Getting Started with

project**solve**²

a Parsons Brinckerhoff solution

The place where effective teams go to collaborate and coordinate project delivery around the corner or around the globe.

www.projectsolve2.com

PB
100 YEARS

project**solve**²
powered by **EMC**²

ProjectSolve[2] is a secure Internet-based collaboration tool that allows project teams of all sizes to communicate easily regardless of their location. Tailored for the AEC industry, ProjectSolve[2] adapts to unique business processes, and facilitates the synthesis of the various information systems often found among project partners.
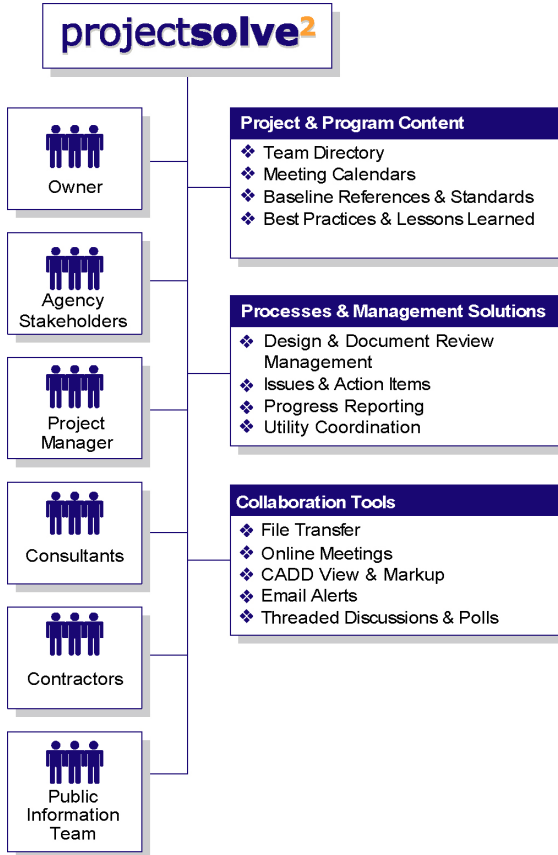

Built upon EMC's Documentum | eRoom collaboration platform, ProjectSolve is the most powerful tool of its kind.

Benefits

- ❖ Facilitates team coordination and cohesion, accelerating project start-up.
- ❖ Streamlines business processes that cross organizational boundaries.
- ❖ Eliminates many simple but costly information requests and administrative tasks.
- ❖ Captures valuable knowledge in a manner that enables future re-use.
- ❖ Eases scheduling and event management with logically-crafted calendars and online meeting tools.

Features

- ❖ Secure login for each member and 128-bit SSL encryption on all project site communications.
- ❖ my projectsolve portal provides a single point of entry to multiple project sites.
- ❖ Allows "drag and drop" of files and folders between the site and the member's workstation.
- ❖ Automatic email notification of content changes.
- ❖ Easily configurable using standard items such as Folders, Databases, Calendars, Project Plans, Inboxes, Polls and Links.
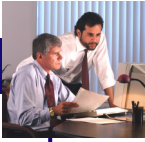
Once you have been set up as a member on a ProjectSolve^2 site, you should receive an invitation via email. For your benefit and for the benefit of your fellow team members, it is important that you promptly login and acquaint yourself with the site.

Login Instructions

1. Click the link that appears in your email invitation OR open a browser session and go to the following address: www.projectsolve2.com/login.asp

2. On the Login page, enter your email address and password, then click **proceed**. Your password was sent to you in the invitation email. If you have not received an invitation email, please contact your Site Coordinator or support@projectsolve.com.

3. The first time you login you will be prompted to change your initial password. Your new password must start with a letter and be at least eight characters in length. The use of some combination of letters, numbers and/or special characters is recommended, e.g., January6 becomes J@nu@ry6.

   Note: If you should forget your password, simply click the Forgot Your Password? link that appears on the login page. A new password will be emailed to you.

4. Once you have successfully logged in you will be taken to your **my projectsolve** page. From this page, you may access each of the project sites to which you have been registered as well as a number of related resources.
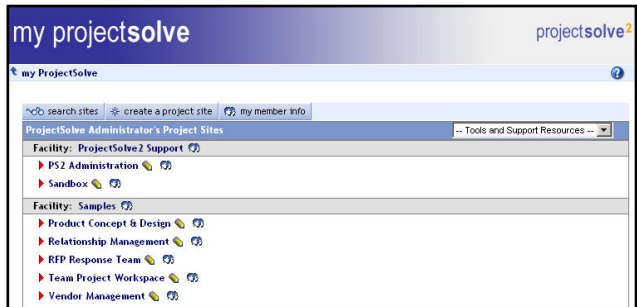
5. The first time you access a project site you will be asked whether you want to run ProjectSolve^2 with or without a plug-in. The plug-in is an optional piece of software that will enable you to use several of ProjectSolve^2's advanced features such as rich text editing, drag-and-drop file management, and real-time desktop sharing.

