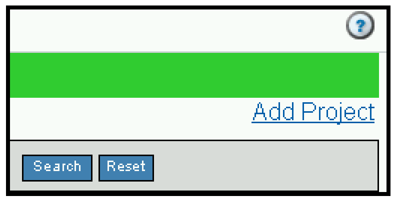
Quick-Start Guide: ProjNet℠ Frequently Asked Questions

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

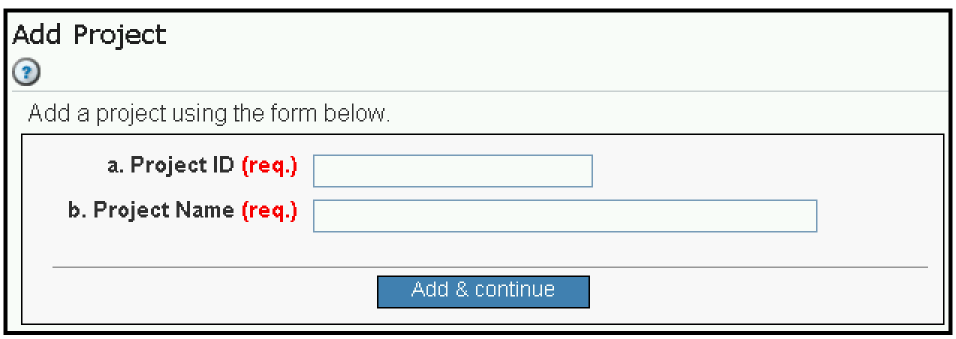
How do I create a new project?

1. Log in to the ProjNet℠ 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":

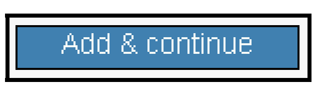


3. The Add Project form displays:



4. Type the Project ID number.

5. Type the Project Name.

6. Click the 

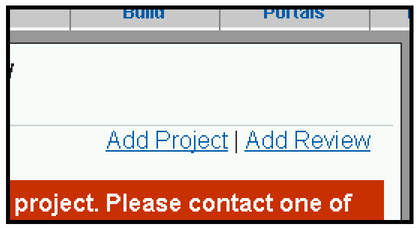
button.

How do I create a new review?

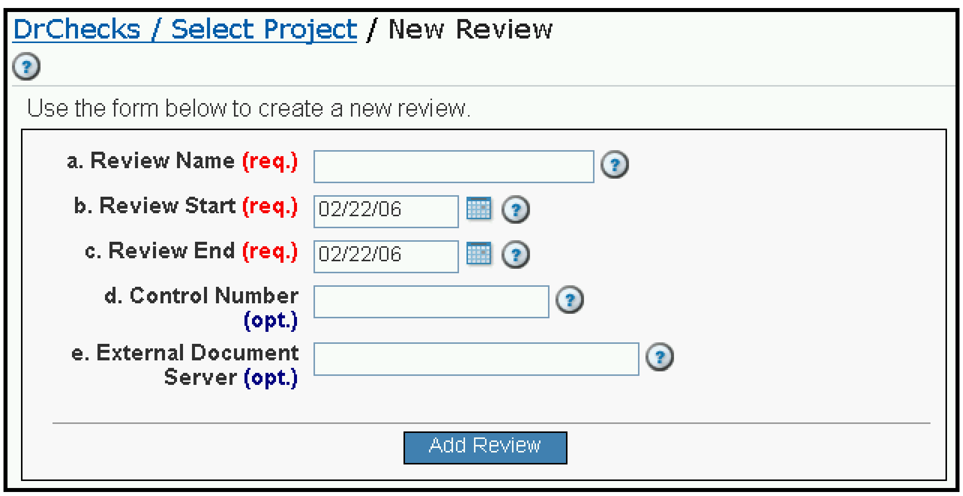
Log in to the ProjNet℠ system.

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.

How do I assign users/offices to a review?

1. Log in to the ProjNet℠ 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: EDIT REPORTS. Click the EDIT 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”:

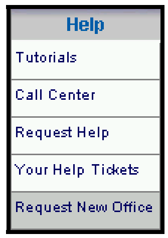
   1. Check Office Assignments
   2. Submitter Offices
   3. Evaluator Offices
   4. Back-Checker Offices
   5. View-only Offices

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

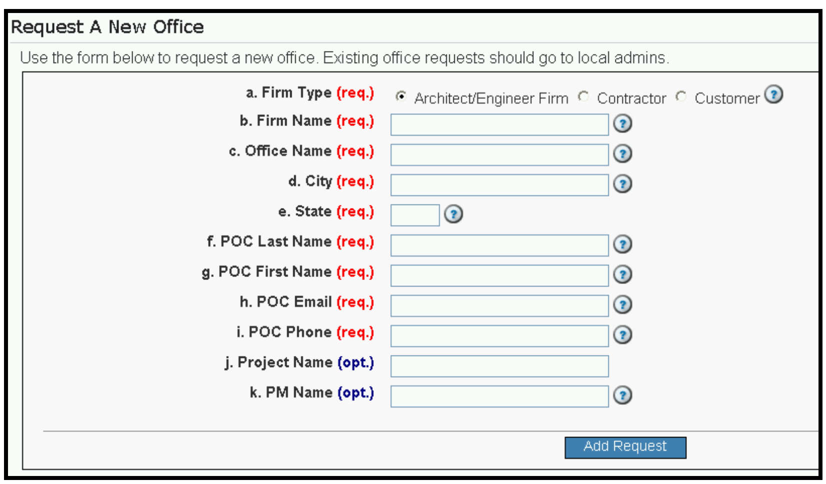
When a new Design firm, customer, or contracting firm becomes involved with a project, you can request that a new "office" be created so that all members of that particular firm will be able to register their internal personnel. Here's how to request a new office:

1. Log in to the ProjNet^SM 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:



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.

