

ProjNetSM User's Manual

Version 2.0
August 2006

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Introduction: About This Manual

About This Manual

The ProjNetSM User's Manual was written by Resource Center Enterprises in conjunction with the Engineering Research and Development Center, Champaign,IL (ERDC). The manual is available online on the Whole Building Design Guide website at the following URL:

<http://www.wbdg.org/tools/projnet.php>

The WBDG website is © 2006 National Institute of Building Sciences. Please check the wbdg.org website for updated versions of this manual as new versions are released.

Introduction: Conventions Used In This Manual

Conventions Used In This Manual

The following typographical conventions are used in this guide:

| <i>Text like this:</i> | <i>Indicates:</i> |
|---|-------------------------------------|
| Section #4: DrChecksSM User Roles and Activities | Page Title (Header) |
| 1.1 Using the Call Center | Section Title |
| <i>Contacting the Call Center by phone</i> | Sub-section Title |
| https://www.projnet.org | Web address (URL) |
| Figure 1-1 | Figure Caption |
| You will need to download and install the Macromedia Flash | “Important” box text |
| DocumentControl@state.gov | E-mail Address |
| If you are unsure who the Point of Contact is for your organization, | “Note”/“Tip”/“Info” box Text |
| DrChecks SM User Roles and Activities - Page 26 | Page title and page number (footer) |

The following iconographical conventions are used in this guide:

| <i>An Icon like this:</i> | <i>Indicates:</i> |
|---|--|
|  | Info: Displays additional information regarding topic being discussed |
|  | Important: Alerts the reader to information of high importance |
|  | Note: Notes relating to covered topic |
|  | Tip: Extra “hints” for using the program |

Introduction: ProjNetSM System Elements

Standard Elements Used In the ProjNetSM System

The following labeled diagram shows the standard elements that are common on many ProjNetSM pages and the function of each item. An explanation of each element follows which corresponds to the numbers on the diagram.

The screenshot shows the ProjNetSM web application interface. At the top, there is a navigation bar with tabs: My Account, Design, Bid, Build, Portals, Lessons, and Help. A red circle labeled '1' is placed over the Help tab. Below the navigation bar, there is a breadcrumb menu: DrChecks / Select Project, with a red circle labeled '3' over the text. A green banner displays a welcome message: 'Welcome back Test Tester.' To the right of this banner is a drop-down menu with options: RFI, Submittal Register, and Submittal Admin, with a red circle labeled '2' over the menu. Below the banner is a search bar with radio buttons for 'My', 'My Office', and 'All', a 'Site' dropdown set to 'Any Site', and a 'Name' input field with 'Search' and 'Reset' buttons. Below the search bar is a pagination control with '<<First', '< Prev', 'Viewing 1 records', 'Next >', and 'Last>>' buttons, with a red circle labeled '4' over the '< Prev' button. Below the pagination is a table with columns: Project ID (with a dropdown arrow), Project Name, and Created On. The table contains one row with 'PROJECT ID NUMBER', 'Your Project Title Here', and '01-Feb-06'. A red circle labeled '5' is over the 'Project Name' header. Below the table is another pagination control with '<<First', '< Prev', 'Viewing 1 records', 'Next >', and 'Last>>' buttons. Below the pagination is a 'Jump directly to Comment ID (req.):' input field with a search icon. At the bottom of the page, there is a footer with text: 'There are currently a total of 78 users online as of 02:43 PM 13-Feb-06.' followed by links: 'About ProjNet | About Us | Privacy Policy | Test Browser | Test Connection | Call Center | SBU Only | ©ERDC 2004'. A red circle labeled '6' is over the 'SBU Only' link. Below the footer is a security notice: 'Classified information is NOT permitted on this site. Do NOT share your ProjNet password.'

1. Tabs – The Tabs that are displayed across the top of every ProjNetSM page are the central navigation item for the ProjNetSM system. Each group of related ProjNetSM applications is represented by a navigation tab. When you roll your mouse over a tab, a drop-down menu will automatically appear which shows the available applications for each grouping.

2. Drop-down menus – Each tab option contains a set of relevant drop-down menu options that can be accessed by moving your mouse over each tabbed option.

3. “Breadcrumb” Menus – Every ProjNetSM page contains a “breadcrumb” menu across the top which shows the navigation sequence that led to the page you are working on. Use these hierarchical links rather than your browser’s “Back” button to navigate backwards in the ProjNetSM system.

4. Search Bar – Several places in the ProjNetSM system will contain a search bar like the one shown. Depending on where you are in the system, this search bar will allow you to search for items (comments, lessons, CCR’s, etc) by ID number, keyword, and more.

5. Data Area – Column Headers – Whenever ProjNetSM data is displayed in a table with hyperlinked headers, you can click on the header to sort the results by that item. For example, in the diagram, clicking on “Project ID” will sort the list of projects by ID number.

6. Standard Footer Utility Links – Each ProjNetSM footer contains links to information about ProjNetSM and its creators, our Privacy policy, browser and connection test utilities and Call Center information. Each footer also contains a link to the explanation of security policy for Sensitive but Unclassified (SBU) material.

Quick-Start Guide: ProjNetSM Frequently Asked Questions

Quick-Start Guide Part I: End-User FAQ's



I need a password reset/I lost my password.



There are two ways to reset a password. If you remember the answer to your secret question, you can use the self-reset option:

1. Point your web browser to the following URL: <https://www.projnet.org/>:



2. From the grey Home/Design/Bid/Build menu across the top of the screen, move the mouse over the "Home" button and then select "Forgot Password" from the drop-down menu:



3. Choose your Agency from the drop-down box and enter your last name, phone number and e-mail address *exactly* as they were entered at registration. (If the information entered does not match the information listed for you in the database, the password reset will be unsuccessful).



4. Click the  button.

5. You will then see your Secret Question displayed on the screen. Type the answer in the text box exactly as it was typed during registration.



6. Click the  button. Your new password will be displayed on the screen. Please note that it is case sensitive.

The second way to obtain a new password is to call the ProjNetSM Call Center at:

(800) 428-4357 or (217) 367-3273

Quick-Start Guide: ProjNetSM Frequently Asked Questions



Can I choose my own password?



Yes, you can choose your own password, as long as it conforms to the accepted ProjNetSM password standards (2 upper case letters (excluding I and O), 2 lower case letters, 2 numbers (2-9), and 1 symbolic character (- \$ * ! + =)). Here's how to set your own password:

Log in to the ProjNet system at <https://www.projnet.org/>:



From the ProjNet home page, move the mouse over the “My Account” button in the menu bar across the top of the screen, and then select “Edit My Account”:



Click the  button.

Type in a new password that is 8 characters long and contains at least 2 upper case letters (excluding I and O), 2 lower case letters, 2 numbers (2-9), and 1 symbolic character (- \$ * ! + =), as in the following example:

a. Password (req.)

Click on the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I find a project?



When you first log in to the ProjNetSM system, you will see a list of all projects that have been assigned to you. However, you may have occasion to need to see projects that are not assigned to you yet to be able to request access and/or see project manager contact information. Here's how to search for a project that is not in the "My" projects list:

From the "Select Project" screen that displays immediately upon login, locate the Search box at the top of the screen as follows:

Use the forms below to search or browse projects.

Select: My My Office All Site: Any Site Name: Search Reset

<<First < Prev Viewing 1 records Next > Last>>

Click the "All" radio button to search all projects. *(If you would like to narrow the search further to include only projects that have been assigned to members of your office, click the "My Office" radio button instead).*

Use the forms below to search or browse projects.

Select: My My Office All Site: Any Site:

<<First < Prev

In the box marked "Name", type one or more keywords that are present in the project title you are looking for. (For example, if you were searching for a project called "First National Convention Center", you could search for "first" or "first national" to find the project):

Name: First National Search Reset

Click the  button to the right of the "Name" box. All projects matching the criteria specified will be displayed on your screen. Click on the title of the project to display the associated reviews.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I register for ProjNetSM ?



1. Point your web browser to the following URL: <https://www.projnet.org/>:



2. In the “Home/Design/Bid/Build” menu across the top of the screen, move the mouse over the “Home” button and then select “Register” from the drop-down menu:



3. Choose the Agency you are working with from the drop-down box:



4. Click the  button.

5. Choose your Site from the drop-down box.

6. Click the  button.

7. Choose your Office name from the drop-down box.

8. Type your Vendor ID *exactly* as it has been given to you by the Point of Contact (POC) for your organization.

9. Fill in the blanks for your first name, last name, and e-mail address.

10. Enter a secret question. Type in the answer to your secret question in the next blank.

11. Click the  button to receive your new password. Make a note of the password exactly as it appears on your screen (passwords are case-sensitive).

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I add a comment?



1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for:

| Project ID ▼ | Project Name | Created On |
|-------------------|---|------------|
| PROJECT ID NUMBER | Your Project Title Here | 01-Feb-06 |

3. The “Select Review” screen displays. Click on the title of the review you would like to enter a comment for:

| REPORTS | Your review name goes here (02-Feb-06 to 02-Feb-07) Review underway. |
|---------|---|
| | |

4. The “Enter Comment” form displays.
5. From the drop-down list in the “Discipline” field, choose the discipline that best fits the individuals who will be addressing the comment.
6. Choose the Document Type (DocType) from the drop-down list in the “b. DocType” field.
7. Optionally, you can choose to enter a Document Reference Number (field c.), the name of a pertinent plan sheet (field d.), Plan Detail (field e.), Spec section (field f.) or an attachment (field g.). Since these optional fields allow further sorting of comments during the response process of comment retrieval it is a good practice to use these fields when entering a comment.
8. Enter your Comment into the “h. Comment” field.
9. If your comment is considered a “Critical Issue”, you can optionally choose to select the “Yes” radio button in the “i. Critical issue?” field to flag it as such.
10. If Lessons Learned is enabled for this review phase, you can also choose to create a Lesson Learned from your comment by selecting the “Yes” radio button in field “j. Lessons Learned?” This button should only be used to solve repetitive issues that should be addressed via the vetting in the Design Quality Lesson Learned (DQLL) process.

11. Click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I enter an evaluation?



1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to Evaluate comments for.
3. Look at the numbers in the “Evaluate” column for the review you want and click on the hyperlinked number under “Pend” (Pending):

| Evaluate |
|---------------------------|
| Pend/Concur/Other |
| 2 / 0 / 0 |
| 7 / 0 / 0 |
| 4 / 0 / 0 |

4. The original comment will display at the top of the page and the “Add Evaluation” form directly follows, as shown.

Add Evaluation 1

a. Status (req.) Concur Non-concur For information only Check and resolve

b. Discussion (req.)

c. Potential Scope Impact (opt.) Yes No

d. Potential Cost Impact (opt.) Yes No

e. Potential Schedule Impact (opt.) Yes No

f. Attachment (opt.)

5. Choose the radio button for the Status of your evaluation and enter your evaluation text into the box marked “Discussion”.
6. If the proposed solution will cause a potential scope, cost or schedule impact, select the “Yes” radio button next to these options.
7. If you would like to add an attachment, click the button. You will then be prompted to choose the location of the file you would like to attach on your local hard drive. Navigate to the location of the file you want to attach and click on it to select it. Then click the button.

8. Click the button to enter your evaluation.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



Why does the project/review say I am not assigned?



If, after searching for a project, and when you click on the title of a project to enter it, you may see a notice that you are “not assigned”, similar to this one:

| Edit | Evaluate | My E |
|---|-------------------|------|
| All/Note/Yours | Pend/Concur/Other | Pen |
| You are not assigned to this review. If needed, contact a manager (listed below). | | |

This means that you have not yet been assigned to the review by the Project Manager or Review Manager. Project/Review Managers are the individuals responsible for assigning users to reviews. Below the review list, you should see the name(s) and contact information for any and all Project Managers who have access to the project, as follows:

| To change your access to this project, please contact a manager listed below. | | | |
|--|-------------|--|--------------|
| First Name | Last Name ▼ | Email | Voice |
| Test | Tester | staff@rcesupport.com | 217-367-3273 |

Please contact the Project Manager(s) listed to request assignment to the project.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I see all comments at once/print all my comments out together?



Log in to the ProjNetSM system.

Click on the hyperlinked name of the project you would like to see comments for:

Select a **project** from the table below. You

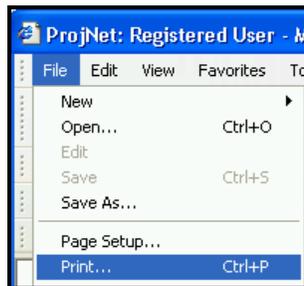
| Project ID ▼ | |
|-----------------------------------|---|
| PROJECT ID NUMBER | Your Project Title Here |

The reviews that are available for that project will be displayed. To the left of the review name, you will see two small buttons as follows: . Click on the  button.

In the reports list, click the link for  to view the list of your own submitted comments.

To view all comments, click the  link.

The reports will open up in a new browser window. To print a report once it is displayed, Click on File in your browser's action menu and then choose the Print command:



Quick-Start Guide: ProjNetSM Frequently Asked Questions

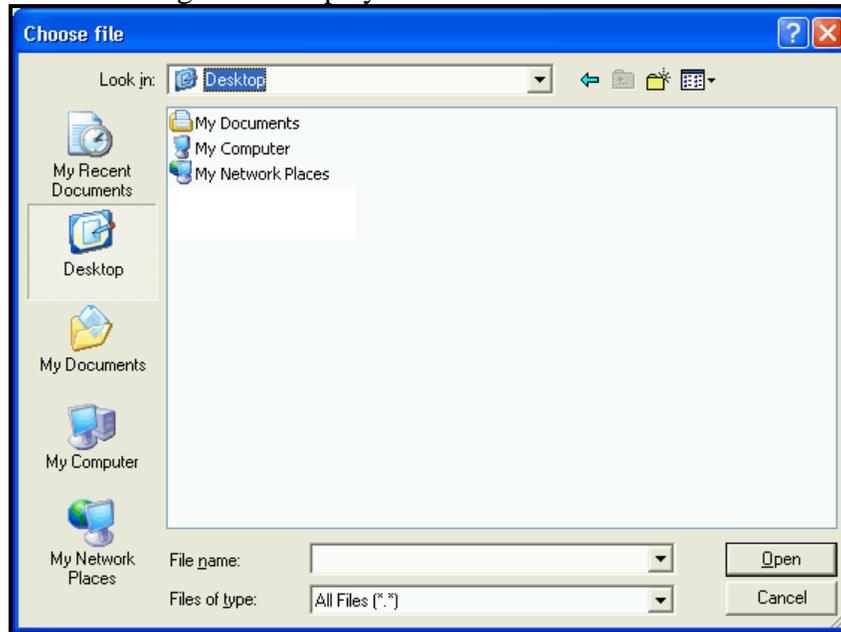


How do I attach a file to my comment?



When filling out the “Enter Comment” form, you will see a field labeled “g. Attachment”. Once you have filled out all required fields to enter a new comment, click the  button to the right-hand side of this field.

The “Choose File” dialogue box displays as follows:



Click on the  arrow to the right-hand side of the “Look In:” box to select the location of your file.

Once you have located your file, click on the file name to select it and then click the  button.

If all comment details are complete and correct, and you are ready to submit your comment with the file attached, click on the  button.



ProjNetSM will only accept file names that do not contain spaces and are under 30 characters. If you receive an error when you try to upload a file, check for spaces in the name and/or try using a shorter file name.

Quick-Start Guide: ProjNetSM Frequently Asked Questions

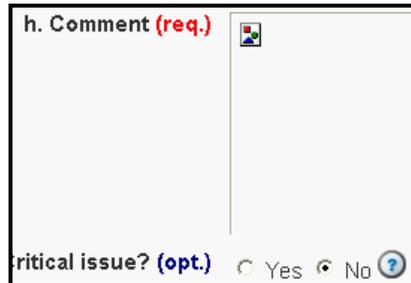


After I put in a comment/evaluation and click on the add button, nothing happens. Why?

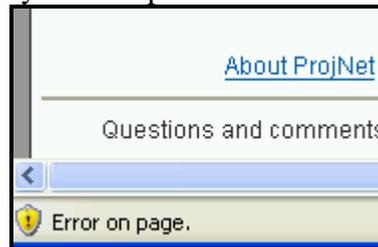


ProjNetSM contains a third-party spell checker called *Chado SpellText*. This spell checker uses Active X controls to check the spelling of text typed into ProjNetSM as the user is typing. Certain security restrictions will keep the spell checker Active X control from being able to run properly, which may in-turn cause ProjNetSM to “hang”, or not function correctly. There are two tell-tale signs that the spell checker may be to blame for problems you are having using ProjNetSM:

You see an “image placeholder” rather than a text box where you can type, as follows:



You see an “error on page” warning at the bottom of your Internet Explorer window when you attempt to submit a comment:



If you have identified that the spell checker is causing one (or both) of these problems, here is how to turn it off:

Click on “My Account” in the “My Account/Design/Bid/Build” menu bar across the top of the screen and then click on “Edit my account” from the resulting drop-down menu as shown:



Scroll all the way down on the resulting account details page and locate the “Enable spell checker” option as shown:



Select the “No” radio button and then click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions

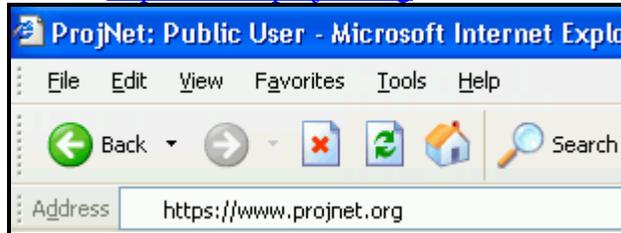


I was directed to ProjNetSM to view information for a bid, but I don't have a password - How do I login?



Bid Inquiry users do not need a password to login and view bid information and post inquiries. To use the Bid Inquiry system, you will need to obtain the Bid Inquiry key from the solicitation. If you do not have the Bid Inquiry key, contact the Project Manager with the Agency who is managing contract efforts for the project to obtain it. Once you have obtained the bid inquiry key, here's how to login to the Bid Inquiry system:

Point your web browser to: <https://www.projnet.org>.



On the “Home/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Bid” button and click on “Bid Inquiry” from the resulting drop-down menu:



The “Bid Inquiry Login” form is displayed. Select the Agency you are working with from the “Agency” drop-down menu:

a. Agency (req.) Please select from below
b. Key (req.) -
c. EMail (req.)
Login

Enter your Bid Inquiry Key in the “Key” field. (The key you are typing in should be six characters separated by a hyphen).

Enter your e-mail address.

Click the  button.



Each time you return to the Bid Inquiry system, you will use the same entry process outlined above. Bid Inquiry users do not receive a password.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



My Project Manager has assigned me as a comment submitter to a project, but the project doesn't appear in my project list. Why?



When you have first been assigned to a project as a submitter, you may* not see the project in your “My” projects list until after you have posted your first comment. To see the project to be able to enter your first comment:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” page. The list of projects on this page defaults to the “My” setting (meaning you will see only active projects assigned to you). To find a project that is assigned to you but is not yet on this page, click on the “My Office” radio button, as shown:

Select: My My Office All Site: Any Site Name: Search Reset

<<First < Prev Viewing 2 records Next > Last >>

3. Next, enter a keyword that is present in the project ID number or project title in the “Name” box.
4. Click on the  button. You should now see a list of matching projects. Click on the title of the project to enter it.



Note this only occurs if submitter assignments are made by office instead of by name. If you have not posted your first comment in a given review, but you had previously participated in any other review in the project, you will still see it in your “my” project list.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



My account is “locked out” after three unsuccessful login attempts. What should I do?



Once you have tried three times to login and have been unsuccessful, you will need to contact either your Site Administrator or the Call Center to have your account unlocked and your password reset. This cannot be performed without the assistance of the Call Center or a Site Administrator.



Where do I get the Vendor ID?



The Vendor ID needed to register will be provided to you by the POC (Point of Contact) at your office. If you are uncertain who the POC is for your office, please call the ProjNetSM Call Center at (800) 428-4357 or (217) 367-3273.

If you are the designated POC for your office and need to obtain the vendor ID, please call the Call Center at (800) 428-4357 or (217) 367-3273. You will be asked some identifying questions to confirm your identity and the Vendor ID will be provided to you verbally.



How do I change my email address on my account?



Users are not currently able to change their own email addresses on ProjNetSM user accounts. However, your Site Administrator is able to update your email address. Please contact your Site Administrator for e-mail address changes. If you are unable to reach your Site Administrator, please call the Call Center at (800) 428-4357 or (217) 367-3273 for further assistance with changing the e-mail address listed on your account.



I have changed offices. What do I do?



Please contact your Site Administrator for office changes. If you are unable to reach your Site Administrator, please call the Call Center at (800) 428-4357 or (217) 367-3273 for further assistance with changing the e-mail address listed on your account.

There is, however, one exception to this rule: **if you are changing from a government agency office (USACE, NAVFAC, etc). to a private company, you will not be able to change your office.** Your old account will be retired and you will need to re-register again with your new private contractor contact information. This is done for security purposes so that permissions granted to government agency workers do not “accidentally” carry over after an individual is no longer a government employee.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



The “jump to” function isn’t working for me. Why?



If you are trying to use the “jump to” feature to access a comment and are getting a blank page or an error message, there are three things to try:

Double-check the comment ID number. Make sure that the comment ID number you are entering is correct and there are no extra or missed digits.

Make sure you are assigned to the review. Check with your Project Manager and/or Site Administrator and ask them to verify that you are assigned to the review that contains the comment.

If you are certain that you have entered the correct comment ID number, and your Project Manager/Site Administrator has verified that you are correctly assigned to the review, there may be a technical problem preventing you from accessing the comment. Please call the Call Center at (800) 428-4357 or (217) 367-3273 for further assistance.

Quick-Start Guide: ProjNetSM Frequently Asked Questions

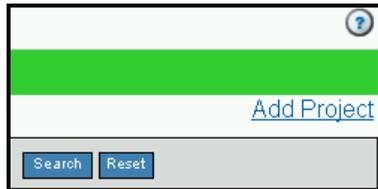
Quick-Start Guide Part II: Project Manager/Site Administrator FAQ's



How do I create a new project?



1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. In the upper right hand corner of the screen (by the question mark symbol), click on “Add project”:



3. The Add Project form displays:

A screenshot of a web form titled "Add Project". At the top left of the form is a small blue circle with a white question mark. Below the title, the text "Add a project using the form below." is displayed. The form contains two input fields: "a. Project ID (req.)" and "b. Project Name (req.)". Below the input fields is a blue button labeled "Add & continue".

4. Type the Project ID number.
5. Type the Project Name.
6. Click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



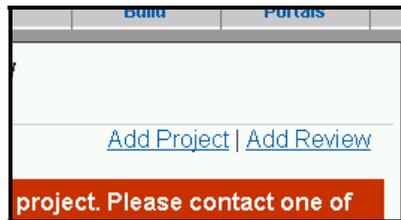
How do I create a new review?



Log in to the ProjNetSM system.

You will then be on the “Select Project” screen. Click on the hyperlinked **title** of the project you would like to create a review for.

In the upper right-hand corner of the screen, click on “Add Review”, as shown:



The “New Review” form displays:

Type the Review Name.

Type the Review Start and Review End dates (or click on the tiny calendar icon to the right-hand side of the field to select the date).

Optionally, you may choose to type in a Control Number and/or External Document Server name.

Click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How do I assign users/offices to a review?



1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project that contains the review you would like to make assignments for.
3. Locate the title of the review. To the left of the review title, you will see two small buttons: . Click the  button.
4. To view current assignments for the review, click on the following link under the “Assign Individuals to this Review” header. To assign individuals to the review, click on the option for the role you would like to assign under the “Assign Individuals to this Review” header. Choose from Submitters, Evaluators, Back-Checkers, Review Managers and View-only Access as shown:

1. [Check All User Assignments](#)
2. [Comment Submitters](#)
3. [Comment Evaluators](#)
4. [Comment Back-Checkers](#)
5. [Review Managers](#)
6. [Design Managers](#)
7. [View-only access](#)

5. To assign offices to the review, click on the role you would like to assign under the “Assign Offices to this Review” header. Choose from Submitters, Evaluators, Back-Checkers and View-only Offices. To view all current office assignments, click on “Check Office Assignments”:

1. [Check Office Assignments](#)
2. [Submitter Offices](#)
3. [Evaluator Offices](#)
4. [Back-Checker Offices](#)
5. [View-only Offices](#)

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How can I add a new office for an A/E firm, Contractor, or Customer?



When a new Design firm, customer, or contracting firm becomes involved with a project, you can request that a new “office” be created so that all members of that particular firm will be able to register their internal personnel. Here’s how to request a new office:

1. Log in to the ProjNetSM website.
2. Move your mouse over ‘Help’ in the grey My Account/Design/Bid/Build menu bar towards the top of the page and click on “Request New Office” from the resulting drop-down menu:



3. The “Request A New Office” form displays:

Request A New Office
Use the form below to request a new office. Existing office requests should go to local admins.

a. Firm Type (req.) Architect/Engineer Firm Contractor Customer ?

b. Firm Name (req.) ?

c. Office Name (req.) ?

d. City (req.) ?

e. State (req.) ?

f. POC Last Name (req.) ?

g. POC First Name (req.) ?

h. POC Email (req.) ?

i. POC Phone (req.) ?

j. Project Name (opt.)

k. PM Name (opt.) ?

4. Choose the radio button next to the “Firm Type” that matches the office you are requesting.
5. Type in the Firm Name, Office Name, Firm City, State, POC (Point of Contact) First and Last name, POC e-mail, and the POC’s phone number.



6. Click on the  button. The Call Center will take the actions necessary to create this new office and contact the listed POC to provide registration instructions and assistance.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



Can I copy review assignments?



Yes, if you have Project Manager and/or Site Administrator rights, you can copy review assignments from one individual to another, and also from one office to another. Here's how:

1. Log in to the ProjNetSM system.
2. You will then be on the "Select Project" screen. Click on the title of the project that contains the review you would like to copy assignments for.

3. Locate the title of the review. To the left of the review title, you will see two small buttons:  . Click the  button.

4. Scroll down to the bottom of the page and locate the header "Advanced Assignment Options":

1. [Copy Individual Assignments](#)
2. [Copy Office Assignments](#)

5. **To copy assignments from one *individual* to another**, click on "Copy Individual Assignments". Choose the Site for the source user from the drop-down list and click on the  button. Then, click on the project that contains the review you would like to copy assignments from and click the  button. Lastly, choose the review you would like to copy assignments from and select the radio button next to the roles you want to copy. When you have made your selections, click the  button.

6. **To copy assignments from one *office* to another**, click on "Copy Office Assignments". Choose the Site that contains the office from the "Site" drop-down box and click the  button. Next, click on the name of the project which contains the review you would like to copy assignments for and click the  button. Then, choose the review you would like to copy assignments from and click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions

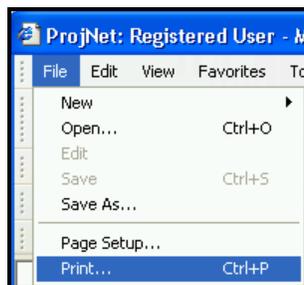


What are “critical” comments?



When a comment is entered, it can be flagged as a “critical” comment, meaning the issue is a potential “showstopper” for the project and the Project Manager will receive immediate notification. As a Project Manager/Site Administrator, you have the ability to run reports that display all comments that have been flagged as critical so you can review them. Here’s how to access the Critical Comments report:

1. Log in to the ProjNetSM system.
2. Click on the title of the project that contains the review you would like view critical comments for.
3. The reviews that are available for that project will be displayed. To the left of the review name, you will see two small buttons as follows: . Click on the  button.
4. Under the “Manager Reports” header, click on one of the following options:
 - [Reviewers Critical Comments](#)
 - [Submitters Critical Comments](#)
5. The report you have chosen will be displayed in a new window. To print the report, click on File and then Print from your browser’s menu bar as shown:



Quick-Start Guide: ProjNetSM Frequently Asked Questions



I have assigned users as submitters/evaluators and I can see that they are assigned, but when the user logs on, they don't see the project in the "My" list. Why?



When a user has first been assigned to a project as a submitter, that user may* not see the project in their "My" projects list until after they have posted their first comment. To see the project to be able to enter their first comment, the user will need to search "My Projects" using the following steps:

1. Log in to the ProjNetSM system.
2. The user will then be on the "Select Project" page. The list of projects on this page defaults to the "My" setting (meaning the user will see only active projects assigned to themselves). To find a project that is assigned to the user but is not yet on this page, click on the "My Office" radio button, as shown:

Select: My My Office All Site: Any Site Name: Search Reset

<<First < Prev Viewing 2 records Next > Last>>

3. Next, enter a keyword that is present in the project ID number or project title in the "Name" box.
4. Click on the  button. A list of matching projects is displayed. Click on the title of the project to enter it.



Note this only occurs if submitter assignments are made by office instead of by name. If a user has not posted their first comment in a given review, but they had previously participated in any other review in the project, they will still see it in their "my" project list.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



How can I find out if an office is registered in DrChecksSM?



You can use the Address Book feature to search all offices at all sites to see if the office is already in the system before entering a New Office Request. To search for an office:

1. Log in to the ProjNetSM website.
2. Move your mouse over 'Help' in the grey "My Account/Design/Bid/Build" menu bar towards the top of the page and click on "Address Book" from the resulting drop-down menu:



3. To search all sites for an office, select the radio button next to the option labeled "User (Office Name), and choose "All" from the "Site" drop-down list as shown:

Use the form below to search for a specific user's contact details.

| | | | |
|---|--|---|---|
| a. Type of Listing (req.) | <input type="radio"/> User (Last Name) | <input checked="" type="radio"/> User (Office Name) | <input type="radio"/> Office Listings ? |
| b. User Type (opt.) | <input checked="" type="radio"/> All Users | <input type="radio"/> Managers | <input type="radio"/> Administrators ? |
| c. Site (req.) | All [v] ? | | |
| d. Keyword (req.) | <input checked="" type="radio"/> Starts With | <input type="radio"/> Contains ? | |
| | <input type="text"/> ? | | |
| <input type="button" value="Search For User(s)"/> | | | |

4. Type all or part of the office name you are looking for in the "Keyword" box.

5. Click on the  button.

6. If the office is registered, a list of all registered users in that office will appear in the table below the search form. If no results were returned, you will see the following message:

 **There were no results for your search criteria.**

Quick-Start Guide: ProjNetSM Frequently Asked Questions

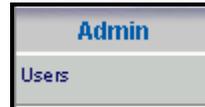


I know that a user is registered, but I can't find them in the list to assign them. Why?



You will **only** be able to assign users to the roles if they have been granted the required permissions in their User Account first. For example, if a user has only Submitter permissions in their User account, and you try to assign them as an Evaluator, you will not see their name in the list of available Evaluators upon assignment. Here's how to check a user's permissions to see if they are available to be assigned to the role you want:

1. Log in to the ProjNetSM website as a Site Administrator.
2. Move your mouse over 'Admin' in the grey "My Account/Design/Bid/Build" menu bar towards the top of the page and click on "Users" from the resulting drop-down menu:



3. Your site will be automatically selected in the "Site" drop-down box. From the "Type" drop-down list, select the type of search you would like to execute. You can search based on user first or last name, phone number, e-mail address, Office name or ID number:

The screenshot shows a search interface with the following elements: Site: ProjNet Support Staff, Type: Last Name (dropdown menu open), Text: (input field), Status: all users (dropdown), Search (button), and Reset (button). Below the search fields, there are navigation buttons: <<First, < Prev, and a table with the text "Select a user from the table below". To the right of the table, it says "Viewing items 1 to 25. Total items: 69".

4. Enter a keyword in the "Text" box. For example, if you are searching for the user by Last Name, type the last name of the user into this box.
5. Click the  button. A list of matching users will be displayed. Click on the hyperlinked ID number next to the user you would like to view.
6. Scroll down until you see the section labeled "Use the form below to update DrChecks/FILER permissions". The permissions with the "Yes" radio button selected have been granted for this user. The permissions with the "No" radio button selected have not been granted for this user.
7. Make any changes to the Yes/No radio button selections as needed and then click the  button.

Quick-Start Guide: ProjNetSM Frequently Asked Questions



When I try to copy office assignments, it times out - - what do I do?



When you are trying to copy office assignments from one review to another, and the review has a very large number of people assigned, you may see a “time out” error message. This is because the system “times out” waiting for a large amount of data to be transferred. Normally, when this occurs, it is because too many people have been inadvertently assigned to a review by office, even though many of them may not have anything to do with the project. Here are some things to try if copying office assignments “times out”:

1. Check the list of current assignments for the review you are trying to copy assignments to. Even though you received an error message, some or all of the assignments you were trying to copy may have been transferred successfully.
2. Remove some of the superfluous assignments if you can safely determine which ones are no longer needed and then try the copy again.
3. Contact the Call Center for further assistance. The Call Center can be reached at (800) 428-4357 or (217) 367-3273.



I need to delete a project/review from the system. How?



Users are not able to delete reviews or projects from the ProjNetSM system. This is a security measure that is done for your protection so that valuable data will not be inadvertently deleted from the system. If you need to delete a project or review, please call the Call Center at (800) 428-4357 or (217) 367-3273 or submit an online help ticket with details.

Section #1: How to get help with ProjNetSM

1.1 Using the Call Center



Department of State/Overseas Building Operations users must contact Document Control for assistance with ProjNetSM. To reach Document Control, send e-mail to DocumentControl@state.gov. Users from all other agencies may utilize the Call Center as discussed below.

No matter how easy a computer program may be to use, everyone can use a little help once in a while. Sometimes, you just need to talk to a “real person”. The ProjNetSM Call Center staff is here to help. The Call Center can help with a wide range of user issues, including, but not limited to:

- Password resets
- General how-to questions
- New office requests
- Technical problems (unable to access ProjNetSM, web page errors, etc.)
- Questions about Best Practices

The Call Center offers support not only to agency employees who use ProjNetSM, but also to the Customers, Contractors, and Design firms involved in the design review process*. Depending on the way you work, you may find it convenient to contact the Call Center by phone, or you may prefer to submit an automated Helpdesk ticket. Here’s how to reach us when you need to:

Contacting the Call Center by phone

The Call Center is available for telephone support Monday through Friday from 8:00am until 5:00pm Central Standard Time (CST)*. To reach the ProjNetSM Call Center, please call:

(800) 428-4357 or (217) 367-3273

Submitting an online helpdesk ticket

Both logged-in and non logged-in users are able to submit a ticket to the Call Center through the ProjNetSM website. To submit a new ticket to the Call Center:

1. Point your web browser to <https://www.projnet.org>
2. Move your mouse over the “Help” option in the “Home/Design/Bid/Build” menu bar (non logged-in users) or “My Account/Design/Bid/Build” menu bar (logged-in users) located at the top of the screen.

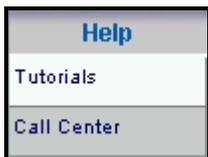


Figure 1-1

* Support hours and user groups serviced may vary according to the support contract options your Agency has selected.

Section #1: How to get help with ProjNetSM

3. Click on “Call Center” from the drop-down menu that appears (Figure 1-1).
4. The Call Center information page displays. Under the “On-line Help” header, click the link to “open a new ProjNetSM issue”.
5. The “Request Help” form is shown. Choose your Issue Type and Priority from the drop-down menus. (Optionally, logged-in users can also select the Application they have been working with from the “c. Application” drop-down menu).
6. Enter a Description of your issue. Please include any relevant details such as project ID number, comment number, and/or text of any error messages received.
7. If you are not already logged in to ProjNetSM, type your first and last name in the fields provided. You will also need to enter your phone number and e-mail address. (It is important that this information be accurate so that the Call Center will have a valid way to reach you regarding your problem report).
8. Click the “Submit Ticket” button.

Help tickets are continuously monitored by Call Center staff, so once your Call Center ticket has been submitted, you will receive a response from the Call Center by e-mail and/or telephone within the next business day.

1.2 Self-help Tools

The following self-help resources are available to help you learn about ProjNetSM and get answers to commonly asked questions quickly:

1. **Tutorials:** Access the ProjNetSM tutorials by moving your mouse over the “Help” option in the “Home/Design/Bid/Build” menu bar (non logged-in users) or “My Account/Design/Bid/Build” menu bar (logged-in users) located at the top of the screen. Click on “Tutorials” from the drop-down menu that appears (Figure 1-2). Here you will find links to all available ProjNetSM training pieces in the form of Macromedia Flash animated slides and accompanying audio.



Figure 1-2



Figure 1-3

You will need to download and install the Macromedia Flash® plugin-to be able to view the tutorials. If not already prompted by your browser, visit <http://www.macromedia.com/software/flashplayer/> to download the plugin.

2. **Context sensitive help:** At different places in the system, such as the upper right-hand corner of any page on the ProjNetSM website and next to some form fields and options, you will find a question mark symbol as in Figure 1-3. Click on this symbol to receive pertinent help for the page you are visiting and/or field you are entering.



The user's manual is available online in .PDF format. Before accessing the user's manual online, make sure you have the free Adobe Reader installed. Visit <http://www.adobe.com/products/acrobat/readstep2.html> to download the Adobe Reader software.

Section #2: Introduction – ProjNetSM Overview

2.1 ProjNetSM Introduction/Business Process Overview

The ProjNetSM web site was developed as a collection of modules that support collaboration of various stakeholders during the design, bid, and build phases of the facility acquisition process. The tools that comprise ProjNetSM are designed to fit business processes that were historically handled via in-person meetings and off-line collaboration and, more recently, via exchange and distribution of materials in electronic form via email or direct file exchange. Modules of the web site provide definite structure for various issue identification and resolution cycles common during facility design, bid, and build. Modules in place in the site support such benefits as reduction in meetings, a comprehensive record of business interaction, and appropriate status monitoring.

DrChecksSM supports the process of design review following the submittal of design components. It enables the systematic collection of comments by all members of the team of stakeholders in the facility (tenants, managers, owners, managers, etc.). It supports the automatic collation of the comments so that designers and the professional support teams that they employ they can address the issues in a systematic fashion. Finally, it maintains a complete record of this collaborative effort so that the commitments may be kept and resolutions are always available for review as the design process continues and as construction proceeds.

As a business process, much of what DrChecksSM addresses relates to specification documents that regulate the design of facilities. In light of that need, there are modules that both support the maintenance of the specification documents and support the feedback to the specification documents from the design review activity. The Criteria Management System (CMS) is an interagency tool that supports reviews in the style of DrChecksSM, but targets the support of document review so that technical proponents of Uniform Guide Specifications can present drafts of update documents to reviewers. As with DrChecksSM, the reviewer comments can be considered, accepted/incorporated, or rejected. Drafts of documents can be reviewed, updated, and transmitted to NIBS (National Institute of Building Standards) for publication.

ProjNetSM offers the CMS module along with two options for end users of the guide specifications to submit suggestions or updates. The CCR (Criteria Change Request) module is available to collect suggestions from the public and post those suggestions against a document. The CCR function again supports the collaboration and automatic collation of Criteria Change Requests against documents so that suggestions are presented in one place and a legal record of the suggestion is maintained.

The second ProjNetSM module that can address maintenance and updating of guide specifications by feeding back from the design process is the DQLLSM (Design

Section #2: Introduction – ProjNetSM Overview

Quality Lessons Learned) module. In addition to collecting and addressing design issues in DrChecksSM, the DQLLSM feature may be activated to support submittal of issues from the comment phase of DrChecksSM. Issues that recur and are addressed during the design review may be identified and submitted to subject matter experts during the review process. The subject matter experts are gatekeepers for the agency DQLLSM database and are tasked with accepting or rejecting proposed items. Those items that are accepted become part of the agency lessons database and may, at the discretion of the subject matter expert, be submitted as a CCR to the CMS module of ProjNetSM. Approved lessons from the agency database of Lessons Learned can also be copied back into a review as comments on other reviews, as a means of reusing prior developed and captured knowledge of issues in the design process.

The ProjNet-FilerSM module facilitates the design review process by providing stake-holders with a place to exchange documents that are associated with the review and development of a project without using insecure exchange options like email attachments or public FTP sites.

The Bidder Inquiry module extends the issue identification process from the design phase into the bid phase by providing a tool for interested bidders who wish to post questions regarding the request for quote that was developed to support the build phase. The module again supports issue resolution but changes the framework of the process so that Contract Officers control the material that is presented to the bidders.

These modules represent the portions of the ProjNetSM site that are fully implemented for most of the user agencies.* This manual provides support for use of these modules and will be amended as necessary to support additional modules as they are developed and placed in active use.

2.2 Security and Ownership of Data

The ProjNetSM site has been designed to provide a secure location for the design review and collaboration effort. The web site operates on the pretext that agencies are the owners of their data and they must control the access to their data accordingly. In that context, agency site administrators control data access, and the control of access to specific projects or reviews is maintained as a project manager function.

The site is maintained in a government facility and all standard security practices are in place to allow certification of the site for storage of Sensitive but Unclassified (SBU) documents.

Data is transmitted across the Internet using Secure Socket Layer (SSL) encryption. This type of encryption protects users from having data "harvested" as it is moved

* The options available to users within an agency are determined by the contract in place with the agency. If there is question regarding access to a module the user could contact their site administrator regarding availability.

Section #2: Introduction – ProjNetSM Overview

over public network hardware.

Approved users with accounts must use passwords to access the site. Passwords conform to government requirements for password construction and users are prohibited from sharing or transmitting passwords. The site requires password entry on each startup and times out and requires reentry of the user's password after 30 minutes of inactivity. As an additional security measure, user passwords expire every six months.

Users can only access ProjNetSM modules with a login to the site. Site administrators must approve the creation of accounts. Accounts are further restricted by role. In other words, users who are registered are limited to functions that are enabled for their user profile. For example, a person who does not have the reviewer role enabled for their ProjNetSM account cannot be assigned as a reviewer in any module on the system.

Finally, users cannot access functions in DrChecksSM, ProjNet-FilerSM, or other modules without an assignment to that function. The project or review manager control the assignment to a project or review phase and without an assignment the only information accessible to an unassigned individual is a listing of the project or review managers.

2.3 Setting Up Your PC to Use ProjNetSM

Since ProjNetSM is a web-based application, it is accessible and usable from any internet-capable Windows PC with access to the internet. ProjNetSM can be used with broadband, DSL and dial-up internet services and does not require any special hardware or software to be installed on your computer. Most computers, even with minor changes to the manufacturer's default browser and security configuration settings, will still be able to use ProjNetSM with no problems. However, there is one change that is **mandatory** for all users of ProjNetSM that is not a default browser setting. Please follow the instructions for "Temporary Internet Files Settings" below to correctly set up your browser to use ProjNetSM.



You must perform the following steps to make sure that your browser is set to correctly to use ProjNetSM.

Temporary Internet Files Settings

Because of the way that ProjNetSM processes entered data, if you experience problems with pages on the website not automatically "refreshing" (updating) as soon as data has been entered, check for the following setting in Internet Explorer:

1. Open your Internet Explorer browser.
2. Click on "Tools" in the "File/Edit/View/Favorites" menu at the top of your Internet Explorer page.

