at the top of the file list, you will receive a prompt asking if you'd like to continue downloading. Click "OK" to continue.



You will then receive a message in the right pane. Click the "Download Zip File..." button to continue downloading.



Save the .zip file to your desired location. Then extract the .zip file to view all the selected files.

Troubleshooting Login

Reset your password

If you don't remember your password to login to the system, click on the "Forgot your password" link on the login screen.

The system will prompt you for your Last and First name. After entering that information, click the "Display security question" button to view your security question.

Answer the security question and submit your answer to the system. A new password will be sent to you via e-mail.

For security reasons, your password is encrypted in our database and cannot be decrypted. You can reset your password by answering the security question below. If you answer correctly, you will receive a new, temporary password via email that must be changed next time you login.

Email (login):	<input type="text" value="sean.winfield@cincinnati-oh.gov"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>

Troubleshooting Installation

Overview

This section will cover the configuration requirements that need to be met on your computer in order for you to be able to view files from within ProjectDox.

Browser Support

For ProjectDox version 7.5, **only** Internet Explorer, 32-bit is supported. For ProjectDox version 8.2, Internet Explorer, Firefox, Safari, and Google Chrome are supported.

Disable Pop-up Blockers

ProjectDox uses pop-up windows (browser windows with no toolbars).

If you login but no ProjectDox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You must disable pop-up blocking in your browser to allow the ProjectDox window to open (pop-up blockers allow you to disable pop-up blocking for specified sites).

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Troubleshooting Installation, Continued

Disable UAC (User Access Control)

A User Account Control (UAC), depending on your permission level and computer rights, may prevent you from performing some functions with the ProjectDox Brava Client viewer:

- ✦ During installation, UAC (if on) can prevent the Brava Client from being installed as UAC blocks your ability to write files being downloaded by the browser (Internet Explorer).
- ✦ With the Brava Client installed, UAC (if on) can prevent the Brava Client from saving/writing files to the local file system.
- ✦ During the Brava Client's side loading/processing, UAC (if on) can prevent Brava's client side loading/processing by preventing the Brava Client from writing the temporary output CDL files to the user's temp directory.

To turn off UAC:

1. From the Control Panel, open **User Accounts**.
2. Click the "Turn User Account Control on or off" link.
3. In the "Turn on User Account Control (UAC) to make your computer more secure" options screen, un-check "Use User Account Control (UAC) to help protect your computer" check box.
4. Click "OK" and restart the system.

Note: Your permissions level and computer rights will affect how the UAC works.

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Troubleshooting Installation, Continued

Add ProjectDox Online as a Trusted Site

To add ProjectDox as a Trusted Site, you may first need to make the following changes to your Internet Explorer Security settings:

- On the Trusted Sites Security level settings, set the Zone to Medium or Lower (assuming you're using the default settings for the zone).
- Select OK in the Internet Options Control Panel and restart IE

Access the ProjectDox website and attempt to open the file using Brava. The Brava Client should now install.

Adding ProjectDox as a Trusted Site:

You will need to set your browser security setting to a minimum level that allows certain ProjectDox technologies to function. There are two ways to achieve this. The easiest is to add the ProjectDox site to the list of Trusted Sites of your Internet browser. For IE, follow the steps below:

1. Click on the Tools menu and select Internet Options.
2. In the Internet Options dialog box, click the Security tab.
3. Make sure the Enable Protected Mode is not checked.
4. Click the Trusted Sites icon and then the Sites... button.
5. In the "Add this website to the zone field, type <https://cagisdocs.hamilton-co.org>.
6. Click the Add button to add the site to the list, then click the close button.
7. Close all open dialogs by clicking OK.

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Troubleshooting Installation, Continued

Add ProjectDox Online as a Trusted Site – cont'd

The second option is to enable only the needed technologies without marking the entire site as trusted. Based on the Default Security Level as "High" in Internet Explorer, follow these steps:

1. Click on the Tools menu and choose Internet Options.
2. In the Internet Options dialog box, click the Security tab.
3. In the Security tab, click the Internet icon. If the web site is on your Intranet, click the Local Intranet icon instead.
4. Click on the Custom Level... button.
5. In the Security Settings option list, enable the following options.
6. Run components signed with Authenticode.
7. Download signed ActiveX controls.
8. Run ActiveX controls and plug-ins.
9. Script ActiveX controls marked safe for scripting.
10. File download.
11. Active scripting.
12. Click the OK buttons to close the settings dialogs. Restarting IE is not necessary.

The "Download signed ActiveX controls" option is only needed for the first visit to the site. If so desired, it can be disabled again after the viewer has automatically installed on the first view of a document on the site. The "File download" option only needs to be enabled, if the web site offers downloading of original documents.