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 ProjNet^SM 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: EDIT REPORTS. Click the EDIT 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 Select Site button. Then, click on the project that contains the review you would like to copy assignments from and click the Select Project 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 Copy Review Assignments 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 Select Site button. Next, click on the name of the project which contains the review you would like to copy assignments for and click the Select Project button. Then, choose the review you would like to copy assignments from and click the Copy Review Assignments button.

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 ProjNet℠ system.

2. Click on the title of the project that contains the review you would like view critical comments for.

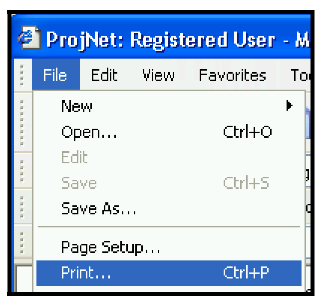
3. The reviews that are available for that project will be displayed. To the left of the review name, you will see two small buttons as follows: 

. 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:

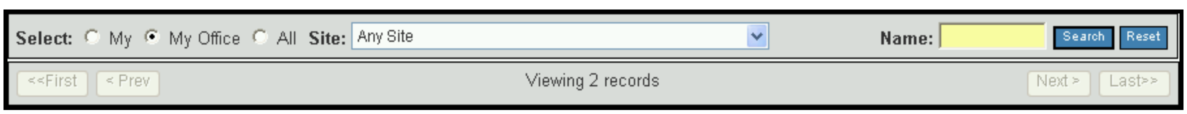


I have assigned users as submitters/evaluators and I can see that they are assigned, but when the user logs on, they don’t see the project in the “My” list. Why?

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 ProjNet^{SM} 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:



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.

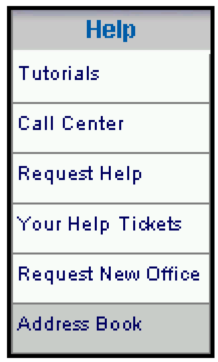
Note this only occurs if submitter assignments are made by office instead of by name. If a user has not posted their first comment in a given review, but they had previously participated in any other review in the project, they will still see it in their “my” project list.

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

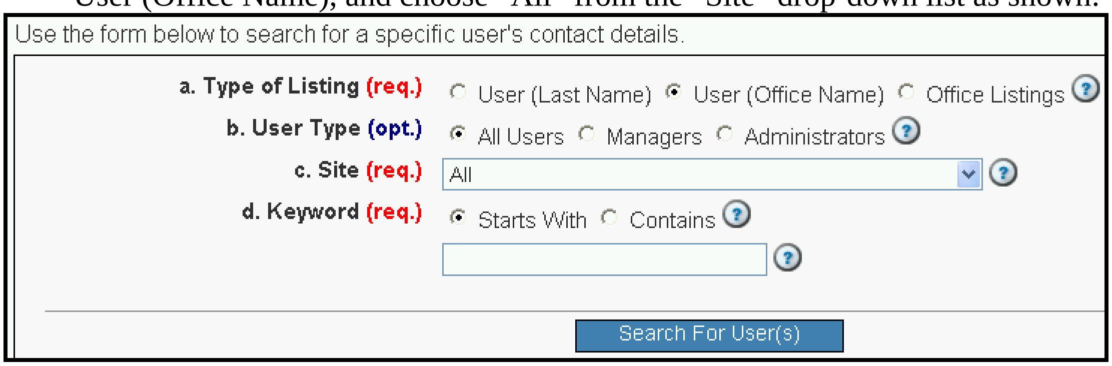
You can use the Address Book feature to search all offices at all sites to see if the office is already in the system before entering a New Office Request. To search for an office:

1. Log in to the ProjNet℠ 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:



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:

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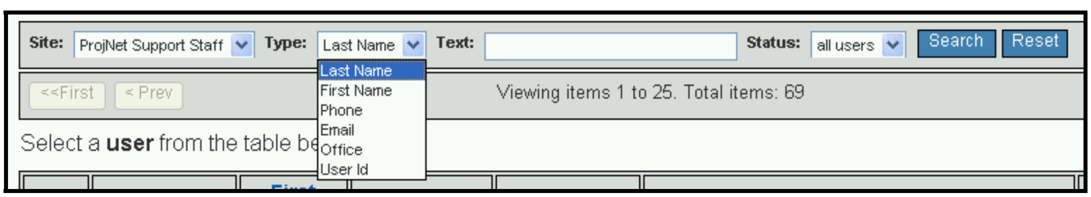
I know that a user is registered, but I can't find them in the list to assign them. Why?

You will **<u>only</u>** 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 ProjNet℠ 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:



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.

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 ProjNet^{SM} 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.