Section #2: Introduction – ProjNetSM Overview

3. Click on “Internet Options”.
4. Click the “Settings” button in the “Temporary Internet files” section (Figure 2-12):



Figure 2-12

5. On the resulting screen, look at the radio button for the “Check for new versions of stored pages” setting and make sure that “Every visit to the page” is selected as shown (Figure 2-13):

Section #2: Introduction – ProjNetSM Overview

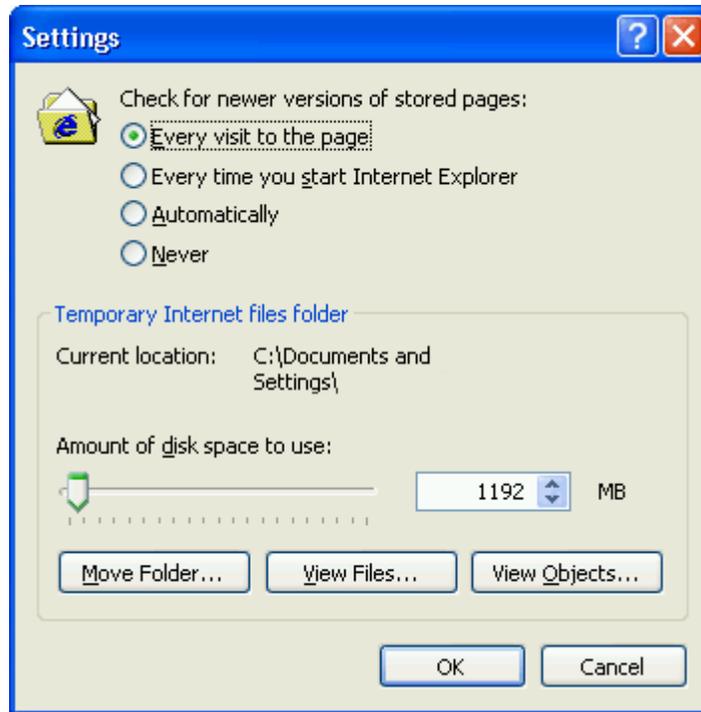


Figure 2-13

If your settings do not look like the figure above, click the radio button next to the “Every visit to the page” option and then click the “OK” button.

Keep in mind that there are some situations where configuration and/or security settings have been changed at some point by the computer owner or system administrator, which may prevent successful connection to the ProjNetSM system. See the following section for troubleshooting hints which may help you to quickly resolve any connection issues you may encounter.

2.4 Troubleshooting

In order to be able to use ProjNetSM successfully, you will first need to be sure that your computer meets the system requirements. Since ProjNetSM is web-based, you won’t need any specialized hardware to use it. However, there are a few points to be aware of to ensure your ProjNetSM experience runs smoothly:

Supported operating systems

ProjNetSM is supported under the following Operating Systems:

- Windows 95
- Windows 98/98SE
- Windows 2000
- Windows XP

Unfortunately, ProjNetSM has **not** been developed and tested to support the Macintosh platform at this time.

Section #2: Introduction – ProjNetSM Overview

Supported Browsers

At this time, ProjNetSM has been developed and tested for use with Microsoft's Internet Explorer browser **only**. Other browsers may be supported in future releases. We recommend using Internet Explorer version 6 or above when accessing ProjNetSM. For more information on how to obtain/update Internet Explorer, please visit Microsoft on the web at: <http://www.microsoft.com/windows/ie/>.

Browser Settings

Depending on your computer and network configuration, you may experience problems accessing the ProjNetSM website. You may have third-party security or firewall software installed, or your network may be blocking ProjNetSM traffic at the server level. Here are a few basic settings to check before contacting the Call Center for technical support:

1. **Security Settings:** Your security settings may be set too high to allow a successful connection to the ProjNetSM system. Perform the following steps to ensure that your security settings are set correctly:
 - Open your Internet Explorer browser.
 - Click on “Tools” in the “File/Edit/View/Favorites” menu at the top of your Internet Explorer page.
 - Click on “Internet Options”.
 - Click on the “Security” tab.
 - Your security settings should be set to “Medium”, as shown in Figure 2-1. If your security level is set to High, move the slider bar down by clicking and dragging with your mouse until you see the level change to “Medium”. (If there is no slide bar available, you can restore it by clicking on the button labeled “Default Level”).

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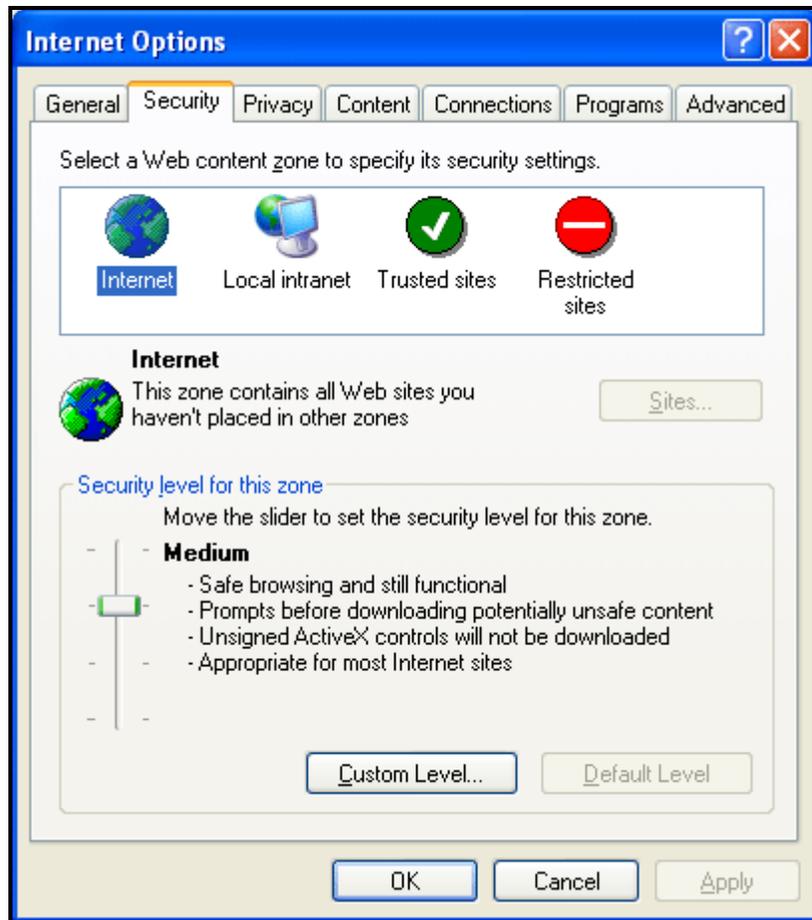


Figure 2-1

2. **Cookies:** Your browser will need to be set to allow “Cookies” in order to use ProjNetSM. To check your cookie settings:
- Open your Internet Explorer browser.
 - Click on “Tools” in the “File/Edit/View/Favorites” menu at the top of your Internet Explorer page.
 - Click on “Internet Options”.
 - Click on the “Privacy” tab.
 - Your Privacy settings should be set to “Medium”, as shown in Figure 2-2. If your Privacy level is set to High, move the slider bar down by clicking and dragging with your mouse until you see the level change to “Medium”. **(If there is no slide bar present on your screen and it does not look like the one below, you can restore it to the Medium setting by clicking on the “Default” button).**

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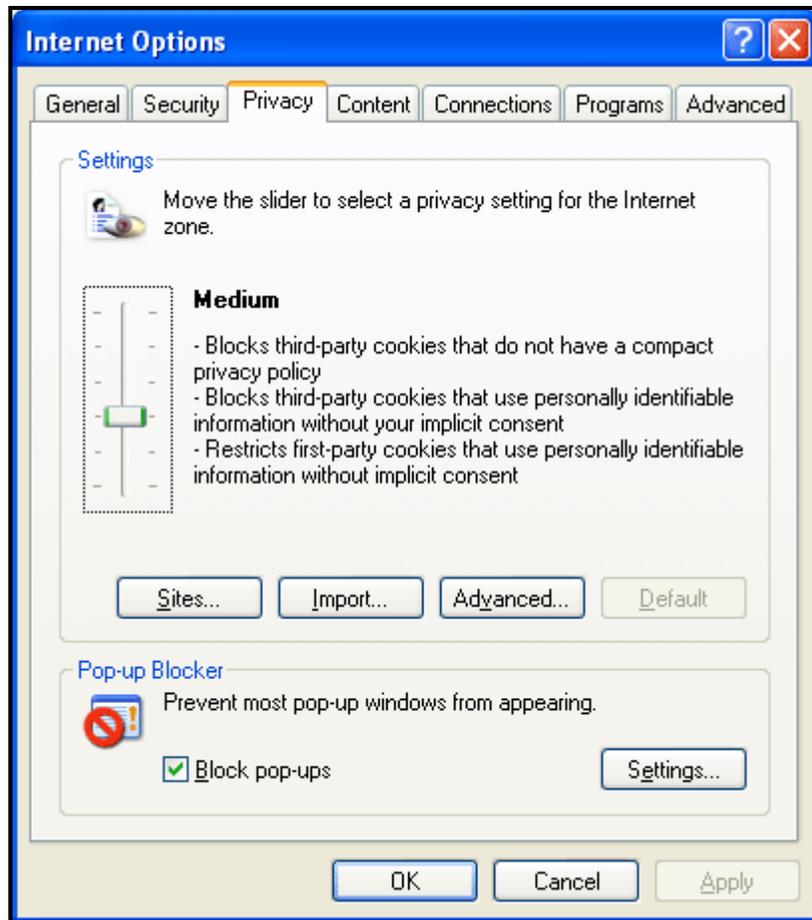


Figure 2-2

3. **Trusted Sites:** If you are still unable to access ProjNetSM after checking the settings in steps 1 and 2 above, try adding ProjNetSM to your list of “Trusted Sites”. To add the web address to “Trusted Sites”:
 - Open your Internet Explorer browser.
 - Click on “Tools” in the “File/Edit/View/Favorites” menu at the top of your Internet Explorer page.
 - Click on “Internet Options”.
 - Click on the “Security” tab.
 - In the “Web content zone” box, click on “Trusted Sites”, as shown in figure 2-3:



Figure 2-3

- Click the “Sites” button (Figure 2-4):

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Figure 2-4

- In the “Add this Web site to the zone” field (Figure 2-5), type the following URL: <https://www.projnet.org> and then click the “Add” button.

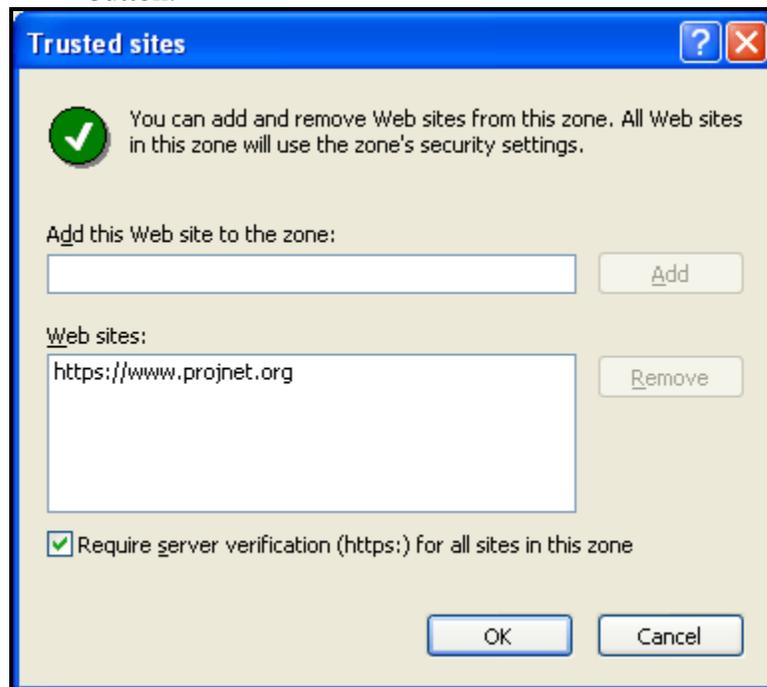


Figure 2-5

- Click the OK button.
- Restart your web browser and try once again to connect to <https://www.projnet.org>.

If you have checked these settings and you still cannot connect to ProjNetSM, Check with your network support professional to see if there are measures in place that might be preventing your connection. The ProjNetSM Call Center also stands ready to assist you in the event that you are unable to find a solution. See Section 1.1 for more information about how to reach the Call Center.

Auto-complete settings

Internet Explorer contains a feature where it will automatically save your password. This can be helpful if you are logging in to the same agency every time. However, if you use ProjNetSM for more than one agency, you may need to clear this entry, as AutoComplete will only store one password per page. Similarly, given that passwords expire every six months, you may need to clear your AutoComplete information when you receive a new password. Here's how to clear the data saved in AutoComplete:

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1. Open your Internet Explorer browser.
2. Click on “Tools” in the “File/Edit/View/Favorites” menu at the top of your Internet Explorer page.
3. Click on “Internet Options”.
4. Click on the “Content” tab.
5. Click the AutoComplete button (Figure 2-6):

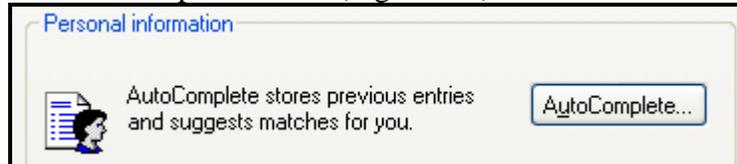


Figure 2-6

6. To clear your saved passwords, click the “Clear Passwords” button (Figure 2-7):



Figure 2-7

When you type in your new password on the login page, Internet Explorer may prompt you to change your stored password to your new entry. Click the “yes” button if asked if you want to change the password to the new stored entry.



When clearing saved Passwords in AutoComplete, Internet Explorer will clear all saved passwords for all websites, not just ProjNetSM. Make sure you have all of your passwords saved or written down prior to using this option.

Active X controls

ProjNetSM contains a third-party spell checker function to allow users to check spelling in ProjNetSM entries. However, the spell check function requires that an Active X control be allowed to run while using the ProjNetSM website. (See section 4.4, “Making changes to your account information” for more information about how to enable and disable the spell checker).

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When you first attempt to run a page that contains the Active X control for the spell checker, you may see an error message* across the top of the page that looks like this (Figure 2-8):



Figure 2-8

Click on the error text and then click “Install Active X Control” in the resulting pop-up menu to allow the Active X control to install. The following Internet Explorer Security Warning displays (Figure 2-9):



Figure 2-9

Click the “Install” button to install the spell checker.



Popup blockers may also interfere with the function of the spell checker. If the spell checker is not working correctly after you perform these steps, try disabling any popup blockers you may have installed on your computer.

When the spell checker is properly enabled, you will see that misspelled words will be underlined with a wavy maroon line (Figure 2-10). A pop-up box will display the misspelled word and suggestions for correction:



Figure 2-10

You can also use the spell checker by right-clicking on any red wavy underlined word. You will see a popup menu with suggestions for the correction and the option to “Add” the word to the spell checker dictionary or “Ignore All” instances of the word from this point on (Figure 2-11):

* Specific error messages may vary based on version of Internet Explorer used.

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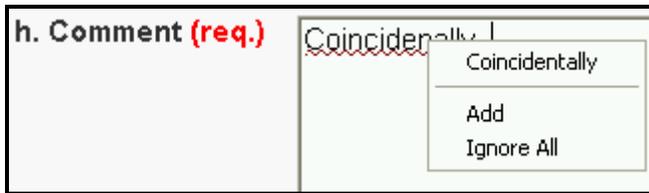


Figure 2-11



Once the spell check has been turned on in your account preferences, the spell check option will attempt to run every time you log on to your account, regardless of which computer you are using. Therefore, it will be necessary to enable the spell check Active X control on every computer you use to login to ProjNetSM.

Third-party Applications

ProjNetSM uses Macromedia Flash functionality for several of its functions including the Redi-Review template chooser (covered in Section 4.2) and the animated tutorials (covered in section 1.2). In addition, ProjNetSM documentation is delivered in Adobe Reader .PDF format, which requires the free Adobe Reader software be installed. Your browser may automatically prompt you to install these components as needed. However, to manually download and install these third-party software applications, please visit the manufacturer's websites:

- **Macromedia Flash:** <http://www.macromedia.com/software/flashplayer/>
- **Adobe Reader:** <http://www.adobe.com/products/acrobat/readstep2.html>

ProjNetSM Web Address



For security reasons, Department of State users will need to point their browsers to a different URL to access the ProjNetSM system. Contact Document Control (DocumentControl@state.gov) for more information on State Department access.

The official website address for ProjNetSM users to login is:

<https://www.projnet.org>

Make sure your browser is pointing to this exact web address when you are trying to login. If you are trying to access ProjNetSM via any other URL, you will experience problems logging in.

Section #3: Logging in and Getting Started

3.1 Registering for the ProjNetSM System

All users of the ProjNetSM System must first register before they will be able to access the system. Each office will hold a unique alphanumeric key called the “Vendor ID” which will be distributed to personnel in the office who will need to register for the system. To register, users will need to obtain this Vendor ID from the designated Point of Contact (POC) at your agency or firm. The POC should also have a simple one page instruction sheet sent to them by the Call Center that shows the steps to register for ProjNetSM for your office.



If you are unsure who the Point of Contact is for your organization, the ProjNetSM Call Center can assist you with this information. Please see Section 1.1 of this manual for more information about how to reach the Call Center.



Figure 3-1

To Register for the ProjNetSM system:

12. Point your web browser to the following URL:
<https://www.projnet.org/>
13. In the “Home/Design/Bid/Build” menu across the top of the screen, move the mouse over the “Home” button and then select “Register” from the drop-down menu (as shown in Figure 3-1).
14. Choose the Agency you are working with from the drop-down box (Figure 3-2). (‘Agency’ refers to the organization that is managing the contract efforts for your project.)
15. Click the ‘Select Agency’ button.
16. Choose your Site from the drop-down box. (Note: if you are a contractor or an employee of an AE firm, you will likely need to choose ‘Contractor’ or ‘Design A-E’ as your site. If you are a customer of the agency who is managing the project for you, will most likely need to choose ‘Customer’ as your site. You will be asked to choose your office in the next step).
17. Click the ‘Select Site’ button.
18. Choose your Office name from the drop-down box. (NOTE: If you don't find your company, you may have chosen the wrong Agency or Site.)
19. Enter your Vendor ID exactly as it has been given to you by the Point of Contact (POC) for your organization. Vendor ID's are case sensitive, so it is important to be sure your Caps Lock is not on and that the Vendor ID is entered exactly.
20. Fill in the blanks for your first name, last name, and e-mail address.
Make sure that your e-mail address is correct during the registration process. You will use your e-mail address as your sign-on name for all subsequent logins to ProjNetSM, and it will also be posted with each of your entries in the system, so it is important to make sure you have entered it correctly.
21. Choose a secret question. Your question and answer will be used to verify your identity in the event that you forget your password or your password expires. Fill in the answer to your secret question in the next blank.



Figure 3-2



Section #3: Logging in and Getting Started

22. Click on the 'Register' button to receive your new password. Make a note of the password exactly as it appears on your screen (passwords are case-sensitive).



The Vendor ID you have entered is not correct. You have 2 more tries.

If you see this banner during the registration process, be sure that you have selected the correct Agency and Office name (some companies will do work with more than one agency). Some organizations have very similar names and/or multiple locations. Also, be sure that the vendor ID was entered exactly as provided – case *does* matter.

ProjNetSM Password Security Policy:

It is very important to make sure that you keep your password secure and do not distribute it to other individuals or allow others to login to your account.

Sharing passwords is a violation of the ProjNetSM Terms of Service.

Remember never to e-mail your password or leave it written down where others can see it, as this is also a violation.

The following password policy is in place to prevent repeat offenses of password sharing:

- **First offense:** The Call Center will notify the supervisor of the individual committing the password offense. Within 24 hours of notification, the individual's supervisor is to send a warning email to all staff that use the ProjNetSM system stating that passwords may not be shared. Supervisor will carbon-copy the Call Center on this e-mail and failure to provide the Call Center with a copy of the notification e-mail will result in temporary retirement of the offending user's account.
- **Second offense:** The account of the offending user will be immediately retired. Re-activation may occur following receipt of a formal memorandum from the individual's supervisor to employee stating password policy. A copy of this memo is to be provided to the Help Desk. Any administrator sharing their account will be stripped of administrative privilege for one year.
- **Third offense:** Requires documentation of counseling from supervisor with a written memo to be entered in the individual's personnel file. A copy of this memo must be provided to the Help Desk before the user's account is re-activated.
- **Fourth offense:** The offending individual will be permanently barred from ProjNetSM.

3.2 Logging On To the ProjNetSM System

Once you have registered for the system, you are ready to log on using your e-mail address and the password given to you during the registration process (Section 3.1).

Section #3: Logging in and Getting Started



Figure 3-3



1. Point your web browser to the following URL:
<https://www.projnet.org/>
2. In the Login box in the upper left-hand corner of the screen, choose the agency you are working with from the drop-down box and fill in your e-mail address and password (Figure 3-3).
3. Click the 'Login' button.

You will have three tries to log on successfully. After you have used an incorrect password and/or e-mail address three times, your account will be locked out for 30 minutes. Once you have been locked out of the system, you will also need to restart your browser before you can log back in.

Once logged in, you will begin on the 'Select Project' screen. Proceed to section four to learn more about working with projects.

3.3 Password Resets And Expiration



Figure 3-4

ProjNetSM passwords expire every six months for security purposes. If your password is lost or expired, you will need to reset it using the following steps:

7. Point your web browser to the following URL:
<https://www.projnet.org/>
8. From the grey Home/Design/Bid/Build menu across the top of the screen, move the mouse over the "Home" button and then select "Forgot Password" from the drop-down menu (Figure 3-4).
9. Choose your Agency from the drop-down box and enter your last name, phone number and e-mail address *exactly* as they were entered at registration. (If the information entered does not match the information listed for you in the database, the password reset will be unsuccessful).
10. Click the 'Submit' button.
11. You will then see your Secret Question displayed on the screen. Enter the answer in the text box exactly as it was typed during registration.
12. Click the "Verify Answer" button.
13. Your new password will be displayed on the screen. Please note that it is case sensitive.



If you did not have a valid secret question, or cannot remember the answer to the secret question you chose, the ProjNetSM Call Center can assist you with resetting your password. Please see Section 1.1 of this manual for more information about how to reach the Call Center.

When you first attempt to login to the system after the date that your password has expired, you will receive a "Password Expired" notice that displays your new password immediately (Figure 3-5). Write down your new password. You will have to login again immediately with your new password before you will be able to access the system. Note that you will only be shown this new password once and cannot use the Back button to return to this page, so be sure to make a note of this password or you will need to request another password reset.

Section #3: Logging in and Getting Started

Password Expired

Write down your new password **ci7-LCy4** before leaving this page.

Figure 3-5

3.4 Making Changes To Your Account Information



Figure 3-6

Once you are logged in to the system, you can easily make changes to your own account information, such as phone number, secret question and password. Here's how:

1. Log in to the ProjNetSM system at <https://www.projnet.org/>.
2. From the ProjNetSM home page, move the mouse over the "My Account" button in the menu bar across the top of the screen, and then select "Edit My Account" (Figure 3-6).
3. The Update Account screen will show you your current information as it is listed in the system (Figure 3-7):

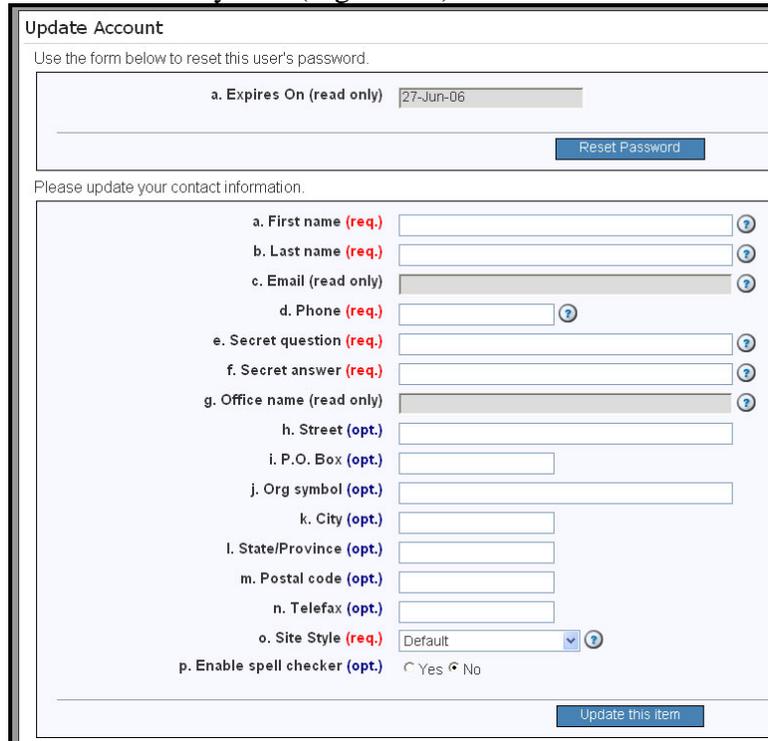
A screenshot of the "Update Account" web form. The form is titled "Update Account" and has a subtitle "Use the form below to reset this user's password." Below the subtitle, there is a field for "Expires On (read only)" with the value "27-Jun-06" and a "Reset Password" button. Below this, there is a section titled "Please update your contact information." with a list of fields: "a. First name (req.)", "b. Last name (req.)", "c. Email (read only)", "d. Phone (req.)", "e. Secret question (req.)", "f. Secret answer (req.)", "g. Office name (read only)", "h. Street (opt.)", "i. P.O. Box (opt.)", "j. Org symbol (opt.)", "k. City (opt.)", "l. State/Province (opt.)", "m. Postal code (opt.)", "n. Telefax (opt.)", "o. Site Style (req.)" (set to "Default"), and "p. Enable spell checker (opt.)" (with "Yes" and "No" radio buttons). There is an "Update this item" button at the bottom right.

Figure 3-7



You will not be able to change your office name or your e-mail address on this screen. If you need to make changes to either item, please contact the ProjNetSM Call Center. See Section 1.1 of this manual for more information about how to reach the Call Center.

4. Make changes to your user information and when you have finished editing, click on the "Update this item" button.
5. To enable/disable the spell checker, click the 'yes' or 'no' radio button accordingly. (Please note that you will need to enable any resulting Active X controls for this feature to work properly (see Section 2.3 for

Section #3: Logging in and Getting Started



- more information about Active X controls and how to tell if you need to turn them on).
6. If you need to reset your password, click the blue ‘Reset Password’ button towards the top of the screen.
 7. You will have the option to either enter your own password in the blank, or to use the grey ‘Auto Generate’ button to generate a random password for you.
ProjNetSM currently requires user passwords to be 8 characters long and contain at least 2 upper case(excluding I,O), 2 lower case, 2 numeric(2-9), and 1 symbolic character (- \$ * ! + =) only.
 8. Click the ‘Update Your Password’ button to complete the password update process.

Setting your default home page

At the bottom of the “Update account” screen, you will see that you have the option to set your own default home page. Currently, ProjNetSM users are taken to the DrChecksSM project list page by default when they first log in to the system. If you would like, you can set your default page to show either My Taskers or your FILER list of projects instead by choosing them from the drop-down list (Figure 3-8):

Use the form below to set your default login home page.

a. Home Page (req.)

Figure 3-8

Select a default home page from the “a. Home Page” drop-down list and then click the “Set Home Page” button to submit your changes. Your home page will update and will take effect on your next login.

3.5 Using Multiple Browser Windows

Once you have logged in to ProjNetSM on one browser window, you should not attempt to log in again from a second window on the same machine. This is because of the way the system handles session variables on the server side. Working in two windows simultaneously is not recommended and will cause you to lose your connection to the system in the non-active window. In addition, loss of data may occur and will most likely require you to close all browser windows and log in again.

3.6 Working With Multiple Agencies

Each agency has its own self-contained database in the ProjNetSM system. This means that if you are working with more than one agency, you will need to have a login for each agency you are working with. For example, if you are a contractor and you know that you will be working on projects for both

Section #3: Logging in and Getting Started

USACE and NAVFAC, you will have a different logon and password for the USACE projects than you would for the ones with NAVFAC, and would have to log in and out when switching between the two.



Again, never attempt to work in two agencies at the same time or in multiple windows at the same time. This could result in loss of data.

3.7 “Time out” Screens

For security purposes, the ProjNetSM system “times out” after 28 minutes of inactivity. For the purposes of this system, “inactivity” refers to the amount of time in between changing screens or pages. This means that you may be actively typing on a screen for 28 minutes or more and still receive a message that you have been logged off due to inactivity. Work will not be saved until the page has changed, which means that what is typed in will not be automatically “remembered” until it is entered into the database.



Some ProjNetSM users find it helpful to prepare their comments in a notepad file or a word document because the preparation often involves research and interruptions such that it may end up taking more time than is allowed before the time-out occurs. By preparing their comments outside the system and then cutting-and-pasting them into DrChecksSM, they are not subject to the pitfalls of losing work during time-out or maintenance and may also use their own spelling and grammar checkers prior to submitting a comment in the system.

Remember that the information you have typed into a form on ProjNetSM is not sent to the server until you save, update, or add the data when you submit the form.

3.8 Daily Maintenance

Each day the ProjNetSM server is taken down for daily maintenance at 11:00AM Central Standard Time. The server will be down for approximately 15 minutes and then will once again become available. You will see a warning message for a period of time before the maintenance window, and then the following message when the system is about to be taken down (Figure 3-9):

The server is now going down for daily maintenance. It will be down for approximately 5-15 minutes.

Figure 3-9

Several of our users have inquired as to why this occurs during the middle of the workday. There are several reasons as to why this time was chosen:

- In order to perform daily maintenance tasks such as backups and updates, manual intervention is required from the programmers and system administrators to reboot the machines and perform code updates. This is done during the workday when we are fully staffed because this ensures that all necessary personnel are on-site at the time.

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- A large number of ProjNetSM users are located on the east coast and the 11:00AM (12:00PM EST) maintenance time was chosen because it overlaps with lunch hours for many users of ProjNetSM.

3.9 Logging Out of ProjNetSM

When you have finished using the system, it is important that you log off correctly for security reasons. If a user has not logged off correctly, or has double-clicked the “Login” button on the home page, they may see the following error message upon next login (Figure 3-10):

**! Please note this account was already listed as being online.
If you have not logged in during the past thirty minutes, please contact the Call Center.**

Figure 3-10



Figure 3-11

To log off of the system, move your mouse over the ‘My Account’ button in the grey menu bar across the top and then click on ‘Logout’ (Figure 3-11). Once you have logged out successfully, you will see the following confirmation message (Figure 3-12):



Figure 3-12

Section #4: DrChecksSM User Roles and Activities

4.1 Introduction

DrChecksSM is organized into a hierarchy of user roles based on various stakeholder activities in the design review process. User roles in DrChecksSM will not always correspond to the actual job title of the user. For example, The “Project Manager” role in DrChecksSM has the capability to create and update projects. However, the individual assigned to this role in DrChecksSM may not carry the title of “Project Manager” at his or her agency.

In addition, DrChecksSM can be used to perform two separate and distinct types of reviews: Design Reviews (Plans & Specs), and Document Reviews. The Project Manager/Review Manager and Submitter sections below are split into the two different review types to guide you depending on which type of review you are using DrChecksSM for.

Agency and Site Administrators comprise possess the most extensive set of user rights within the program, as well as the ability to designate roles of authority of others within DrChecksSM. It is essential for Administrators to carefully select the personnel that will be responsible for entering comments, adding evaluations, backchecking, etc. and ensure that they obtain proper training on the system. Making sure that all users understand their roles and how to perform the activities required of them will yield the best results when utilizing the ProjNetSM system. Each of the ProjNetSM roles and the activities they are able to perform are described below.

4.2.1 Project Manager/Review Manager (Design Review)

The Project Manager role in DrChecksSM is perhaps the most involved role in the project. Project Managers are responsible for creating and administering projects and reviews and managing assignments of other users.



Remember that the individual assigned as “Project Manager” in DrChecksSM may or may not hold a Project Manager title with his or her agency. DrChecksSM roles are independent of actual job title.

The Review Manager role is a limited subset of permissions that are similar to the Project Manager role, but only allow management of an individual review rather than an entire project. This role is useful, for example, for a large project where the project manager would like to designate other individuals to handle the management of reviews, or when a third-party agency has been contracted to perform the review process.

Creating a new project (Project Manager Only)

Users with project manager permissions in the ProjNetSM system are able to create new projects at the beginning of a review using the following procedure:

7. Log in to the ProjNetSM system.

Section #4: DrChecksSM User Roles and Activities

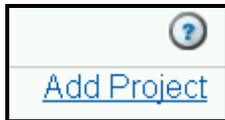


Figure 4-1



8. You will then be on the “Select Project” screen. In the upper right hand corner of the screen by the question mark symbol, click on “Add project” (Figure 4-1).
9. The Add Project form displays (Figure 4-2). Type the Project ID number into the field marked “a. Project ID”.

It is best to select a project ID that corresponds to numbering systems that are used to identify the project elsewhere in the agency.

Figure 4-2

10. Type the Project Name in field “b. Project Name”.
11. Click the “Add & Continue” button.
12. When your project has been added successfully, you will see the following confirmation displayed (Figure 4-3):

! Your project has been added.

Figure 4-3

You will also see that the project options menu displays immediately after project creation to allow you to edit the project right away after you have created it. Click on an option to enter the editing form. (The project editing options will be discussed further in the next section).

Editing a project (Project Manager Only)

You can change project options such as name and ID number after they have been entered by accessing the project options menu. Here you can also change categories, office, index values and add Project Managers. Here’s how to edit a project:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. For project managers, the value in the “Project ID” column will be hyperlinked (in blue text with underline) as in Figure 4-4. To edit the project, click on the hyperlinked project ID.

| | |
|-----------------------------------|---|
| PROJECT ID NUMBER | Your Project Title Here |
|-----------------------------------|---|

Figure 4-4



If a project ID is not presented as a hyperlink, you do not have access as a project manager.

3. The “Select Editing Task” menu will appear (Figure 4-5). Here, you can choose from the following tasks:
 - **Project Name and ID:** Click on this option if you have made a

Section #4: DrChecksSM User Roles and Activities

1. [Project Name and ID](#)
2. [Edit Project Categories](#)
3. [Edit Project Site Office](#)
4. [Edit Project Index Values](#)
5. [Edit Project Managers](#)
6. [RediReview Option](#)

Figure 4-5



If a person you wish to make project manager is not on the list of unassigned project managers, contact the Site Administrator and request that the person have schedule a training session and add the project manager role added to their record.

- **Redi-Review Option:** This enables the Redi-Review function for the agency you select. (See below section labeled “Redi-Review Option” for more information on this feature and how to use it).



You can change the project name and ID, categories, and the index for the the selected categories at any time during the project without impacting any of the work stored in reviews.

Creating a Review (Project Manager and Review Manager)

Project managers will normally be responsible for setting up reviews and selecting review options. Here’s how to create a new review:



Figure 4-6

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. The value in the “Project Name” column will be hyperlinked (in blue text with underline). Click on the hyperlinked project name to enter the project.
3. In the upper right hand corner of the screen, you will see hyperlinks for “Add Project” and “Add Review” (Figure 4-6). To add a new review, click the “Add Review” link.
4. The “New Review” page displays (Figure 4-7). Type the review title in the “a. Review Name” field.

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DrChecks / Select Project / New Review

Use the form below to create a new review.

a. Review Name (req.)

b. Review Type (req.) Plans and Specs Document

c. Review Start (req.)

d. Review End (req.)

e. Control Number (opt.)

f. External Document Server (opt.)

Figure 4-7

5. Select the radio button next to “Plans and Specs” (which is the default choice) in field “b. Review Type”.
6. Enter the “Review Start” and “Review End” dates in fields c and d. (You can also click on the tiny calendar icon to access a calendar that allows you to pick a date).



These dates do not control the actual use of the program. They should be selected to inform the participants of the expected timeframe for the review.

7. Optionally, you may choose to enter a Control Number (Field “e. Control Number”) and an “External Document Server” name (Field f. “External Document Server”).



The External Document Server will provide an on-screen link to a server location of your choosing and is frequently used if plans or review materials are posted on the web.

8. When all of the review details have been entered, click the “Add Review” button.
9. The following confirmation displaying your review name will display at the top of the page when your review has been added successfully (Figure 4-8):

Review 'Your review name goes here' created.

Figure 4-8

You will also see that the review options menu displays immediately after review creation to allow you to edit the review right away after you have created it. Click on an option to enter the editing form. (The review editing options will be discussed further in the next section).

Editing reviews (Project Manager and Review Manager)

Project managers have the ability to edit the review details, open and close the review, and add documents to the review through the “Edit this review” menu (Figure 4-9). To reach this menu:

6. Log in to the ProjNetSM system.
7. You will then be on the “Select Project” screen. Click on the title of the project that contains the review you would like to edit.
8. To the left of the review title, you will see two small buttons – “Edit” and



Figure 4-9

Section #4: DrChecksSM User Roles and Activities

“Reports” (Figure 4-10). Click the “Edit” button.



Figure 4-10

9. The “Select Editing Task” screen displays. You will see four options under “Edit this review” (the first grouping at the top of the page). Click on the option you want to change. Your choices are as follows:
- **Review Name & Schedule:** This option allows you to change the review name and start and end dates that you initially entered when the review was created. Make any changes to this information that are needed and then click the “Update & continue” button.
 - **Open/Close Review:** This is the place to go to update the current review status. Accessing this option displays the “Edit Status” screen (Figure 4-11):

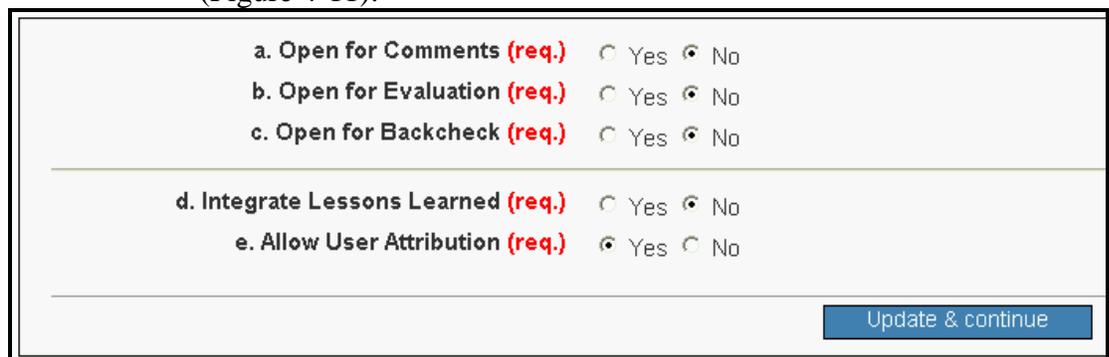


Figure 4-11

You will see several radio buttons for “Yes” and “No” with their corresponding review phases. For example, if you would like to open the review for comments, choose the “yes” radio button for the “a. Open for Comments” field. When you are ready to close the review for comments and open it for evaluations, choose the “no” radio button next to “a. Open for comments” and the “yes” radio button next to option “b. Open for Evaluation”. If your agency is using DQLLSM, you must enable the option to integrate Lessons Learned for a review if you want to allow users to submit comments as Lessons Learned. The option to Allow User Attribution should normally be left as yes. If it is changed to no, the comment reports will no longer include information about who posted comments, evaluations, and backchecks.



Please see the Best Practices Guide located in the Appendix at the end of this manual for more information on the recommended procedure for when to open/close review phases.

- **View/Edit QuickAdd Key:** Click this option if you want to change the review key that is maintained for any instance where the review

Section #4: DrChecksSM User Roles and Activities

must be identified to attach information without the end-user actually logging in to ProjNetSM. (This feature is used in the Bidder Inquiry feature discussed in Section 8 and also in the QuickAdd Comment feature that supports posting comments against reviews when users do not have a login (discussed in Section 4.6).

- **Add/Edit Review Documents:** Here you can choose to add one or more documents to reference that will be visible to all users who have access to the review. To add a document, click the “Add Record” link in the upper right-hand corner of the page, enter the Document Name and a description, and then click the “Browse...” button to locate the file on your local hard drive. To add the document, click the “Add & continue” button. Documents are accessed from a link on comment, evaluation, and Backcheck forms.



ProjNetSM will only accept file names that do not contain spaces and are under 30 characters. If you receive an error when you try to upload a file, check for spaces in the name and/or try using a shorter file name.

Making Review Assignments (Project Manager and Review Manager)

From the “Select Editing Task” screen discussed above, you can also access several menu options that will allow you to change assignments for the review. (To access this page, perform steps 1-3 in the previous section).

The menu grouping “Assign individuals to This Review” (Figure 4-12) contains several options for assignment of individuals:



Figure 4-12

1. **Check All User Assignments:** This option allows you to see a table containing the names of all users who have been assigned to the review and their current access levels (Figure 4-13):

| Keep? | Site | Office | User/Email | User Phone |
|---|-----------------------|--------------------------|-------------|--------------|
| <input checked="" type="radio"/> Yes <input type="radio"/> No | ProjNet Support Staff | RCE - DrChecks Help Desk | Tester_Test | 217-367-3273 |

Figure 4-13

Along with being able to see the current assignments, you can also choose to “mass un-assign” users from this screen by clicking the “No” button in the “Keep?” column next to the names of the users that you want to remove and then clicking the “Remove ‘No’ Submitters/Evaluators/Backcheckers” button. **Removal must be done for each section. If you mark persons for removal from more than one section, the selections that you made in the section associated with the button you click will be made and any other changes on the page will be ignored.**

2. **Comment Submitters:** The “Assign Reviewers & Submitters” page has a list of assigned submitters in the box on the right-hand side of the screen and all possible “unassigned” submitters in the box on the left-hand side (Figure 4-14):



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DrChecks / Select Project / Select Review / Edit Task / Assign Reviewers & Submitters

Project: Another exciting test project! Review: Testy test test

Select a site from the list below.

Site (req.): ProjNet Support Staff

Assign submitters using the form below

| Unassigned Submitters (37 possible) | | Assigned Submitters (1 currently) |
|---|--|---|
| Bower, Bill (Users retired prior to demo office de Brown, Crystal (RCE - DrChecks Help Desk) Day, Jerry (RCE - DrChecks Help Desk) Designer, Eastern Region (Users retired prior to East, Bill (CERL - DrChecks Project Office) East, William (CERL - DrChecks Project Office) Galey, Amy (RCE - DrChecks Help Desk) ignore me, test user (CERL - DrChecks Project Jones, Jerry2 (RCE - DrChecks Help Desk) Kirby, Jeff (CERL - DrChecks Project Office) | <input type="button" value="Add >"/> <input type="button" value="< Del"/> | Tester, Test (RCE - DrChecks Help Desk) |

Figure 4-14

3. The persons in the list will include only those people with the reviewer role in the site that owns the project. To assign an individual as a Submitter from a different site, choose their Site from the “Site” drop-down menu at the top of the page and then click the “Select Site” button. All possible submitters in that site will populate in the box on the left-hand side of the screen. To assign a user, click on their name in the box on the left-hand side and then click the “Add>” button. Conversely, to un-assign a submitter, click on their name in the right-hand side box and then click the “< Del” button. To assign or unassign more than one person at one time, hold down the Control key while making multiple selections.

If you have selected the Site for the user you want to assign, but do not see their name in the “Unassigned” list, it is possible that 1) The user you want to register does not have permissions for the activity you are trying to assign or 2) The user you want to register has not registered for the ProjNetSM system yet.

4. **Comment Evaluators:** This option functions the exact same as the “Comment Submitters” function described in step 2 except this will assign un/assign evaluators rather than submitters.
5. **Comment Back-Checkers:** This option functions the exact same as the “Comment Submitters” function described in step 2 except this will assign un/assign Backcheckers rather than submitters.
6. **Review Managers:** This option functions the exact same as the “Comment Submitters” function described in step 2 except that this allows you to assign individuals to the Review Manager role. (See Section 4.5 for more on the Review Manager role).
7. **Design Managers:** This is an unused role in ProjNetSM that is reserved for special evaluator functions. Do not assign users to this role unless directed to do so by Call Center staff.
8. **View-only Access:** This option functions the exact same as the “Comment Submitters” function described in step 2 except that this allows you to assign individuals to the View Only role. (This means that users will be able to run reports that enable them to read comments and evaluations but they will not be able to post or modify any data).