   The plug-in is optional, but is recommended if you expect to be a frequent user of ProjectSolve^2.

   Note: In order to install the plug-in, you will need administrative rights to your workstation. If you do not have administrative rights, please download the *ProjectSolve^2 Plug-in Guidelines* from the Tools and Support Resources menu found on the my projectsolve page and review these with your local I.T. Administrator.

projectsolve^2
a Parsons Brinckerhoff Solution

A project home page displays once you have clicked on the project name on your **my projectsolve** page. From here, you can explore what is available in your project site by using the navigation **Map** on the left, or directly accessing items in the main content pane on the right.


A The **Map** acts as a table of contents and lets you navigate by clicking items. The **Map's** behavior is similar to that of Microsoft Windows Explorer. You may return to the project home page by clicking the project name at the top of the **Map**. You can also hide or expand the **Map** by clicking on the bar to the right of the **Map**. To redisplay the **Map**, click the tab.

B The path found at the top of the frame tracks your location in the project (like a trail of bread crumbs). Navigate by clicking the links it contains.

C Tool buttons located in the upper right corner and below the **Map** activate project-wide functions, including sending an **Alert**, viewing online **Help**, and **Logging out**.

D The button bar allows you to create and search for items. Links are also provided to summaries of your events as well as to a list of members who have access to the project site.

E The content pane displays the icons associated with your current location on the **Map**.

F Popup menus are brought up by right-clicking on an item's icon. The popup menu gives you access to context-sensitive actions such as **View**, **Edit** and **Rename**.

G On the command bar, click the , , and icons to control how items are displayed. You can also access popup menu functions from here.

ProjectSolve^2 provides a number of standard item types that can be used in your project site.
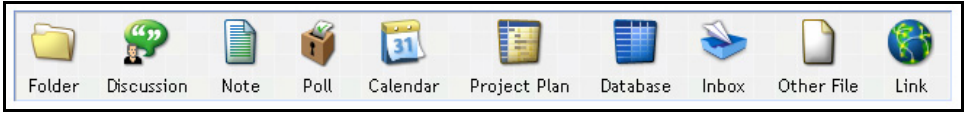

These are added with the **create** button, found throughout your site. The items created may be nested within one another – allowing for some creative solutions. For example a Calendar specifically for the Design Team can be nested within the Folder used by that group. Similarly, an agenda document may be nested within an Event on the Calendar.
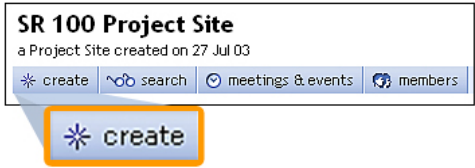

Each of the standard item types are described below:

Folder – A container in which you can store files and other items, a Folder facilitates site organization and access control. The Design Team Folder shown here contains the tools and resources shared by this group.
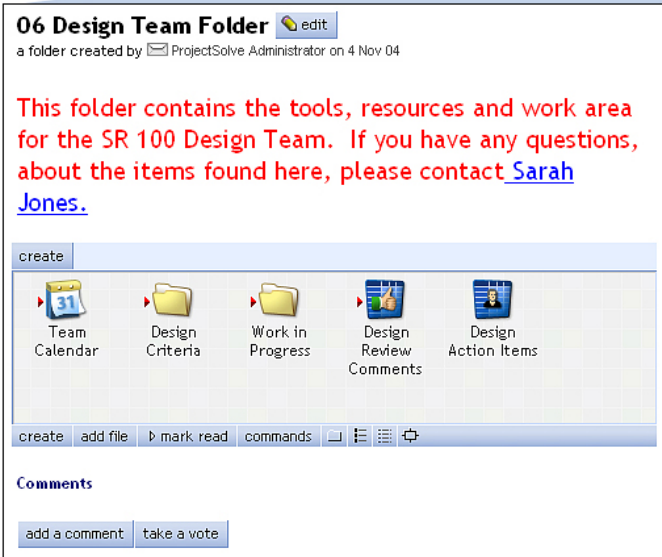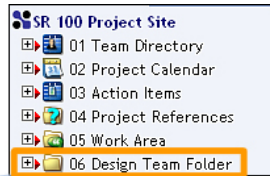
Folders, as well as most ProjectSolve^2 Items, include a banner area that can be tailored with informative text, images and links. In the example above, the banner includes information about the folder contents as well as an email link to the person responsible.
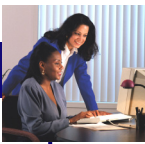
Calendar – Team members often do not work in the same organizations and therefore do not typically share a common calendar system. To fill the need, ProjectSolve provides a simple team calendar for scheduling meetings and posting event-related files such as agendas, presentation materials, and meeting minutes. Provided the plug-in is installed, files may be dragged from your desktop to the Attachments area within a Calendar Event. Note that the create button can also be used to add files or other items under an Event.