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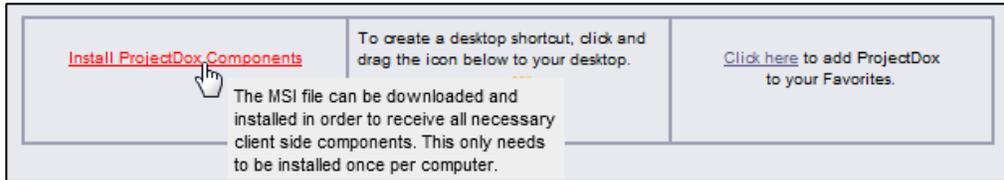
Troubleshooting Installation, Continued

Installing ProjectDox Online Components

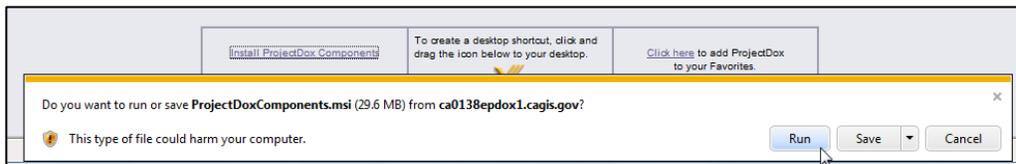
In order to view documents within ProjectDox Online, you must first install the ProjectDox components on your computer.

Click the “Install ProjectDox Components” link at the bottom of the login screen to start the process.

Please note: You must have local administrative rights in order to install these components. If you do not have local administrative rights, or do not know, be sure to ask your organization’s IT helpdesk or IT service professional.



After clicking the link, (and depending on the browser used), you may receive an additional pop-up asking to save or run the file. Be sure to click the “Run” button.



On the initial setup wizard screen, click “Next” to begin the installation process of the components on your computer.

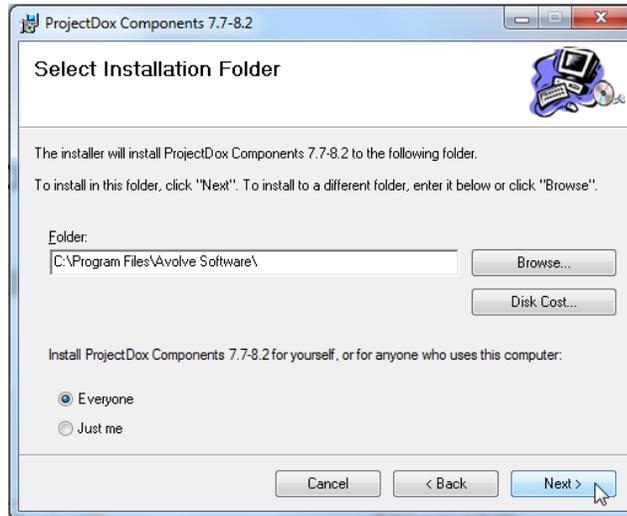


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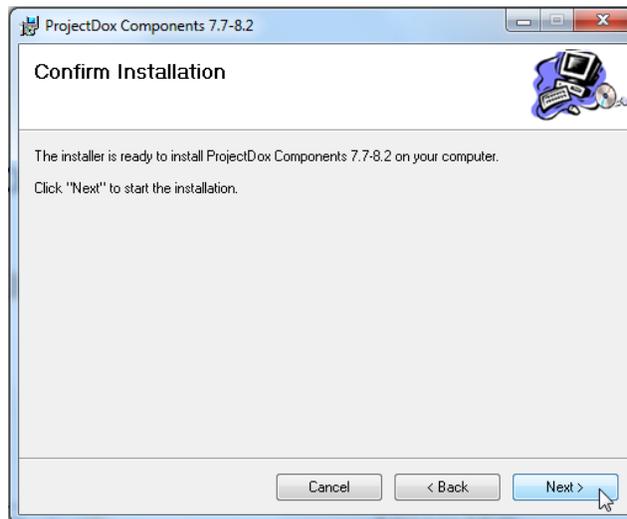
Troubleshooting Installation, Continued

Installing ProjectDox Online Components – cont'd

On the Select Installation Folder screen, select the option for “Everyone” and then click “Next”.



On the Confirm Installation screen, click “Next” to start the installation.

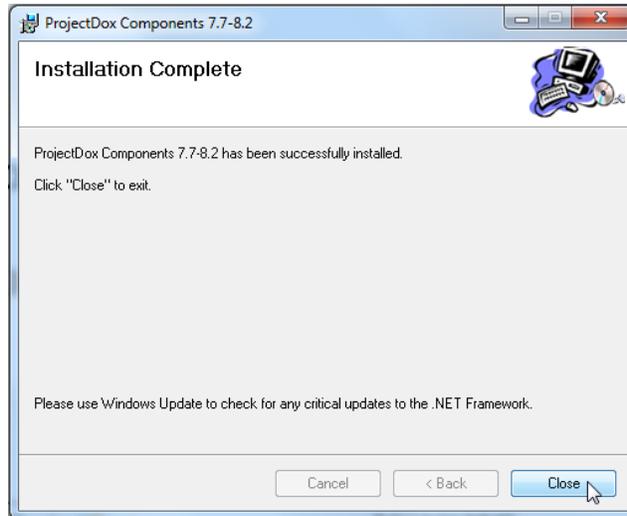


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Troubleshooting Installation, Continued

Installing ProjectDox Online Components – cont'd

Once the installation is complete, click the Close button to finish the installation and prepare to login to the system.



Other questions or issues?

Please call Sean Winfield – CAGIS 513-352-4739, M – F 9am – 5pm.