The menu grouping “Assign Offices to This Review” (Figure 4-12) contains several

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options for assignment of entire offices at one time:

1. **Check Office Assignments:** This option functions similarly to the “Check All User Assignments” feature described above except it allows you to see and mass un-assign entire offices instead of individuals (Figure 4-15):

| Current Submitters: | | | | |
|---|-----------------------|--------------------------|------|-------|
| Keep Assignment ? | Site | Office | City | State |
| <input checked="" type="radio"/> Yes <input type="radio"/> No | ProjNet Support Staff | RCE - DrChecks Help Desk | | |
| Remove 'No' Submitters | | | | |

Figure 4-15

You can choose to “mass un-assign” offices from this screen by clicking the “No” button in the “Keep?” column next to the names of the offices that you want to remove and then clicking the “Remove ‘No’ Submitters/Evaluators/Backcheckers” button.



When you de-assign an office, it will **not** remove people in the office from the review. It will only stop any future registrants from gaining access to the review.

2. **Submitter Offices:** The “Submitter Offices” page has a list of assigned submitter offices in the box on the right-hand side of the screen and all possible “unassigned” submitter offices for the project site in the box on the left-hand side. If you wish to assign an office outside the project site, choose their Site from the “Site” drop-down menu at the top of the page and then click the “Select Site” button. All possible submitter offices in that site will populate in the box on the left-hand side of the screen. To assign an office, click on the office name in the box on the left-hand side and then click the “Add>” button. Conversely, to un-assign an office, click on the office name in the right-hand side box and then click the “< Del” button.



When you assign submitter offices, the program will enable the office, but will **not** actually insert the user assignment. Users will need to actually enter comments in a review before their individual assignment will be inserted for the review. The program will provide you with a list of potential reviewers at the time of assignment. This controlled assignment is only in place for comment submitters.



When assigning an office to a review, only the users who have the permission you are trying to assign will be able to perform the action you have assigned them to. For example, if you assign an office of 10 people to be a Submitter office, but only 4 of them have Submitter privileges, only **these** four people will be assigned as Submitters when you assign the office.

3. **Evaluator Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except this will assign un/assign evaluator offices rather than submitter offices.
4. **Back-Checker Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except this will assign un/assign backchecker offices rather than submitter offices.
5. **View-Only Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except that this allows you to assign offices to the View Only role. (This means that users in the office will be able to run reports but will not be able to post or modify any data).

Importing Comments (Project Manager Only)

At times, it may be necessary for Project Managers to import comments that were created off-line by members of the project team (for example because a user that

Section #4: DrChecksSM User Roles and Activities

needs to submit comments may not have internet access). If you have a need for this, the ProjNetSM Call Center can provide users with a copy of a template that can be used to compose comments in order to easily import them into DrChecksSM. Each agency that uses DrChecksSM will have its own MS WordTM template, since the discipline pick list in the template must match that of the agency. This means that if you use DrChecksSM across agencies, you will need to be sure you are using the correct template for the agency you are going to be posting comments for.

There are two steps to composing comments offline: 1) Prepare comments using the MS WordTM template (See Appendix for more information) and 2) Upload comments into DrChecksSM:



To obtain the MS WordTM template for importing comments into DrChecksSM, please contact the ProjNetSM Call Center. Please see Section 1.1 of this manual for more information about how to reach the Call Center.

Uploading the MS WordTM Template into DrChecksSM

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
3. Click the title of the review you would like to import comments into.
4. At the upper right-hand side of the screen, you will see three links underlined in blue letters (Figure 4-16). Click the “Upload” link.



Figure 4-16

5. The Import Comment screen displays (Figure 4-17):

A screenshot of the "Import Comment" screen in DrChecks. The breadcrumb trail is "DrChecks / Select Project / Select Review / Enter Comment / Import Comment". The page shows "Project: Test Project" and "Review: 60% Test Review". A warning message states: "Editing upload files will result in errors. View Word File or PCARMS Instructions." There are two main sections for user selection. The first section has "a. Last Name (req.)" with a text input field and a question mark icon, and "b. User Type (req.)" with a dropdown menu showing "Assigned Users" and a question mark icon. Below this is a "Select User Group" button. The second section has "a. Comment Author (req.)" with a dropdown menu showing "Import as your comments." and a question mark icon, and "b. Comment File (req.)" with a text input field, a "Browse..." button, and a question mark icon. At the bottom is an "Upload Comment(s)" button.

Figure 4-17

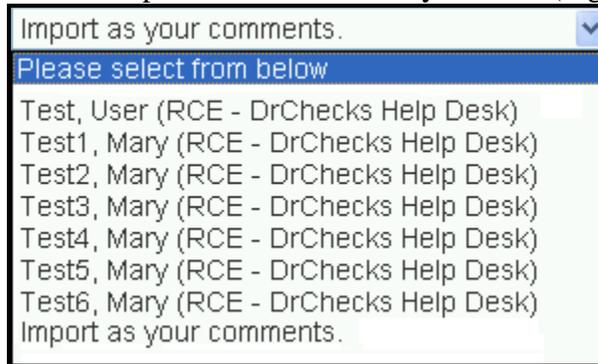
6. You can choose to either enter the comment as being authored by yourself or you may select another user to credit the comment entry to. Type the Last Name of the person you would like to credit the comment to into the “a. Last Name” field.
7. Select the user type that best describes the user you are attributing the comment to. The choices are:

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Select User Group

Figure 4-18

- a. **Assigned Users:** This narrows the last name search to only users who are already assigned to the project.
 - b. **Site Users:** Choosing this option narrows the search to only users registered into the same Site as you are.
 - c. **All Users:** This is the broadest search option that will return the largest number of results.
8. Click the “Select User Group” button (Figure 4-18).
 9. Choose the individual you would like to attribute the comment to from the “a. Comment Author” dropdown box. You will see the names of all the individuals who matched your search in this list, and you will also have the option to choose to import the comments as your own (Figure 4-19):



Import as your comments. ▾

Please select from below

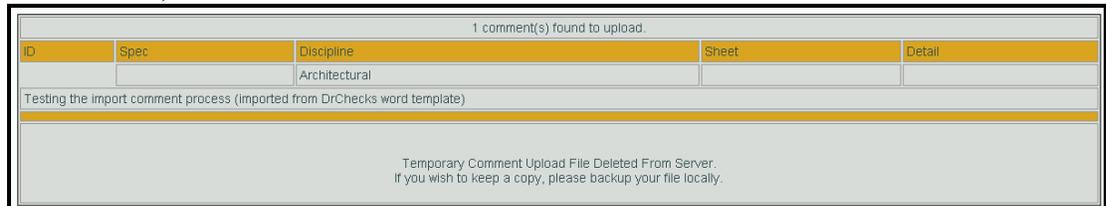
- Test, User (RCE - DrChecks Help Desk)
- Test1, Mary (RCE - DrChecks Help Desk)
- Test2, Mary (RCE - DrChecks Help Desk)
- Test3, Mary (RCE - DrChecks Help Desk)
- Test4, Mary (RCE - DrChecks Help Desk)
- Test5, Mary (RCE - DrChecks Help Desk)
- Test6, Mary (RCE - DrChecks Help Desk)
- Import as your comments.

Figure 4-19

Upload Comment(s)

Figure 4-20

10. Click the “Browse...” button next to right of the “b. Comment File” field. From the “choose file” dialog box, locate the .txt file created by the MS WordTM template on your computer’s Desktop and click the “Open” button.
11. Click the “Upload Comment” button (Figure 4-20).
12. You will receive a confirmation when you have completed uploading your comment which will list the comments that were found and uploaded (Figure 4-21):



1 comment(s) found to upload.

| ID | Spec | Discipline | Sheet | Detail |
|----|------|---------------|-------|--------|
| | | Architectural | | |

Testing the import comment process (imported from DrChecks word template)

Temporary Comment Upload File Deleted From Server.
If you wish to keep a copy, please backup your file locally.

Figure 4-21



When comments have been uploaded successfully, the Project Manager will receive a notification e-mail stating the project and review name and the name of the individual who imported the comment(s).

Global E-mail (Project/Review Managers Only)

There is a feature available to Project and Review Managers which allows them to send e-mail to groups of users directly from the ProjNetSM system without having to know/type in e-mail addresses or use an e-mail client. Any e-mails sent from this portion of the system will also be recorded in the project record. Here’s how to access this option:

1. Log in to the ProjNetSM system.

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2. You will then be on the “Select Project” screen. Click on the title of the project that contains the review you would like to edit.
3. To the left of the review title, you will see two small buttons – “Edit” and “Reports” (Figure 4-22). Click the “Edit” button.



Figure 4-22

Email Options

1. [Send EMail](#)
2. [EMail History](#)

Figure 4-23

4. The “Select Editing Task” screen displays. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping (Figure 4-23). Click on the “Send Email” link.
5. The “Email Users” form displays (Figure 4-24):

Figure 4-24

For the “a. Send To:” field, you will see that there are four drop-down menus to select from. Each dropdown represents the options that are available for that user group. You can choose to send the e-mail to user groups who have or have not participated in the review yet – for example, you can choose to send to **all** Reviewers/Submitters, or **only** Reviewers/Submitters who have not yet entered comments. Select the user groups you would like to send e-mail to from the drop-downs.

For example, if you wanted to send the e-mail to **all** assigned Reviewers/Submitters **and only** Customers who have not entered comments **and all** Designers/Evaluators **and only** Backcheckers who have not entered any backchecks, you would choose the following options (Figure 4-25):

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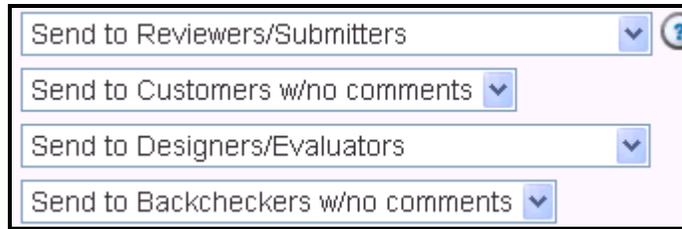


Figure 4-25

6. Optionally, you can choose to manually list other e-mail addresses, separated by commas, in the “b. Addtl. Email(s)” field. (These do NOT have to be registered users of ProjNetSM to receive the e-mail, but the users will need to have access to the system to be able to log on and view comments).
7. Enter the body of your e-mail message in the “c. Message” field.
8. Click the “Send Email” button.
9. A confirmation displays that lists all of the addresses that the message was sent to along with the message text.

To view the history of all e-mail messages sent by the system:

1. Repeat steps 1-3 above to access the “Select Editing Task” screen.
2. The “Select Editing Task” screen displays. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping (Figure 4-23). Click on the “Email History” link.

A table is displayed containing the date the e-mail was sent, who it was sent to, and the text of each message.

Redi-Review Option

At the project level, an option is provided for the project manager to insert a Redi-Review. The Redi-Review is a standard review that provides a set of comments that are generic plan coordination comments. Project managers can reasonably consider that the design team prior to sending a submittal to their agency will have considered the majority of the comments presented prior to sending a submittal to their agency. If a project manager chooses to include a Redi-Review, they can select the option and pick the standard file for their agency. After they select that review, the system will automatically insert the full set of comments into the review. It is then necessary for the project manager to assign the A/E firm offices or the users to the review. Members of the A/E firms should then proceed through the review and indicate compliance or reasons for non-compliance for each of the presented Redi-Review comments.

Project/Review Manager Reports

In addition to being able to access the reports available to all other user groups (evaluator, submitter and backchecker), there are several manager-specific reports available to Project and Review Managers which make it easier to get an idea of the progress of the project at a glance. To access Manager reports:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the

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project you want to view reports for.

3. You will then see a table containing the reviews for the project (Figure 4-26). On the left hand side of the Review name, click the “Reports” button.



| | Add Comments | All/Total |
|-------------------------|--|-----------|
| REPORTS | Sample Review (Closed for new comments) | 1 / |

Figure 4-26



Figure 4-27



4. You will then have access to the available list of Manager reports (Figure 4-27). Click on the name of the report to view it.

For more information about each of the reports and the data they contain, please refer to the DrChecksSM Reports Guide in the Appendix at the end of this manual.

4.2.2 Project Manager/Review Manager (Document Review)

The Project Manager role in DrChecksSM is perhaps the most involved role in the project. Project Managers are responsible for creating and administering projects and reviews and managing assignments of other users.



Remember that the individual assigned as “Project Manager” in DrChecksSM may or may not hold a Project Manager title with his or her agency. DrChecksSM roles are independent of actual job title.

The Review Manager role is a limited subset of permissions that are similar to the Project Manager role, but only allow management of an individual review rather than an entire project. This role is useful, for example, for a large project where the project manager would like to designate other individuals to handle the management of reviews, or when a third-party agency has been contracted to perform the review process.

Creating a new project (Project Manager Only)

Users with project manager permissions in the ProjNetSM system are able to create new projects at the beginning of a review using the following procedure:

13. Log in to the ProjNetSM system.
14. You will then be on the “Select Project” screen. In the upper right hand corner of the screen by the question mark symbol, click on “Add project” (Figure 4-28).
15. The Add Project form displays (Figure 4-29). Type the Project ID number into the field marked “a. Project ID”.

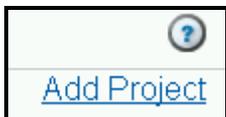


Figure 4-28



It is best to select a project ID that corresponds to numbering systems that are used to identify the project elsewhere in the agency.

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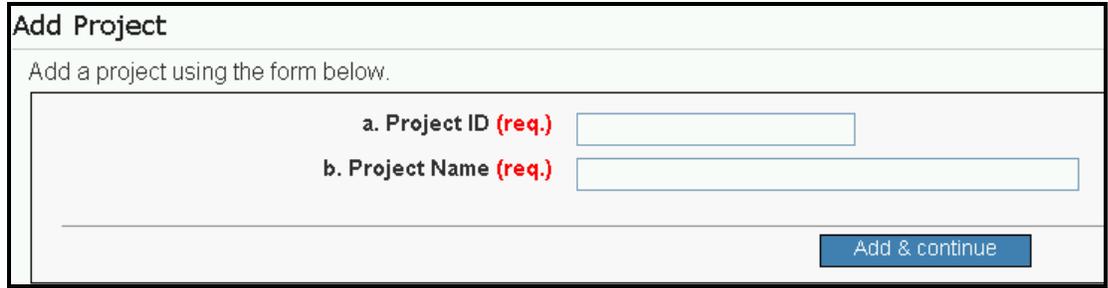


Figure 4-29

16. Type the Project Name in field “b. Project Name”.
17. Click the “Add & Continue” button.
18. When your project has been added successfully, you will see the following confirmation displayed (Figure 4-30):



Figure 4-30

You will also see that the project options menu displays immediately after project creation to allow you to edit the project right away after you have created it. Click on an option to enter the editing form. (The project editing options will be discussed further in the next section).

Editing a project (Project Manager Only)

You can change project options such as name and ID number after they have been entered by accessing the project options menu. Here you can also change categories, office, index values and add Project Managers. Here’s how to edit a project:

4. Log in to the ProjNetSM system.
5. You will then be on the “Select Project” screen. For project managers, the value in the “Project ID” column will be hyperlinked (in blue text with underline) as in Figure 4-31. To edit the project, click on the hyperlinked project ID.



Figure 4-31



If a project ID is not presented as a hyperlink, you do not have access as a project manager.

6. The “Select Editing Task” menu will appear (Figure 4-32). Here, you can choose from the following tasks:
 - **Project Name and ID:** Click on this option if you have made a mistake entering the project ID number or the project name. Make any changes to the project information and then click the “Update and continue” button.
 - **Edit Project Categories:** This menu option allows you to choose the category or categories that best describe the project. To select a category, click on the category name from the available categories on the left-hand side of the page and then click the “Add >” button.
 - **Edit Project Site Office:** Choose the Site office that the project

1. [Project Name and ID](#)
2. [Edit Project Categories](#)
3. [Edit Project Site Office](#)
4. [Edit Project Index Values](#)
5. [Edit Project Managers](#)
6. [RediReview Option](#)

Figure 4-32

Section #4: DrChecksSM User Roles and Activities

belongs to. By default, the project will be created under your own site office, but if you need to change that, select another office from the “b. Site” drop-down menu and then click the “Edit Site” button. (If you move a project from one site to another, the Call Center will be notified of the change by an automated e-mail notification).

- **Edit Project Index Values:** If Project Categories have been assigned to the project, you can select from a drop-down menu of index values that your agency has selected for that category. (These values will differ from agency to agency).
- **Edit Project Managers:** If you need to add other individuals as Project Managers for the project, you can select them from the list of “Unassigned managers” by clicking on their name in the box on the left-hand side of the screen and clicking the “Add >” button. (Similarly, if you need to remove someone from the list of Assigned Managers, click on their name in the right-hand side of the screen and then click the “< Del” button).



If a person you wish to make project manager is not on the list of unassigned project managers, contact the Site Administrator and request that the person have schedule a training session and add the project manager role added to their record.

- **Redi-Review Option:** This enables the Redi-Review function for the agency you select. (See below section labeled “Redi-Review Option” for more information on this feature and how to use it).



You can change the project name and ID, categories, and the index for the the selected categories at any time during the project without impacting any of the work stored in reviews.

Creating a Review (Project Manager and Review Manager)

Project managers will normally be responsible for setting up reviews and selecting review options. Here’s how to create a new review:



Figure 4-33

10. Log in to the ProjNetSM system.
11. You will then be on the “Select Project” screen. The value in the “Project Name” column will be hyperlinked (in blue text with underline). Click on the hyperlinked project name to enter the project.
12. In the upper right hand corner of the screen, you will see hyperlinks for “Add Project” and “Add Review” (Figure 4-33). To add a new review, click the “Add Review” link.
13. The “New Review” page displays (Figure 4-34). Type the review title in the “a. Review Name” field.

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DrChecks / Select Project / New Review

Use the form below to create a new review.

a. Review Name (req.)

b. Review Type (req.) Plans and Specs Document

c. Review Start (req.)

d. Review End (req.)

e. Control Number (opt.)

f. External Document Server (opt.)

Figure 4-34

- Click the radio button next to “Document” in the field marked “b. Review Type”.
- Enter the “Review Start” and “Review End” dates in fields c and d. (You can also click on the tiny calendar icon to access a calendar that allows you to pick a date).



These dates do not control the actual use of the program. They should be selected to inform the participants of the expected timeframe for the review.

- Optionally, you may choose to enter a Control Number (Field “e. Control Number”) and an “External Document Server” (Field f. “External Document Server”).



The External Document Server will provide an on-screen link to a server location of your choosing and is frequently used if plans or review materials are posted on the web.

- When all of the review details have been entered, click the “Add Review” button.
- The following confirmation displaying your review name will display at the top of the page when your review has been added successfully (Figure 4-35):

Review 'Your review name goes here' created.

Figure 4-35

You will also see that the review options menu displays immediately after review creation to allow you to edit the review right away after you have created it. Click on an option to enter the editing form. (The review editing options will be discussed further in the next section).

Editing reviews (Project Manager and Review Manager)

Project managers have the ability to edit the review details, open and close the review, and add documents to the review through the “Edit this review” menu (Figure 4-36). To reach this menu:

- Log in to the ProjNetSM system.
- You will then be on the “Select Project” screen. Click on the title of the project that contains the review you would like to edit.
- To the left of the review title, you will see two small buttons – “Edit” and



Figure 4-36

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“Reports” (Figure 4-37). Click the “Edit” button.



| | |
|-------------------------------|---|
| | Add Comments |
| EDIT REPORTS | Your review name goes here (Closed for new comments) |

Figure 4-37

13. The “Select Editing Task” screen displays. You will see four options under “Edit this review” (the first grouping at the top of the page). Click on the option you want to change. Your choices are as follows:

- **Review Name & Schedule:** This option allows you to change the review name and start and end dates that you initially entered when the review was created. Make any changes to this information that are needed and then click the “Update & continue” button.
- **Open/Close Review:** This is the place to go to update the current review status. Accessing this option displays the “Edit Status” screen (Figure 4-38):



| | | |
|-------------------------------------|--------------------------------------|-------------------------------------|
| a. Open for Comments (req.) | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| b. Open for Evaluation (req.) | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| c. Open for Backcheck (req.) | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| d. Integrate Lessons Learned (req.) | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| e. Allow User Attribution (req.) | <input checked="" type="radio"/> Yes | <input type="radio"/> No |

Update & continue

Figure 4-38

You will see several radio buttons for “Yes” and “No” with their corresponding review phases. For example, if you would like to open the review for comments, choose the “yes” radio button for the “a. Open for Comments” field. When you are ready to close the review for comments and open it for evaluations, choose the “no” radio button next to “a. Open for comments” and the “yes” radio button next to option “b. Open for Evaluation”. If your agency is using DQLLSM, you must enable the option to integrate Lessons Learned for a review if you want to allow users to submit comments as Lessons Learned. The option to Allow User Attribution should normally be left as yes. If it is changed to no, the comment reports will no longer include information about who posted comments, evaluations, and backchecks.



Please see the Best Practices Guide located in the Appendix at the end of this manual for more information on the recommended procedure for when to open/close review phases.

- **View/Edit QuickAdd Key:** Click this option if you want to change the review key that is maintained for any instance where the review

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must be identified to attach information without the end-user actually logging in to ProjNetSM. (This feature is used in the Bidder Inquiry feature discussed in Section 8 and also in the QuickAdd Comment feature that supports posting comments against reviews when users do not have a login (discussed later in this section).

- **Add/Edit Review Documents:** Here you can choose to add one or more documents to reference that will be visible to all users who have access to the review. To add a document, click the “Add Record” link in the upper right-hand corner of the page, enter the Document Name and a description, and then click the “Browse...” button to locate the file on your local hard drive. To add the document, click the “Add & continue” button. Documents are accessed from a link on comment, evaluation, and Backcheck forms.



ProjNetSM will only accept file names that do not contain spaces and are under 30 characters. If you receive an error when you try to upload a file, check for spaces in the name and/or try using a shorter file name.

Making Review Assignments (Project Manager and Review Manager)

From the “Select Editing Task” screen discussed above, you can also access several menu options that will allow you to change assignments for the review. (To access this page, perform steps 1-3 in the previous section).

The menu grouping “Assign individuals to This Review” (Figure 4-39) contains several options for assignment of individuals:



Figure 4-39

9. **Check All User Assignments:** This option allows you to see a table containing the names of all users who have been assigned to the review and their current access levels (Figure 4-40):

| Keep? | Site | Office | User/Email | User Phone |
|---|-----------------------|--------------------------|-------------|--------------|
| <input checked="" type="radio"/> Yes <input type="radio"/> No | ProjNet Support Staff | RCE - DrChecks Help Desk | Tester_Test | 217-367-3273 |

Figure 4-40

Along with being able to see the current assignments, you can also choose to “mass un-assign” users from this screen by clicking the “No” button in the “Keep?” column next to the names of the users that you want to remove and then clicking the “Remove ‘No’ Submitters/Evaluators/Backcheckers” button. **Removal must be done for each section. If you mark persons for removal from more than one section, the selections that you made in the section associated with the button you click will be made and any other changes on the page will be ignored.**

10. **Comment Submitters:** The “Assign Reviewers & Submitters” page has a list of assigned submitters in the box on the right-hand side of the screen and all possible “unassigned” submitters in the box on the left-hand side (Figure 4-41):



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DrChecks / Select Project / Select Review / Edit Task / Assign Reviewers & Submitters

Project: Another exciting test project! Review: Testy test test

Select a site from the list below.

Site (req.): ProjNet Support Staff

Assign submitters using the form below

Unassigned Submitters (37 possible)

- Bower, Bill (Users retired prior to demo office de
- Brown, Crystal (RCE - DrChecks Help Desk)
- Day, Jerry (RCE - DrChecks Help Desk)
- Designer, Eastern Region (Users retired prior to
- East, Bill (CERL - DrChecks Project Office)
- East, William (CERL - DrChecks Project Office)
- Galey, Amy (RCE - DrChecks Help Desk)
- ignore me, test user (CERL - DrChecks Project
- Jones, Jerry2 (RCE - DrChecks Help Desk)
- Kirby, Jeff (CERL - DrChecks Project Office)

Assigned Submitters (1 currently)

- Tester, Test (RCE - DrChecks Help Desk)

Figure 4-41

11. The persons in the list will include only those people with the reviewer role in the site that owns the project. To assign an individual as a Submitter from a different site, choose their Site from the “Site” drop-down menu at the top of the page and then click the “Select Site” button. All possible submitters in that site will populate in the box on the left-hand side of the screen. To assign a user, click on their name in the box on the left-hand side and then click the “Add>” button. Conversely, to un-assign a submitter, click on their name in the right-hand side box and then click the “< Del” button. To assign or unassign more than one person at one time, hold down the Control key while making multiple selections.

If you have selected the Site for the user you want to assign, but do not see their name in the “Unassigned” list, it is possible that 1) The user you want to register does not have permissions for the activity you are trying to assign or 2) The user you want to register has not registered for the ProjNetSM system yet.

12. **Comment Evaluators:** This option functions the exact same as the “Comment Submitters” function described in step 2 except this will assign un/assign evaluators rather than submitters.
13. **Comment Back-Checkers:** This option functions the exact same as the “Comment Submitters” function described in step 2 except this will assign un/assign Backcheckers rather than submitters.
14. **Review Managers:** This option functions the exact same as the “Comment Submitters” function described in step 2 except that this allows you to assign individuals to the Review Manager role. (See Section 4.5 for more on the Review Manager role).
15. **Design Managers:** This is an unused role in ProjNetSM that is reserved for special evaluator functions. Do not assign users to this role unless directed to do so by Call Center staff.
16. **View-only Access:** This option functions the exact same as the “Comment Submitters” function described in step 2 except that this allows you to assign individuals to the View Only role. (This means that users will be able to run reports that enable them to read comments and evaluations but they will not be able to post or modify any data).

The menu grouping “Assign Offices to This Review” (Figure 4-12) contains several



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options for assignment of entire offices at one time:

6. **Check Office Assignments:** This option functions similarly to the “Check All User Assignments” feature described above except it allows you to see and mass un-assign entire offices instead of individuals (Figure 4-42):

| Current Submitters: | | | | |
|---|-----------------------|--------------------------|------|-------|
| Keep Assignment ? | Site | Office | City | State |
| <input checked="" type="radio"/> Yes <input type="radio"/> No | ProjNet Support Staff | RCE - DrChecks Help Desk | | |
| <input type="button" value="Remove 'No' Submitters"/> | | | | |

Figure 4-42

You can choose to “mass un-assign” offices from this screen by clicking the “No” button in the “Keep?” column next to the names of the offices that you want to remove and then clicking the “Remove ‘No’ Submitters/Evaluators/Backcheckers” button.



When you de-assign an office, it will **not** remove people in the office from the review. It will only stop any future registrants from gaining access to the review.

7. **Submitter Offices:** The “Submitter Offices” page has a list of assigned submitter offices in the box on the right-hand side of the screen and all possible “unassigned” submitter offices for the project site in the box on the left-hand side. If you wish to assign an office outside the project site, choose their Site from the “Site” drop-down menu at the top of the page and then click the “Select Site” button. All possible submitter offices in that site will populate in the box on the left-hand side of the screen. To assign an office, click on the office name in the box on the left-hand side and then click the “Add>” button. Conversely, to un-assign an office, click on the office name in the right-hand side box and then click the “< Del” button.



When you assign submitter offices, the program will enable the office, but will **not** actually insert the user assignment. Users will need to actually enter comments in a review before their individual assignment will be inserted for the review. The program will provide you with a list of potential reviewers at the time of assignment. This controlled assignment is only in place for comment submitters.



When assigning an office to a review, only the users who have the permission you are trying to assign will be able to perform the action you have assigned them to. For example, if you assign an office of 10 people to be a Submitter office, but only 4 of them have Submitter privileges, only **these** four people will be assigned as Submitters when you assign the office.

8. **Evaluator Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except this will assign un/assign evaluator offices rather than submitter offices.
9. **Back-Checker Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except this will assign un/assign backchecker offices rather than submitter offices.
10. **View-Only Offices:** This option functions the exact same as the “Submitter Offices” function described in step 2 except that this allows you to assign offices to the View Only role. (This means that users in the office will be able to run reports but will not be able to post or modify any data).

Importing Comments (Project Manager Only)

At times, it may be necessary for Project Managers to import comments that were created off-line by members of the project team (for example because a user that

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needs to submit comments may not have internet access). If you have a need for this, the ProjNetSM Call Center can provide users with a copy of a template that can be used to compose comments in order to easily import them into DrChecksSM. Each agency that uses DrChecksSM will have its own MS WordTM template, since the discipline pick list in the template must match that of the agency. This means that if you use DrChecksSM across agencies, you will need to be sure you are using the correct template for the agency you are going to be posting comments for.

There are two steps to composing comments offline: 1) Prepare comments using the MS WordTM template (See Appendix for more information) and 2) Upload comments into DrChecksSM:



To obtain the MS WordTM template for importing comments into DrChecksSM, please contact the ProjNetSM Call Center. Please see Section 1.1 of this manual for more information about how to reach the Call Center.

Uploading the MS WordTM Template into DrChecksSM

13. Log in to the ProjNetSM system.
14. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
15. Click the title of the review you would like to import comments into.
16. At the upper right-hand side of the screen, you will see three links underlined in blue letters (Figure 4-43). Click the “Upload” link.



Figure 4-43

17. The Import Comment screen displays (Figure 4-44):

Figure 4-44

18. You can choose to either enter the comment as being authored by yourself or you may select another user to credit the comment entry to. Type the Last Name of the person you would like to credit the comment to into the “a. Last Name” field.
19. Select the user type that best describes the user you are attributing the comment to. The choices are:

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Select User Group

Figure 4-45

- a. **Assigned Users:** This narrows the last name search to only users who are already assigned to the project.
- b. **Site Users:** Choosing this option narrows the search to only users registered into the same Site as you are.
- c. **All Users:** This is the broadest search option that will return the largest number of results.

20. Click the “Select User Group” button (Figure 4-45).

21. Choose the individual you would like to attribute the comment to from the “a. Comment Author” dropdown box. You will see the names of all the individuals who matched your search in this list, and you will also have the option to choose to import the comments as your own (Figure 4-46):

Figure 4-46

Upload Comment(s)

Figure 4-47

22. Click the “Browse...” button next to right of the “b. Comment File” field.

From the “choose file” dialog box, locate the .txt file created by the MS WordTM template on your computer’s Desktop and click the “Open” button.

23. Click the “Upload Comment” button (Figure 4-47).

24. You will receive a confirmation when you have completed uploading your comment which will list the comments that were found and uploaded (Figure 4-48):

| ID | Spec | Discipline | Sheet | Detail |
|----|------|---------------|-------|--------|
| | | Architectural | | |

Testing the import comment process (imported from DrChecks word template)

Temporary Comment Upload File Deleted From Server.
If you wish to keep a copy, please backup your file locally.

Figure 4-48



When comments have been uploaded successfully, the Project Manager will receive a notification e-mail stating the project and review name and the name of the individual who imported the comment(s).

Global E-mail (Project/Review Managers Only)

There is a feature available to Project and Review Managers which allows them to send e-mail to groups of users directly from the ProjNetSM system without having to know/type in e-mail addresses or use an e-mail client. Any e-mails sent from this portion of the system will also be recorded in the project record. Here’s how to access this option:

10. Log in to the ProjNetSM system.

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11. You will then be on the “Select Project” screen. Click on the title of the project that contains the review you would like to edit.
12. To the left of the review title, you will see two small buttons – “Edit” and “Reports” (Figure 4-49). Click the “Edit” button.



Figure 4-49

13. The “Select Editing Task” screen displays. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping (Figure 4-50). Click on the “Send Email” link.
14. The “Email Users” form displays (Figure 4-51):

Email Options

1. [Send Email](#)
2. [Email History](#)

Figure 4-50

Figure 4-51

For the “a. Send To:” field, you will see that there are four drop-down menus to select from. Each dropdown represents the options that are available for that user group. You can choose to send the e-mail either with or without comments attached. Select the user groups you would like to send e-mail to from the drop-downs. For example, if you wanted to send the e-mail **with** comments to **all** available groups, you would choose the following options (Figure 4-52):

Figure 4-52

15. Optionally, you can choose to manually list other e-mail addresses, separated by commas, in the “b. Addtl. Email(s)” field. (These do NOT have to be

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registered users of ProjNetSM to receive the e-mail, but the users will need to have access to the system to be able to log on and view comments).

16. Enter the body of your e-mail message in the “c. Message” field.
17. Click the “Send Email” button.
18. A confirmation displays that lists all of the addresses that the message was sent to along with the message text.

To view the history of all e-mail messages sent by the system:

3. Repeat steps 1-3 above to access the “Select Editing Task” screen.
4. The “Select Editing Task” screen displays. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping (Figure 4-50). Click on the “Email History” link.
5. A table is displayed containing the date the e-mail was send, who it was sent to, and the text of each message.

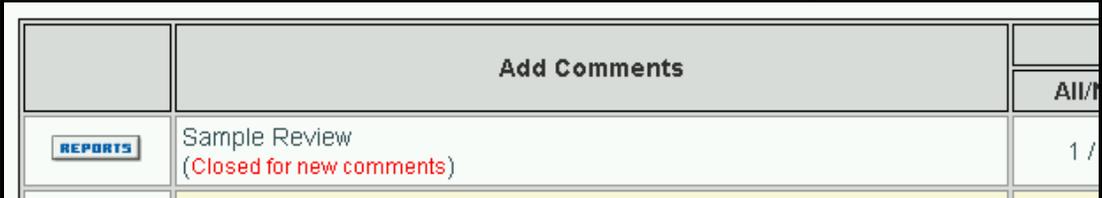
Redi-Review Option

At the project level, an option is provided for the project manager to insert a Redi-Review. The Redi-Review is a standard review that provides a set of comments that are generic plan coordination comments. Project managers can reasonably consider that the design team prior to sending a submittal to their agency will have considered the majority of the comments presented prior to sending a submittal to their agency. If a project manager chooses to include a Redi-Review, they can select the option and pick the standard file for their agency. After they select that review, the system will automatically insert the full set of comments into the review. It is then necessary for the project manager to assign the A/E firm offices or the users to the review. Members of the A/E firms should then proceed through the review and indicate compliance or reasons for non-compliance for each of the presented Redi-Review comments.

Project/Review Manager Reports

In addition to being able to access the reports available to all other user groups (evaluator, submitter and backchecker), there are several manager-specific reports available to Project and Review Managers which make it easier to get an idea of the progress of the project at a glance. To access Manager reports:

5. Log in to the ProjNetSM system.
6. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.
7. You will then see a table containing the reviews for the project (Figure 4-53). On the left hand side of the Review name, click the “Reports” button.



| | Add Comments | All/T |
|--|--|-------|
| <input type="button" value="REPORTS"/> | Sample Review (Closed for new comments) | 1 / |

Figure 4-53

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Manager Reports

- [My Comments](#)
- [All Comments](#)
- [Snapshot By Discipline](#)

Figure 4-54



8. You will then have access to the available list of Manager reports (Figure 4-54). Click on the name of the report to view it.

For more information about each of the reports and the data they contain, please refer to the DrChecksSM Reports Guide in the Appendix at the end of this manual.

4.3.1 Submitter (Design Review)

Submitting a new Comment

The Comment Submitter role in DrChecksSM is typically assigned to Government staff, customers, owners and contractors who review deliverables and submit review comments¹. The comment submission process allows reviewers to document possible issues they have discovered that need to be addressed by other members of the project team. A user must first have “Submitter” rights before they can submit their own comments. Comment submitters can enter a comment using the following steps:



Before entering a comment, run a Snapshot Report to make sure that the comment you are making has not already been entered by someone else.

12. Log in to the ProjNetSM system.
13. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
14. The “Select Review” screen displays. Click on the title of the review you would like to enter a comment for.
15. The “Enter Comment” form displays (Figure 4-55):

¹ East, Dr. William, *Best Practices Guidelines: Design Review and Checking System (DrChecksSM)*. December 2005.

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DrChecks / Select Project / Select Review / Enter Comment

Project: Testing101 Review: Review 10/13/04 - Review Docs

Enter your comment in the form below.

a. Discipline (req.) Please select from below

b. DocType (req.) Please select from below

c. Doc. Ref. Number (opt.)

d. Plan Sheet (opt.)

e. Plan Detail (opt.)

f. Spec Section (opt.)

g. Attachment (opt.) Browse...

h. Comment (req.)

i. Critical issue? (opt.) Yes No

j. Lessons learned? (opt.) Yes No

Add Comment Add & Clear

Figure 4-55

16. From the drop-down list in the first field, “a. Discipline”, choose the discipline that best fits the individuals who will be addressing the comment (not necessarily your own discipline). For example, if your main area of concentration is Environmental, but you are entering a comment regarding a possible Electrical problem you have cited, you would want to choose Electrical as the discipline for the comment you are entering.
17. Choose the Document Type (DocType) from the drop-down list in the “b. DocType” field.
18. Optionally, you can choose to enter a Document Reference Number (field c.), the name of a pertinent plan sheet (field d.), Plan Detail (field e.), Spec section (field f.) or an attachment (field g.). Entering a value in these blanks allows for sorting of the comments by these fields.
19. Enter your Comment into the “h. Comment” field.



In order to most effectively utilize the ProjNetSM system, it is important to limit your comments to one issue per comment. Enter multiple comments to track multiple issues individually.

20. If your comment is considered a “Critical Issue”, you can optionally choose to select the “Yes” radio button in the “i. Critical issue?” field to flag it as such. (Critical issues will show up on the “Critical Comments” report which is accessible by Evaluators, Backcheckers and Project Managers).



If you have flagged a comment as “critical” (meaning the issue is a potential “showstopper” for the project, you will receive the following message upon submittal of the comment instructing you to contact the project manager to alert them to the issue (Figure 4-56):

Please contact the project manager immediately regarding your critical comment.

Figure 4-56

21. Optionally you can also choose to create a potential Lesson Learned from your comment by selecting the “Yes” radio button in field “j. Lessons

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Learned?”. (For more on this, see Section 9.9: “Entering a Lessons Learned when submitting a DrChecksSM comment”).



Your agency must have chosen to participate in the DQLLSM portion of ProjNetSM and your project manager must have turned on the option for the review before you will be able to submit a comment as a potential lesson learned.

22. Click the Add Comment button. You will see the following confirmation which includes your unique comment ID number for the new comment (Figure 4-57):

Your comment has been saved as ID 3463.

Figure 4-57



If you are going to be entering several comments in a row and would like to remain on the Enter Comment form but clear all the fields, click the “Add & Clear” button to add your comment and start fresh with a new form. By default, the form carries the top fields from form to form since many users keep part of the fields in place for several issues located at the same location within the document being reviewed.

QuickAdd Comments

ProjNetSM includes a special feature that allows comments to be submitted without having to log in to DrChecksSM. To do this, you will need to obtain a “Quick Add Key” from your Project Manager or Review Manager. Each review will have its own unique key. To Access QuickAdd:

1. Point your web browser to the ProjNetSM website (<https://www.projnet.org/>). Note that you do NOT need to login at this time.
2. From the “Home/Design/Bid/Build” menu bar at the top of the page, move your mouse over the “Design” button and then click on “QuickAdd” from the resulting drop-down menu (Figure 4-58).
3. The “Quick Add Login” page displays (Figure 4-59):



Figure 4-58

DrChecks / Quick Add Login

a. Agency (req.)

b. Key (req.) - ?

c. EMail (req.)

Figure 4-59

4. Select the Agency you are working with from the drop-down list in field “a. Agency”.
5. In the field marked “b. Key”, Enter the QuickAdd Key for the review that was given to you by the Project Manager.
6. Enter your e-mail address in field “c. Email”.
7. Click the “Continue” button.
8. You will then be prompted for the answer to your Secret Question to verify your identity. Type the answer to your secret question in field “b. Answer” and then click the “Login” button.
9. The “Comment Entry” form displays (Figure 4-60). Select the Discipline that applies to your comment from the “a. Discipline” drop-down list.

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Figure 4-60

10. Optionally, it is a good practice to reference a plan sheet in field “b. Plan Sheet”, a plan detail in field “c. Plan Detail” or a Spec Section in field “d. Spec Section”.
11. Enter your comment in the “e. Comment” field.
12. Click the Add Comment button.



Comments posted using the QuickAdd method cannot be retracted once you have clicked on the “Add Comment” button.

Updating Comments

Submitted comments can be edited by the author, (as well as the Project Manager and Site Administrator). Here are the steps to update a comment once it has been entered into DrChecksSM:



Changes can only be made on comments while the review is open for comments or until they have been evaluated.

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
3. The “Select Review” screen displays. You will see a table with the name of the review and the review status (“Review Underway”) will be listed next to the review dates. The numbers in the “edit”, “evaluate”, “MyBackCheck” and “All BackCheck” columns, display the number of comments in each status as follows (Figure 4-61):

| Add Comments | | Edit | Evaluate | My BackCheck | All BackCheck |
|-------------------------|---|---------------------------|-------------------|---------------|---------------|
| | | All/Note/Yours | Pend/Concur/Other | Pend/Opn/Clsd | Pend/Opn/Clsd |
| REPORTS | 60% Test Review (20-Jan-06 to 31-Jan-06) <i>Review underway.</i> | 1 / 0 / 1 | 1 / 0 / 0 | 0 / 0 / 0 | 0 / 0 / 0 |

Figure 4-61

4. As a Submitter, you will notice a hyperlinked number in the “Yours” portion of the “Edit” column for the review if you have any comments that you have entered that are still eligible to be modified. Click on this hyperlinked number.

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5. The “Edit My Comments” screen displays (Figure 4-62):

Use the forms below to search or browse comments [Add Comments](#) | [Quick Pick](#) | [Upload](#)

Type: Keyword: Discipline:

DocType:

<<First < Prev Viewing 1 of 2 Items ?

b. Discipline (req.)

c. DocType (req.)

d. Doc. Ref. Number (opt.)

e. Plan Sheet (opt.)

f. Plan Detail (opt.)

g. Spec Section (opt.)

h. Attachment (opt.)

i. Comment (req.)

j. Critical issue? (opt.) Yes No ?

Figure 4-62

6. You will then see a form (one per page) for each of the comments that you have entered that can be updated. To scroll through the comments, you can use the “Next >” and “Last >>” buttons in the upper right hand corner of the page and the “<< First” and “< Previous” (“Prev”) buttons in the upper left hand corner of the screen.



You may wish to investigate the search feature for getting to a specific comment if you have a very large collection of comments to page through to find one comment.

7. You will notice that for each editable comment, the fields are already pre-filled with the information that was previously saved when the comment was entered. You can make your changes to this information just as you did when you first entered the comment (see Section 3.6 for more information and a breakdown of the different fields and what they are used for).
8. When you have finished editing the comment, click the “Update Comment” button at the bottom of the screen (Figure 4-63).
9. You will receive the following confirmation when your comment has been updated successfully (Figure 4-64):

Update Comment

Figure 4-63

! Your comment has been updated.

Figure 4-64

Deleting Comments (Comment Author Only)

1. Follow steps 1-7 in the previous section (“Updating Comments”) to reach the “Edit My Comments” screen.
2. Locate the comment you would like to delete.
3. Scroll down to the bottom of the screen and click the “Delete comment” button (Figure 4-65):

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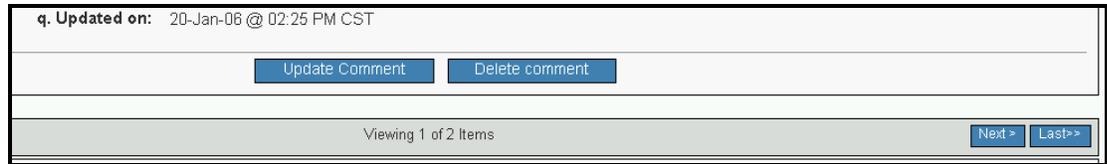


Figure 4-65

4. You will see the following confirmation that your comment was deleted successfully (Figure 4-66):



Figure 4-66



Deleted comments cannot be recovered. It is wise to make a backup copy of anything that you will be deleting in case it were later to be discovered that it was removed in error.