Project Plan – A very simple project schedule with a Gantt chart interface. You can group and filter the project tasks, and report actual progress. Each project task can have comments and attachments, like any other ProjectSolve[2] page.

Database – A configurable data management tool for managing structured information such as team directories, utility conflicts, design comments or action items.

Unlike a traditional spreadsheet, a ProjectSolve[2] database can be used by multiple users at the same time. ProjectSolve[2] databases also support document attachments, comment threads and approval workflows providing teams with useful solutions to common business process requirements.

Users can import as well as export database information using the commands found at the bottom of the database summary page.

Inbox – A special folder that can receive and store email messages. By cc'ing email messages about your project to an inbox, you can create an automatic archive of project correspondence. An Inbox may also serve as a central repository for public comments that have been submitted via email.

Project Email Archive
an inbox created by ✉ ProjectSolve Administrator on 4 Nov 04

The email address of this inbox is:
PROJECT_email@projectsolve.com

Project-related email shall be archived here. Forward received messages and CC outgoing messages to **PROJECT_email@projectsolve.com.**

Name	Modified	Owner	Size
☐ ▶ ✉ FW: ABC Center – Ramp L retaining wall conflict	16 Feb 05 12:18 pm	Sam Smith	4k
☐ ▶ ✉ Scott Circle Design Charrette - Follow-up (2)	15 Feb 05 10:12 am	Sam Smith	3k
☐ ▶ ✉ Scott Circle Design Charrette - Follow-up	15 Feb 05 9:25 am	Sam Smith	3k
☐ ▶ ✉ FW: Meeting Minutes for Scott Circle Design Charrette	14 Feb 05 8:46 am	Coordinators Only	4k
☐ ▶ ✉ RE: Consultative Status Request/ ABC Center Access Improvements	10 Feb 05 3:11 pm	Coordinators Only	3k

Discussion – Commonly referred to as a "threaded discussion," this is a multi-person dialog where members can read others' comments and contribute their own. Discussions serve as a practical alternative to unwieldy email threads.

Public Outreach Discussions ✎ edit
a discussion started by ✉ ProjectSolve Administrator on 4 Nov 04

Topics   start a new topic

▷ **What methods should be used and what priority should be given to each?**   5   ▷ When should be launch and ramp up the outreach campaign?   2   ▷ How should we measure effectiveness and what metrics should we track?   3

Poll – A page for taking a vote where you pose questions and supply the possible responses. As people vote the results are automatically tabulated and displayed based on settings you define.

Charrette Planning Poll ✎ edit
a poll created by ✉ ProjectSolve Administrator on 4 Nov 04

Vote

The Design Charrette is tentatively planned to span two full days. The City Planning Department has suggested that we conduct it on a Friday and Saturday to allow maximum participation by community stakeholders. Please select the dates from the list below that would work best for you.