Importing Comments

At times, it may be necessary for Submitters to import comments that have been composed off-line that can later be imported into DrChecksSM. If you have a need for this, the ProjNetSM Call Center can provide users with a copy of a template that can be used to compose comments in order to easily import them into DrChecksSM. Each agency that uses DrChecksSM will have its own MS Word template, since the discipline pick list in the template must match that of the agency. This means that if you use DrChecksSM across agencies, you will need to be sure you are using the correct template for the agency you are going to be posting comments for.

There are two steps to composing comments offline: 1) Prepare comments using the MS Word template (see Appendix for more information) and 2) Providing this file to the Project Manager or Review Manager for the upload of these comments into DrChecksSM:



When comments have been uploaded successfully, the Project Manager will receive a notification e-mail stating the project and review name and the name of the individual who imported the comment(s).

Submitter Reports

There are several reports available to comment submitters which make it easier to view and sort through comments. To access Submitter reports, you must be assigned as a Submitter to the *review* for which you are trying to view the reports (i.e., it could be possible that you have permission to view the reports for one review in a given project but not another). To access Submitter reports:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.
3. You will then see a table containing the reviews for the project (Figure 4-67). On the left hand side of the Review name, click the “Reports” button.

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| | Add Comments | All/None |
|---------|--|----------|
| REPORTS | Sample Review (Closed for new comments) | 1 / |

Figure 4-67

4. You will then have access to the available list of Submitter reports (4-68). Click on the name of the report to view it.



| Submitter Reports |
|---|
| <ul style="list-style-type: none">• My Comments• All Comments• Snapshot By Discipline• Snapshot By Submitter |

Figure 4-68



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

4.3.2 Submitter (Document Review)

Submitting a new Comment

The Comment Submitter role in DrChecksSM is typically assigned to Government staff, customers, owners and contractors who review deliverables and submit review comments². The comment submission process allows reviewers to document possible issues they have discovered that need to be addressed by other members of the project team. A user must first have “Submitter” rights before they can submit their own comments. Comment submitters can enter a comment using the following steps:



Before entering a comment, run a Snapshot Report to make sure that the comment you are making has not already been entered by someone else.

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
3. The “Select Review” screen displays. Click on the title of the review you would like to enter a comment for.
4. The “Enter Comment” form displays (Figure 4-69):

² East, Dr. William, *Best Practices Guidelines: Design Review and Checking System (DrChecksSM)*. December 2005.

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Enter your comment in the form below.

a. Discipline (req.)

b. Page Number (opt.)

c. Line Number (opt.)

d. Section/Figure (opt.)

e. Reference (opt.)

f. Attachment (opt.) Browse... ?

g. Comment (req.)

h. Critical issue? (opt.) Yes No ?

i. Lessons learned? (opt.) Yes No ?

Figure 4-69

5. From the drop-down list in the first field, “a. Discipline”, choose the discipline that best fits the individuals who will be addressing the comment (not necessarily your own discipline). For example, if your main area of concentration is Environmental, but you are entering a comment regarding a possible Electrical problem you have cited, you would want to choose Electrical as the discipline for the comment you are entering.
6. Optionally, you can choose to enter a Page Number (field b.), a Line Number (field c.), a particular Section/Figure (field d.), a Reference (field e.) or add an attachment (field f.). Entering a value in these blanks allows for sorting of the comments by these fields.
7. Enter your Comment into the “g. Comment” field.



In order to most effectively utilize the ProjNetSM system, it is important to limit your comments to one issue per comment. Enter multiple comments to track multiple issues individually.

8. If your comment is considered a “Critical Issue”, you can optionally choose to select the “Yes” radio button in the “i. Critical issue?” field to flag it as such. (Critical issues will show up on the “Critical Comments” report which is accessible by Evaluators, Backcheckers and Project Managers).



If you have flagged a comment as “critical” (meaning the issue is a potential “showstopper” for the project, you will receive the following message upon submittal of the comment instructing you to contact the project manager to alert them to the issue (Figure 4-70):

Please contact the project manager immediately regarding your critical comment.

Figure 4-70

9. Optionally you can also choose to create a potential Lesson Learned from your comment by selecting the “Yes” radio button in field “j. Lessons

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Learned?”. (For more on this, see Section 9.9: “Entering a Lessons Learned when submitting a DrChecksSM comment”).

Your agency must have chosen to participate in the DQLLSM portion of ProjNetSM and your project manager must have turned on the option for the review before you will be able to submit a comment as a potential lesson learned.

10. Click the Add Comment button. You will see the following confirmation which includes your unique comment ID number for the new comment (Figure 4-71):



① Your comment has been saved as ID 3463.

Figure 4-71



If you are going to be entering several comments in a row and would like to remain on the Enter Comment form but clear all the fields, click the “Add & Clear” button to add your comment and start fresh with a new form. By default, the form carries the top fields from form to form since many users keep part of the fields in place for several issues located at the same location within the document being reviewed.

QuickAdd Comments

ProjNetSM includes a special feature that allows comments to be submitted without having to log in to DrChecksSM. To do this, you will need to obtain a “Quick Add Key” from your Project Manager or Review Manager. Each review will have its own unique key. To Access QuickAdd:

13. Point your web browser to the ProjNetSM website (<https://www.projnet.org/>). Note that you do NOT need to login at this time.
14. From the “Home/Design/Bid/Build” menu bar at the top of the page, move your mouse over the “Design” button and then click on “QuickAdd” from the resulting drop-down menu (Figure 4-72).
15. The “Quick Add Login” page displays (Figure 4-73):



Figure 4-72

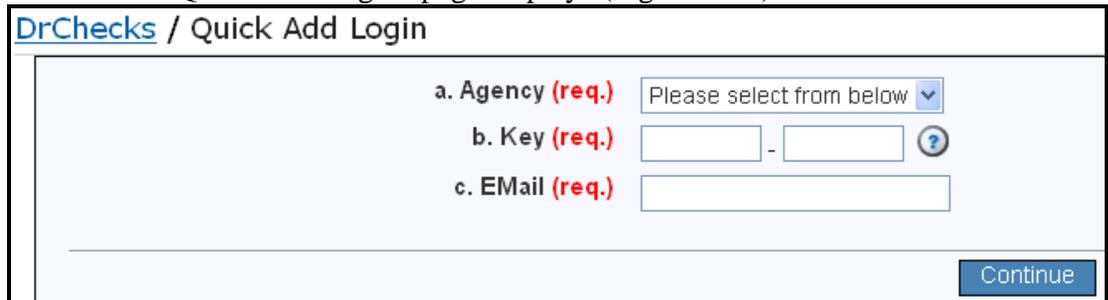


Figure 4-73

16. Select the Agency you are working with from the drop-down list in field “a. Agency”.
17. In the field marked “b. Key”, Enter the QuickAdd Key for the review that was given to you by the Project Manager.
18. Enter your e-mail address in field “c. Email”.
19. Click the “Continue” button.
20. You will then be prompted for the answer to your Secret Question to verify your identity. Type the answer to your secret question in field “b. Answer” and then click the “Login” button.
21. The “Comment Entry” form displays (Figure 4-74). Select the Discipline that applies to your comment from the “a. Discipline” drop-down list.

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Figure 4-74

22. Optionally, it is a good practice to reference a plan sheet in field “b. Plan Sheet”, a plan detail in field “c. Plan Detail” or a Spec Section in field “d. Spec Section”.
23. Enter your comment in the “e. Comment” field.
24. Click the Add Comment button.



Comments posted using the QuickAdd method cannot be retracted once you have clicked on the “Add Comment” button.

Updating Comments

Submitted comments can be edited by the author, (as well as the Project Manager and Site Administrator). Here are the steps to update a comment once it has been entered into DrChecksSM:



Changes can only be made on comments while the review is open for comments or until they have been evaluated.

10. Log in to the ProjNetSM system.
11. You will then be on the “Select Project” screen. Click on the title of the project you want to enter a comment for.
12. The “Select Review” screen displays. You will see a table with the name of the review and the review status (“Review Underway”) will be listed next to the review dates. The numbers in the “edit”, “evaluate”, “MyBackCheck” and “All BackCheck” columns, display the number of comments in each status as follows (Figure 4-75):

| Add Comments | | Edit | Evaluate | My BackCheck | All BackCheck |
|-------------------------|---|---------------------------|-------------------|---------------|---------------|
| | | All/Note/Yours | Pend/Concur/Other | Pend/Opn/Clsd | Pend/Opn/Clsd |
| REPORTS | 60% Test Review (20-Jan-06 to 31-Jan-06) <i>Review underway.</i> | 1 / 0 / 1 | 1 / 0 / 0 | 0 / 0 / 0 | 0 / 0 / 0 |

Figure 4-75

13. As a Submitter, you will notice a hyperlinked number in the “Yours” portion of the “Edit” column for the review if you have any comments that you have entered that are still eligible to be modified. Click on this hyperlinked number.

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14. The “Edit My Comments” screen displays (Figure 4-76):

Figure 4-76

15. You will then see a form (one per page) for each of the comments that you have entered that can be updated. To scroll through the comments, you can use the “Next >” and “Last >>” buttons in the upper right hand corner of the page and the “<< First” and “< Previous” (“Prev”) buttons in the upper left hand corner of the screen.



You may wish to investigate the search feature for getting to a specific comment if you have a very large collection of comments to page through to find one comment.

16. You will notice that for each editable comment, the fields are already pre-filled with the information that was previously saved when the comment was entered. You can make your changes to this information just as you did when you first entered the comment (see Section 3.6 for more information and a breakdown of the different fields and what they are used for).
17. When you have finished editing the comment, click the “Update Comment” button at the bottom of the screen (Figure 4-77).
18. You will receive the following confirmation when your comment has been updated successfully (Figure 4-78):

Update Comment

Figure 4-77

Your comment has been updated.

Figure 4-78

Deleting Comments (Comment Author Only)

5. Follow steps 1-7 in the previous section (“Updating Comments”) to reach the “Edit My Comments” screen.
6. Locate the comment you would like to delete.
7. Scroll down to the bottom of the screen and click the “Delete comment” button (Figure 4-79):

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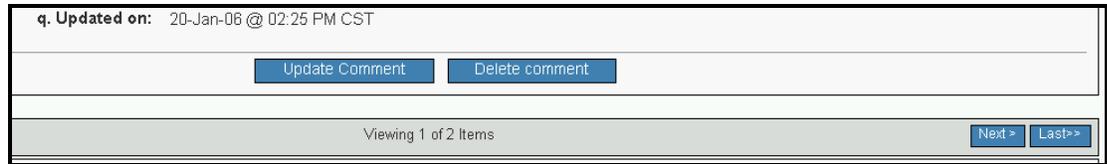


Figure 4-79

8. You will see the following confirmation that your comment was deleted successfully (Figure 4-80):



Figure 4-80



Deleted comments cannot be recovered. It is wise to make a backup copy of anything that you will be deleting in case it were later to be discovered that it was removed in error.

Importing Comments

At times, it may be necessary for Submitters to import comments that have been composed off-line that can later be imported into DrChecksSM. If you have a need for this, the ProjNetSM Call Center can provide users with a copy of a template that can be used to compose comments in order to easily import them into DrChecksSM. Each agency that uses DrChecksSM will have its own MS Word template, since the discipline pick list in the template must match that of the agency. This means that if you use DrChecksSM across agencies, you will need to be sure you are using the correct template for the agency you are going to be posting comments for.

There are two steps to composing comments offline: 1) Prepare comments using the MS Word template (see Appendix for more information) and 2) Providing this file to the Project Manager or Review Manager for the upload of these comments into DrChecksSM:



When comments have been uploaded successfully, the Project Manager will receive a notification e-mail stating the project and review name and the name of the individual who imported the comment(s).

Submitter Reports

There are several reports available to comment submitters which make it easier to view and sort through comments. To access Submitter reports, you must be assigned as a Submitter to the *review* for which you are trying to view the reports (i.e., it could be possible that you have permission to view the reports for one review in a given project but not another). To access Submitter reports:

5. Log in to the ProjNetSM system.
6. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.
7. You will then see a table containing the reviews for the project (Figure 4-81). On the left hand side of the Review name, click the “Reports” button.

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| | | |
|----------------|--|---------|
| | Add Comments | |
| | | All/... |
| REPORTS | Sample Review (Closed for new comments) | 1 / |

Figure 4-81

- You will then have access to the available list of Submitter reports (4-82). Click on the name of the report to view it.

| Submitter Reports |
|--|
| <ul style="list-style-type: none"> • My Comments • All Comments • Snapshot By Discipline • Snapshot By Submitter |

Figure 4-82



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

4.4 Evaluator

Once a review has been closed for comments, the Project Manager will open the submitted comments up for Evaluation. For a fast-track project, the Project Manager may chose to have comment submission and comment evaluation both turned on at the same time. Individuals who have the Comment Evaluator role will have the ability to read posted comments and submit evaluations for them. Here are the steps for performing an Evaluation:

- Log in to the ProjNetSM system.
- You will then be on the “Select Project” screen. Click on the title of the project you want to evaluate comments for.
- Look at the numbers in the “Evaluate” column for the review you want to enter evaluations for (Figure 4-83):

| Evaluate |
|---------------------------|
| Pend/Concur/Other |
| 2 / 0 / 0 |
| 7 / 0 / 0 |
| 4 / 0 / 0 |

Figure 4-83

You will see that some of the numbers are hyperlinked (in blue text with underline). Each of the numbers in the “Pend” column represent comments

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that are pending and in need of evaluation. Numbers in the “Concur” column are comments that have been evaluated and the Evaluator has concurred with the statement made in the comment. All comments in any other status will appear in the “Other” column. Click on the number in the “Pend” (Pending) column for the review you would like to evaluate.

4. The original comment will display at the top of the page and the “Add Evaluation” form directly follows (Figure 4-84):

The screenshot shows a web form titled "Add Evaluation 1". It contains the following elements:

- a. Status (req.):** Four radio buttons: Concur, Non-concur, For information only, Check and resolve.
- b. Discussion (req.):** A large text area for entering a discussion.
- c. Potential Scope Impact (opt.):** Two radio buttons: Yes, No.
- d. Potential Cost Impact (opt.):** Two radio buttons: Yes, No.
- e. Potential Schedule Impact (opt.):** Two radio buttons: Yes, No.
- f. Attachment (opt.):** A text input field followed by a "Browse..." button.
- At the bottom right, there is a blue "Add Evaluation" button.

Figure 4-84

5. In the “a. Status” field, you will see several radio buttons which represent the status you would like to designate for the evaluation. Choose the radio button next to the option you want. A breakdown of these statuses and what they are normally used for is as follows:
 - **Concur:** You agree with the assessment stated in the original comment and believe it should be resolved with a change or fix.
 - **Non-concur:** You do not agree with the assessment stated in the original comment.
 - **For information only:** Typically used when the comment presents an incomplete picture or when the designer feels that, while they may agree or they may disagree with the comment, there are factors that all involved should consider before committing to a change or a fix. (Example: The original comment takes issues with a proposed material because it does not comply with requirements of a mechanical system. The designer may be proposing a different mechanical system that has different material requirements. They may submit a response of "For Information Only" and then attach specifications for the new mechanical system. The designer wants the commenter to review the specifications to see if the design should still be modified to meet the now outdated specifications).
 - **Check and resolve:** Most often used to remove the comment from Pending status because a member of the design team knows that he or she will be supplying the answer to the issue that has been raised but that they are not yet in possession of the details that they want to present. The comment is then viewed as being addressed by the evaluator.

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6. Type your evaluation into the field marked “b. Discussion”.
7. Optionally, you can choose to flag this item as potentially impacting the Scope of the project (field c. Potential Scope Impact), as potentially affecting the overall cost of the project (field d. Potential Cost Impact) and as potentially impacting the schedule of the project (e. Potential Schedule Impact). Choose the “Yes” radio button next to each of these if you would like to activate these options.
8. You can also choose to add a file attachment if you wish by clicking on the “Browse” button next to the “f. Attachment” field. In the “Choose file” dialogue box that appears, navigate to the file you would like to attach on your local computer and click the “Open” button.
9. Click the “Add Evaluation” button (Figure 4-85).
10. When your Evaluation has been submitted successfully, you will see a confirmation displaying the new comment status as follows (Figure 4-86):

Add Evaluation

Figure 4-85

Comment status now is 'Concur'. Your evaluation has been saved.

Figure 4-86

Searching for Comments

There are several ways to locate comments in the DrChecksSM system. The first way is to search for comments using the Comment Search bar. The second is that if you know the unique comment ID number, you can also “jump to” the comment directly by entering the ID. Steps for searching both ways are outlined below:

Using the Comment Search bar



All of the fields in the Comment Search bar are optional. If your search returns too many results, try searching on more narrow criteria.

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to search comments for.
3. You will then see a table containing the reviews for the project (Figure 4-87) with hyperlinked numbers for the comments in each category. Click on any of the hyperlinked numbers to access the search bar.

| Edit | Evaluate | My BackCheck | All BackCheck |
|---|---|---------------|---------------|
| All/Note/Yours | Pend/Concur/Other | Pend/Opn/Clsd | Pend/Opn/Clsd |
| 1 / 0 / 1 | 1 / 1 / 0 | 1 / 0 / 0 | 1 / 0 / 0 |
| 7 / 0 / 0 | 7 / 0 / 0 | 0 / 0 / 0 | 0 / 0 / 0 |
| 4 / 0 / 3 | 4 / 0 / 0 | 0 / 0 / 0 | 0 / 0 / 0 |

Figure 4-87

4. At the top of the page, you will see the search box appear (Figure 4-88):

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A dropdown menu with the following options: Comment Text (selected), Select a search item, Comment ID, Comment Text, Design Discipline, Drawing Sheet, Spec Section.

Figure 4-89

A rectangular button with the text 'Search' in white on a blue background.

Figure 4-90



A search form with the following fields: Type (dropdown menu), Keyword (text input), Discipline (dropdown menu), and DocType (dropdown menu). There are 'Search' and 'Reset' buttons below the Keyword field. Links for 'Add Comments', 'Quick Pick', and 'Upload' are in the top right corner.

Figure 4-88

5. From the “Type” search box, choose the item that best describes the criteria you will be searching for. (The default option is “Comment Text”). Your choices are Comment ID, Comment Text, Design Discipline, Drawing Sheet and Spec Section (Figure 4-89).
6. You may choose to narrow your search further by selecting a Document Type from the “DocType” drop down list.
7. Enter a keyword that corresponds with the option you chose in Step 5. (For example, if you chose to search on “Comment ID”, enter the ID number you are looking for into the “Keyword” box. If you chose to search based on Comment Text, enter the text you are looking for in the “Keyword” box.
8. If you would like to narrow the search by Discipline, select the Discipline you are looking for from the “Discipline” drop-down box.
9. Click the “Search” button underneath the “Keyword” box (Figure 4-90).

When a review has opened for evaluation, it may seem overwhelming to the evaluator team because there are a very large number of pending comments. It is likely to be most efficient for the team to use the filter by design discipline to address comments that are in their primary subject area on the first pass. If a comment is listed under the wrong discipline, the evaluator can just skip it and move on. After a first pass by discipline, the remaining comments will be more manageable.

Using the “Jump To” feature

If you have the Comment ID number for the comment you would like to find, you can enter it at the bottom of any DrChecksSM page in the “Jump directly to Comment ID” field (Figure 4-91). Just type the number and click the “Go” button.

A text input field with the label 'Jump directly to Comment ID (req.):' and a 'Go' button to its right.

Figure 4-91

Evaluator Reports

Comment evaluators will have access to all of the Submitter reports (discussed in section 5.3) and will also have access to a set of Evaluator reports. To access Evaluator reports:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.
3. You will then see a table containing the reviews for the project (Figure 4-92). On the left hand side of the Review name, click the “Reports” button.

| Add Comments | | All/... |
|--------------|--|---------|
| REPORTS | Sample Review (Closed for new comments) | 1 / |

Figure 4-92

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4. You will then have access to the available list of Submitter reports (discussed in section 4.3) as well as the Evaluator Reports (Figure 4-93). Click on the name of the report to view it.

| Evaluator Reports | |
|-------------------|---|
| • | Designers Pending Comments |
| • | My Comments |
| • | All Comments |
| • | Snapshot By Discipline |
| • | Snapshot By Evaluator |
| • | Backcheck Issue Report |
| • | Open Backcheck Comments |
| • | Evaluated Non-Concurred Comments |
| • | Reviewers Critical Comments |
| • | Designers Critical Comments |
| • | Email Yourself The Evaluators Summary |

Figure 4-93



When you run a report, it opens a new Internet Explorer window for the report display. You can use the browser print function to print the report. When you have finished viewing the report, you should just close that report window and you will be left on the report selection window.

For more information about each of the reports and the data they contain, please refer to the DrChecksSM Reports Guide in the Appendix at the end of this manual.

4.5 Backchecker

Backcheckers review comments in combination with the evaluations and determine the status of the dialog. After reviewing the evaluations, if satisfied that the issue is addressed, Backcheckers can close the comment. If not satisfied, they can leave the comment open and mark it with an explanation of why it is not resolved. Individuals performing backchecks will need to have Submitter permissions and will have to be assigned to the Backcheck function.

Entering a Backcheck

When a review has been opened for Backchecking, you will see the “My Backcheck” and “All Backcheck” columns highlighted in blue (Figure 4-94):

| | Add Comments | Edit | Evaluate | My BackCheck | All BackCheck |
|-------------------------|--|----------------|-------------------|---------------|---------------------------|
| | | All/Note/Yours | Pend/Concur/Other | Pend/Opn/Clsd | Pend/Opn/Clsd |
| REPORTS | Sample Review (Closed for new comments) | 1 / 0 / 0 | 1 / 1 / 0 | 0 / 0 / 0 | 1 / 0 / 0 |

Figure 4-94

All comments that have been evaluated will now be available to be Backchecked. The number of comments that are available for Backchecking will be hyperlinked (written in blue text with underline). To enter a Backcheck:

1. Click on the hyperlinked number in the “All Backcheck” column under “Pending” (‘Pend’).
2. You will see the comment displayed with the evaluations displayed beneath it. At the end of the page, the “Add Backcheck” form is displayed (Figure 4-95):

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Figure 4-95

3. For the field marked “a. Status”, select the radio button next to the status that you feel applies to the comment.
4. Choose the radio button for “yes” or “no” in the “b. Flag for followup” field.
5. Enter your reasoning for your choice of whether to leave the comment open or closed in the “c. Discussion” field.
6. Click the “Add Backcheck” button (Figure 4-96).

If a comment has been marked ‘critical’, and should remain ‘critical’ after the backcheck (has not been resolved), you must check the “Flag for Follow-up” radio button in order for the comment to retain its “critical” status.

You can add more than one Backcheck per comment by repeating this procedure. If you change the comment status in subsequent Backchecks, the status of the comment will change also. (Example: you add a second Backcheck to a closed comment with a status of “open”. The comment is now in “open” status).



Add Backcheck

Figure 4-96



Updating or Deleting a Backcheck

If you have entered text incorrectly or chosen an incorrect option when entering a Backcheck and need to make corrections, here’s how to do it:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.
3. The reviews for the project will be displayed. From the Review Select screen, click on one of the hyperlinked numbers in the “My Backcheck” column for the review you are working on. (Figure 4-97).
4. The original comment and any evaluations that have been entered against it will be displayed in the top half of the page. The bottom half of the page will show your entered backchecks and will give you an opportunity to make changes as follows (Figure 4-98):

| My BackCheck |
|---------------|
| Pend/Opn/Clsd |
| 2 / 0 / 0 |

Figure 4-97

Figure 4-98

5. You will see the text that you have originally entered for this Backcheck

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remains in the “c. Discussion” window, and that the radio buttons in fields “a. Status” and “b. Flag for follow-up” remain the same as when the Backcheck was originally entered. Make any necessary changes to this information.

6. Click the “Update Backcheck” button on the left at the bottom of the “Edit Backcheck” window.

If you decide that the entire Backcheck has been entered incorrectly and you would like to delete it, follow steps 1-5 detailed above and then:

1. Click the Delete Backcheck button on the right at the bottom of the “Edit Backcheck” window.
2. You will see a confirmation window appear to verify that you really want to delete the Backcheck (Figure 4-99):



Figure 4-99

3. Click the “OK” button to delete the Backcheck.
4. When the Backcheck has been deleted successfully, you will see the following confirmation appear at the top of the screen (Figure 4-100):



Figure 4-100

Backchecker Reports

Backcheckers will need to monitor comments for new evaluations once the review has been opened for Backchecking. There are several reports, such as the “All Backchecks Pending” report, that make it easy for Backcheckers to see at a glance which comments need addressing. To access Backchecker reports:

1. Log in to the ProjNetSM system.
2. You will then be on the “Select Project” screen. Click on the title of the project you want to view reports for.

When you run a report, it opens a new Internet Explorer window for the report display. You can use the browser print function to print the report. When you have finished viewing the report, you should just close that report window and you will be left on the report selection window.

3. You will then see a table containing the reviews for the project (Figure 4-101). On the left hand side of the Review name, click the “Reports” button.

| | Add Comments | All/None |
|----------------|--|----------|
| REPORTS | Sample Review (Closed for new comments) | 1 / |

Figure 4-101

4. You will then have access to the available list of Submitter reports (discussed



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in Section 4.3) as well as the Back Check Reports (Figure 4-102). Click on the name of the report to view it.



Figure 4-102



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

4.6 View Only

The “View Only” role is that of a spectator to the DrChecksSM system – users with this permission set are able to view projects, reviews and comments, but are unable to make changes to data of any kind. The only view provided is the report set provided for reviewers.

Section #5: ProjNet-FilerSM

5.1 ProjNet-FilerSM Overview

ProjNet-FilerSM is an optional ProjNetSM module that was developed in response to the need for secure document exchange between members of the project team. As you may know, e-mail is not a “secure” method of transmission, and physically carrying documents from person to person can take a lot of time. Documents can be placed in the secure ProjNet-FilerSM environment and then retrieved only by individuals who have been granted specific access to the files.

5.2 Adding a File/Folder



In order to be able to add a folder and/or file to ProjNet-FilerSM, you will need to be logged in as a user with Project Manager or Review Manager permissions for the project/review you are posting a file for.

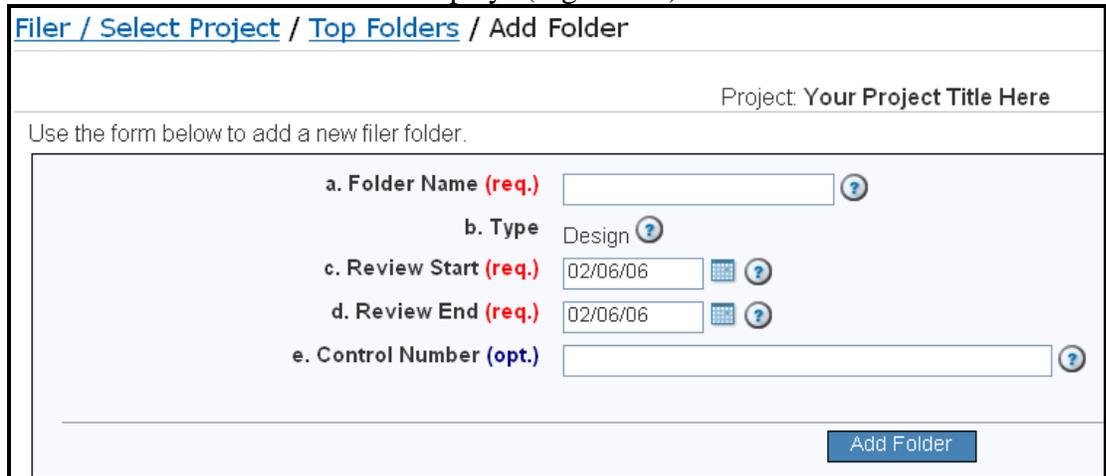
Creating a new folder

ProjNet-FilerSM documents are associated to specific projects. You can create different folders under each project to store ProjNet-FilerSM documents and then grant access to the individuals you choose. To create a new folder and add a document to ProjNet-FilerSM:

1. Log in to the ProjNetSM website.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of the project you would like to add a file folder for.
4. Click on the “Add Folder” link in blue in the upper right-hand corner of the screen (Figure 5-1).
5. The “Add Folder” form displays (Figure 5-2):



Figure 5-1



Filer / Select Project / Top Folders / Add Folder

Project: Your Project Title Here

Use the form below to add a new filer folder.

a. Folder Name (req.)

b. Type Design

c. Review Start (req.) 02/06/06

d. Review End (req.) 02/06/06

e. Control Number (opt.)

Add Folder

Figure 5-2

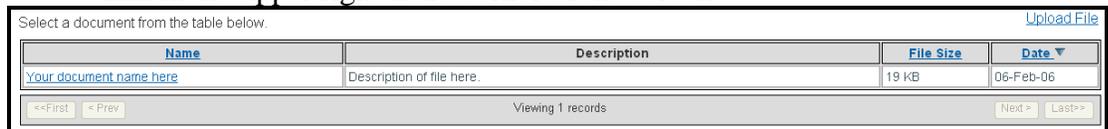
Section #5: ProjNet-FilerSM

the Project Manager or Review Manager was working in when the review was originally created.

8. Enter the review start and end dates into fields “c. Review Start” and “d. Review End”. (You can also click on the tiny calendar icon to select a date from the calendar).
9. Optionally, you can also choose to enter a Control Number in field “e. Control Number”.
10. Click the “Add Folder” button.

Adding a file to a folder

1. Log in to the ProjNetSM website.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of the project you would like to add a file for.
4. You will see a list of all available Filer folders. Click on the name of the folder you would like to add a file to.
5. The list of available files displays (Figure 5-5). Click on the “Upload File” link in the upper right-hand corner of the screen.

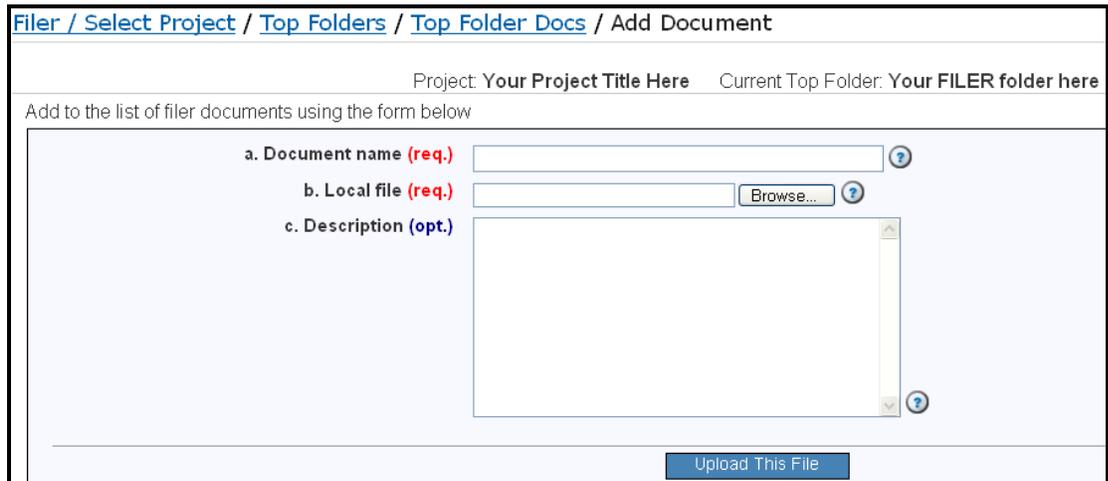


| Name | Description | File Size | Date |
|-------------------------|---------------------------|-----------|-----------|
| Your document name here | Description of file here. | 19 kB | 06-Feb-06 |

Viewing 1 records

Figure 5-5

6. The “Add Document” form displays (Figure 5-6). Type the name of the document in field “a. Document Name”.



Filer / [Select Project](#) / [Top Folders](#) / [Top Folder Docs](#) / Add Document

Project: Your Project Title Here Current Top Folder: Your FILER folder here

Add to the list of filer documents using the form below

a. Document name (req.)

b. Local file (req.)

c. Description (opt.)

Figure 5-6

7. Click the “Browse...” button to the right-hand side of field “b. Local File”.
8. The “Choose File” dialog box displays. Navigate to the file you want to upload on your local hard drive and then click the “Open” button in the lower right-hand corner.
9. Optionally, you may choose to enter a description of the file in the “c. Description” field. (Entering a description will help users identify the

Section #5: ProjNet-FilerSM

document much more easily, especially if you have several documents with similar names).

10. Click the “Upload this File” button.

11. The following confirmation will be displayed once the file has been uploaded successfully (Figure 5-7):



Figure 5-7

5.3 Editing Folders

Once you have created a folder, you will want to assign users access to be able to upload and view files. All active users are available to be assigned to upload and view files. You can assign access to individuals or to entire offices. Here’s how to reach the control panel to assign users to folders:

1. Log in to ProjNetSM.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of the project which contains the folder you would like to change access for.
4. You will see a list of all available Filer folders. To the left of the folder name and ID number, you will see two small buttons: “Edit” and “Reports” (Figure 5-8). Click the “Edit” button.



Figure 5-8

5. The list of folder edit options is displayed, grouped under headings (Figure 5-9).

Section #5: ProjNet-FilerSM

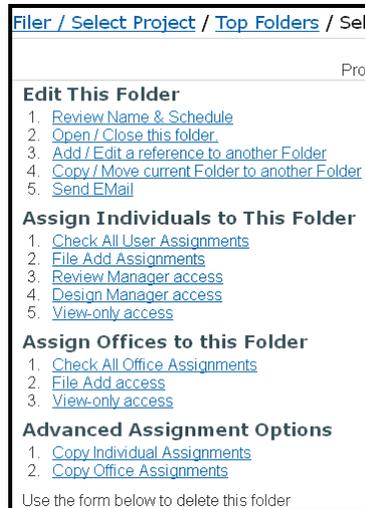


Figure 5-9

A brief explanation of each of the available folder editing options is as follows:

- **Review Name & Schedule:** Make changes to the review name and dates as needed.
- **Open/Close this folder:** Opens and/or closes the folder for new file posts.
- **Add/Edit a reference to another folder:** Allows you to add a reference to a file that already exists in ProjNet-FilerSM in another folder.
- **Copy/Move current folder to another folder:** Copies the contents of the current folder into another ProjNet-FilerSM folder on ProjNetSM.
- **Send Email:** Allows you to send email to ProjNet-FilerSM users by groups (All file-add users, all ProjNet-FilerSM view-only users, or All ProjNet-FilerSM users assigned to the folder).
- **Assign Individuals to This Folder:** Allows you to check current folder assignments, add/change users who are able to add files, assign Review Managers and Project Managers, and assign view-only users.
- **Assign Offices to this Folder:** Will show all office assignments and allows you to add/change entire offices for File Add or View Only access.
- **Advanced Assignment options:** With these menu options, you can copy folder assignments over from another individual, or copy office folder assignments from one office to another.
- **Delete Filer Folder:** Use this button to Delete the entire ProjNet-FilerSM folder and its contents.



Use caution when deleting ProjNet-FilerSM folders. The folders and their contents cannot be retrieved after deletion.

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5.4 Viewing a File



Figure 5-10

1. Log in to the ProjNetSM website.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of the project you would like to view a file for.
4. You will see a list of all available Filer folders. Click on the name of the folder that contains the file you want.
5. The list of available files displays. Click on the Name of the document you would like to view.
6. In the center of the page, you will see the file name displayed followed by links for viewing and saving the file (Figure 5-10). If you would like to view the file, click the “View this File” link. If you would prefer to save it to your hard drive first, click the “Save This File” link.
7. Depending on which option you have chosen, the file will either open automatically with the application that created it, or you will be prompted for the location to save the file by the “Save As” dialogue box.

Searching for a file

To search for a file by keyword:

1. Log in to the ProjNetSM website.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of *any* of the projects.
4. At the top of the screen, you will see a form to search or browse filer folders. Type a keyword to search on in the “Keyword” box.
5. Click the “Search” button to search for the file.

5.5 ProjNet-FilerSM Reports

There are three specialized reports available in ProjNet-FilerSM to all users who have View access to the folder. Here’s how to access them:

1. Log in to ProjNetSM.
2. In the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over “Design” and click on “FILER” in the drop-down menu that appears.
3. A table displays that shows a list of all projects you have been assigned to. Click on the name of the project which contains the folder you would like to

Section #5: ProjNet-FilerSM

change access for.

4. You will see a list of all available Filer folders. To the left of the folder name and ID number, a small button labeled “Reports” (Figure 5-11). Click on this “Reports” button.



Figure 5-11

5. The Reports page displays (Figure 5-12):



Figure 5-12

6. Click on the report you would like to access.



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

Section #6: CCR (Criteria Change Request)

6.1 CCR (Criteria Change Request) Introduction

In conjunction with the CMS module that supports review and evaluation of draft documents that update guide specifications and other government documents, the CCR module supports collections of remarks and comments that come from document users who have determined that problems exist and wish to propose updates to correct said problems. CCR's are associated with documents and may be reviewed and accepted, expanded, or rejected within the CMS system.

6.2 Submitting a CCR – General Public



Figure 6-1

The general public is permitted to request criteria changes to Standards documents by utilizing the CCR Public Submission form. Here are the steps for a Public user to submit a CCR:

1. Point your web browser to: <https://www.projnet.org>
2. In the “Home/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CCR” from the resulting drop-down menu that appears (Figure 6-1).
3. Under the “Public Submission” header, click on the link to access the “CCR Public Submission” form.
4. The “CCR Agency Select” form displays (Figure 6-2):

Figure 6-2

5. Choose the Agency that prepared the document you are submitting a CCR for from the drop-down list in the “a. Preparing Activity” field.
6. Click the “Select Agency” button.
7. Select the Document Type from the “b. Doc Type” drop-down list.
8. Click the “Select Doc Type” button (Figure 6-3).
9. The “CCR Add” form displays. Select the specific document you are submitting a CCR for from the “a. Document” drop-down list.
10. Enter a detailed description of the problem in field “b. Problem”.
11. Type a proposed solution in the field marked “c. Solution”.
12. Enter your personal information (First name, last name, office name if applicable, e-mail address and phone number) in boxes d through e. (NOTE: You will receive an e-mail confirmation following submission of your CCR that will be sent to the e-mail address you provided in field “g. Email”. Make sure the information entered in this field is correct.)



Figure 6-3

Section #6: CCR (Criteria Change Request)

13. Click the “Submit CCR” button.
14. The following confirmation will be displayed on the screen when the submission has completed successfully (Figure 6-4):

 Your CCR has been submitted for review and a confirmation email has been sent out.

Figure 6-4

6.3 Submitting a CCR – Registered ProjNetSM Users



Figure 6-5

Registered users are able to submit CCR’s using a similar process:

1. Log in to ProjNetSM.
2. In the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CCR” from the resulting drop-down menu that appears (Figure 6-5).
3. The “CCR Agency Select” form displays (Figure 6-6):

Figure 6-6

4. Choose the Agency that prepared the document you are submitting a CCR for from the drop-down list in the “a. Preparing Activity” field.
5. Click the “Select Agency” button.
6. Select the Document Type from the “b. Doc Type” drop-down list.
7. Click the “Select Doc Type” button.
8. The “CCR Add” form displays. Select the specific document you are submitting a CCR for from the “a. Document” drop-down list.
9. Enter a detailed description of the problem in field “b. Problem”.
10. You may choose to attach a file to further illustrate the problem. If so, click the “Browse...” button to the right-hand side of field “c. Problem Backup”.



If you are attaching a file to your CCR, make sure it is one of the following supported file types: .pdf, .doc, .html, .txt, .sec, .dgn, .dwg

11. Type the details of your proposed solution in field “d. Solution”.
12. You may choose to attach a file to further illustrate the solution. If so, click the “Browse...” button to the right-hand side of field “e. Solution Backup”.
13. Click the “Submit CCR” button.



Once a registered user has submitted a CCR, the document Contacts will receive an e-mail message notifying them that a CCR has been entered against a document they are responsible for managing.

14. When the CCR has been submitted successfully, the following confirmation message will be displayed at the top of the screen (Figure 6-7):

 Your CCR has been entered and the Contact(s) for the document have been notified.

Figure 6-7

Section #7: CMS (Criteria Management System)

7.1 CMS (Criteria Management System) Introduction

The CMS module supports collaboration in the review of government documents by recording who is responsible for the document and also by providing a place for posting of draft documents and collection of evaluations/comments about those draft documents from various review participants. CMS further supports review of the evaluative comments, maintaining a record of activities surrounding the publication of a draft document.

Technical proponents of documents are able forward their documents to NIBS (National Institute of Building Standards) for posting on the Whole Building Design Guide web site (<http://www.wbdg.org/ccb/>)

The review process in CMS functions similarly to the review process you read about in DrChecksSM. Reviews created are associated to specific documents, and individuals can be assigned to each document as Technical Proponents and Technical Representatives. Document reviews need not be associated with any particular DrChecksSM project.

7.2 Adding a Document (*Criteria Administrators*)



Figure 7-1



Figure 7-2

The first step to accepting CCR's (Criteria Change Requests) on ProjNetSM is to add a document to CMS. In order to be able to add a document to CMS, you will first need to be assigned as a Criteria Administrator. To add a document:

1. Log in to the ProjNetSM website.
2. On the "My Account/Design/Bid/Build" menu bar across the top of the page, move your mouse over the "Design" button and click on "CMS" from the resulting drop-down menu that appears (Figure 7-1).
3. In the upper right-hand corner of the screen, you will see two links, "Add Document" and "Global Reports" (Figure 7-2). Click on the "Add Document" link.
4. The "Add New Document" form displays (Figure 7-3). Select a Document Type from the "a. Document Type" drop-down menu.

Section #7: CMS (Criteria Management System)

CMS / Select Document / Add New Document

Enter the information below to enter a new document.

a. Document Type (req.) Please select from below

b. Doc Nbr (req.)

c. Document Name (req.)

d. Description (opt.)

e. Target UFC (opt.)

(Review the [UFC Master List](#) to select a correct UFC.)

f. Participating Agencies (req.)

ARMY
AirForce
DEMO
GSA
NASA
NAVFAC
NIH
RCE

Insert New Document

Figure 7-3

5. Enter the document number in field “b. Doc Nbr”. (This field is required).
6. Enter the document name in field “c. Document Name”. (This field is also required).
7. Optionally, you may choose to enter a document description in field d. and/or a Target UFC in field e.



Click on the “Review the UFC Master List” link to open a new window containing the UFC List if you need assistance selecting the correct UFC.



8. Click on the name of the participating agency(ies).

Hold down the CTRL key while clicking on the agency names to select multiple agencies.

9. Click the “Insert New Document” button.
10. When the document has been added successfully, the following confirmation message displays on the screen (Figure 7-4):

The document has been added.

Figure 7-4

11. The “Edit Document” options are shown immediately following document submission to allow you to change agencies, document versions and user assignments immediately after the document has been entered. Document editing options are described in the next section.

Section #7: CMS (Criteria Management System)

7.3 Editing a Document (*Criteria Administrators*)



Figure 7-5

Document editing options are automatically displayed immediately following a new document submission. Once the document has been entered, you can also reach the document editing options at any time by performing the following steps:

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears (Figure 7-5).
3. Click on the hyperlinked document number in the “Doc Nbr” column.
4. The “Edit Document” page displays (Figure 7-6):

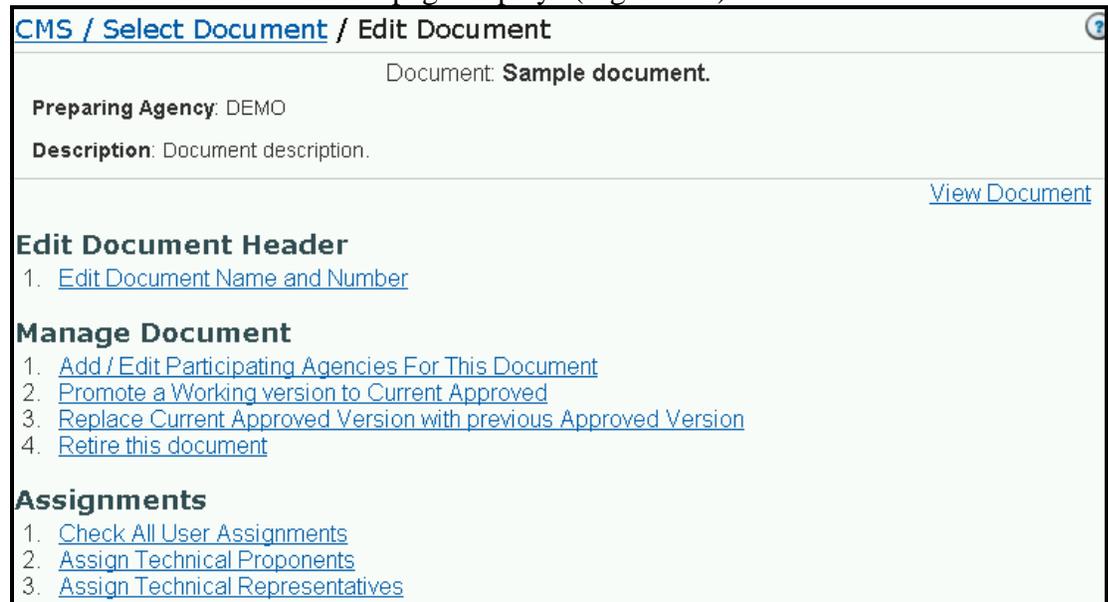


Figure 7-6

5. Click on the menu option you would like to modify. The document editing options are as follows:
 - **Edit Document Name and Number:** Change the name or document number if they were originally entered incorrectly.
 - **Add / Edit Participating Agencies For This Document:** Select the radio buttons next to the participating agencies for the document.
 - **Promote a Working version to Current Approved:** Select the version you wish to promote as the current approved version.



Setting a new version as the Current Approved version will remove all other documents except the new one you specify.

- **Replace Current Approved Version with previous Approved Version:** “Rolls back” the current approved version to the last saved Approved version.
- **Retire this document:** Allows a document to be “retired” so it is no longer visible to anyone except for Technical Proponents and Criteria Administrators.

Section #7: CMS (Criteria Management System)

- **Check All User Assignments:** Displays the current list of users and their assignments to the document. Also allows you to “mass-unassign” users to the document by selecting the check box in the “remove” column and updating the user assignments.
- **Assign Technical Proponents:** Choose technical proponents who will be reviewing the document and CCR’s submitted against it.
- **Assign Technical Representatives:** Select the users you would like to designate as technical representatives for the document.

7.4 Searching For Documents

To search for a document:

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears.
3. The “Select Document” page. Locate the Document Search box at the top of the page (Figure 7-7):

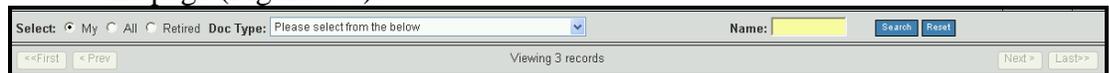


Figure 7-7

4. To search all documents, click the radio button next to “All” on the left-hand side of the toolbar.
5. Select the Document Type from the “Doc Type” drop-down list.
6. Enter a keyword to search on in the “Name” box.
7. Click the “Search” button.

7.5 Global Reports



Figure 7-8

The Global Reports in CMS option provides

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears.
3. In the upper right-hand corner of the screen, you will see two links, “Add Document” and “Global Reports” (Figure 7-8). Click on the “Global Reports” link.
4. The “CMS and CCR Global Reports” page displays (Figure 7-9):

Section #7: CMS (Criteria Management System)

[CMS / Select Document](#) / CMS and CCR Global Reports

CCR Global Reports

Submitter Reports Across All Documents

1. [My CCR\(s\)](#)
2. [All CCR\(s\)](#)

Evaluators Reports Across All Documents

1. [CCRs Pending Evaluation](#)

Disposition Reports Across All Documents

1. [Approved Without Finalization](#)
2. [CCRs that have been incorporated](#)
3. [Denied CCRs](#)

Administrator

1. [Status Counts](#)

CMS Global Reports *(Note: these reports are generated once per day approximately 0300 cst)*

1. [UFGS Technical Proponents](#)
2. [Document Technical Proponent Index](#)
3. [Criteria Document Index](#)

Figure 7-9

5. Click on the option for the report you would like to view.



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

Section #8: ProjNetSM Bidder Inquiry

8.1 Creating a Bid Review (*Project Managers & Review Managers*)



In order to be able to create a Bid Review, you will need to be logged in as a user with Project Manager or Review Manager permissions for the project/review you are working with.

The ProjNetSM bid applications are optional ProjNetSM modules that allow members of the public (contractors, etc) who are not registered for ProjNetSM to access bid documents and post bidder inquiries. You must be a Project Manager or Review Manager to be able to setup a review for use with Bidder Inquiry. Once the project has been created in DrChecksSM, you can create Bidder Inquiry reviews by performing the following steps:

1. Log in to ProjNetSM.
2. In the “My Account/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Bid” option and click on “Bidder Admin” (Figure 8-1).
3. A list of the projects that have been assigned to you displays. Click on the title of the project you would like to establish a Bid Review for.
4. If this is your first Bid Review for this project, you will see a red information box stating “There are no open Bid reviews for this project.” Click on “Add Bidder Review” in blue text in the upper right-hand corner of the screen (Figure 8-2).
5. The “New Review” form displays (Figure 8-3). Enter the name of your Bid Review in the “a. Review Name” field.



Figure 8-1

Add Bidder Review

Figure 8-2

Figure 8-3

6. Field “b. Type” contains the review type and is determined by the application the Project Manager/Review Manager was working in when the review was originally created. (Reviews created in Bid Inquiry are type “Bid”).
7. Enter the review start and end dates into fields “c. Review Start” and “d. Review End”. (You can also click on the tiny calendar icon to select a date from the calendar).
8. Click the “Add Bid Review” button.
9. When your review has been created, you will see the following confirmation message (Figure 8-4):

Review 'Bid Review #12345' created.

Figure 8-4

You will notice that the “Edit This Review” options are displayed

Section #8: ProjNetSM Bidder Inquiry

immediately after review creation. These are covered in the next section.

8.2 Editing and Assigning a Bid Review (*Project/Review Managers*)

Editing a Bid Review

To access the editing options for a Bid Review:

1. Log in to ProjNetSM.
2. In the “My Account/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Bid” option and click on “Bidder Admin”.
3. A list of the projects that have been assigned to you displays. Click on the title of the project you would like to edit a Bid Review for.
4. A table is shown containing the name of any bid reviews that have been created for the project. To the left of the review name, you will see two small buttons: “Edit” and “Reports” (Figure 8-5). Click the “Edit” button.

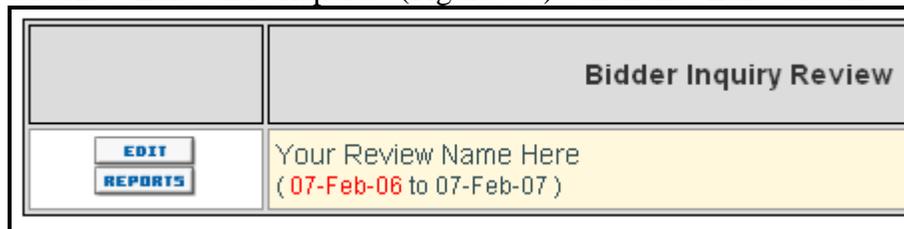


Figure 8-5

5. The “Select Editing Task” page displays (Figure 8-6):

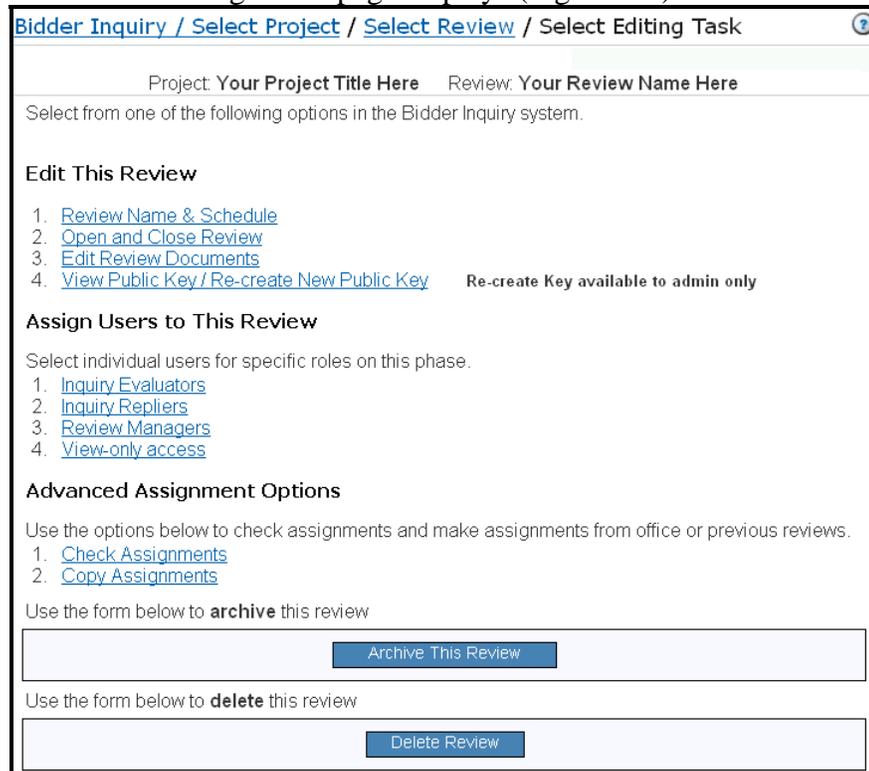


Figure 8-6

6. Click on the review editing task that you would like to perform. A brief

Section #8: ProjNetSM Bidder Inquiry

explanation of your options are as follows:

- **Review Name and Schedule:** Make changes to the review name and/or review dates.
- **Open and Close Review:** Open or close the review for Bid Inquiries, Evaluations, and Backchecks.
- **Edit Review Documents:** Add or change documents associated with the Bid Review.
- **View Public Key / Re-create New Public Key:** Shows current Bid Inquiry key (to be distributed to the public) and allows Administrators to generate a new Review Key if necessary.
- **Archive This Review:** When the review is complete, use this option to Archive it. (NOTE: This option is **only** available to Site Administrators).

Assigning Users to a Bid Review

The “Select Editing Task” page also contains the Assignment options for the review. Click on the link for the activity you would like to perform. The assignment options are as follows:

- **Inquiry Evaluators:** Assign individual users as Evaluators for the Bid Review.
- **Inquiry Repliers:** Select individuals who will be responsible for replying to Bid Inquiries.
- **Review Managers:** Select additional Review Managers for the Bid Review.
- **View-only Access:** Assign users to the review with “view-only” permissions (they will not be able to enter or change any data).
- **Check Assignments:** Displays the current assignments for the Bid Review.
- **Copy assignments:** Copy Bid Review permissions from one user to another.



Remember that public users do not need to be assigned to bid reviews. They will only need the Bid Inquiry key to access the review.

8.3 Accessing a Bid Review

Once you have set up a new bid review, added documents and assigned internal ProjNetSM users, you will need to provide the Bid Inquiry key to members of the public. Typically, the key will be published with the solicitation.

Public Bid Inquiry Access

Using the Bid Inquiry key provided by the agency, members of the public can access the Bid Review by performing the following steps:

1. Point your web browser to: <https://www.projnet.org> .

Section #8: ProjNetSM Bidder Inquiry



Figure 8-7

2. From the “Home/Design/Bid/Build” menu bar at the top of the screen, move your mouse over the “Bid” button and then click on “Bidder Inquiry” from the resulting drop-down menu (Figure 8-7).
3. The “Bid Inquiry Login” form is shown (Figure 8-8). Select the Agency you are working with from the “a. Agency” drop-down menu.

Bid Inquiry Login

To access Bid Inquiry, you must get the Bid Inquiry Key from the project solicitation.

1. To submit and review bid inquiry items, you will have to provide valid business contact information (e.g. Company name, you
2. Please read the privacy policy at the bottom of this page.
Failure to provide accurate information will result in your inability to use the system.
Use the form below to begin using Bidder Inquiry.

a. Agency (req.) Please select from below

b. Key (req.) -

c. EMail (req.)

Login

Figure 8-8

4. Enter your Bid Inquiry Key in field “b. Key”. The key you are typing in should be six characters separated by a hyphen.
5. Enter your e-mail address in the field marked “c. EMail”.
6. Click the “Login” button.
7. The “Create Account” screen displays (Figure 8-9):

Bid Inquiry Login / Create Account

User Account not found. Fill out the form below to register.

Use the form below to create a Bidder Inquiry account.

a. First Name (req.)

b. Last Name (req.)

c. Company (req.)

d. City (req.)

e. State (req.)

f. Phone (req.)

g. EMail (req.)

h. Secret Question (req.) Please select from below

i. Secret Answer (req.)

Create User

Figure 8-9

8. Type your personal information into the fields for First Name, Last Name, Company, City, State, Phone, and EMail.
9. Select a Secret Question in the drop-down list for field “h. Secret Question”. This will be used to verify your identity when you login to the Bid Inquiry system.
10. Type the answer to your secret question. (At login you will be asked to enter it exactly, so be sure and make a note of any capital letters or abbreviations

Section #8: ProjNetSM Bidder Inquiry

used.)

11. Click the “Create User” button.

12. The “Select Option” screen is shown (Figure 8-10):

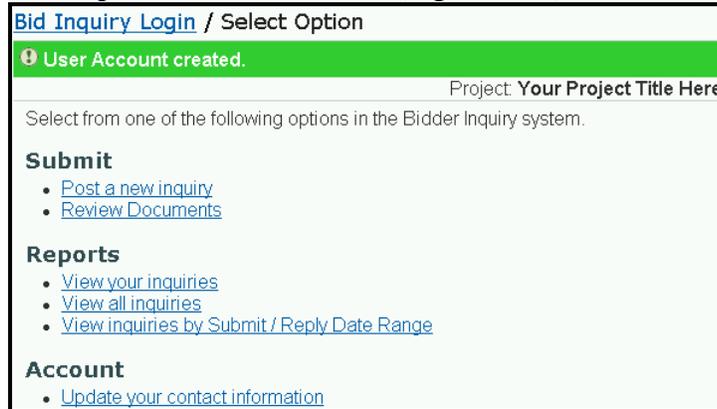


Figure 8-10



Creating a Public account for Bid Inquiry is **not** the same as registering for ProjNetSM. The Bid Inquiry account is a “QuickAdd” limited access account that works for the designated Bid Review **ONLY**.

13. Click on the action you would like to perform from the options menu. The menu functions are as follows:

- **Post a New Inquiry:** Allows you to submit a question pertaining to the Bid materials.
- **Review Documents:** Lists the available documents associated with the Bid Review and allows you to view and/or save them.
- **View your Inquiries:** Will display a report with a summary of the project details and any inquiries you have entered for the review.
- **View all inquiries:** Public report which shows inquiries made by **all** users with contractor-approved responses included where available.
- **View inquiries by Submit / Reply Date Range:** Displays a form that enables you to search inquiries by inquiry Type and Date (Figure 8-11):

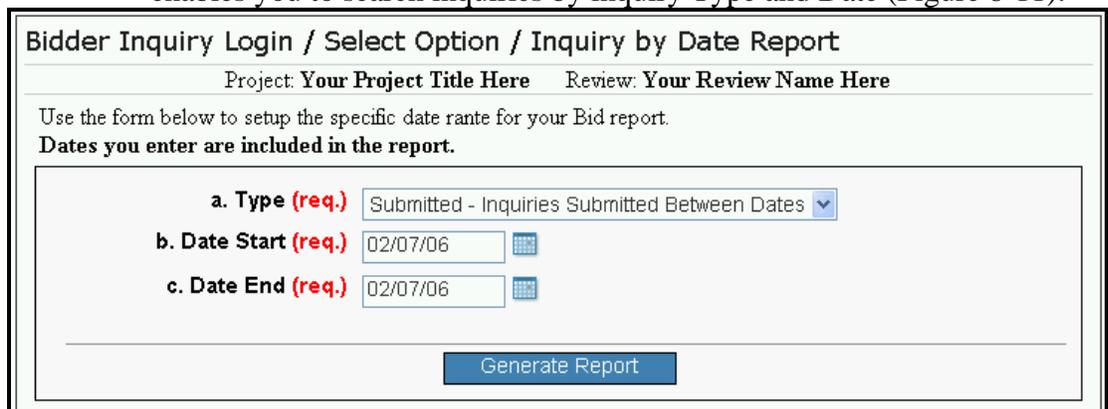


Figure 8-11

- **Update your contact information:** Your contact information will be made available to the review administrators and others viewing the Bid Inquiry, so click on this option if you need to update any information or to verify that the information listed for you is correct.

Section #8: ProjNetSM Bidder Inquiry

Bid Inquiry Access for Registered Users

1. Perform steps 1-6 as described in the previous section, “*Public Bid Inquiry Access*”.
2. You will then be asked to type the answer to your Secret Question. Enter it in field “b. Answer”.
3. Click the “Login” button.
4. The “Select Option” screen displays.
5. Once logged in, the menu options will perform the same functions as described in the previous section.

8.4 Posting An Inquiry

Once you have logged in to Bid Inquiry (steps detailed in the previous section), you can post inquiries related to project materials on the system to be addressed by evaluators and contract officers. To post an inquiry:

1. Follow steps 1-5 in the previous section, 8.3 (“*Accessing a Bid Review*”).
2. Click the “Post a New Inquiry” link.
3. The “Submit Question” form displays (Figure 8-12). Select the Discipline from the drop-down menu.

The screenshot shows a web form titled "Bid Inquiry Login / Options / Submit Question". At the top, it displays "Project: Your Project Title Here" and "Review: Your Review Name Here". Below this, a note states: "Use the form below to submit your question. Selection of either the 'Sheet', 'Detail', or 'Spec.' section is required." The form contains six labeled fields:

- a. Discipline (req.) with a dropdown menu showing "Please select from below".
- b. Sheet (see note) with a text input field and a help icon.
- c. Detail (see note) with a text input field and a help icon.
- d. Specification (see note) with a text input field and a help icon.
- e. File (pdf only) (opt.) with a text input field, a "Browse..." button, and a help icon.
- f. Question (req.) with a large text area and a help icon.

At the bottom of the form is a blue "Add Inquiry" button. Below the button, a note reads: "NOTE: One of the marked fields must be completed."

Figure 8-12

4. Optionally, you can choose to enter Sheet Information into field “b. Sheet Information”.
5. Enter any Detail information in field “c. Detail”. (This field is optional).
6. Optionally, enter the Specification information in field “d. Specification”. (If you have not entered any Sheet Information in step 4, you must enter the Specification information).

Section #8: ProjNetSM Bidder Inquiry



You **must** enter either the Sheet Information or the Specification information.

- If you would like to attach a document to your Bid Inquiry, click the “Browse...” button to the right-hand side of the “e. File” field.



Only PDF files can be uploaded via this method.

- Type your specific inquiry into the “f. Question” field.
- Click the “Add Inquiry” button.

8.5 Bid Inquiry Evaluations & Replies

Once the public has entered inquiries for the Bid Review, they will then need to be evaluated by the technical Subject Matter Experts (SME’s). The evaluations will then be reviewed by the Contract Office, who will in turn enter replies. The Contract Officer considers the acceptability of the technical response and selects the text to present to the bidders and either chooses to display the response to the bidder by closing the comment or may leave it open and not present a response. To enter any evaluation, you must be assigned to the Bid Review as a Technical Evaluator.



Evaluations will NOT be visible to the general public. Only contractor-approved replies entered by the Contract Experts will be shown.

Entering an Evaluation

- Log in to ProjNetSM.
- From the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over the “Bid” button and then click on “Bidder Admin” from the resulting drop-down menu (Figure 8-13).
- Click on the title of the project.
- The Bid Inquiry reviews that have been created for the project you have selected are displayed. In the “Evaluate” column to the right-hand side of the review name, the number of pending inquiries will be displayed as a hyperlinked number (Figure 8-14). Click on the number in the “Pending” section of the “Evaluate” column.



Figure 8-13

| | Bidder Inquiry Review | Evaluate | | | Reply | | |
|--|--|----------------------|--|--|---------------------|--|--|
| | | Pending/Concur/Other | | | Pending/Open/Closed | | |
| | Your Review Name Here (Closed for new comments) | 2 / 1 / 0 | | | 1 / 0 / 0 | | |

Figure 8-14

- You will then see a form (one per page) for each of the inquiries that have been entered that need to be evaluated. To scroll through the inquiries, you can use the “Next >” and “Last >>” buttons in the upper right hand corner of the page and the “<< First” and “< Previous” (“Prev”) buttons in the upper left hand corner of the screen.

Section #8: ProjNetSM Bidder Inquiry



The search function at the top of the inquiry evaluation pages functions the same way the search function for DrChecksSM comments described in Section 5.4, “Searching for Comments”.

- The Inquiry is displayed at the top of the screen followed by the evaluation form (Figure 8-15). Choose the Status of your evaluation by selecting the appropriate radio button in field “a Status”.

Inquiry ID: 3491 (display only)
b. Design Discipline: Electrical
c. Spec Section:
d. Drawing Sheet/Detail: 12564
e. Inquiry Text: Electrical question details.

Submitted by [Han_Solo](#) (phone: 217-000-0000) han@rcesupport.com on 07-Feb-06

This inquiry has not yet been evaluated.

Add Evaluation 1

Use the form below to add an evaluation.

a. Status (req.) Concur Non-concur For information only Check and resolve

b. Discussion (req.)

c. Potential Scope Impact (opt.) Yes No

d. Potential Cost Impact (opt.) Yes No

e. Potential Schedule Impact (opt.) Yes No

f. Attachment (opt.) Browse...

Add Evaluation

Figure 8-15

- Enter the details of your evaluation and the reason for the status you chose into field “b. Discussion”.
- If the Inquiry potentially affects the Scope, Cost or Schedule of the Project, select the “Yes” radio button for the appropriate field (c, d, and/or e.)
- Optionally, you may choose to attach a file to your evaluation. Click the “Browse...” button to the right-hand side of the field marked “f. Attachment”.
- Click the “Add Evaluation” button.
- When your evaluation has been entered successfully, you will see the following confirmation message displaying the evaluation status you chose and confirming that your entries have been saved (Figure 8-16):

Comment status now is 'Concur'. Your evaluation has been saved.

Figure 8-16

Entering a Reply

- Log in to ProjNetSM.
- From the “My Account/Design/Bid/Build” menu bar at the top of the screen, move your mouse over the “Bid” button and then click on “Bidder Admin” from the resulting drop-down menu.
- Click on the title of the project.

Section #8: ProjNetSM Bidder Inquiry

- The Bid Inquiry reviews that have been created for the project you have selected are displayed. In the “Reply” column to the right-hand side of the review name, the number of pending evaluations will be displayed as a hyperlinked number (Figure 8-17). Click on the number in the “Pending” section of the “Reply” column.

| | Bidder Inquiry Review | Evaluate | Reply |
|---|--|---|---------------------------|
| | | Pending/Concur/Other | Pending/Open/Closed |
|  | Your Review Name Here (Closed for new comments) | 2 / 1 / 0 | 1 / 0 / 0 |

Figure 8-17

- You will then see a form (one per page) for each of the evaluations that have been entered that need to be replied to. To scroll through the evaluations, you can use the “Next >” and “Last >>” buttons in the upper right hand corner of the page and the “<< First” and “< Previous” (“Prev”) buttons in the upper left hand corner of the screen.



The search function at the top of the inquiry reply pages functions the same way the search function for DrChecks comments described in section 5.4, “Searching for Comments”.

- The original inquiry will be displayed along with any evaluations that have been entered for the inquiry. At the bottom of the page, the “Add Reply 1” form displays (Figure 8-18):

Eval. 1 - Add Reply 1 Once any reply is Closed, no reply can be changed!

Use the form below to add a reply.

a. Status (req.) Open Closed

b. Discussion (req.)

Figure 8-18

- Click the radio button next to “open” or “closed” in the field marked “a. Status”.



Once a reply has been closed, no replies associated with the inquiry can be changed.

- Enter your reply in the “b. Discussion” field. (Remember that your reply will be displayed to the public if the inquiry has been closed).
- Click the “Add Reply” button.



Once a reply has been posted, the author of the inquiry will receive an e-mail letting them know that their question has been answered.

Section #9: Design Quality Lessons Learned (DQLLSM)

9.1 DQLLSM Overview

Design Quality Lessons Learned (DQLLSM) is an **optional** ProjNetSM module that will allow you to create Lessons Learned from past projects - some of which may be incorporated into future design standards. Lessons can be created from existing DrChecksSM comments or can be entered directly into the DQLLSM system. Once entered into the DQLLSM system, lessons will go through an approval process and be reviewed for possible inclusion in future design guides. DQLLSM will assist your organization in improving overall design quality by helping to identify past issues that cost time and money to resolve and will foster improved standards in the future.

Submitted proposed lessons will be routed to Subject Matter Experts (SME's) that have been assigned to evaluate submissions for a specific index value – such as a specific discipline. (The steps for assigning Subject Matter Experts (also known as Lesson POC's) are discussed in Section 9.9, “Lesson Admin Functions”)

If your agency has chosen to utilize the DQLLSM module, the Project Manager must first enable the “Integrate Lessons Learned” option for the review to prevent seeing this error message when submitting a comment that has been flagged as a Lessons Learned (Figure 9-1):

Please note: Lessons integration is turned off on this review and therefore you cannot enter this as a lesson learned.

Figure 9-1

(See Section 4.2, “Editing Reviews – Opening/Closing a Review”, for details on how to enable this option).

9.2 Creating New Lessons



New lessons will not appear in the Basic search until the next day.



Figure 9-2

To enter a new proposed Lesson Learned into the DQLLSM system:

1. Once logged in to ProjNetSM, move your mouse over ‘Lessons’ in the grey My Account/Design/Bid/Build menu bar towards the top of the page.
2. Click on ‘Add New’ from the resulting drop-down menu. You will then be on the ‘Add Lesson’ screen as follows (Figure 9-3):

Section #9: Design Quality Lessons Learned (DQLLSM)

The screenshot shows the 'Lessons Learned / Add Lesson' form in the ProjNet SM application. The form is titled 'Lessons Learned / Add Lesson' and includes a navigation bar with 'My Account', 'Design', 'Bid', 'Build', 'Portals', 'Lessons', and 'Help'. Below the navigation bar, there is a sub-header 'Lessons Learned / Add Lesson' and a brief instruction: 'Use the form below to draft a new Lessons Learned. After saving the draft, you can update the item and submit'. The form contains the following fields:

- a. Business Area (read only): A text box containing 'Process'.
- b. Discipline (req.): A drop-down menu with 'Please select from below'.
- c. Title (req.): A text box.
- d. Problem (req.): A large text area for entering the problem description.
- e. Solution (req.): A large text area for entering the proposed solution.
- f. Problem Backup (opt.): A text box with a 'Browse...' button.
- g. Solution Backup (opt.): A text box with a 'Browse...' button.

A 'Save Draft' button is located at the bottom right of the form.

Figure 9-3

3. Select a Discipline from the drop-down box.
4. Enter the Title.
5. Enter a description of the original problem.
6. Enter a proposed solution.



The Discipline, Title, Problem and Solution fields are all required when entering a new lesson.

7. Optionally, you may also choose to attach a Problem Backup and/or Solution Backup document to the lesson. To attach a file, click on the 'Browse' button next to Problem Backup or Solution backup, browse to the file location on your hard drive, and then click the 'Open' button. The file will then be uploaded to the ProjNetSM server and will be visible to all who are viewing the lesson.
8. Click the 'Save Draft' button to save your new proposed Lesson as a draft.



ProjNetSM will only accept file names that do not contain spaces and are under 30 characters. If you receive an error when you try to upload a file, check for spaces in the name and/or try using a shorter file name.

9.3 Editing Lessons



Lessons can ONLY be edited if in Draft or Pending status. Once a proposed lesson has been submitted, it cannot be edited.

New proposed lessons are initially entered in Draft status to lesson authors to review and modify them before they are submitted.

Section #9: Design Quality Lessons Learned (DQLLSM)



Figure 9-4



Figure 9-5

To edit a lesson draft:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Edit Draft' (Figure 9-4).
2. You will then see a list of lessons that are currently in 'Draft' status, along with the lesson ID number, the creation date, and the name of the lesson creator. Click on a lesson name to enter it.
3. On this screen, click the Edit button towards the bottom of the screen.
4. The Edit Lesson screen displays. Here you can make changes to the lesson categories, title, problem description, solution and/or attachments. When you have finished updating the lesson, click the 'Update Lesson' button at the bottom of the page (Figure 9-5). If your updates were successful, you will see the following confirmation message (Figure 9-6):

 Your lesson draft has been successfully updated.

Figure 9-6

9.4 Submitting Lesson Drafts



Figure 9-7



Figure 9-8

New lessons are initially entered in Draft status to allow the author to review them and modify them prior to submittal.

To submit a lesson as a draft:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Edit Draft' (Figure 9-7).
2. You will then see a list of lessons that belong to you that are currently in 'Draft' status. Click on a lesson name to enter it.
3. On this screen, you will have the option to edit the lesson categories, description and any attachments once more before it has been submitted using the 'Edit Categories', 'Edit Description' and 'Edit Attachments' buttons.
4. When you are ready to submit the lesson, click the 'Submit lesson' button at the bottom of the page (Figure 9-8).
5. Lesson will now be submitted and will be in 'Pending' status following submission and will be ready for evaluation. You should see the following confirmation message when the draft submission is complete (Figure 9-9):

 The draft item has been submitted, and Lesson POCs have been emailed.

Figure 9-9



Once a Draft lesson has been submitted, the designated SME (Subject Matter Expert) for the index value of the potential lesson will receive an automatic e-mail that this action has been taken.

Section #9: Design Quality Lessons Learned (DQLLSM)

9.5 Evaluating Lessons

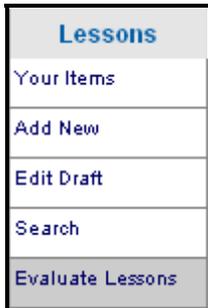


Figure 9-10

Once a potential lesson has been submitted for review, it will then be open for evaluation. In each agency, there will be designated Subject Matter Experts (SME's) who have a specialization in different disciplines. SME's and Site Administrators can evaluate lessons based on a certain discipline or project type.

To evaluate a lesson, perform the following steps:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Evaluate Lessons' (Figure 9-10).
2. You will now be on the 'Select Lesson to Evaluate' screen. You will see a list of assigned pending lessons as shown (Figure 9-11):

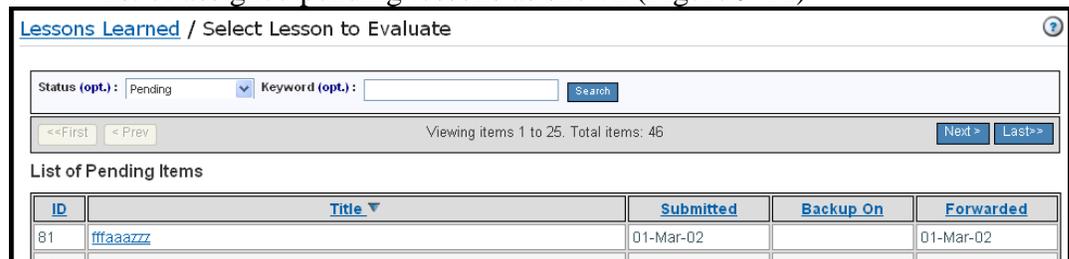


Figure 9-11

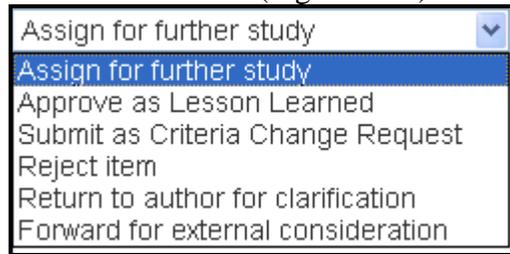
3. To navigate through the existing list of pending lessons, use the 'next' and 'last' buttons on the right hand side of the page and the 'first' and 'previous' ('prev') buttons on the left hand side of the page.
4. The Lesson Select screen also includes a search function which allows you to narrow the list of lessons by status and/or keyword.
 - To search by status, select the status from the drop-down list and click 'search'. You will have the ability to search based on Pending, Approved, Denied or Sunsetting statuses.
 - To search by keyword, enter a keyword that is found within the lesson title into the field and click 'search'.
5. Click on the title of the lesson you would like to evaluate.
6. The 'Evaluate Lesson View' screen displays. All lesson information is displayed on this page and at the bottom of the page you will find the form for lesson evaluation as follows (Figure 9-12):

The screenshot shows the "Evaluate Lesson View" form. It includes a title "Use the form below to perform an evaluation action on this item." and two main sections: "a. Evaluation Action (opt.)" with a dropdown menu set to "Assign for further study", and "b. Action Comments (req.)" with a large text area. At the bottom of the form is an "Update Lesson" button.

Figure 9-12

Section #9: Design Quality Lessons Learned (DQLLSM)

7. Choose the Evaluation Action from the drop-down list. You will have the following options to choose from (Figure 9-13):

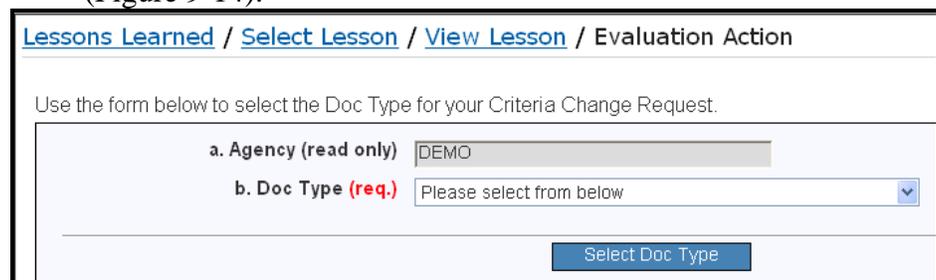


- Assign for further study
- Assign for further study
- Approve as Lesson Learned
- Submit as Criteria Change Request
- Reject item
- Return to author for clarification
- Forward for external consideration

Figure 9-13

If you are unsure which action you would like to perform, here is a brief explanation of the different evaluation actions and their general uses:

- **Assign for Further Study:** Assign to another DrChecksSM user for further study. (The individual must be a registered user of the ProjNetSM system in order to receive the assignment). When you choose this option, you will then be taken to the next screen where you can choose the site and individual to assign to. After the lesson has been updated, the new status will be “Pending, assigned to user” and the user you have assigned the lesson to will receive an automatically generated e-mail notification.
- **Approved As Lesson Learned:** Lesson is accepted and will be incorporated into the list of Approved Lessons Learned. Only approved Lessons Learned are viewable by the general user population in the ProjNetSM system.
- **Submit as Criteria Change Request:** Lesson has been approved and will be forwarded to the Criteria Change Request (CCR) system for inclusion in criteria standards. When choosing this option and clicking ‘update lesson’, you will be taken to the following screen (Figure 9-14):



Lessons Learned / [Select Lesson](#) / [View Lesson](#) / Evaluation Action

Use the form below to select the Doc Type for your Criteria Change Request.

a. Agency (read only)

b. Doc Type (req.)

Figure 9-14

- Select the Document Type from the drop-down menu and then click the ‘Select Doc Type’ button.
- **Reject Item:** Lesson has been denied. For example, an evaluator may decide to reject a potential lesson altogether because it does not qualify to become a lesson or because of inaccurate or incomplete information or because the topic is covered by criteria.
- **Return to Author for Clarification:** Can be used when more information is required from the lesson author to be able to decide

Section #9: Design Quality Lessons Learned (DQLLSM)

what further action to take with the lesson. When this option is selected, the Lesson will once again become a Draft, and the new status will be “Draft, returned to author”. The Lesson author will receive an e-mail notification and will have 30 days to resubmit the lesson or else it will be automatically deleted.

- **Forward for external consideration:** This function will allow you to forward the lesson to another party for further consideration (they do not have to be a registered DrChecksSM user). Choosing this option will take you to the following page where you can supply an assignee name and e-mail address (Figure 9-15):

Lessons Learned / Select Lesson / View Lesson / Evaluation Action

Use the form below to enter the person's name and email.

a. Evaluation Action (read only) Forward for external consideration ?

b. Action Comments (req.)

c. Assignee's Name (req.)

d. Assignee's Email (req.)

Forward Lesson

Figure 9-15

Enter your comments to the assignee into the box provided and click the ‘Forward Lesson’ button. The lesson status will now read “Pending, forwarded externally”. Once you have received a response from your external contact, you can then edit the lesson to include the new information. (See Section 9.3 for more information about editing lessons).

8. Enter your Action Comments into the text box provided.
9. Click the ‘Update Lesson’ button.



When an evaluation is completed, the lesson submitter will receive an email indicating the evaluation decision.

Section #9: Design Quality Lessons Learned (DQLLSM)

9.6 Searching Approved Lessons



Figure 9-16

Basic Search

You can search the DQLLSM system for Approved Lessons by keyword, Site name or by Discipline.

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Search' (Figure 9-16).
2. The "Search Lessons" screen is displayed (Figure 9-17):

Figure 9-17

3. You may search by Keyword, Discipline, Site or all three criteria to find approved lessons. It is not required that any of the criteria must be selected in order to search; however, you will obtain fewer and more meaningful search results if you select at least one criteria to search on.
4. Select the quantity of results that you would like to see returned from your search. Choosing 'Top 10' or 'Top 25' will return the top 10 or 25 matches (according to relevance). Searching for '100 best' will return the closest 100 matches to your search criteria.
5. Click the 'Search' button. If there are results returned, you will see a table which displays a list of the matching lessons and each lesson's percent match to your search criteria, the Lesson ID, Title, Summary, Discipline and Site for each lesson listed.



If there are no results returned when searching for lessons, try searching based on fewer criteria.

6. You can sort the search results by Score, Title, Discipline or Site by clicking on the underlined column headings at the top of the results page. By default, the search will return matches sorted by score (relevancy). Click on the column header once to sort the results in ascending order, and then click a second time to toggle to descending order.
7. Click on the lesson title to view the lesson. You will now see the complete lesson information page.

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New lessons will not appear in the Basic Search until the next day.

Advanced Search



While using the Advanced Search, you can switch back to the Basic style search at any time by clicking on the “Basic” link in the upper right-hand corner.



Figure 9-18

1. While logged on to the ProjNetSM site, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on ‘Search’.
2. The “Search Lessons” screen is displayed (Figure 9-17). At the top right hand side of the page, click on the ‘Advanced’ link (Figure 9-18) to access the Advanced Search.
3. You have the option to select one or more categories to search upon (Figure 9-19). (Note that the categories displayed will vary by agency and may not appear exactly as shown in the example). To choose a category, click on the category name and then click the ‘Add >’ button.

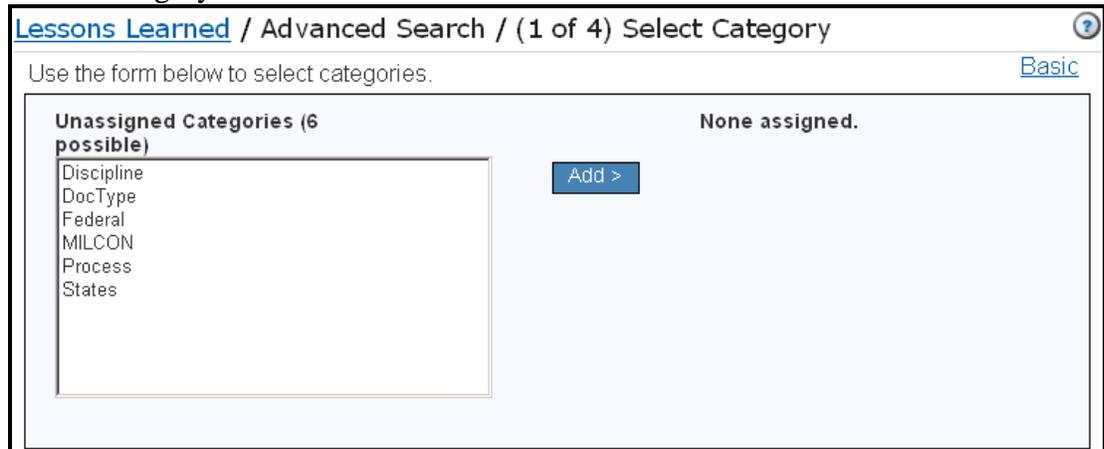


Figure 9-19



To select multiple categories at one time, hold down the Control key on your keyboard when clicking on the category selections.

4. The selected categories will now appear in the box on the right-hand side of the screen labeled “Assigned Categories”.
5. If you would like to remove a category, click on the name of the category you would like to remove in the “Assigned Categories” box and then click the “< Del” (delete) button.
6. Click the ‘Go’ button at the bottom of the screen.
7. For each the categories you have selected, a drop-down menu will be displayed containing the available choices for the category. (For example, if you have chosen “States” as the category to search on, the drop-down box will contain a list of US states to choose from). Choose the option(s) you want from the drop-down boxes and click the ‘Go’ button.
8. You will then have the option to further narrow the search by choosing a status, Site or entering a keyword.
9. Choose the Display Format you want. You have three options:

Section #9: Design Quality Lessons Learned (DQLLSM)

- **Screen:** Results will be displayed on the screen within the ProjNetSM system.
- **E-mail:** Results will be e-mailed directly to the e-mail address listed in your ProjNetSM account. You will see the text of the e-mail that will be sent to you along with the following confirmation box on the following screen displayed (Figure 9-20):

 An email containing the advanced search results will be sent to you by the DQLL module of ProjNet.

Figure 9-20

10. **Export Report:** Allows you to export search results to a file that can be saved on your hard drive. You will receive an e-mail which will be sent to the e-mail address in your ProjNetSM account with the exported file attached.

9.7 Entering a Lessons Learned when submitting a DrChecksSM comment

It is easy to designate a comment as a possible Lesson Learned when it is originally entered. Here are the steps to enter a new comment and flag it as a possible Lesson Learned:

1. While logged on to the ProjNetSM system by move your mouse over the 'Design' button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'DrChecksSM'.
2. You will see a list of projects assigned to you. Click on the project name of the project for which you are entering a comment.
3. Click on the title of the Review you would like to enter the comment into. You will then see the 'Enter Comment' form as follows (Figure 9-21):

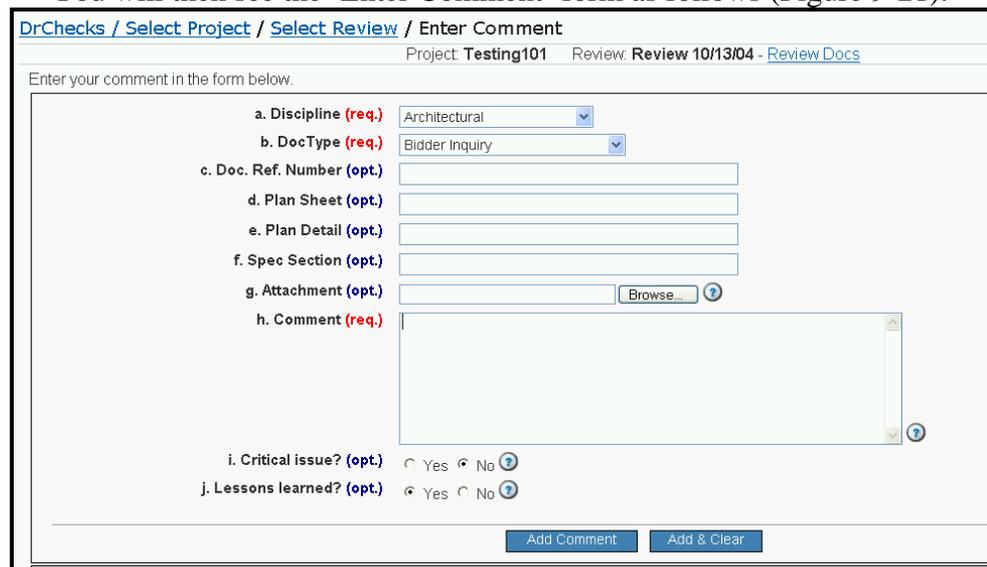


Figure 9-21

4. Enter the Discipline, DocType and Comment.
5. The last option on the page (option j) is the radio button used to flag a comment as a Lesson Learned. Click the 'Yes' radio button to turn this option on.

Section #9: Design Quality Lessons Learned (DQLLSM)

6. Click the 'Add Comment' button.
7. You will then be taken to the DrChecksSM Lessons Learned Insert form (Figure 9-22):

Figure 9-22



The DrChecksSM Lessons Learned Insert form will open in a small “window” against a grey background on your browser screen. This window is not resizable and will not normally cover the entire screen area. This is normal behavior.

8. Choose the 'Discipline' from the drop-down list.
9. Enter a Title for your new lesson.
10. Enter the 'Problem' being addressed in this lesson.
11. Enter the proposed 'Solution'.
12. Using the scroll bars located on the right hand side of the Lessons Learned Insert form, scroll down to the bottom of the form (Figure 9-23):

Figure 9-23

13. Optionally, you can choose to attach a file for 'Problem Backup' and/or

Section #9: Design Quality Lessons Learned (DQLLSM)

'Solution Backup'. Do so by clicking the "Browse.." button to the right hand side of the field and then browsing for the file on your computer.

14. Click the blue 'Save Draft' button at the bottom of the form.

15. You will then see a confirmation of your submission in green at the top of the screen (Figure 9-24) that shows your comment ID number and confirms that the Lesson has been saved as a Draft as well:

Your comment has been saved as ID 3462. (Note: Your comment has been saved as a draft Lessons Learned as well.)

Figure 9-24

16. To submit a lesson draft, follow the steps in Section 9.4 above.

9.8 View Lesson POC's



Figure 9-25

To view the lesson Points of Contact, perform the following steps:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Lesson POC's' (Figure 9-25).
2. You will then be able to choose the Site that the individual you are looking for belongs to (Figure 9-26).

Figure 9-26

3. You may wish to further narrow your results by choosing an Index Category from the drop-down box. (If you choose an option in the drop-down box of this optional field, you will then have the opportunity to choose an Index Item from the second drop-down box below.)
4. Click the blue 'Search for POC's' button. You will then see a list of lesson POC's and their contact information.

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9.9 Lesson Admin Functions



Figure 9-27

If you are a site admin and/or DQLLSM gatekeeper, you will also have the option to perform several administrative functions as described below. To reach the Lesson Admin control panel:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on 'Lesson Admin'. (Figure 9-27).
2. You will then be at the Lesson Admin control panel and can select any of the admin functions by clicking on them in the list, as shown (Figure 9-28):

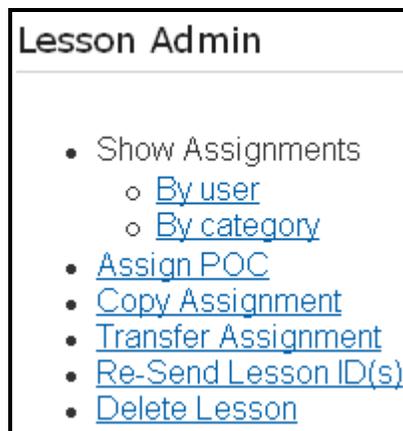


Figure 9-28

Show/Remove Current Lesson Assignments

There are two ways to view current lesson assignments from the Lesson Admin control panel:

By User:

1. Click on 'By User' to view each user in a given site and their corresponding Assignments (Figure 9-29):

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| Remove | Category | Item |
|-----------------------------|------------|-----------------|
| <input type="checkbox"/> | Discipline | Architectural |
| <input type="checkbox"/> | | Civil |
| <input type="checkbox"/> | | Estimating |
| <input type="checkbox"/> | | Fire Protection |
| <input type="checkbox"/> | States | Illinois |
| Smith, Mary (Example Site) | | |
| <input type="checkbox"/> | Discipline | Architectural |
| <input type="checkbox"/> | | Civil |
| <input type="checkbox"/> | | Estimating |
| <input type="checkbox"/> | | Fire Protection |
| <input type="checkbox"/> | States | Illinois |
| Rodgers, Kenny (Site 12345) | | |
| <input type="checkbox"/> | Discipline | Civil |

Figure 9-29

- To remove a user's assignment, click on the check box under the 'Remove' column to place a check mark in it.
- Click the 'Update Assignments' button to remove the users you have selected.
- You will know that your assignment changes have been completed when you see the following confirmation in the green box at the top of the screen (Figure 9-30):



Figure 9-30

By Category:

- Click on 'By category' to choose the category as follows (Figure 9-31):

Figure 9-31

- Choose the category you would like to see user assignments for. (You can also choose the Index Item and Site if you would like to narrow your results further).
- Click the 'View Assignments' button.

Section #9: Design Quality Lessons Learned (DQLLSM)

Changing Lesson POC's

If you are the lesson owner or the Project Manager and have determined that you need to make changes to the POC assignments, here's how to do it:

1. Click on "Assign POC" from the Lesson Admin control panel.
2. Select the site from the "Site" drop-down list that the POC you would like to assign belongs to (Figure 9-32):

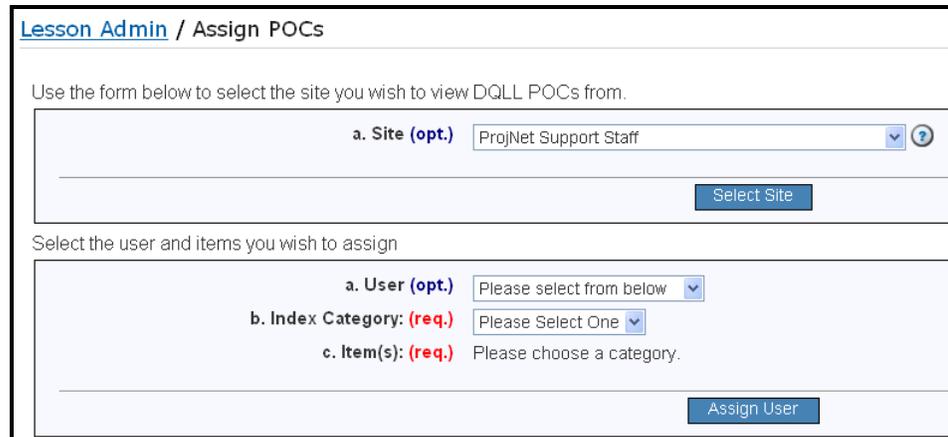


Figure 9-32

3. Click on the 'Select Site' button.
4. Select the name of the user from the 'User' drop-down list. (Note that the user must be registered and active in the ProjNetSM system to appear in this list).
5. Select the Index Category and Item from the drop-down list.



The Index Category and Item fields are both required when choosing a new POC for a lesson.

6. Click the 'Assign User' button.
7. If the user assignment was successful, you will see the confirmation in the green box at the top of the page as follows (Figure 9-33):



Figure 9-33

Copying Lesson Assignments

If you have users that are assigned as lesson POC's to multiple categories, and you would like another user to be assigned as a lesson POC for the exact same category without having to assign them one at a time, you can copy assignments from one user to another. This is particularly useful if you have one staff member taking over another staff member's responsibilities, or if you add a new user to a department that needs to have the same assignments as another user:

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1. Click on 'Copy Assignments' from the Lesson Admin control panel screen.
2. From the 'Site' drop-down list, choose the Point(s) of Contact belongs to (Figure 9-34):

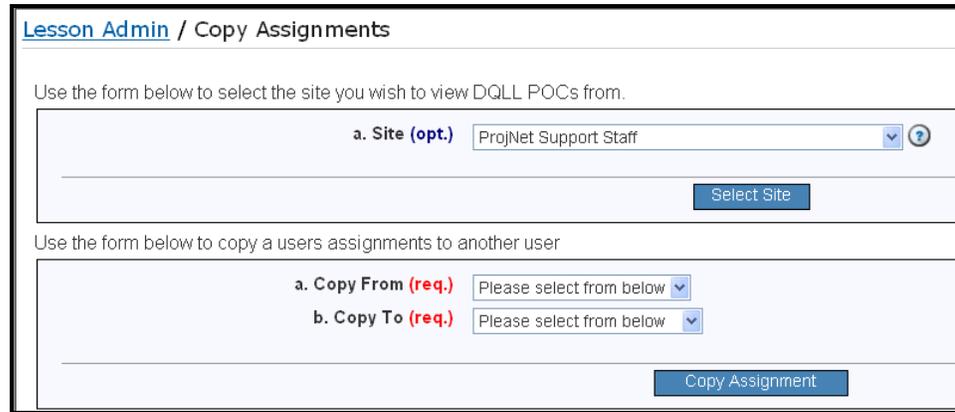


Figure 9-34

3. Click the 'Select Site' button.
4. Select the user whose permissions you want to copy *from* in the 'copy from' drop-down list.
5. Select the user you would like to copy the permissions *to* in the 'copy to' drop-down box.
6. Click the "Copy Assignment" button. You will see the following confirmation that your assignment was successful (Figure 9-35):



Figure 9-35

Transferring Lesson Assignments



When lesson assignments are "transferred", the system will remove the permissions from the user you are transferring from. If you would like both users to have the assignments, use the "Copy Assignments" function instead (see above section).

Sometimes it becomes necessary to transfer permissions from one user to another when a user changes roles or another user leaves. This function differs from "copying" lesson POC category assignments in that when assignments are "transferred", they are actually *moved* from one user to another and those assignments will be *removed* from the first user. Here is how to transfer lesson POC category assignments:

1. Click on 'Transfer Assignments' from the Lesson Admin control panel screen.
2. The "Transfer Assignment" form displays (Figure 9-36):

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Lesson Admin / Transfer Assignment

Use the form below to select the site you wish to view DQLL POCs from.

a. Site (opt.) ProjNet Support Staff

Select Site

Use the form below to transfer assignments from a user to another. Note: the 'From' users assignments will be removed.

a. Transfer From (req.) Please select from below

b. Transfer To (req.) Please select from below

Transfer Assignment

Figure 9-36

3. From the drop-down list, select the Site that the user you are transferring *from* is a member of.
4. Click the 'Select Site' button.
5. In the "Transfer From" drop-down list, choose the name of the user you would like to transfer the assignment *from*.
6. In the "Transfer To" drop-down list, select the name of the individual you would like to transfer the assignments to.
7. Click the "Transfer Assignment" button at the bottom of the screen.
8. You will receive the following confirmation that the assignments have been transferred successfully (Figure 9-37):



Figure 9-37

Re-Sending Lesson ID's

When lessons are created or updated, the POC's for the lesson will receive an automated e-mail alerting them to the updates. If the POC's did not receive this email (for example due to the recipients e-mail server being down or a recipient's e-mail address has changed and needs to be updated in the ProjNetSM system), you can manually re-send this email confirmation so that the POC will have it for their records. Here are the steps:

1. Click on 'Re-Send Lesson ID(s)' from the Lesson Admin control panel screen.
2. Enter the Lesson ID in the "Lesson ID(s)" text box. (If you would like to re-send multiple Lesson ID's, type the ID's into the box separated by commas).
3. Click the "ReSend Lesson Information" button.
4. When the e-mail has been sent to the POC's you will receive the following confirmation listing the Lesson number(s) and the addresses it was sent to (Figure 9-38):

Section #9: Design Quality Lessons Learned (DQLLSM)

 Email Sent for these Lessons - 172. Email Sent to these people - jmol@rcesupport.com

Figure 9-38



The Lesson must be in 'Pending' status for you to be able to re-send lesson information to the POC's.

Deleting Lessons

There are times when a lesson entered needs to be removed from the system completely. Some examples of when it might be appropriate to delete a lesson altogether include duplicate lessons (the exact same lesson was inadvertently entered more than once), and erroneous lessons (a user entered text which had nothing to do with the lesson and submitted it by mistake). To delete a lesson:

1. Click on 'Delete Lesson' from the Lesson Admin control panel screen. The Delete Lesson form displays (Figure 9-39):

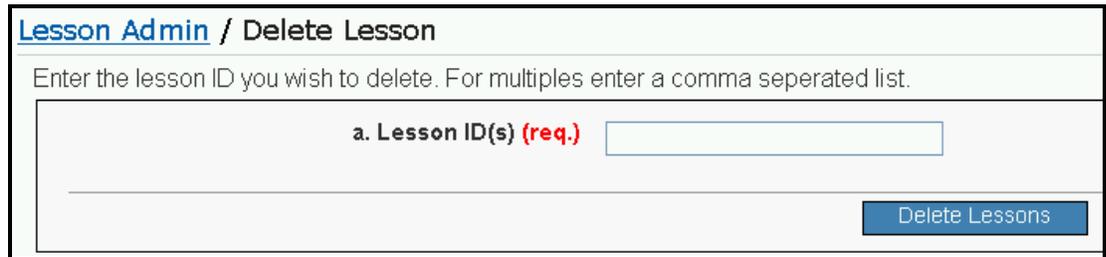


Figure 9-39

2. Type the Lesson ID for the lesson you would like to delete. (If you would like to delete more than one lesson, enter the Lesson ID's separated by commas).



Once a lesson has been deleted, it cannot be recovered. Make sure you are entering the correct Lesson ID(s) when deleting lessons.

3. Click the "Delete Lessons" button at the bottom of the form.
4. You will see the following confirmation box appear on your screen (Figure 9-40):

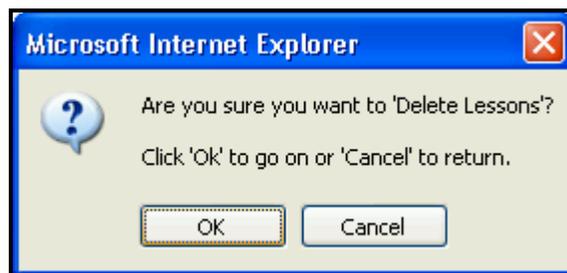


Figure 9-40

5. Click 'OK' to delete the lesson(s) (or click "Cancel" if you feel you may have made a mistake and would like to go back).

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6. You will receive the following confirmation when the lesson(s) have been deleted (Figure 9-41):

 These lesson(s) have been deleted - 172.

Figure 9-41

9.10 Sunsetting Approved Lessons (*Lesson Gatekeepers Only*)

Once lessons have been submitted, evaluated, approved and then been incorporated into a revised design standard (or covered by another action), the lesson is no longer necessary and therefore should be “sunsetting”, or in other words, “retired”. DQLLSM has a built in function for this purpose that you can get to from the lesson view screen.

1. Follow the directions in the previous Section (9.9) to reach the Lesson View screen for the lesson you want to sunset.
2. Scroll down to the bottom of the page until you see the form to sunset a lesson, as follows (Figure 9-42):

Use the form below to sunset this approved lesson. The sunset date must be today or before.

| | |
|--------------------------|--------------------------|
| a. Sunset Date (req.) | <input type="text"/> |
| b. Sunset Reason (req.) | Please select from below |
| c. Sunset Comment (opt.) | <input type="text"/> |

Figure 9-42

3. Type a sunset date in the blank provided or click on the small calendar to the right of the blank to select a sunset date.



The Sunset date must be today's date or earlier.

4. Choose a sunset reason from the drop-down box. The choices are as follows (Figure 9-43):

Please select from below

- Please select from below
- National Criteria Change
- Local Criteria Change
- Installation Criteria Change
- Overcome By Events
- Other

Figure 9-43

Section #9: Design Quality Lessons Learned (DQLLSM)



- **National Criteria Change:** Lesson has already been incorporated into national design criteria.
 - **Local Criteria Change:** Lesson has already been incorporated into local design criteria.
 - **Installation Criteria Change**
 - **Overcome by Events:** Lesson was addressed by events that occurred during the design and/or build process.
 - **Other:** All other reasons for sunsetting.
5. Optionally, you can also choose to enter a comment explaining the reason for the sunset in the ‘Sunset Comment’ text box.
- If “other” is selected as your sunset reason, **be sure to provide an explanation for the sunset in the “Sunset comment” text box.**
6. Click the ‘Sunset Lesson’ button at the bottom of the page.
7. You will receive the following confirmation when the sunset has completed successfully (Figure 9-44):

 Lesson has been updated.

Figure 9-44

9.11 Sunsetting Approved Lessons in Bulk (*Lesson Gatekeepers Only*)

| Lessons |
|------------------|
| Your Items |
| Add New |
| Edit Draft |
| Search |
| Evaluate Lessons |
| Sunset Approved |

Figure 9-45

If you have a large number of lessons to sunset (for example, with the publication of a new standard), it is often more convenient to sunset several lessons at once. To perform this activity:

1. While logged on to the ProjNetSM system, move your mouse over the Lessons button in the grey Account/Design/Bid/Build menu bar at the top of the screen and click on ‘Sunset Approved’ (Figure 9-45).
2. The “Sunset Lessons in Bulk” screen displays (Figure 9-46):

Section #9: Design Quality Lessons Learned (DQLLSM)

Lessons Learned / Sunset Lessons in Bulk

Enter comma separated Lesson IDs. The date and reason applied to all..

a. Lesson Id # (req.) ?

b. Sunset Date (req.) ?

c. Sunset Reason (req.) Please select from below ?

d. Sunset Comment (opt.) ?

Sunset Lessons

Figure 9-46

3. You will first need to make a list of the Lesson ID numbers you would like to sunset. (See Section 9.6 for more on how to search for Approved lessons). Enter the ID numbers of the lessons you would like to sunset separated by commas.
4. Enter the Sunset Date (or use the calendar icon to select a date.)
5. Select a Sunset reason from the drop-down menu.
6. Optionally, you may choose to enter comments that explain why these lessons are being sunsetted.
7. Click the 'Sunset Lessons' button.

Section #10: ProjNet-RFISM (Request for Information)

10.1 ProjNet-RFISM Introduction

ProjNet-RFISM is an optional ProjNetSM module that provides a forum for parties bound by a contractual obligation to post and resolve questions about the contract they are involved in. ProjNet-RFISM inquiries may be posted at any time post-award, whether it be prior to, during, or after construction. The ProjNet-RFISM process addresses questions posed which pertain directly to the contract being executed and the resolution of these questions may result in contract change orders or contract modifications. Inquiries are evaluated by agency technical representatives, who will receive a single e-mail each evening alerting them that one or more new inquiries have been posted. Contract officers will utilize the evaluations provided by the technical representatives to craft a response to the ProjNet-RFISM inquiries and manage the process to ensure that all pending questions have been resolved successfully.

10.2 Adding a New ProjNet-RFISM Review (*Project Managers Only*)

The ProjNet-RFISM module works in conjunction with DrChecksSM. In order to create a new ProjNet-RFISM review, the project must first be created in DrChecksSM and then the Project Manager will have the ability to create a new ProjNet-RFISM Review for that project. (See section 4.2 of this manual for more information about creating new projects). After the project is created, perform the following steps to set up a new ProjNet-RFISM review:



Figure 10-1

1. Log in to the ProjNetSM system.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu (Figure 10-1).
3. A list of projects assigned to you will be displayed. Click on the hyperlinked title of the project (Figure 10-2) that you would like to create an ProjNet-RFISM review for:

| | |
|-------------------|--|
| Project ID ▾ | |
| 0012345-6 | Another exciting test project! |
| PROJECT ID NUMBER | Your Project Title Here |

Figure 10-2

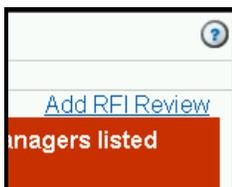


Figure 10-3

4. Click on “Add RFI Review” in the upper right-hand corner of the screen (Figure 10-3).
5. The “Add RFI Review” form displays (Figure 10-4):

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RFI / [Select Project](#) / [Select Review](#) / Add RFI Review

Project: Your Project Title Here

Use the form below to create a new review.

a. Review Name (req.) ?

b. Review Type RFI

c. Review Start (req.) 03/15/06 ?

d. Review End (req.) 03/15/06 ?

Figure 10-4

6. Type the name of the review in the field marked “a. Review Name”.
7. You will notice that the “b. Review Type field” is pre-populated based on the application you are using. (This cannot be changed).
8. Type the review start and end dates into the fields marked “c. Review Start” and “d. Review End”. (Alternatively, you can choose to click on the tiny calendar icon and select the dates from a pop-up calendar by clicking on them).
9. Click the “Add RFI Review” button.

10.3 Editing and Assigning a ProjNet-RFISM Review (*Project/Review Managers*)

ProjNet-RFISM Review editing options are automatically displayed immediately following the creation of a new review. Once the review has been entered, you can reach the editing options again at any time by performing the following steps:

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu.
3. A list of projects assigned to you will be displayed. Click on the project title for the project that contains the review you would like to edit.
4. The ProjNet-RFISM review names will be displayed. Click on the “Edit” button to the left of the review name, as shown (Figure 10-5):

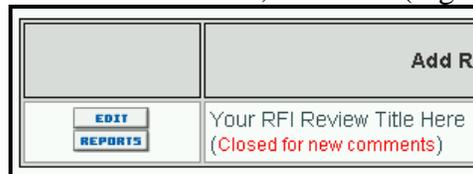


Figure 10-5

5. The “Select RFI Edit Task” page displays (Figure 10-6):

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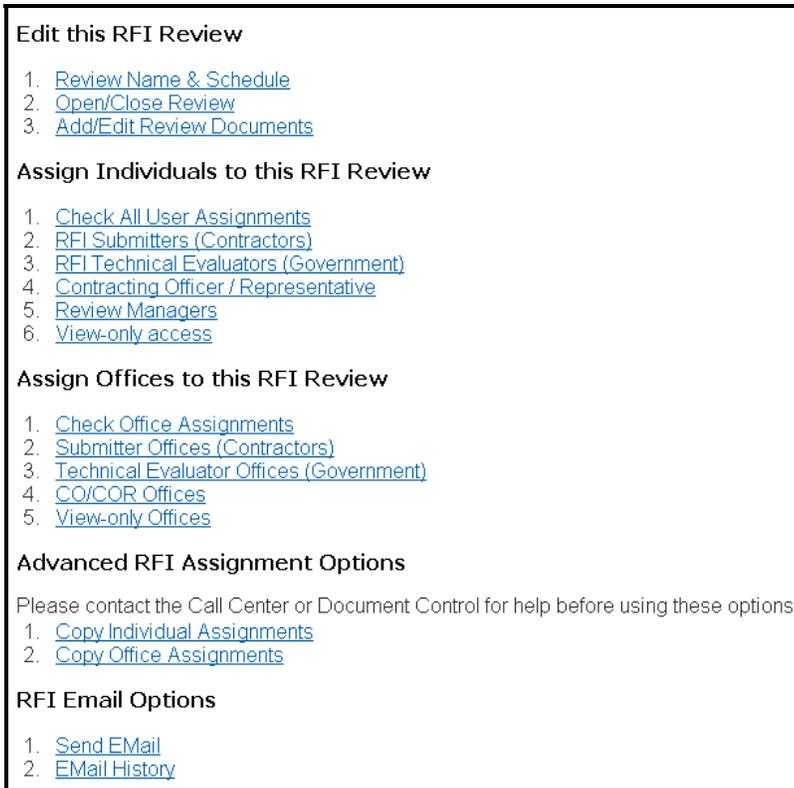


Figure 10-6

6. Click on the review editing task that you would like to perform. A brief explanation of your review editing options are as follows:
 - **Review Name and Schedule:** Make changes to the review name and/or review dates.
 - **Open and Close Review:** Open or close the review for Requests, Evaluations and Replies.
 - **Add/Edit Review Documents:** Add or change documents associated with the ProjNet-RFISM Review.

Assigning Users to a ProjNet-RFISM Review

The "Select RFI Edit Task" page also contains the Assignment options for the ProjNet-RFISM Review. Click on the link for the activity you would like to perform. The assignment options are as follows:

- **Check All User Assignments:** Displays the current individual assignments for the ProjNet-RFISM Review.
- **RFI Submitters (Contractors):** Assign users registered as Contractors in ProjNetSM to the review to allow them to submit RFI's.
- **RFI Technical Evaluators (Government):** Assign government technical representatives to evaluate inquiries.
- **Contracting Officer/Representative:** Assign Contracting Officers to submit replies.
- **Review Managers:** Select additional managers for this review. Users assigned via this option will have "manager rights", but they will be limited to this specific review.

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- **View-only Access:** Assign users to the review with “view-only” permissions (they will not be able to enter or change any data).

Assigning Offices to a ProjNet-RFISM Review

In addition to assigning users individually, the “Select RFI Edit Task” page also contains the Office Assignment options for the ProjNet-RFISM Review. Click on the link for the activity you would like to perform. The assignment options are as follows:

1. **Check Office Assignments:** Displays the current office assignments for the ProjNet-RFISM Review.
2. **Submitter Offices (Contractors):** Assign entire offices as Submitters (Contractors) to the ProjNet-RFISM Review to allow them to submit RFI's.
3. **Technical Evaluator Offices (Government):** Assign entire offices as government technical representatives to evaluate inquiries.
4. **CO/COR Offices:** Assign entire offices as Contracting Officers to submit replies for the RFI's.
5. **View-only Offices:** Assign offices to the review with “view-only” permissions (they will not be able to enter or change any data).

Advanced ProjNet-RFISM Assignment Options

Please contact the ProjNetSM Call Center before using any of the Advanced assignment options (“Copy Individual Assignments or Copy Office Assignments”). These options have specific functions which may or not be the functions you intended and can cause loss of data if not used properly.

RFI Email Options

There is a feature available to RFI Project Managers and Review Managers which allows them to send e-mail to groups of users directly from the ProjNetSM system without having to know/type in e-mail addresses or use an e-mail client. Any e-mails sent from this portion of the system will also be recorded in the RFI record. Here's how to access this option from the “Select RFI Edit Task” screen:

19. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping. Click on the “Send Email” link.
20. The “Email Users” form displays (Figure 10-7):

Use the form below to send an email to one or more user groups.

Select one or more groups from the dropdowns below.

a. Send To: (opt.) Please select from below
Please select from below
Please select from below

b. Addtl. Email(s) (opt.)

c. Message (req.)

Figure 10-7

21. . For the “a. Send To:” field, you will see that there are three drop-down

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menus to select from. Each drop-down menu represents the options that are available for that user group. You can choose to send the e-mail to users who have or have not participated in the RFI review accordingly.

Select the user groups you would like to send e-mail to from the drop-downs. For example, if you wanted to send the e-mail to all contractors who submitted RFI's **and** all Evaluators who have not posted evaluations **and** all CO/COR's who have posted replies, you would choose the following options (Figure 10-8):

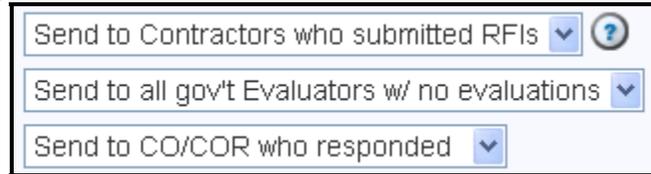


Figure 10-8

22. Optionally, you can choose to manually list other e-mail addresses, separated by commas, in the “b. Addtl. Email(s)” field. (These do NOT have to be registered users of ProjNetSM to receive the e-mail, but the users will need to have access to the system to be able to log on and view comments).
23. Enter the body of your e-mail message in the “c. Message” field.
24. Click the “Send Email” button.
25. A confirmation displays that lists all of the addresses that the message was sent to along with the message text.

To view the history of all e-mail messages sent by the system for a particular RFI review:

6. Access the “Select Editing Task” screen for the RFI review in question.
7. Scroll down to the bottom of the page where you will find two links under the “Email Options” grouping. Click on the “Email History” link.
8. A table is displayed containing the date the e-mail was sent, who it was sent to, and the text of each message.

10.4 Submitting a ProjNet-RFISM

To enter a request for information into a ProjNet-RFISM Review, you will first need to be assigned as a Submitter (Contractor) for that particular review. Contact your Project Manager to request assignment to the Review if you are not assigned. The Review must also be open for requests in order to enter a new ProjNet-RFISM. To enter a new request:

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu.
3. A list of projects assigned to you will be displayed. Click on the project title for the project that contains the review you would like to submit an RFI for.
4. The ProjNet-RFISM review names will be displayed. Click on the hyperlinked title of the review name, as shown (Figure 10-9):

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Figure 10-9

5. The “Enter Request” form displays (Figure 10-10):

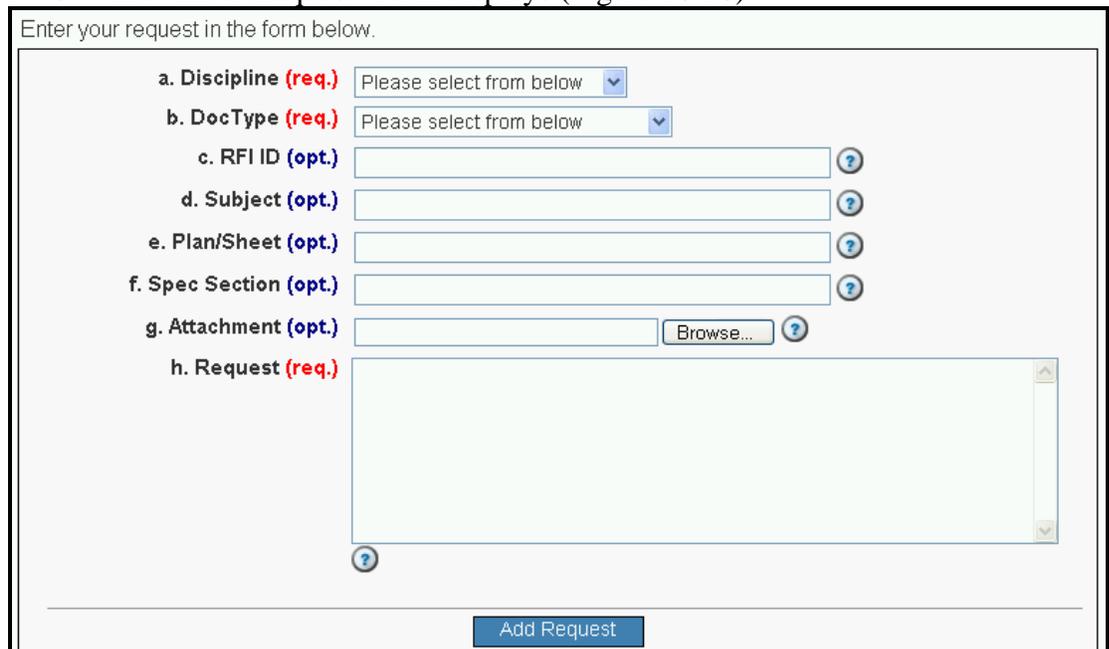


Figure 10-10



Requests for Information are contractual communications. Once a request has been submitted, it cannot be edited. For this reason, please review your request in a word processing application prior to pasting it into ProjNet-RFISM.

6. Select the discipline to which your inquiry pertains from the drop-down list in field “a. Discipline”.
7. Select the document type to which your inquiry pertains from the drop-down list in field “b. DocType”.
8. Optionally, you can choose to enter an RFI ID in field “c. ProjNet-RFISM ID”, an inquiry subject in field “d. Subject”, or to reference a Plan Sheet or Spec Section in fields “e. Plan/Sheet” and “f. Spec Section”.
9. If you would like to attach a file to your request, click the “Browse...” button to the right-hand side of field “g. Attachment”.
10. Type (or paste) the details of your RFI into field “h. Request”.
11. Click the “Add Request” button.
12. Once your request has been submitted, you will see the following confirmation displayed (Figure 10-11):

Section #10: ProjNet-RFISM (Request for Information)

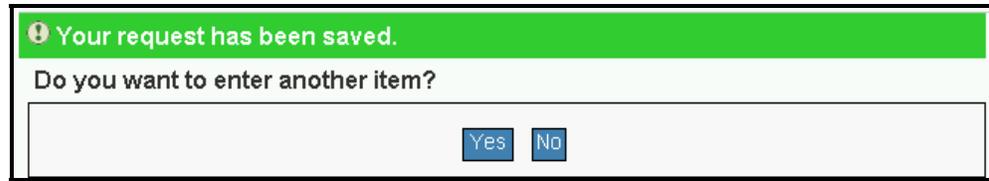


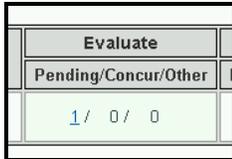
Figure 10-11

13. If you would like to enter another request, click the “Yes” button and repeat steps 6-11 above for each request you are entering.
14. If you are finished entering requests, click the “No” button.

10.5 Evaluating Pending ProjNet-RFISM Requests

To evaluate pending ProjNet-RFISM requests that have been submitted by Contractors, you will first need to be assigned as a Government ProjNet-RFISM Technical Evaluator for that particular review. Contact your Project Manager to request assignment to the review if you are not assigned. The review must also be open for evaluations in order to evaluate a ProjNet-RFISM. To evaluate a pending request:

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu.
3. A list of projects assigned to you will be displayed. Click on the project title for the project that contains the review you would like evaluate requests for.
4. The ProjNet-RFISM review names will be displayed. Look at the numbers in the “Evaluate” column for the review you want to evaluate requests for (Figure 10-12).
5. You will see that some of the numbers are hyperlinked (in blue text with underline). Each of the numbers in the “Pending” column represent requests that are pending and in need of evaluation. Numbers in the “Concur” column are comments that have been evaluated and the Evaluator has concurred with the statement made in the comment. All comments in any other status will appear in the “Other” column. Click on the number in the “Pending” column for the request you would like to evaluate.
6. The first pending request will be displayed. The original request will display at the top of the page and the “Add Evaluation” form directly follows (Figure 10-13):



| Evaluate | Pending/Concur/Other | |
|-------------------|----------------------|---|
| 1 | 0 | 0 |

Figure 10-12

Section #10: ProjNet-RFISM (Request for Information)

The screenshot shows a web form titled "Add Evaluation 1". It contains the following fields and options:

- a. Status (req.)**: Radio buttons for Concur, Non-concur, and For information only.
- b. Discussion (req.)**: A large text area for entering the evaluation discussion.
- c. Potential Scope Impact (opt.)**: Radio buttons for Yes and No.
- d. Potential Cost Impact (opt.)**: Radio buttons for Yes and No.
- e. Potential Schedule Impact (opt.)**: Radio buttons for Yes and No.
- f. Attachment (opt.)**: A text box followed by a "Browse..." button.

An "Add Evaluation" button is located at the bottom right of the form.

Figure 10-13

- In the “a. Status” field, you will see several radio buttons which represent the status you would like to designate for the evaluation. Choose the radio button next to the option you want. A breakdown of these statuses and what they are normally used for is as follows:
 - Concur:** The proposed modification or revision or contract interpretation conforms to government and customer needs and interests and it is believed that the revision or action implied or proposed should proceed.
 - Non-concur:** The proposed modification or revision or contract interpretation does not conform to government and customer needs and interests and it is believed that the revision or action implied or proposed should not proceed.
 - For information only:** The evaluation provides relevant information about the proposed modification or revision or action, but does not speak to the option of proceeding with the action. In other words, the RFI was only a clarification posted for informational purposes.
- Type your evaluation into the field marked “b. Discussion”.
- Optionally, you can choose to flag the outcome of this request as potentially impacting the Scope of the project (field c. Potential Scope Impact), as potentially affecting the overall cost of the project (field d. Potential Cost Impact) and as potentially impacting the schedule of the project (e. Potential Schedule Impact). Choose the “Yes” radio button next to each of these if you would like to activate these options.
- You can also choose to add a file attachment to support your evaluation if you wish by clicking on the “Browse” button next to the “f. Attachment” field. In the “Choose file” dialogue box that appears, navigate to the file you would like to attach on your local computer and click the “Open” button.
- Click the “Add Evaluation” button to submit your evaluation.

10.6 Replying to ProjNet-RFISM Requests

To reply to ProjNet-RFISM requests that have been evaluated by government tech

Section #10: ProjNet-RFISM (Request for Information)

reps, you will first need to be assigned as a Contracting Officer for that particular review. Contact your Project Manager to request assignment to the review if you are not assigned. The review must also be open for replies in order to be able to post a reply to an evaluated ProjNet-RFISM. To post a reply:

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu.
3. A list of projects assigned to you will be displayed. Click on the project title for the project that contains the review you would like to enter replies for.
4. The ProjNet-RFISM review names will be displayed. Look at the numbers in the “Reply” column for the review you want to submit a reply for (Figure 10-14).
5. You will see that some of the numbers are hyperlinked (in blue text with underline). Each of the numbers in the “Pending” column represent requests that have been evaluated and are in need of a reply. Numbers in the “Open” column are comments that have been replied to and left open. Numbers in the “Closed” column are comments that have been replied to and closed. Click on the number in the “Pending” column for the request you would like to enter a reply for.
6. The first request that is pending reply will be displayed. The original request will display at the top of the page and any subsequent evaluations will follow. At the bottom of the page, the “Add Reply” form is displayed (Figure 10-15):

| Reply | | |
|---------------------|-------------------|-------------------|
| Pending/Open/Closed | | |
| 1 | 0 | 0 |

Figure 10-14

Figure 10-15

7. Enter the text of your reply exactly as you would like to have it appear to the requestor (contractor).
8. Select a status from the radio buttons in field “a. Status”.
9. Click the “Add Reply” button.



Once a reply has been submitted in ProjNet-RFISM, it cannot be edited. For this reason, please review your reply in a word processing application prior to pasting it into ProjNet-RFISM.

10.7 ProjNet-RFISM Reports

There are several Contractor Reports available that make it easy for contractors to see at a glance which requests they have entered and the status of that request, and several Government Reports that make it easy for government tech evaluators and contract officers to see what requests are pending evaluation and reply. To access ProjNet-RFISM reports:

Section #10: ProjNet-RFISM (Request for Information)

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, click on the “Build” button and then click “RFI” in the resulting drop-down menu.
3. A list of projects assigned to you will be displayed. Click on the project title for the project that contains the review you would like to edit.
4. The ProjNet-RFISM review names will be displayed. Click on the “Reports” button to the left of the review name, as shown (Figure 10-16):

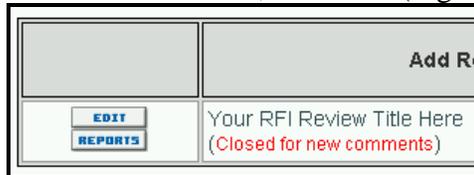


Figure 10-16

5. You will then have access to the available list of ProjNet-RFISM Reports (Figure 10-17). The reports that will be available to you will be dependant on the role you have been assigned to for the review. Click on the name of the report to view it.



Figure 10-17



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.

Appendix Part 1: Site Administrator Guide

The site administrator is perhaps the most involved in the use of ProjNetSM and will be the individual that has the ability to perform tasks such as initiating/approving new office setups, requesting POC (Point of Contact) changes for offices, designating Project Managers, and running Reports.

Requesting a New Office

When working with a multitude of design firms, engineering firms and general contractors, DrChecksSM makes it easy to get all the personnel involved in a project to be able to collaborate with each other regardless of their physical location. When a new Design firm, Customer, or Contractor firm becomes involved with a project, you can request that a new “office” be created so that all members of that particular firm will be able to register their internal personnel. Here’s how to request a new office:

7. Once logged in to ProjNetSM, move your mouse over ‘Help’ in the grey My Account/Design/Bid/Build menu bar towards the top of the page and click on “Request New Office” from the resulting drop-down menu (Figure A-1).
8. The “Request A New Office” form displays. Choose the radio button next to the “Firm Type” that matches the office you are requesting (Figure A-2):



Figure A-1

Figure A-2

9. For line “b. Firm Name”, type in the name of the firm you are requesting a new office for. Examples include “ABC Design” or “Acme General Contractors”.
10. Enter the name of the office in field “c. Office Name”. This may be the same or slightly different than the Firm name. One example might be “ABC Design – Southwestern Division”.
11. Enter the City and State of where the office is located. For State, be sure to use the two-letter abbreviation for the state you are typing.

12. Enter the first and last name of the POC (Point of Contact) for the office you are requesting.



The POC (Point of Contact) is the individual who will hold the “Vendor ID” for the office. The Vendor ID is a unique key that each user must obtain in order to register for ProjNetSM. All subsequent users that will need to register in that office will need to obtain vendor ID from their designated POC.

13. Enter the POC e-mail and telephone number into fields “h” and “I”.

14. Optionally, you may choose to enter the name of the Project and Project Manager in blanks “j” and “k”.

15. Click the “Add Request” button.



Users who are not Site Administrators are also able to submit requests for new offices. However, these offices will not be created without approval from a Site Administrator. When this occurs, the Call Center will contact the Site Admin from the site the user belongs to and ask for approval.

Requesting POC (Point of Contact) changes for Offices

Sometimes a Point of Contact retires, changes roles, or leaves the company altogether. When this happens, a new POC must be appointed. In order for the Call Center to process this request, it must come from a Site Administrator.

To submit a POC change request:

1. Once logged in to ProjNetSM, move your mouse over ‘Help’ in the grey My Account/Design/Bid/Build menu bar towards the top of the page and click on “Request Help” from the resulting drop-down menu (Figure A-3).



The Create a new Help Ticket form will open in a small “window” against a grey background on your browser screen. This window is not resizable and will not normally cover the entire screen area. This is normal behavior.

2. The “Create a new help ticket” window displays (Figure A-4):



Figure A-3

Figure A-4

3. From the “a. Issue Type” drop-down menu, choose “I have an issue not related to any of the above choices” which is the last option on the menu.
4. Choose the Priority from the “b. Priority” drop-down list.
5. Enter the details of your request into the “d. Description” field. You must specify the following details:

- Name of office you are changing the POC for
 - Old POC name and why they are no longer acting as POC (retired, etc.)
 - New POC name
 - New POC phone
 - New POC e-mail address
6. Click on the “Submit Ticket” button at the bottom of the window.

Your request will be received immediately at the Call Center and the request will normally be processed within two business hours. You will receive an e-mail confirming when the change is complete and the new POC will also receive an email with registration instructions for his or her office directing them to contact the Call Center by phone for a Vendor ID.

Creating a new office within your Site



Before you create a new office, search the existing offices in the database to ensure you are not creating a duplicate. Duplicate offices can cause confusion for users who need to register. See the next section for a discussion of how to search offices.

Although offices for Contractors, Customers and Design Firms must be requested through the Call Center, the Site Administrator can easily create offices for internal agency personnel within your site. To create a new office within your site, perform the following steps:



Figure A-5



Figure A-6

1. Log in to the ProjNetSM website at <https://www.projnet.org>.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Admin” button and click on “Offices” from the resulting drop-down menu (Figure A-5).
3. In the upper right-hand corner of the screen, locate the “Add Record” link (Figure A-6) and click on it to reach the “Add Office” form.
4. Since you can only create an office within your own Site, the Site Office will already be pre-populated with your Site name and cannot be changed. Type the name of the new office in the “d. Name” field (Figure A-7):

Site Admin / Select Office / Add Office

Use the form below to add a new office.

a. Site Office: ProjNet Support Staff
b. Choose Site Office: N/a (sys admin only)
c. ParentID (req.)
d. Name (req.)
e. Street (opt.)
f. Box (opt.)
g. Stop (opt.)
h. City (opt.)
i. State/Province (opt.)
j. Postal Code (opt.)
k. Phone (opt.)
l. Fax (opt.)
m. Email (opt.)
n. URL (opt.)
o. Security Officer (opt.) ?

Use the below buttons to set the **default** permissions for this offices users.

p. Submitter (req.) Yes No
q. Evaluator (req.) Yes No
r. Contractor (req.) Yes No
s. Customer (req.) Yes No

Figure A-7

5. Type the name of the office POC (if applicable) in the field marked “g. Stop”.
6. Enter the city and state of the office in the “h. City” and “i. State/Province” fields.
7. Type the POC phone number in the field marked “k. Phone”.
8. Enter the POC e-mail in the field marked “m. Email”.
9. Select the default permissions that you would like users in this office to be given by clicking the “Yes” radio button next to the role(s) you would like to enable.
10. Click the “Add Office” button to add the new office. The Vendor ID will be immediately displayed on the screen. Make a note of this Vendor ID because you will need to distribute it to any personnel that need to register into this office.

Managing/Searching for Offices

As a Site Administrator, there may be times when office details have changed, or when you need to look up an office record to get the Vendor ID. To locate and edit an office record:

1. Log in to the ProjNetSM website at <https://www.projnet.org>.
2. From the “My Account/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Admin” button and click on “Offices” from the resulting drop-down menu.

- The office search bar will be displayed across the top of the screen (Figure A-8):

Figure A-8

- To search for an office within your site, type the name of the office (one or more words, spaces are allowed) into the “Name” box at the top of the page and then click the “Search” button.
- A table of offices that match your search criteria will be displayed. Click on the hyperlinked office ID number (Figure A-9) to open the office record:

| Site | ID | Parent | Name | City | State |
|------|--------------------|--------|-----------------------|------|-------|
| | 78 | 0 | ProjNet Support Staff | | |

Figure A-9

- The office record will be displayed. Make any changes to the office details in the blanks provided.
- Note that the Vendor ID appears in field “p. Vendor ID” and is read-only.
- When you have finished making changes to the office details, click the “Update Office” button (Figure A-10).

Update Office

Figure A-10

User Management

As a Site Administrator, you will have the ability to perform administrative activities to keep user account information current and establish assignments for the user groups you are responsible for. Here’s how to edit user account information, including password resets, for your user base:

- Log in to the ProjNetSM website at <https://www.projnet.org>.
- From the “My Account/Design/Bid/Build” menu bar across the top of the screen, move your mouse over the “Admin” button and click on “Users” from the resulting drop-down menu (Figure A-11).
- Your site will be automatically selected in the “Site” drop-down box (Figure A-12):



Figure A-11

Figure A-12



Figure A-13

- From the “Type” drop-down list (Figure A-13), select the type of search you would like to execute. You can search based on user first or last name, phone number, e-mail address, Office name or ID number.
- Type the text to search for in the “Text” box.
- Select the status of the user(s) you are looking for from the “Status” drop-down menu. You can choose to search for All Users, Active users, Retired users or Inactive users.

“Retired” users refers to users whose accounts have been “turned off”, either by an Administrator or by the system. “Inactive” refers to users who are otherwise active, but whose passwords have expired since last login.

- Click the “Search” button.
- All users who fit the criteria that you searched on will be displayed in a table



along with their user ID number, first and last name, office name, contact information and status (Figure A-14):

Select a **user** from the table below. [Add Record](#)

| ID | Last Name | First Name | Office | Phone | Email | Active | Actions |
|---------------------|-----------|------------|--------------------|--------------|--|--------|---|
| 130 | Customer | Satisfied | RCE - DrChecks ... | 217-367-3273 | staff@rcesupport.com | No |  |

<<First < Prev Viewing 1 records Next > Last>>

Figure A-14

9. Locate the user you would like to modify in the list and then click on the hyperlinked user ID number in the far left column for that user.
10. The “Edit User” screen displays. From this screen, you are able to perform the following functions:

- **Reset User Password:** To reset the password for this user, click the blue “Reset Password” button towards the top of the screen (Figure A-15). The new password will be displayed in black letters in a grey box across the middle of the screen. If you are unsure of the identity of the requestor and/or do not know them personally, be sure to ask them for the answer to their secret question to confirm they are who they say they are before you provide them with a new password. To complete the password reset, you **must** click the following button on the next screen (Figure A-16):

Reset Password

Figure A-15

Identity Confirmed -- Update Satisfied Customer's Password

Figure A-16

The user’s password will now be reset and will be valid for six months from the date of issue, at which time the user will be prompted to reset it again upon first login after expiration.

- **Edit User Details:** You have the ability to change the Office that the user is assigned to, the user’s personal information such as name, phone number and e-mail address, and the Spell Check options for the user on this screen (Figure A-17):

Use the form below to edit the selected user.

a. PKeyUser (read only) 130

b. Site Office: ProjNet Support Staff

b. Office: (req.) RCE - DrChecks Help Desk

c. First name (req.) Satisfied

d. Last name (req.) Customer

e. Email (req.) staff@rcesupport.com

f. Phone (req.) 217-367-3273

g. Secret question (req.) What is your secret question?

h. Secret answer (req.) Here is the secret answer.

i. Street (opt.)

j. P.O. Box (opt.)

k. Org symbol (opt.)

l. City (opt.)

m. State/Province (opt.)

n. Postal Code (opt.)

o. Telefax (opt.)

p. Enable spell checker (opt.) Yes No

Update User Delete User

Figure A-17

Make any changes to the user's account information on this screen and then click the "Update User" button. If you would like to Delete this user's account altogether, click the "Delete User" button.



Use extreme caution when deleting a user account. This action cannot be undone and the user's account cannot be recovered. You cannot delete a user until all the data associated with that user is removed.

- **Unlock User:** If a user has incorrectly entered their password three times or has tried three times to enter the answer to their secret question, their account will be "locked out" and they will not be able to log in again without the help of an administrator. To unlock a user, click the "Unlock User" button.



Make sure that the user you are updating is not signed on to ProjNetSM when performing the following steps to update DrChecksSM user permissions. If the user is online during the update, they will automatically be logged off without warning.

- **Update DrChecksSM/ProjNet-FilerSM Permissions:** Select the "yes" radio button next to the role(s) that you want the user to have in DrChecksSM/ProjNet-FilerSM and then click the "Update Permissions" button (Figure A-18). Conversely, if the "yes" radio button is selected but you want to remove the permission listed, select the "no" radio button. When you are finished making changes to the user's permissions, click the "Update Permissions" button:

Use the form below to update **DrChecks/FILER** permissions

a. **Project Manager (req.)** Yes No

b. **Review Manager (req.)** Yes No

c. **Design Manager (req.)** Yes No

d. **Comment Submitter (req.)** Yes No

e. **Comment Evaluator (req.)** Yes No

Figure A-18

- **Lesson POC:** Select the “yes” or “no” radio button to allow this user to be designated as a Lessons Learned Point of Contact (POC). Click the “Update User” button when you have finished making your selection (Figure A-19):

Use the form below to make the user available to be a Lesson POC.

a. **Lessons Learned POC (req.)** Yes No

Figure A-19

- **Update General Access Permissions:** Use this section to select/deselect general access permissions for the user. This will affect the e-mail notifications that the user receives and also the reporting data for the user. Select the “yes” radio button next to the permissions you would like for this user to have and the “no” radio button next to the permissions you would like to remove. When you have finished making your selections, click the “Update Access” button.
- **Site Admin Status:** This option is only for use by the ProjNetSM Call Center.
- **Retire User:** If you need to retire the user because they are no longer with your organization, click the radio button next to “Active” and type in a reason why you are retiring the user (Figure A-20):

Use the form below to **retire** this user.

a. **User Status (req.)** Active Retired

b. **Reason (opt.)**

Figure A-20

- **History Logs:** Use the “View History” button to access the user history records. You can also place an annotation in the user history log to make notes about offline activities such as training that you

would like to have recorded in the user's history.

- **Assignment Features:** Detailed information about the assignment features will be covered in the next section.

User Assignments

In the user account record, there are several places where you can modify a user's assignments depending on what activity best suits your needs. The following options are available (Figure A-21):

| | |
|--|--|
| Use the form below to access bulk (re)assignment features. | View User Assignments |
| Use the form below to assign this user to multiple projects. | Bulk User Assignments |
| Use the form below to duplicate another user's assignments. | Copy User Assignments |
| Use the form below to replace another user's assignments. | Replace User Assignments |

Figure A-21

1. **View User Assignments:** Click this button to see a table containing all of the projects that the user is assigned to and their current role. The “Y” (yes) radio button will be selected for all the permissions that the user currently has; conversely, for the permissions that the user doesn't have, the “N” (no) radio button will be selected. You can make changes to these displayed assignments as needed and then click the “Update XYZ Assignments As Noted” button (where XYZ is the permission you are modifying).

To delete all assignments for a review or for Filer, use the “DELETE all XYZ Assignments” button (where XYZ is the application for which you are deleting assignments).

2. **Bulk User Assignments:** To assign a user to all reviews within a project, choose the role you are assigning them as from the “Assign as:” drop-down list. Notice that only the roles the user has been granted permission to access in their user account will be available for you to choose from in this drop-down list. Next, choose the Site that the user belongs to from the drop-down list and click the “Select Projects to Assign” button. A table containing all the available projects and reviews to be assigned in that site will be displayed with the “Yes” or “No” radio button selected to indicate assignment. If you would like to modify individual review permissions, make your changes on this screen and then click the “Select Projects to Assign” button at the bottom of the page.

Alternatively, if you would like to assign user to an entire project at a time, place a check mark in the “Assign to entire project” box and then click the

- “Select Projects to Assign” button.
3. **Copy User Assignments:** Click this button if you would like to copy assignments from one person to another. You can **only** copy permissions to and from other users within your same site, so the Site Name box is read-only and is pre-populated with your site name. The assignments will be copied to the user record you are currently working on, which will be displayed in the “To User” field. Select the user you would like to copy permissions **from** and click the “Copy Assignments” button to copy the assignments from the destination user to the user whose account record you are working with.
 4. **Replace User Assignments:** This will remove the assignments from the source user and place them with the destination user. Be careful about using this option because it will completely **remove** the permissions from the source user and they will then reside only with the destination user.

Project Management Activities

The Site Administrator will also serve as a “backup” Project Manager in DrChecksSM. Site Admins are able to do everything that Project Managers can do, so they are automatically added as Project Managers to all new projects that are created. (See Section 4.2 of the User’s Manual for complete information about Project Manager activities). The Site Admin can also function as a “backup” gatekeeper for DQLLSM (see section 9 of the User’s Manual for more details about the DQLLSM system).

Using “Screeners”

Typically, Screeners are branch chiefs or office chiefs that need or desire to review comments of subordinates. Site Administrators have the ability to assign a “Screener” to an individual to allow that Screener the ability to annotate and/or withdraw the comments of the user to whom they have been assigned. This annotation (or withdrawal) will then be sent back to the comment submitter via e-mail to notify them that their comment has been annotated or withdrawn. The comment submitter can then make any updates or changes to their comments that were requested by the Screener. (Note that once assigned, Screeners can assign others within their own office to act as substitute Screeners for them).

Screeners will need to have Submitter permissions associated with their user account to be able to be “screen” a review comment prepared by another individual. The assignment of any Screeners must be performed by the Site Administrator.

Identifying Screeners

Before a user can be identified as a “Screener”, they must first be identified by the Site Administrator as someone who is able to be assigned as such. To identify an individual as a Screener:

1. Log in to the ProjNetSM website.
2. From the “My Account/Design/Bid/Build” menu bar at the top of the screen, click the “Admin” tab.
3. In the drop-down menu that results, click the “Screeners” button (Figure A-22).
4. Click the “Identify Screeners” link (Figure A-23).

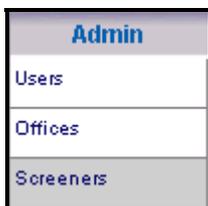


Figure A-22

- Select one of the items below.
1. [Identify Screeners](#)
 2. [Assign Users to Screeners](#)
 3. [Screener Report\(s\)](#)

Figure A-23

5. The “Screener Add” screen is displayed. From the “Site” drop-down list, select the Site where the individual you would like to assign as a Screener is registered.
6. Click the “Select Site” button (Figure A-24).

Select a site from the list below.

Site (req.): ProjNet Support Staff

Select Site

Figure A-24

7. Select a Screener from the list of Unassigned Users in the box on the left-hand side of the screen (Figure A-25). Click on the name of the Screener to select them.

Select screeners from the list below

Unassigned Users (90 possible)

- 1, Student (The Classroom)
- 10, Student (The Classroom)
- 11, Student (The Classroom)
- 12, Student (The Classroom)
- 2, Student (The Classroom)
- 3, Student (The Classroom)
- 4, Student (The Classroom)
- 5, Student (The Classroom)
- 6, Student (The Classroom)
- 7, Student (The Classroom)

Add >

< Del

Assigned Screeners (1 currently)

- Staff, RCE (RCE - DrChecks Help Desk)

Figure A-25

8. Click the “Add >” button to assign the user as an identified Screener.
9. Alternatively, if you would like to de-assign a user from being identified as a Screener, click on their name in the “Assigned Screeners” box on the right-hand side of the screen, and then click the “< Del” button to remove them.

Assigning Users to Screeners

Once you have identified your Screeners, you are ready to assign the submitter to this Screener. Typically, a Screener will be assigned to a comment Submitter, as the primary function of the Screener is to have the ability to annotate or withdraw comments that have been submitted by the user (presumably, to ask them to modify the comment in some way, i.e., add additional information or clarify a previously stated point). To assign a Screener:

1. Follow steps 1-3 above in the “Identifying Screeners” section to reach the “Screener Tasks” page.
2. Click the “Assign Users to Screeners” link.
3. Select the Site of the Screener from the drop-down list (Figure A-26). Click the “Select Site” button.

Select a site from the list below.

Site (req.): ProjNet Support Staff

Select Site

Figure A-26

4. Select a Screener from the “Select Screener” drop-down list (Figure A-27):



Select a screener from the list below.

Select Screener (req.): Please select

Figure A-27

If you do not find the name of the Screener you are looking for in the drop-down list, follow the procedure in the above section, “Identifying Screeners”, to make sure that the Screener has been properly identified.

5. Click the “Select Screener” button.
6. Select the Site of the user you will be assigning a Screener to from the drop-down list and click the “Select Site” button (Figure A-28):

Select the site of the person you wish to assign a screener to.

Site: ProjNet Support Staff

Figure A-28

7. From the “Unassigned Users” list in the box on the left-hand side of the screen, click on the name of the user you would like to assign a Screener to and then click the “Add >” button (Figure A-29):

Select Users to Screen.

| Unassigned Users (68 possible) | | Assigned Screeners (1 currently) |
|---|--|---|
| <ul style="list-style-type: none"> 1, Student (The Classroom) 10, Student (The Classroom) 11, Student (The Classroom) 12, Student (The Classroom) 2, Student (The Classroom) 3, Student (The Classroom) 4, Student (The Classroom) 5, Student (The Classroom) 6, Student (The Classroom) 7, Student (The Classroom) | <input type="button" value="Add >"/> <input type="button" value="< Del"/> | <ul style="list-style-type: none"> Submitter, Ima (ProjNet Call Center Demo Users) |

Figure A-29

You have now assigned a Screener to a user, and that Screener will have the ability to annotate the comments of the user to whom they have been assigned.

Annotating/Withdrawing a Comment as a Screener

Once your Screener has been granted rights to screen an individual using the steps above, the Screener can perform an annotation or withdrawal on any comments that the user they are screening has entered. The Screener first needs to be assigned to the review as a **comment submitter**. Once the user they are screening has entered their first comment, then the Screener can go into the review and make notes on the comments that the user they are screening has entered, or withdraw the comments.



In order to be able to annotate the comments of another user as a Screener, the user you are screening must first enter a comment successfully, and the Screener must also be assigned to the review as a submitter.

To annotate or withdraw the comment of another user as a Screener:

1. Log in to the ProjNetSM website.
2. Select the project that the user you have been assigned to screen is working on.
3. Click on the title of the project in the projects list to display the associated

reviews.

4. The reviews contained within the project will be displayed. Locate the name of the review which contains comments you would like to screen.
5. To the right-hand side of the review, the comment tallies will be displayed and you will have the an active (hyperlinked) number under the “Note” portion of the “Edit” column, as shown (Figure A-30):

| | Add Comments | Edit |
|-------------------------|--|---------------------------|
| | | All/Note/Yours |
| REPORTS | Your review name goes here (02-Feb-06 to 02-Feb-07) Review underway. | 4 / 2 / 0 |

Figure A-30

6. Click on the hyperlinked number under the “Note” column to view the first comment entered by the user you are screening.
7. The original comment as entered by the user you are screening will be displayed first on the screen, followed by the Annotation/Withdrawal form seen only by Screeners (Figure A-31):

The screenshot shows a form with the following fields and buttons:

- a. Comment ID (read only)**: 3586
- b. Annotation (req.)**: A large text area for entering an annotation.
- c. Reason For Withdrawal (opt.)**: A text area for entering a reason for withdrawal.
- Buttons**: "Edit Comment" and "Withdraw Comment".

Below the "Reason For Withdrawal" field, there is a note: "You MUST enter a reason if you are withdrawing this comment."

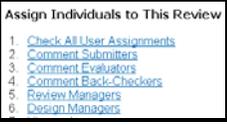
Figure A-31

8. **If you are entering an annotation on the comment**, enter your annotation text in the “b. Annotation” field and click the blue “Edit comment” button to update the comment with your notes. An automatic e-mail will then be sent to the comment author letting them know that their comment has been annotated.
9. **If you are choosing to withdraw the comment altogether**, enter the reason for withdrawal in the “c. Reason for Withdrawal” field and click the blue “Withdraw comment” button.



Be sure that the review is closed for Evaluations during the time that Screeners are reviewing the submitted comments of others. If you open the review for Evaluations while the Screener is still making notes on comments, there is a chance that the Evaluators will see unfinished or incomplete comments and place evaluations against them.

Appendix Part 2: Design Manager Guide

| | |
|--|--|
| | <p>Introduction</p> |
| | <p>The Design Manager role was created to allow Project Managers to designate a "lead" A/E at their participating A/E firms. This Design Manager will have the ability to re-classify comment disciplines during the evaluation process (without over-writing the originally selected discipline) and also to run reports that will easily show the status of the evaluation process for each Design Discipline they have selected. Utilization of this role will allow A/E's to better manage their evaluations and, in-turn, will make the review phases run more smoothly.</p> <p>The Design Manager role will be able to perform the following functions:</p> <ul style="list-style-type: none"> • Assign Evaluators • Limit evaluation visibility • Designate "Designer Discipline" |
| | <p>Activating the Design Manager Module: Assigning a Design Manager (Project/Review Managers Only)</p> |
|  <p>Figure A-26</p>  <p>Figure A-27</p>  <p>Figure A-28</p> | <p>To activate the Design Manager module on a given review, you will need to assign at least one person to the review as a Design Manager. In order to allow an individual to be assigned as a Design Manager, they will need to have this role selected in their user account. Here's how to assign a Design Manager to an existing review:</p> <ol style="list-style-type: none"> 1. Log in to the ProjNetSM website. 2. A list of all of your assigned projects will be displayed. Click on the Name of the project that contains the review you would like to assign a Design Manager for (Figure A-25):  <p>Figure A-25</p> <ol style="list-style-type: none"> 3. A list of the available reviews for the project will be displayed. To the left of the project name you will see two small buttons: 'Edit' and 'Reports'. Click on the 'Edit' button (Figure A-26). 4. Under the "Assign Individuals to This Review" grouping, click on the "Design Managers" Link (Figure A-27). 5. From the "Site" drop-down box, select the site where the individual you are trying to assign is registered. (The drop-down list will default to your own site). 6. Click the "Select Site" button (Figure A-28). 7. Two boxes will be displayed on the screen (Figure A-29). The one on the left marked "Unassigned Design Managers" contains the names of all eligible Design Managers within the Site you selected. |
|  | <p>If you do not see the name of the Design Manager you would like to assign, but you are certain that they have registered for ProjNetSM, this indicates that the Design Manager role has not been enabled in the User's Account.</p> |

Appendix Part 2: Design Manager Guide

8. The box on the right marked “Assigned Design Managers” contains the names of all Design Managers at the selected Site that have already been assigned:

Figure A-29

To assign a user, click on the user’s name in the “Unassigned Design Managers” box on the left, and then click the “Add >” button. Conversely, to un-assign a user, click on the user’s name in the “Assigned Design Managers” box on the right and then click the “< Del” button.

Assigning an Evaluator (Design Managers)

Once an individual has been assigned to a review as a Design Manager, they now have the ability to assign Evaluators to the review. Here’s how:

1. Log in to the ProjNetSM website.
2. A list of all of your assigned projects will be displayed. Click on the Name of the project that contains the review you would like to assign an Evaluator for (Figure A-30):

Figure A-30

3. A list of the available reviews for the project will be displayed. To the left of the project name you will see two small buttons: ‘Edit’ and ‘Reports’. Click on the ‘Edit’ button (Figure A-31).
4. Under the “Assign Individuals to This Review” grouping, click on the “Comment Evaluators” Link (Figure A-32).
5. From the “Site” drop-down box, select the site where the individual you are trying to assign is registered. (The drop-down list will default to your own site).
6. Click the “Select Site” button (Figure A-33).
7. Two boxes will be displayed on the screen (Figure A-34). The one on the left marked “Unassigned Evaluators” contains the names of all eligible Evaluators within the Site you selected. The box on the right marked “Assigned



Figure A-31



Figure A-32



Figure A-33

Appendix Part 2: Design Manager Guide

Evaluators” contains the names of all Design Managers at the selected Site that have already been assigned:

Figure A-34

To assign a user as an Evaluator, click on the user’s name in the “Unassigned Evaluators” box on the left, and then click the “Add >” button. Conversely, to un-assign a user, click on the user’s name in the “Assigned Evaluators” box on the right and then click the “< Del” button.

Assigning Design Discipline to a comment during Evaluation (Design Managers)

Design Managers have the ability to assign a “Design Discipline” to a particular comment during the evaluation process. Perform the following steps to assign a Design Discipline while evaluating a pending comment:

1. Log in to the ProjNetSM website.
2. A list of all of your assigned projects will be displayed. Click on the Name of the project that contains the review you would like to assign an Evaluator for (Figure A-35):

| Project ID | |
|------------|----------------------|
| 45 | Big Building Project |

Figure A-35

| Evaluate | | M |
|-------------------|--|---|
| Pend/Concur/Other | | P |
| 1 / 3 / 1 | | |

Figure A-36

3. A list of the available reviews for the project will be displayed. To the right of the review name, you will see a tally of comments listed in different statuses. Look in the Evaluate column under “Pend” (Pending) as shown in Figure A-36. Click on the hyperlinked number under the “Pend” column to evaluate pending backchecks.
4. The first comment to be evaluated will be displayed on the screen. Immediately following the comment, the Designer Discipline form is displayed (Figure A-37):

Appendix Part 2: Design Manager Guide

| | |
|---|---|
| | <p>Use the form below to assign a Designer Discipline to this comment. This discipline will be separate in some cases from the discipline the comment submitter entered.</p> <div data-bbox="402 247 1479 394" style="border: 1px solid black; padding: 5px;"> <p>a. Designer Discipline (req.) <input type="text" value="Real Estate"/></p> <hr/> <p style="text-align: center;"><input type="button" value="Update Designer Discipline"/></p> </div> <p style="text-align: center;">Figure A-37</p> <p>Select the Designer Discipline you would like to assign to the comment from the drop-down list marked “Designer Discipline”.</p> <p>5. Click the “Update Designer Discipline” button.</p> |
|  | <p>Note that the comment search bar that appears on the evaluation entry page above the comment you are evaluating will now display the ability to search by Designer Discipline by choosing the desired discipline from the drop-down list.</p> |
| | <p><i>Limiting Evaluation Visibility (Design Managers)</i></p> |
| | <p>If a Design Manager is assigned to the review, Evaluations will not be visible while the “evaluate” phase of the review is open. Once the “evaluate” phase of the review is closed, the evaluations will once again be visible. Currently the “Design Manager” can use this time to request the original evaluator make changes to evaluations that are not appropriate or out of scope for the design review.</p> |
|  | <p>In order for evaluation visibility to be limited during the evaluation phase of the review, no other review phases can be open while the Evaluation phase is open.</p> |
| | <p><i>Assigning comments to Design Discipline in bulk (Design Managers)</i></p> |
| <div data-bbox="142 1402 375 1486" style="border: 1px solid black; padding: 2px;"> <p>Design Manager Tools</p> <ol style="list-style-type: none"> 1. Bulk Comment Assignment 2. Comment ID Assignment </div> <p style="text-align: center;">Figure A-38</p> | <p>Two tools are available to the Design Manager that allow Designer Disciplines to be assigned to more than one comment at a time. To access these tools:</p> <ol style="list-style-type: none"> 1. Log in to the ProjNetSM website. A list of all of your assigned projects will be displayed. Click on the Name of the project that contains the review you would like to assign an Evaluator for. 2. A list of the available reviews for the project will be displayed. To the left of the project name you will see two small buttons: ‘Edit’ and ‘Reports’. Click on the ‘Edit’ button. 3. Under the “Design Manager Tools” grouping, two links will be displayed: “Bulk Comment Assignment” and “Comment ID Assignment” (Figure A-38). <ul style="list-style-type: none"> • Bulk Comment Assignment: Clicking on this option allows you to change the designation of all comments of a given Discipline to a different Discipline. Choose the discipline you want to change from the top drop-down box marked “Designer Discipline”, and then select the Discipline you want to change to from the bottom box marked “Change to Designer Discipline”. When finished, click the “Update Designer Disciplines” button. • Comment ID Assignment: If you would like to change the Discipline for more than one comment at a time, select the Discipline you would like to assign to the comments from the “Designer Discipline” drop- |

Appendix Part 2: Design Manager Guide

| | | | | | |
|---|---|--------------|--|----|----------------------|
| | <p>down list and then enter the comment ID numbers (separated by commas) in the “Comment ID(s)” field. When finished, click the “Update Designer Disciplines” button.</p> | | | | |
| | <p><i>Design Manager Reports (Design Managers)</i></p> | | | | |
| <p>Design Manager</p> <ul style="list-style-type: none"> • Brief ID Report • Designer Discipline Report <p>Figure A-40</p> | <p>Two reports are available exclusively to Design Managers which help make the classification and assignment of comments to be Evaluated a little easier. To access Design Manager reports:</p> <ol style="list-style-type: none"> 1. Log in to the ProjNetSM website. 2. A list of all of your assigned projects will be displayed. Click on the Name of the project that contains the review you would like to assign a Design Manager for (Figure A-39): <div data-bbox="704 678 1175 835" data-label="Image"> <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: left;">Project ID ▾</td> <td></td> </tr> <tr> <td>45</td> <td>Big Building Project</td> </tr> </table> </div> <p style="text-align: center;">Figure A-39</p> <ol style="list-style-type: none"> 3. A list of the available reviews for the project will be displayed. To the left of the project name you will see two small buttons: ‘Edit’ and ‘Reports’. Click on the ‘Reports’ button. 4. Under the “Design Manager” grouping, click on one of the two available reports (Figure A-40). | Project ID ▾ | | 45 | Big Building Project |
| Project ID ▾ | | | | | |
| 45 | Big Building Project | | | | |
|  | <p>For more information about each of the reports and the data they contain, please refer to the ProjNetSM Reports Guide, also located in the Appendix at the end of this manual.</p> | | | | |

Appendix: Using the MS Word™ Template



To obtain the MS Word™ template for importing comments into DrChecksSM, please contact the ProjNetSM Call Center. Please see Section 1.1 of this manual for more information about how to reach the Call Center.

Before you can use the ProjNetSM MS Word Template, you must first enable Macros in your copy of MS Word. To do this, click on “Tools” at the top of the MS Word window, then “Macro”, then Security. Choose “Medium” as your security level.

Preparing Comments Using the ProjNetSM MS Word™ Template

Once you have obtained the MS Word™ template from the ProjNetSM Call Center, perform the following steps to enter comments into the template:

1. Open the template with MS Word™ by double-clicking on the file you have saved to your computer.
2. You will see the following dialog box appear which will ask you to choose whether to Enable or Disable Macros (Figure A-22). Click the “Enable Macros” button.

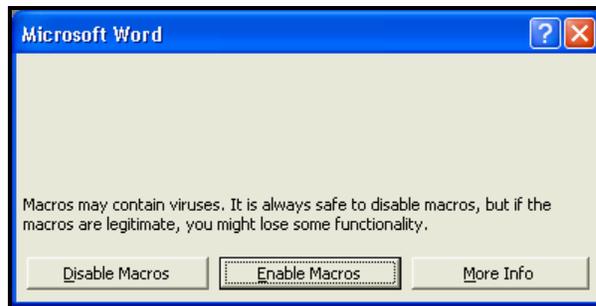


Figure A-22

3. The Comment template will appear on your screen within MS Word (Figure A-23):

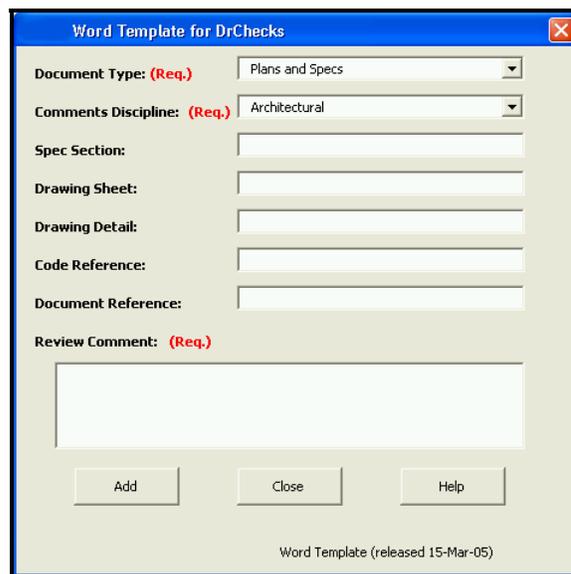


Figure A-23

4. Choose the “Document Type” and “Comments Discipline” from the drop-down boxes.
5. Optionally, you may choose to fill in a Spec Section, Drawing Sheet, Drawing Detail, Code Reference or Document Reference.
6. Enter your Comment into the “Review Comment” field.
7. Click the “Add” button.
8. You will see that your comment has been added to the document behind the template. To enter more comments, fill in the fields again and click “Add”. Continue this procedure until all comments that will be imported have been entered.
9. When you are finished entering Comments, click the “Close” button on the template.
10. The ‘Save As’ dialog box will appear (Figure A-24):

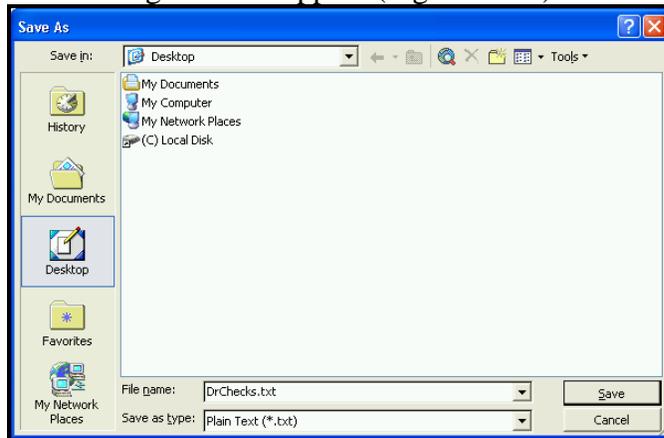


Figure A-24

11. Choose “Desktop” from the buttons on the left-hand side of the window and then click the “Save” button.
12. Close MS Word and return to the ProjNetSM system.



Do not change the file type for the .txt file that is generated by using the MS Word template. The file needs to remain plain text (.txt) and should not be changed to .doc or any other format before uploading. DO NOT EDIT THIS FILE.

Appendix Part 3: ProjNetSM Applications and their Roles and Functions

DrChecksSM Roles and Functions

| | Change Own Password | Change Others' Passwords | Create Offices within own site | Create offices outside own site | Change user permissions within own site | Change user permissions outside own site | Create new projects | Assign users to projects | Create new review | Assign users to reviews | Open/Close Reviews | Assign Designer Disciplines | Submit a comment | Enter an Evaluation | Enter a Backcheck |
|----------------------------|---------------------|--------------------------|--------------------------------|---------------------------------|---|--|---------------------|--------------------------|-------------------|-------------------------|--------------------|-----------------------------|------------------|---------------------|-------------------|
| System Admin (Call Center) | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Site Admin | ● | ● | ● | | ● | | ● | ● | ● | ● | ● | | ● | ● | ● |
| Project Manager | ● | | | | | | ● | ● | ● | ● | ● | | ● | | ● |
| Review Manager | ● | | | | | | | | | ● | ● | | ● | | ● |
| Design Manager | ● | | | | | | | | | ● | | ● | | ● | |
| Evaluator | ● | | | | | | | | | | | | | ● | |
| Submitter | ● | | | | | | | | | | | | ● | | ● |
| View-Only | ● | | | | | | | | | | | | | | |

ProjNet-BIDSM Roles and Functions

| | Create a Bid Review | Edit a Bid Review | Assign Users to Bid Review | Submit a Bid Inquiry | Evaluate a Bid Review | Post Replies | View Technical Evaluator reports | View Contract Officer Reports |
|--|---------------------|-------------------|----------------------------|----------------------|-----------------------|--------------|----------------------------------|-------------------------------|
| Project Manager | ● | ● | ● | ● | | | ● | ● |
| Review Manager | ● | ● | ● | ● | | | ● | ● |
| Non-Registered Users | | | | ● | | | | |
| Technical SME's | | | | | ● | | ● | |
| Contract Officer | | | | | | ● | | ● |
| All registered ProjNet SM Users | | | | ● | | | | |

ProjNet-RFISM Roles and functions

| | Add a new ProjNet- SM RFI Review | Open/Close ProjNet- SM RFI Review | Submit a ProjNet- SM RFI Inquiry | Evaluate an Inquiry | Respond to Inquiries |
|------------------------|---|--|---|---------------------|----------------------|
| Project Manager | ● | ● | ● | ● | ● |
| Review Manager | | ● | | | |
| Gov't Agency Tech Reps | | | | ● | |
| Contract Officer | | | | | ● |
| Contractors | | | ● | | |

DQLLSM Roles and Functions

| | Enable DQLL SM for DrChecks Reviews | Evaluate Potential Lessons | Delete Lessons | Submit a potential Lesson | Edit/Submit own Draft lesson | Search Approved Lessons | View Lesson POC's | Change Lesson POC's |
|-----------------------|--|----------------------------|----------------|---------------------------|------------------------------|-------------------------|-------------------|---------------------|
| Site Admin/Gatekeeper | ● | ● | ● | ● | ● | ● | ● | ● |
| Project Manager | ● | ● | | ● | ● | ● | ● | |
| Review Manager | ● | ● | | ● | ● | ● | ● | |
| Lesson POC's (SME's) | | ● | | ● | ● | ● | ● | |
| Submitters | | | | ● | ● | ● | ● | |

CCR/CMS Roles and Functions

| | Submit a CCR | Create Document Review | Add a New Document | Edit a Document | Assign Users to a Document Review | Edit Participating Agencies | Review CCR's |
|--|--------------|------------------------|--------------------|-----------------|-----------------------------------|-----------------------------|--------------|
| Criteria Admin | ● | ● | ● | ● | ● | ● | |
| Technical Proponents | ● | | | | | | ● |
| Technical Representatives | ● | | | | | | ● |
| Registered ProjNet SM Users | ● | | | | | | |
| General Public | ● | | | | | | |

Appendix Part 4: ProjNetSM Reports Guide

Reports – General Information

All of the reports available on the ProjNetSM website follow a similar functionality. Below you will find some general information that is applicable to all of the reports you will find on the system. It is important to have a general working knowledge of how these operate in order to more efficiently incorporate them into your daily work flow.

Reports Mechanism

When most reports are generated, a new browser window will be opened that contains the report. This window will open separate from your active ProjNetSM window and will allow you to view the report in one pane without losing where you are on the system in another. When having problems generating a report, check for a secondary minimized window that may appear at the bottom of your screen in the task bar. You may also want to check your PC for any third-party software applications (such as pop-up blockers) that might be preventing the reports from opening in a new window.

Report Formatting

The data in the report that will be generated will be display-only, meaning that the data in most reports is not interactive the same way that the rest of the system is (you cannot open/close comments or enter new comments or evaluations from a report window). However, a report may contain hyperlinks to a user e-mail address, etc. Remember that a report is just an output of existing data from the ProjNetSM system, so if there is a problem with comment or evaluation text, comment status, etc., that will need to be addressed while logged in as an active user to ProjNetSM rather than on the report output screen.

Sorting Report Data

Some reports will include the functionality to allow you to sort the displayed data by a given field. When you are viewing a report and you see hyperlinked column headers, you can click on those column headers to sort the data by that field (click once to sort the data in ascending order and twice to sort in descending order).

Running a Report

Depending on the report you are running, it may take several minutes for the report to generate on your screen. If the report contains a lot of data, it will take longer to generate than another report that contains less data. Keep in mind the size of the report you are running if you feel that the report generation is taking a long time, and consider finding an alternative report that contains less data and will generate faster.

Printing a Report

Each report will generate in its own browser window. Use your browser's Print command to print each report. For most versions of Internet Explorer, the print command can be found by clicking on "File" in the "File/Edit/View/Favorites/Tools/Help" menu bar across the top of the screen and then clicking the "Print" option (Figure A-25):

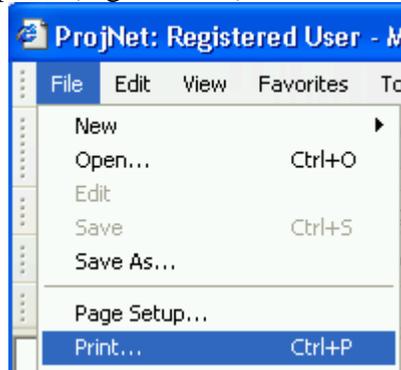


Figure A-25

Depending on which browser you are using, you may also have the option to print by right-clicking anywhere on the area of the report.

It is also important to note that the report information is color-coded in some cases, making it a recommended policy to print the reports in color. However, if black-and-white printing is used, the reports will still display properly.

Report Contents

The following pages contain a sample of each of the available reports along with a diagram of each piece of information found in the report and a summary of who the report is available to and which applications in the ProjNetSM system contain the report. Each of these is only a sample and your individual report data will vary.

| Report Name: | My Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------|---|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|-------------|---------------|-----------------|-----|-----|-----|------------|--|--|--------------------------------|--|---|-----------|-------------------|----------------|-------------|--------------|---------------|-------------|------------|-------|-----|-----|-----|------------|--|------------|--|--|---|
| Summary: | Shows all comments that have been entered by the individual running the report. Includes details of original comment and any evaluations and backchecks that have been entered for the comment. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM, Submitter, Evaluator, Backchecker, View-only | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: User's Comments (Submitted/Impacted) by Test Tester Project: Your Project Title Here Review: For the Your review name goes here (12345678) 1 (sorted by Discipline , ID) Displaying 3 comments.</p> <table border="1"> <thead> <tr> <th>Id 2</th> <th>Discipline 3</th> <th>DocType 4</th> <th>Spec 5</th> <th>Sheet 6</th> <th>Detail 7</th> </tr> </thead> <tbody> <tr> <td>3488</td> <td>Architectural</td> <td>Plans and Specs</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing the import comment process (imported from DrChecks word template) Submitted By: Jeff Moll (217-367-3273). Submitted On: 03-Feb-06 8</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Concurred This is a sample evaluation. 9 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td></td> <td><i>Backcheck not conducted</i></td> </tr> <tr> <td></td> <td>Current Comment Status: Comment Open</td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3489</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing lessons learned integration Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Close Comment 10 This comment has been backchecked and closed. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td></td> <td>Current Comment Status: Comment Closed 11</td> </tr> </table> | Id 2 | Discipline 3 | DocType 4 | Spec 5 | Sheet 6 | Detail 7 | 3488 | Architectural | Plans and Specs | n/a | n/a | n/a | 1-0 | Evaluation Concurred This is a sample evaluation. 9 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | <i>Backcheck not conducted</i> | | Current Comment Status: Comment Open | Id | Discipline | DocType | Spec | Sheet | Detail | 3489 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Close Comment 10 This comment has been backchecked and closed. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | Current Comment Status: Comment Closed 11 |
| Id 2 | Discipline 3 | DocType 4 | Spec 5 | Sheet 6 | Detail 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3488 | Architectural | Plans and Specs | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-0 | Evaluation Concurred This is a sample evaluation. 9 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Backcheck not conducted</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Current Comment Status: Comment Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3489 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-0 | Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-1 | Backcheck Recommendation Close Comment 10 This comment has been backchecked and closed. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Comment ID number 3. Discipline 4. Document Type 5. Spec Section information 6. Sheet information 7. Detail information 8. Original Comment Text 9. Evaluation Text 10. Backcheck Text 11. Comment Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | All Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Summary: | Report displays all comments entered against a review by all users. All evaluations and backchecks entered against the comments and the current comment status is shown. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM, Submitter, Evaluator, Backchecker, View-only | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: All Comments For the Your review name goes here (sorted by Discipline , ID) Displaying 3 comments. 1 219 ms to run this page</p> <table border="1"> <thead> <tr> <th>Id 2</th> <th>Discipline 3</th> <th>DocType 4</th> <th>Spec 5</th> <th>Sheet 6</th> <th>Detail 7</th> </tr> </thead> <tbody> <tr> <td>3488</td> <td>Architectural</td> <td>Plans and Specs</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing the import comment process (imported from DrChecks word template)</p> <p>Submitted By: Jef Moll (217-367-3273). Submitted On: 03-Feb-06 8</p> <table border="1"> <tr> <td>1-0</td> <td> Evaluation Concurred This is a sample evaluation. 9 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 <i>Backcheck not conducted</i> Current Comment Status: Comment Open </td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3489</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing lessons learned integration</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06</p> <table border="1"> <tr> <td>1-0</td> <td> Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 </td> </tr> <tr> <td>1-1</td> <td> Backcheck Recommendation Close Comment 10 This comment has been backchecked and closed. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 </td> </tr> </table> <table border="1"> <tr> <td></td> <td>Current Comment Status: Comment Closed 11</td> </tr> </table> | Id 2 | Discipline 3 | DocType 4 | Spec 5 | Sheet 6 | Detail 7 | 3488 | Architectural | Plans and Specs | n/a | n/a | n/a | 1-0 | Evaluation Concurred This is a sample evaluation. 9 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 <i>Backcheck not conducted</i> Current Comment Status: Comment Open | Id | Discipline | DocType | Spec | Sheet | Detail | 3489 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Close Comment 10 This comment has been backchecked and closed. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | Current Comment Status: Comment Closed 11 |
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| Report Name: | Snapshot by Discipline | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------------------|--|-------------------|------------|------------|------------|----------|------------|-------------|-------------|--|--|----------------|---------|--|------------|--|--|--|--|-----------|--|-------|-----------|---------|--------|-------|------|-----------|--------|------|-------------------------------------|------------|------------|------------|------------|------------|----------|------------|-------------|-------------|----------------------------------|---|---|---|---|---|---|---|---|----------|---------------|--|--|--|--|--|--|--|--|--|----------------|---------|--|------------|--|--|--|--|-----------|--|-------|-----------|---------|--------|-------|------|-----------|--------|------|-----------------------------|---|---|---|---|---|---|---|---|----------|-------------------------------------|---|---|---|---|---|---|---|---|---|
| Summary: | Provides a high-level overview of total project status. Shows a tally of comments pertaining to each discipline in each of the phases of review. Highlights the total number of remaining open issues after backchecks have been conducted. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , Bid Inquiry | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM, Submitter, Evaluator, Backchecker, View-only, Contractor, Contracting Officer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Snapshot Report: Comment Category 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678) (sorted by Category, Value)</p> <table border="1"> <thead> <tr> <th colspan="10">Design Discipline</th> </tr> <tr> <th rowspan="2">Category Value</th> <th colspan="2">Comment</th> <th colspan="5">Evaluation</th> <th colspan="2">Backcheck</th> </tr> <tr> <th>Total</th> <th>Withdrawn</th> <th>Pending</th> <th>Concur</th> <th>Check</th> <th>Info</th> <th>NonConcur</th> <th>Closed</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>Architectural (ARC)</td> <td>3 1</td> <td>4 0</td> <td>5 0</td> <td>6 1</td> <td>7 0</td> <td>8</td> <td>9 0</td> <td>10 0</td> <td>11 0</td> </tr> <tr> <td>Electrical (ELE)</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> <td>1</td> <td>0</td> <td>1</td> <td>1</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="10">Document Type</th> </tr> <tr> <th rowspan="2">Category Value</th> <th colspan="2">Comment</th> <th colspan="5">Evaluation</th> <th colspan="2">Backcheck</th> </tr> <tr> <th>Total</th> <th>Withdrawn</th> <th>Pending</th> <th>Concur</th> <th>Check</th> <th>Info</th> <th>NonConcur</th> <th>Closed</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>Other (OTH)</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> <td>1</td> <td>0</td> <td>1</td> <td>1</td> </tr> <tr> <td>Plans and Specs (P)</td> <td>1</td> <td>0</td> <td>0</td> <td>1</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table> <p>Review/Resolve 1 potential designer problem issues. 12</p> <p>(*) Denotes that review contains critical comments.</p> | Design Discipline | | | | | | | | | | Category Value | Comment | | Evaluation | | | | | Backcheck | | Total | Withdrawn | Pending | Concur | Check | Info | NonConcur | Closed | Open | Architectural (ARC) | 3 1 | 4 0 | 5 0 | 6 1 | 7 0 | 8 | 9 0 | 10 0 | 11 0 | Electrical (ELE) | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | Document Type | | | | | | | | | | Category Value | Comment | | Evaluation | | | | | Backcheck | | Total | Withdrawn | Pending | Concur | Check | Info | NonConcur | Closed | Open | Other (OTH) | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | Plans and Specs (P) | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Design Discipline | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Category Value | Comment | | Evaluation | | | | | Backcheck | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Total | Withdrawn | Pending | Concur | Check | Info | NonConcur | Closed | Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Architectural (ARC) | 3 1 | 4 0 | 5 0 | 6 1 | 7 0 | 8 | 9 0 | 10 0 | 11 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Electrical (ELE) | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Document Type | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Category Value | Comment | | Evaluation | | | | | Backcheck | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Total | Withdrawn | Pending | Concur | Check | Info | NonConcur | Closed | Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Plans and Specs (P) | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Discipline categories 3. Total comments in discipline 4. Withdrawn comments in discipline 5. Pending evaluations 6. Evaluations concurred 7. Check and Resolve evaluations 8. Information only evaluations 9. Non-Concurred evaluations 10. Closed backchecks 11. Open backchecks 12. Total number of open comments/potential issues | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Snapshot by Submitter | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|-----------------------------------|------------|----------|----------|----------|------------|-----------|-----------|--|--|---------------------------------------|-------------------|--|------------|--|--|--|--|-----------|--|-------|-----------|---------|--------|-------|------|------------|--------|------|--|---|----------|----------|----------|----------|----------|-----------|-----------|-----------|---|---|---|---|---|---|---|---|---|---|---------------|---|---|---|---|---|---|---|---|---|
| Summary: | Provides a high-level overview of comment submitter activity grouped by office. Displays a tally of comments, evaluations and backchecks submitted in each status for each user. Includes hyperlinks to view comments submitted by user. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Submitter, View-only | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Snapshot Report: Comment Submitters 1 Project: Your Project Title Here Review: For the Your review name goes here (12345678) (sorted by Office, Last Name)</p> <table border="1"> <thead> <tr> <th colspan="10">RCE - DrChecks Help Desk 2</th> </tr> <tr> <th rowspan="2">3 Assigned Users (Last, First)</th> <th colspan="2">Comments Authored</th> <th colspan="5">Evaluation</th> <th colspan="2">Backcheck</th> </tr> <tr> <th>Total</th> <th>Withdrawn</th> <th>Pending</th> <th>Concur</th> <th>Check</th> <th>Info</th> <th>Non-Concur</th> <th>Closed</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>Reviewer, Sample (view contributed) 4</td> <td>0</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> </tr> <tr> <td>Tester, Test (view contributed) 13</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> <td>1</td> <td>0</td> <td>1</td> <td>1</td> </tr> <tr> <td>OFFICE TOTALS</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> <td>1</td> <td>0</td> <td>1</td> <td>1</td> </tr> </tbody> </table> | RCE - DrChecks Help Desk 2 | | | | | | | | | | 3 Assigned Users (Last, First) | Comments Authored | | Evaluation | | | | | Backcheck | | Total | Withdrawn | Pending | Concur | Check | Info | Non-Concur | Closed | Open | Reviewer, Sample (view contributed) 4 | 0 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Tester, Test (view contributed) 13 | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | OFFICE TOTALS | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 |
| RCE - DrChecks Help Desk 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 Assigned Users (Last, First) | Comments Authored | | Evaluation | | | | | Backcheck | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Total | Withdrawn | Pending | Concur | Check | Info | Non-Concur | Closed | Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Reviewer, Sample (view contributed) 4 | 0 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tester, Test (view contributed) 13 | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OFFICE TOTALS | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Office name 3. List of Assigned users 4. Total comments authored 5. Total comments withdrawn 6. Evaluations pending 7. Evaluations concurred 8. Evaluations check-and-resolved 9. Information only evaluations 10. Evaluations non-concurred 11. Closed Backchecks 12. Open Backchecks 13. Hyperlink to view all comment evaluations and backchecks this user has contributed to | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Designers Pending Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------|--|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|-------------|------------|-----------------|-----|-----|-----|--|---|-----------|-------------------|----------------|-------------|--------------|---------------|-------------|--------|----------------|-----|-----|-----|--|---------------------------------|
| Summary: | Report displays all Pending comments that have been entered and are awaiting evaluation. Includes links to comment attachments and submitter e-mail. | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Designer's Pending Comments 1 Project: Your Project Title Here Review: For the Your review name goes here (12345678) (sorted by Discipline , ID) Displaying 2 comments. 2</p> <table border="1"> <thead> <tr> <th>Id 3</th> <th>Discipline 4</th> <th>DocType 5</th> <th>Spec 6</th> <th>Sheet 7</th> <th>Detail 8</th> </tr> </thead> <tbody> <tr> <td>3501</td> <td>Estimating</td> <td>Planning Report</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>[This item is flagged as a critical issue.] 9 Description of issue. 10 (Attachment: demo-error1.gif) 11</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <table border="1"> <tr> <td></td> <td><i>Evaluation not conducted</i> 12</td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3500</td> <td>Safety</td> <td>Specifications</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Comment text entered here. 13 Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <table border="1"> <tr> <td></td> <td><i>Evaluation not conducted</i></td> </tr> </table> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3501 | Estimating | Planning Report | n/a | n/a | n/a | | <i>Evaluation not conducted</i> 12 | Id | Discipline | DocType | Spec | Sheet | Detail | 3500 | Safety | Specifications | n/a | n/a | n/a | | <i>Evaluation not conducted</i> |
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| 3501 | Estimating | Planning Report | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Evaluation not conducted</i> 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Evaluation not conducted</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Total number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document Type 6. Spec Section 7. Sheet information 8. Plan Detail information 9. Critical Issue flag 10. Comment text 11. Hyperlink to comment attachment 12. Evaluation status 13. Hyperlink to e-mail comment submitter | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Snapshot By Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|-----------------------------------|--------------|------------|------------|-------------|-------------|-------------|-------------|--|--|---------------------------------------|---------------------|--|------------|--|--|--|-----------|--|-------|-----------|---------|--------|-------|------|------------|--------|------|--|------------|--------------|--------------|------------|------------|-------------|-------------|-------------|-------------|---------------|---|-----|-----|---|---|---|---|---|---|
| Summary: | Provides a high-level overview of comment evaluator activity grouped by office. Displays a tally of comments, evaluations and backchecks submitted in each status for each user. Includes hyperlinks to view comments evaluated by user. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Snapshot Report: Comment Evaluators Project: Your Project Title Here 1 Review: For the Your review name goes here (12345678) (sorted by Office, Last Name)</p> <table border="1"> <thead> <tr> <th colspan="10">RCE - DrChecks Help Desk 2</th> </tr> <tr> <th rowspan="2">Assigned Users (Last, First) 3</th> <th colspan="2">Impacted Comment(s)</th> <th colspan="4">Evaluation</th> <th colspan="2">Backcheck</th> </tr> <tr> <th>Total</th> <th>Withdrawn</th> <th>Pending</th> <th>Concur</th> <th>Check</th> <th>Info</th> <th>Non-Concur</th> <th>Closed</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>Tester, Test (3 impacted) 4</td> <td>5 3</td> <td>6 n/a</td> <td>7 n/a</td> <td>8 1</td> <td>9 1</td> <td>10 1</td> <td>11 0</td> <td>12 1</td> <td>13 2</td> </tr> <tr> <td>OFFICE TOTALS</td> <td>3</td> <td>n/a</td> <td>n/a</td> <td>1</td> <td>1</td> <td>1</td> <td>0</td> <td>1</td> <td>2</td> </tr> </tbody> </table> | RCE - DrChecks Help Desk 2 | | | | | | | | | | Assigned Users (Last, First) 3 | Impacted Comment(s) | | Evaluation | | | | Backcheck | | Total | Withdrawn | Pending | Concur | Check | Info | Non-Concur | Closed | Open | Tester, Test (3 impacted) 4 | 5 3 | 6 n/a | 7 n/a | 8 1 | 9 1 | 10 1 | 11 0 | 12 1 | 13 2 | OFFICE TOTALS | 3 | n/a | n/a | 1 | 1 | 1 | 0 | 1 | 2 |
| RCE - DrChecks Help Desk 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Assigned Users (Last, First) 3 | Impacted Comment(s) | | Evaluation | | | | Backcheck | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Total | Withdrawn | Pending | Concur | Check | Info | Non-Concur | Closed | Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tester, Test (3 impacted) 4 | 5 3 | 6 n/a | 7 n/a | 8 1 | 9 1 | 10 1 | 11 0 | 12 1 | 13 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OFFICE TOTALS | 3 | n/a | n/a | 1 | 1 | 1 | 0 | 1 | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Office name 3. List of assigned users 4. Hyperlink to view all impacted comments 5. Total number of impacted comments 6. Total number of comments withdrawn 7. Number of pending evaluations 8. Evaluations concurred 9. Check-and-resolve evaluations 10. Information only evaluations 11. Non-concurred evaluations 12. Closed backchecks 13. Open backchecks | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Backcheck Issue Report | | | | | | | | | | | | | | | | | | | | | | |
|--|---|------------------|---------------------|------------------|-----------------|----------------|-----------------|------|--------|----------------|-----|--|--|------------|---|--|--|------------|---|--|--|---|--|
| Summary: | Displays all comments listed as critical in the comment <i>and</i> flagged as non-concur in the backcheck. | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator, Backchecker | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <div style="border: 1px solid black; padding: 5px;"> <p>Comment Report: Backcheck Issue Report 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678)</p> <p>(sorted by Discipline , ID)</p> <p>Displaying 1 comments. 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Id 3</th> <th style="width: 20%;">Discipline 4</th> <th style="width: 20%;">DocType 5</th> <th style="width: 10%;">Spec 6</th> <th style="width: 10%;">Sheet 7</th> <th style="width: 10%;">Detail 8</th> </tr> </thead> <tbody> <tr> <td>3500</td> <td>Safety</td> <td>Specifications</td> <td>n/a</td> <td></td> <td></td> </tr> </tbody> </table> <p>[This item is flagged as a critical issue.] 9</p> <p>Comment text entered here. 10</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <p>Revised 28-Feb-06.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: center;">1-0</td> <td>Evaluation Potential Cost Impact Concurred 12 Evaluation concurs that this is a problem.</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td style="text-align: center;">1-1</td> <td>Backcheck Recommendation Open Comment 13 Critical comment left open.</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open 14</td> </tr> </table> </div> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3500 | Safety | Specifications | n/a | | | 1-0 | Evaluation Potential Cost Impact Concurred 12 Evaluation concurs that this is a problem. | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | 1-1 | Backcheck Recommendation Open Comment 13 Critical comment left open. | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | Current Comment Status: Comment Open 14 | |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | | | | | | | | | | | | | | | | | | | | |
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| 1-1 | Backcheck Recommendation Open Comment 13 Critical comment left open. | | | | | | | | | | | | | | | | | | | | | | |
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| Current Comment Status: Comment Open 14 | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Total number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Critical issue flag 10. Comment text 11. Submitter e-mail hyperlink 12. Evaluation text 13. Backcheck text 14. Comment status | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Open Backcheck Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|-------------|---------------|-----------------|-----|-----|-----|------------|--|------------|--|---|--|-----------|-------------------|----------------|-------------|--------------|---------------|-------------|------------|-------|-----|-----|-----|------------|--|------------|---|---|--|
| Summary: | Displays all comments with backchecks left in “open” status and the comment, evaluation and Backcheck details. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator, Backchecker | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Open Backcheck Comments Project: Your Project Title Here 1 Review: For the Your review name goes here (12345678) (sorted by Discipline , ID) Displaying 3 comments. 2</p> <table border="1"> <thead> <tr> <th>Id 3</th> <th>Discipline 4</th> <th>DocType 5</th> <th>Spec 6</th> <th>Sheet 7</th> <th>Detail 8</th> </tr> </thead> <tbody> <tr> <td>3488</td> <td>Architectural</td> <td>Plans and Specs</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing the import comment process (imported from DrChecks word template) Submitted By: Jeff Moll (217-367-3273). Submitted On: 03-Feb-06 9</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Concurred This is a sample evaluation. 11 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Open Comment Comment is left open and needs to be addressed. 12 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open 13</td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3490</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Yet another test of DQLL integration. Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Check and Resolve This evaluation has an attachment. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 (Attachment: demo-error.gif)</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Open Comment This comment has been backchecked and left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open</td> </tr> </table> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3488 | Architectural | Plans and Specs | n/a | n/a | n/a | 1-0 | Evaluation Concurred This is a sample evaluation. 11 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Open Comment Comment is left open and needs to be addressed. 12 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | Current Comment Status: Comment Open 13 | | Id | Discipline | DocType | Spec | Sheet | Detail | 3490 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Check and Resolve This evaluation has an attachment. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 (Attachment: demo-error.gif) | 1-1 | Backcheck Recommendation Open Comment This comment has been backchecked and left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | Current Comment Status: Comment Open | |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3488 | Architectural | Plans and Specs | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3490 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Comment text 10. Submitter e-mail hyperlink 11. Evaluation text 12. Backcheck text 13. Comment status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Evaluated Non-Concurred Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|-------------|------------|-------|-----|-----|-----|------------|--|--|--|------------|--|--|--|---|--|-----------|-------------------|----------------|-------------|--------------|---------------|-------------|------------|-------|-----|-----|-----|------------|---|------------|--|---|--|
| Summary: | Displays all evaluated comments with evaluation statuses other than 'concur'. Comment detail, evaluation detail and Backcheck details are shown. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , CMS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator, Backchecker | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Evaluated Non-Concurred Comments 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678)</p> <p>(sorted by Discipline , ID)</p> <p>Displaying 2 comments. 2</p> <table border="1"> <thead> <tr> <th>Id 3</th> <th>Discipline 4</th> <th>DocType 5</th> <th>Spec 6</th> <th>Sheet 7</th> <th>Detail 8</th> </tr> </thead> <tbody> <tr> <td>3489</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing lessons learned integration 9</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06 10</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. 11</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Close Comment This comment has been backchecked and closed. 12</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Closed 13</td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3490</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Yet another test of DQLL integration.</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Check and Resolve This evaluation has an attachment. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 (Attachment: demo-error.gif)</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Open Comment This comment has been backchecked and left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open</td> </tr> </table> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3489 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Potential Cost Impact For Information Only Evaluation text and explanation of status goes here. 11 | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | 1-1 | Backcheck Recommendation Close Comment This comment has been backchecked and closed. 12 | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | Current Comment Status: Comment Closed 13 | | Id | Discipline | DocType | Spec | Sheet | Detail | 3490 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Check and Resolve This evaluation has an attachment. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 (Attachment: demo-error.gif) | 1-1 | Backcheck Recommendation Open Comment This comment has been backchecked and left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | Current Comment Status: Comment Open | |
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| 3489 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 3490 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Report Name: | Reviewers Critical Comments | | | | | | | | | | | | | | | | |
|-----------------------------|---|----------------------------------|-------------------------------------|----------------------------------|---------------------------------|--------------------------------|---------------------------------|-------------|--------|----------------|-----|--|--|------------|---|------------|---|
| Summary: | Report will display all critical comments that have an evaluation associated with them and their subsequent evaluations and backchecks. | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | |
| Available To: | Evaluator | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Reviewers' Critical Comments 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678)</p> <p>(sorted by Discipline , ID)</p> <p>Displaying 1 comments. 2</p> <table border="1"> <thead> <tr> <th>Id 3</th> <th>Discipline 4</th> <th>DocType 5</th> <th>Spec 6</th> <th>Sheet 7</th> <th>Detail 8</th> </tr> </thead> <tbody> <tr> <td>3500</td> <td>Safety</td> <td>Specifications</td> <td>n/a</td> <td></td> <td></td> </tr> </tbody> </table> <p>[This item is flagged as a critical issue.] 9</p> <p>Comment text entered here. 10</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06 11</p> <p>Revised 28-Feb-06.</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Potential Cost Impact Concurred 12 Evaluation concurs that this is a problem. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Open Comment Critical comment left open. 13 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> </table> <p>Current Comment Status: Comment Open 14</p> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3500 | Safety | Specifications | n/a | | | 1-0 | Evaluation Potential Cost Impact Concurred 12 Evaluation concurs that this is a problem. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Open Comment Critical comment left open. 13 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 |
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| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Critical Issue flag 10. Comment text 11. Submitter e-mail hyperlink 12. Evaluation text 13. Backcheck text 14. Comment status | | | | | | | | | | | | | | | | |

| Report Name: | Designer's Critical Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|------|------------|-------|-----|-----|-----|------------|--|------------|--|---|--|-----------|-------------------|----------------|-------------|--------------|---------------|------|--------|----------------|-----|--|--|------------|---|------------|---|---|--|
| Summary: | Report will display all critical comments in any status and their subsequent evaluations and backchecks. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Designer's Critical Comments 1 Project: Your Project Title Here Review: For the Your review name goes here (12345678) (sorted by Discipline , ID) Displaying 2 comments. 2</p> <table border="1"> <thead> <tr> <th>Id 3</th> <th>Discipline 4</th> <th>DocType 5</th> <th>Spec 6</th> <th>Sheet 7</th> <th>Detail 8</th> </tr> </thead> <tbody> <tr> <td>3489</td> <td>Electrical</td> <td>Other</td> <td>n/a</td> <td>n/a</td> <td>n/a</td> </tr> </tbody> </table> <p>Testing lessons learned integration 9 Submitted By: Test Tester (217-367-3273). Submitted On: 03-Feb-06</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Potential Cost Impact For Information Only 11 Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Close Comment This comment has been backchecked and closed. 12 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Closed 13</td> </tr> </table> <table border="1"> <thead> <tr> <th>Id</th> <th>Discipline</th> <th>DocType</th> <th>Spec</th> <th>Sheet</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>3500</td> <td>Safety</td> <td>Specifications</td> <td>n/a</td> <td></td> <td></td> </tr> </tbody> </table> <p>[This item is flagged as a critical issue.] 14 Comment text entered here. Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06 Revised 28-Feb-06.</p> <table border="1"> <tr> <td>1-0</td> <td>Evaluation Potential Cost Impact Concurred Evaluation concurs that this is a problem. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td>1-1</td> <td>Backcheck Recommendation Open Comment Critical comment left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open</td> </tr> </table> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3489 | Electrical | Other | n/a | n/a | n/a | 1-0 | Evaluation Potential Cost Impact For Information Only 11 Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Close Comment This comment has been backchecked and closed. 12 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | Current Comment Status: Comment Closed 13 | | Id | Discipline | DocType | Spec | Sheet | Detail | 3500 | Safety | Specifications | n/a | | | 1-0 | Evaluation Potential Cost Impact Concurred Evaluation concurs that this is a problem. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | 1-1 | Backcheck Recommendation Open Comment Critical comment left open. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | Current Comment Status: Comment Open | |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3489 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-0 | Evaluation Potential Cost Impact For Information Only 11 Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-1 | Backcheck Recommendation Close Comment This comment has been backchecked and closed. 12 Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Current Comment Status: Comment Closed 13 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Current Comment Status: Comment Open | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Comment text 10. Submitter e-mail hyperlink 11. Evaluation text 12. Backcheck text 13. Comment status 14. Critical Issue flag | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Email Yourself The Evaluators Summary | | | | | | | | | | | | | | | | | | | | |
|----------------------------|---|---|-------------------------|---------------|---|------------|---|------------|---|--------|---|-------------------|---------------------------|------------|---|--------------------------|--|--|-----------------------|--------------|---|
| Summary: | This report will generate an e-mail that will automatically be sent to the e-mail address listed in your ProjNet SM account. This e-mail will display a summary of total comments in each discipline that have been submitted and the total number of comments that have yet to be evaluated. | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM , Bid Inquiry | | | | | | | | | | | | | | | | | | | | |
| Available To: | Evaluator, Technical Evaluator | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <p>From: staff@rcesupport.com <staff@rcesupport.com> Date: Mar 1, 2006 3:16 PM Subject: Test ProjNet Comment Entry Status Report To: test@emailaddress.com</p> <p>DEMO DrChecks > Email Report > Eval Summary Your Project Title Here - Your review name goes here (02-Feb-06 to 02-Feb-07) 1</p> <p>The following comments have been submitted on this review.</p> <table border="1"> <thead> <tr> <th>Design Discipline 2</th> <th>Total Comments 3</th> </tr> </thead> <tbody> <tr> <td>Architectural</td> <td>1</td> </tr> <tr> <td>Electrical</td> <td>2</td> </tr> <tr> <td>Estimating</td> <td>1</td> </tr> <tr> <td>Safety</td> <td>1</td> </tr> </tbody> </table> <p>The following comments have yet to be evaluated.</p> <table border="1"> <thead> <tr> <th>Design Discipline</th> <th>Pending Comments 4</th> </tr> </thead> <tbody> <tr> <td>Estimating</td> <td>1</td> </tr> </tbody> </table> <p>The following persons are assigned to evaluate comments on this project.</p> <table border="1"> <thead> <tr> <th colspan="3">RCE - DrChecks Help Desk</th> </tr> </thead> <tbody> <tr> <td>Tester, Test 5</td> <td>217-367-3273</td> <td>test@emailaddress.com 6</td> </tr> </tbody> </table> | Design Discipline 2 | Total Comments 3 | Architectural | 1 | Electrical | 2 | Estimating | 1 | Safety | 1 | Design Discipline | Pending Comments 4 | Estimating | 1 | RCE - DrChecks Help Desk | | | Tester, Test 5 | 217-367-3273 | test@emailaddress.com 6 |
| Design Discipline 2 | Total Comments 3 | | | | | | | | | | | | | | | | | | | | |
| Architectural | 1 | | | | | | | | | | | | | | | | | | | | |
| Electrical | 2 | | | | | | | | | | | | | | | | | | | | |
| Estimating | 1 | | | | | | | | | | | | | | | | | | | | |
| Safety | 1 | | | | | | | | | | | | | | | | | | | | |
| Design Discipline | Pending Comments 4 | | | | | | | | | | | | | | | | | | | | |
| Estimating | 1 | | | | | | | | | | | | | | | | | | | | |
| RCE - DrChecks Help Desk | | | | | | | | | | | | | | | | | | | | | |
| Tester, Test 5 | 217-367-3273 | test@emailaddress.com 6 | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project/Review title and dates 2. Discipline list 3. Tally of submitted comments per discipline 4. Tally of pending comments per discipline 5. Assigned evaluators 6. Evaluator e-mail address hyperlink | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Email Yourself The BackCheck Summary | | | | | | | | | | | | |
|-----------------------------|---|--------------------------|------|----------|------|-----------------------------|--|---|-----|-------|--|---|---|
| Summary: | This report will generate an e-mail that will automatically be sent to the e-mail address listed in your ProjNet SM account. This e-mail will display a summary of total comments by backchecker and the total number of comments that remain open. | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | |
| Available To: | Backchecker | | | | | | | | | | | | |
| Sample Report: | <p>From: staff@rcesupport.com <staff@rcesupport.com> Date: Mar 1, 2006 4:29 PM Subject: Test ProjNet Comment Backcheck Status Report</p> <p>DEMO DrChecks > Email Report > Check Summary</p> <p>Your Project Title Here - Your review name goes here (02-Feb-06 to 02-Feb-07) 1</p> <table border="1"> <thead> <tr> <th colspan="2">RCE - DrChecks Help Desk</th> <th>Comments</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>Tester, Test 2 217-367-3273</td> <td>test@emailaddress.com 3</td> <td>4</td> <td>5 2</td> </tr> <tr> <td colspan="2" style="text-align: right;">TOTAL</td> <td>4</td> <td>2</td> </tr> </tbody> </table> | RCE - DrChecks Help Desk | | Comments | Open | Tester, Test 2 217-367-3273 | test@emailaddress.com 3 | 4 | 5 2 | TOTAL | | 4 | 2 |
| RCE - DrChecks Help Desk | | Comments | Open | | | | | | | | | | |
| Tester, Test 2 217-367-3273 | test@emailaddress.com 3 | 4 | 5 2 | | | | | | | | | | |
| TOTAL | | 4 | 2 | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project/Review title and dates 2. Backchecker name 3. Backchecker e-mail hyperlink 4. Tally of total comments 5. Tally of open comments | | | | | | | | | | | | |

| | | | | |
|--|--|--|---|--|
| Report Name: | Reviewers Summary | | | |
| Summary: | Displays a list of all assigned Submitters/Evaluators and a tally of the comments they have submitted/evaluated. | | | |
| Application(s): | DrChecks SM | | | |
| Available To: | PM/RM | | | |
| Sample Report: | <div style="border: 1px solid black; padding: 5px;"> <p>Comment Report: Reviewers' Summary Project: Your Project Title Here 1 Review: For the Your review name goes here (12345678) (sorted by Office, Last Name)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">ProjNet Support Staff Offices 2</td> </tr> <tr> <td style="padding: 2px;"><i>RCE - DrChecks Help Desk</i> 3</td> </tr> <tr> <td style="padding: 2px;"> Test Tester, RCE - DrChecks Help Desk 4 (authored) 5 (contributed) Comments 6 voice: 217-367-3273 fax: <i>not provided</i> </td> </tr> </table> </div> | ProjNet Support Staff Offices 2 | <i>RCE - DrChecks Help Desk</i> 3 | Test Tester , RCE - DrChecks Help Desk 4 (authored) 5 (contributed) Comments 6 voice: 217-367-3273 fax: <i>not provided</i> |
| ProjNet Support Staff Offices 2 | | | | |
| <i>RCE - DrChecks Help Desk</i> 3 | | | | |
| Test Tester , RCE - DrChecks Help Desk 4 (authored) 5 (contributed) Comments 6 voice: 217-367-3273 fax: <i>not provided</i> | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project/Review information 2. Site name 3. Office name 4. Reviewer name/e-mail hyperlink 5. Tally of authored comments 6. Tally of evaluated comments | | | |

| Report Name: | Submitters Critical Comments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|---|--|---|--|---|------|------------|-----------------|-----|-----|-----|--|---------------------------------|----|------------|---------|------|-------|--------|------|--------|----------------|-----|--|--|-----|---|--|--|-----|---|--|--|---|--|
| Summary: | Report will display all critical comments in pending and open status and their subsequent evaluations and backchecks. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <div style="border: 1px solid black; padding: 5px;"> <p>Comment Report: Submitters Critical Comments Report 1 Project: Your Project Title Here Review: For the Your review name goes here (12345678) (sorted by Discipline , ID) Displaying 2 comments. 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="color: blue;">Id 3</th> <th style="color: blue;">Discipline 4</th> <th style="color: blue;">DocType 5</th> <th style="color: blue;">Spec 6</th> <th style="color: blue;">Sheet 7</th> <th style="color: blue;">Detail 8</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">3501</td> <td>Estimating</td> <td>Planning Report</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> </tr> </tbody> </table> <p>9 [This item is flagged as a critical issue.] Description of issue. 10 (Attachment: demo-error1.gif) 11</p> <p>Submitted By: Test Tester 12 (217-367-3273). Submitted On: 28-Feb-06</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"></td> <td style="text-align: center;"><i>Evaluation not conducted</i></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="color: blue;">Id</th> <th style="color: blue;">Discipline</th> <th style="color: blue;">DocType</th> <th style="color: blue;">Spec</th> <th style="color: blue;">Sheet</th> <th style="color: blue;">Detail</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">3500</td> <td>Safety</td> <td>Specifications</td> <td style="text-align: center;">n/a</td> <td></td> <td></td> </tr> </tbody> </table> <p>9 [This item is flagged as a critical issue.] Comment text entered here.</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <p>Revised 28-Feb-06.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: center;">1-0</td> <td>Evaluation Potential Cost Impact Concurred 13 Evaluation concurs that this is a problem.</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td style="text-align: center;">1-1</td> <td>Backcheck Recommendation Open Comment Critical comment left open. 14</td> </tr> <tr> <td colspan="2">Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06</td> </tr> <tr> <td colspan="2">Current Comment Status: Comment Open 15</td> </tr> </table> </div> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3501 | Estimating | Planning Report | n/a | n/a | n/a | | <i>Evaluation not conducted</i> | Id | Discipline | DocType | Spec | Sheet | Detail | 3500 | Safety | Specifications | n/a | | | 1-0 | Evaluation Potential Cost Impact Concurred 13 Evaluation concurs that this is a problem. | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | 1-1 | Backcheck Recommendation Open Comment Critical comment left open. 14 | Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | Current Comment Status: Comment Open 15 | |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3501 | Estimating | Planning Report | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Evaluation not conducted</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-1 | Backcheck Recommendation Open Comment Critical comment left open. 14 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Current Comment Status: Comment Open 15 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Critical Issue flag 10. Comment text 11. Comment attachment hyperlink 12. Submitter e-mail hyperlink 13. Evaluation text 14. Backcheck text 15. Comment status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Comments Withdrawn Prior to Evaluation | | | | | | | | | | | | |
|---------------------|---|-------------------------|----------------------------|-------------------------|------------------------|-----------------------|------------------------|------|------------|-----------------|-----|--|--|
| Summary: | Displays details of any comment that was Withdrawn by a PM/RM or Site Administrator prior to being evaluated. | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | |
| Available To: | PM/RM | | | | | | | | | | | | |
| Sample Report: | <p>Comment Report: Comments Withdrawn Prior to Evaluation 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678)</p> <p>(sorted by Discipline , ID)</p> <p>Displaying 1 comments. 2</p> <table border="1"> <thead> <tr> <th><u>Id</u> 3</th> <th><u>Discipline</u> 4</th> <th><u>DocType</u> 5</th> <th><u>Spec</u> 6</th> <th><u>Sheet</u> 7</th> <th><u>Detail</u> 8</th> </tr> </thead> <tbody> <tr> <td>3501</td> <td>Estimating</td> <td>Planning Report</td> <td>n/a</td> <td></td> <td></td> </tr> </tbody> </table> <p>[This comment has been withdrawn by Satisfied Customer on 06-Mar-06] 9</p> <p>[This item is flagged as a critical issue.] 10</p> <p>Description of issue. 11</p> <p>(Attachment: demo-error1.gif) 12</p> <p>Annotation: Comment withdrawl reason description. (Withdrawn 06-Mar-06 by Satisfied Customer, email: staff@rcesupport.com voice: 217-367-3273.) 13</p> <p>Submitted By: Test Tester 14 (217-367-3273). Submitted On: 28-Feb-06</p> <p>Comment Withdrawn By: Satisfied Customer 15 (217-367-3273) On: 06-Mar-06</p> | <u>Id</u> 3 | <u>Discipline</u> 4 | <u>DocType</u> 5 | <u>Spec</u> 6 | <u>Sheet</u> 7 | <u>Detail</u> 8 | 3501 | Estimating | Planning Report | n/a | | |
| <u>Id</u> 3 | <u>Discipline</u> 4 | <u>DocType</u> 5 | <u>Spec</u> 6 | <u>Sheet</u> 7 | <u>Detail</u> 8 | | | | | | | | |
| 3501 | Estimating | Planning Report | n/a | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Withdrawal flag 10. Critical Issue flag 11. Comment text 12. Comment attachment hyperlink 13. Withdrawal details 14. Submitter e-mail hyperlink 15. Withdrawing user's e-mail hyperlink | | | | | | | | | | | | |

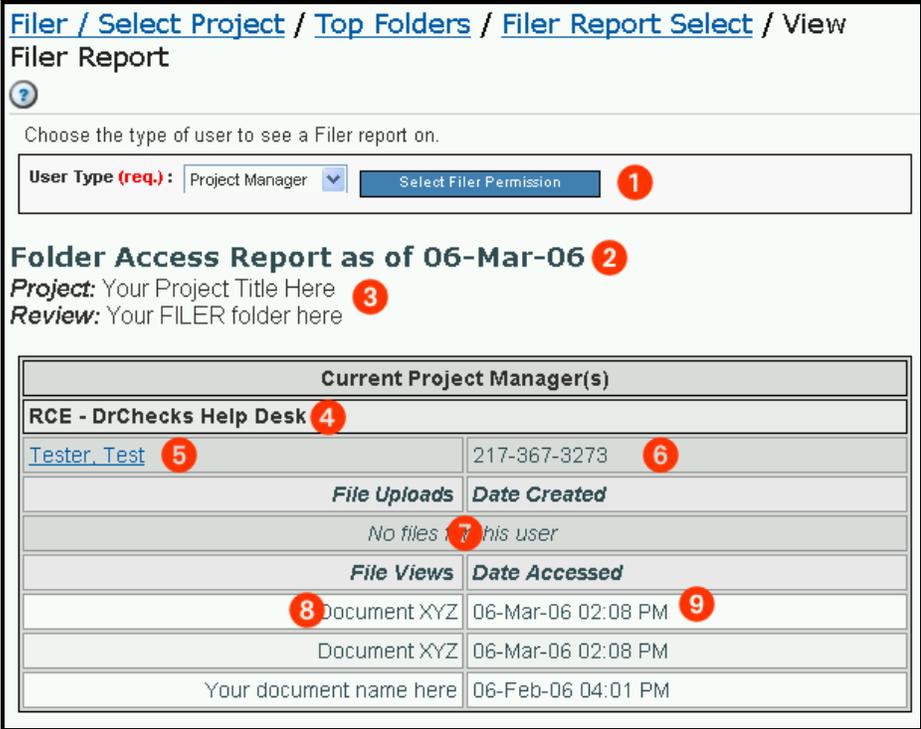
| Report Name: | Evaluate Pending (Designer's Pending Comments) | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|--|--|---|--|---|--|---|------|------------|-----------------|-----|-----|-----|--|---|----|------------|---------|------|-------|--------|------|--------|----------------|-----|-----|-----|--|---------------------------------|
| Summary: | Lists all comments that are pending evaluation. Same as “Designer's Pending Comments” report. (See p. 144 for details on the “Designer's Pending Comments” report). | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM, Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <div style="border: 1px solid black; padding: 5px;"> <p>Comment Report: Designer's Pending Comments 1 Project: Your Project Title Here Review: For the Your review name goes here (12345678) (sorted by Discipline , ID) Displaying 2 comments. 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="color: blue;">Id 3</th> <th style="color: blue;">Discipline 4</th> <th style="color: blue;">DocType 5</th> <th style="color: blue;">Spec 6</th> <th style="color: blue;">Sheet 7</th> <th style="color: blue;">Detail 8</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">3501</td> <td style="text-align: center;">Estimating</td> <td style="text-align: center;">Planning Report</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> </tr> </tbody> </table> <p>9 [This item is flagged as a critical issue.] Description of issue. 10 (Attachment: demo-error1.gif) 11</p> <p>Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"></td> <td style="text-align: center;"><i>Evaluation not conducted</i> 12</td> </tr> </table> </div> <div style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="color: blue;">Id</th> <th style="color: blue;">Discipline</th> <th style="color: blue;">DocType</th> <th style="color: blue;">Spec</th> <th style="color: blue;">Sheet</th> <th style="color: blue;">Detail</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">3500</td> <td style="text-align: center;">Safety</td> <td style="text-align: center;">Specifications</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> </tr> </tbody> </table> <p>Comment text entered here. 13 Submitted By: Test Tester (217-367-3273). Submitted On: 28-Feb-06</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"></td> <td style="text-align: center;"><i>Evaluation not conducted</i></td> </tr> </table> </div> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3501 | Estimating | Planning Report | n/a | n/a | n/a | | <i>Evaluation not conducted</i> 12 | Id | Discipline | DocType | Spec | Sheet | Detail | 3500 | Safety | Specifications | n/a | n/a | n/a | | <i>Evaluation not conducted</i> |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | | | | | | | |
| 3501 | Estimating | Planning Report | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Evaluation not conducted</i> 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | |
| | <i>Evaluation not conducted</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Total number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document Type 6. Spec Section 7. Sheet information 8. Plan Detail information 9. Critical Issue flag 10. Comment text 11. Hyperlink to comment attachment 12. Evaluation status 13. Hyperlink to e-mail comment submitter | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | Evaluated Problem Issues (Designer's Critical Comments) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|------------------|---------------------|------------------|-----------------|----------------|-----------------|------|------------|-------|-----|-----|-----|-----|--|-----|--|---|--|----|------------|---------|------|-------|--------|------|--------|----------------|-----|--|--|-----|---|-----|---|---|--|
| Summary: | Report will display all critical comments in any status and their subsequent evaluations and backchecks. Same as "Designer's Critical Comments" report. (See p. 150 for details on the "Designer's Critical Comments" report). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM, Evaluator | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 3489 | Electrical | Other | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1-0 | Evaluation Potential Cost Impact For Information Only 11 Evaluation text and explanation of status goes here. Submitted By: Test Tester (217-367-3273) Submitted On: 28-Feb-06 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Id | Discipline | DocType | Spec | Sheet | Detail | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3500 | Safety | Specifications | n/a | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Report Contents: | <ol style="list-style-type: none"> 1. Project and Review information 2. Number of comments displayed 3. Comment ID number 4. Comment discipline 5. Document type 6. Spec section 7. Sheet information 8. Plan detail information 9. Comment text 10. Submitter e-mail hyperlink 11. Evaluation text 12. Backcheck text 13. Comment status 14. Critical Issue flag | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Report Name: | All Pending Backchecks Report | | | | | | | | | | | | | | | | | | | | | | |
|---------------------|--|-------------------|---------------------|------------------|-----------------|----------------|-----------------|------|---------|-------------------|-----|-----|-----|------------|---------------------------------------|--|------------------------|--|--|--|--|--|---|
| Summary: | Report details all comments which have been evaluated and are pending backchecks. | | | | | | | | | | | | | | | | | | | | | | |
| Application(s): | DrChecks SM | | | | | | | | | | | | | | | | | | | | | | |
| Available To: | PM/RM | | | | | | | | | | | | | | | | | | | | | | |
| Sample Report: | <div style="border: 1px solid black; padding: 5px;"> <p>Comment Report: Pending Backcheck Comments 1</p> <p>Project: Your Project Title Here</p> <p>Review: For the Your review name goes here (12345678)</p> <p>(sorted by Discipline , ID)</p> <p>Displaying 1 comments. 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Id 3</th> <th style="width: 20%;">Discipline 4</th> <th style="width: 20%;">DocType 5</th> <th style="width: 15%;">Spec 6</th> <th style="width: 15%;">Sheet 7</th> <th style="width: 15%;">Detail 8</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">3505</td> <td style="text-align: center;">General</td> <td style="text-align: center;">Design Directives</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> <td style="text-align: center;">n/a</td> </tr> </tbody> </table> <p>This is a pending comment. 9</p> <p>Submitted By: Test Tester 10 (217-367-3273). Submitted On: 06-Mar-06</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: center;">1-0</td> <td>Evaluation Concurred 11</td> </tr> <tr> <td></td> <td>Details of evaluation.</td> </tr> <tr> <td></td> <td>Submitted By: Test Tester (217-367-3273) Submitted On: 06-Mar-06</td> </tr> <tr> <td></td> <td><i>Backcheck not conducted</i> 12</td> </tr> <tr> <td></td> <td>Current Comment Status: Comment Open 13</td> </tr> </table> </div> | Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | 3505 | General | Design Directives | n/a | n/a | n/a | 1-0 | Evaluation Concurred 11 | | Details of evaluation. | | Submitted By: Test Tester (217-367-3273) Submitted On: 06-Mar-06 | | <i>Backcheck not conducted</i> 12 | | Current Comment Status: Comment Open 13 |
| Id 3 | Discipline 4 | DocType 5 | Spec 6 | Sheet 7 | Detail 8 | | | | | | | | | | | | | | | | | | |
| 3505 | General | Design Directives | n/a | n/a | n/a | | | | | | | | | | | | | | | | | | |
| 1-0 | Evaluation Concurred 11 | | | | | | | | | | | | | | | | | | | | | | |
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| | |
|---------------------|---|
| Report Name: | ProjNet-FilerSM Access Report |
| Summary: | Displays all current Project, Folder, and Design Managers for a given ProjNet-Filer SM folder as well as any and all current folder users. (NOTE: unlike other ProjNet SM reports, this is displayed in the active window and does not open a secondary window to display the report). |
| Application(s): | FILER |
| Available To: | PM/RM |
| Sample Report: | |
| Report Contents: | <ol style="list-style-type: none"> 1. Current date 2. Project and Review information 3. List of Project Manager(s) 4. Office Name 5. User name and e-mail hyperlink 6. User phone number 7. List of Folder Manager(s) 8. List of Design Manager(s) 9. List of Folder User(s) |

| | |
|---------------------|--|
| Report Name: | ProjNet-FilerSM Activity Report |
| Summary: | Displays all users who have accessed the file and their contact information and date of access. (<i>NOTE:</i> unlike other ProjNet SM reports, this is displayed in the active window and does not open a secondary window to display the report). |
| Application(s): | FILER |
| Available To: | PM/RM |
| Sample Report: | |
| Report Contents: | <ol style="list-style-type: none"> 1. Current date 2. Project and Review information 3. Document Name 4. User name and e-mail hyperlink 5. User phone number 6. Date of User Access 7. Document description |

| | |
|---------------------|---|
| Report Name: | ProjNet-FilerSM Authorized Users Report |
| Summary: | Report displays user activity by user type. Drop-down list allows selection of user type displayed (Project Managers, Review Managers, Design Managers and Users). (NOTE: unlike other ProjNet SM reports, this is displayed in the active window and does not open a secondary window to display the report). |
| Application(s): | FILER |
| Available To: | PM/RM |
| Sample Report: |  <p>The screenshot shows the 'Filer Report' interface. At the top, there are navigation links: 'Filer / Select Project / Top Folders / Filer Report Select / View'. Below this is a heading 'Filer Report' and a help icon. A prompt says 'Choose the type of user to see a Filer report on.' Below that is a form with 'User Type (req.):' set to 'Project Manager' and a 'Select Filer Permission' button (1). The main heading is 'Folder Access Report as of 06-Mar-06' (2). Below it are fields for 'Project: Your Project Title Here' (3) and 'Review: Your FILER folder here'. A table titled 'Current Project Manager(s)' shows 'RCE - DrChecks Help Desk' (4). Below that is a table with columns 'File Uploads' and 'Date Created', showing 'Tester_Test' (5) with phone number '217-367-3273' (6). A message says 'No files' (7) 'his user'. Below that is a table with columns 'File Views' and 'Date Accessed', showing 'Document XYZ' (8) with date '06-Mar-06 02:08 PM' (9). The bottom row shows 'Your document name here' with date '06-Feb-06 04:01 PM'.</p> |
| Report Contents: | <ol style="list-style-type: none"> 1. User Type Select drop-down box 2. Today's date 3. Project/Review Information 4. Office Name 5. User name & e-mail hyperlink 6. User phone number 7. List of files uploaded by user & date created 8. List of files viewed by user 9. List of dates files accessed |

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