September 16 & 17: 1
September 23 & 24: 1
September 9 & 10: 0

Other File – This is simply a file uploaded to the site. Note that these "other files" may also be added by selecting the **add file** button from the command menu, or by simply dragging and dropping the file from your desktop (requires plug-in).
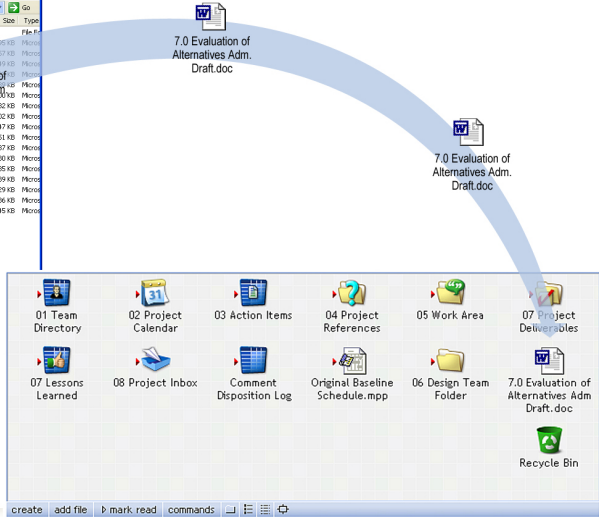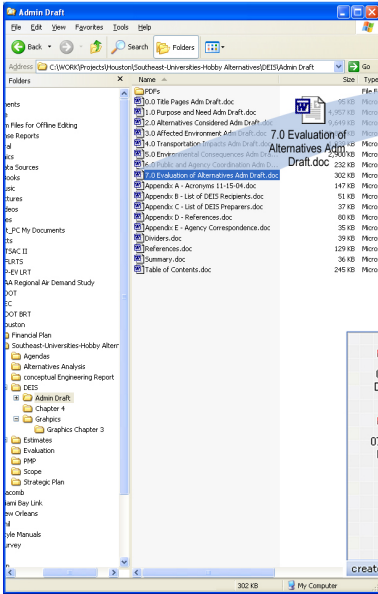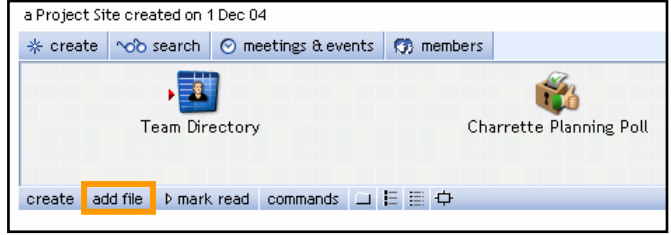
Link – A shortcut to a website, or an individual file or page within the project site. Anything that has a web address (a URL) can serve as a link. A "mail-to" link can also be created by entering the recipient's email address.

Links can also be created within a formatted text field using the ⊞ tool (requires plug-in).
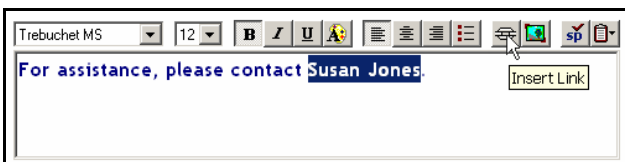
Logging In

Q How do I obtain access to a ProjectSolve^2 site for myself or a co-worker?

A Access to individual ProjectSolve^2 sites is typically managed by the site's local coordinator. If you are unsure who is filling this role on your project, please contact the project manager or support@projectsolve.com.

Q I have forgotten my ProjectSolve^2 password. How can I obtain a new one?

A You can click the Forgot Your Password? link on the Login page. After entering your email address a new password will be sent to you.

Q While logging in for the first time, I was prompted to install a "plug-in" from Documentum | EMC. What is this and must I install it?

A The plug-in is an optional piece of software that will enable you to use several of ProjectSolve^2's advanced features such as rich text editing, drag-and-drop file management, and real-time desktop sharing.

Although optional, the plug-in is recommended if you expect to be a frequent user of the software.

In order to install the plug-in, you will need administrative rights to your workstation. If you do not have administrative rights, please review the *ProjectSolve^2 Plug-in Guidelines* with your local I.T. Administrator. These Guidelines may be found under the Tools and Support Resources menu on the my projectsolve page.

Q When I try to login in for the first time, the screen just flashes. What should I do?

A If you have any pop-up blockers running, temporarily turn them off. This will allow the first time login process to complete successfully. If the problem persists, please contact support@projectsolve.com.

Working with Files

Q I am unable to open or view a file or the contents of another object on a ProjectSolve^2 site. What should I do?

A It's possible that you have not been given permission to access the folder or object in question. Please contact the Coordinator for the project site.

Q How can I upload a file?

A If you have the plug-in software installed you can drag and drop a file or folder from your local desktop to a gray content pane anywhere on a ProjectSolve^2 site. This method allows you to transfer multiple files at a time.

If you do not have the plug-in installed, then you should click the add file button on the command bar. This will lead you to a dialog box where you can upload one file at a time.

Q How can I edit a file that resides on a ProjectSolve^2 site?

A Click the file's edit icon ( ) or right-click the file's icon and select Edit from the pop-up menu.

If you have the plug-in installed, ProjectSolve^2 automatically reserves the file for editing and opens it in its native application. Edit the file and save your changes as you normally would. ProjectSolve^2 automatically uploads the modified file and releases the file's reservation.

If you do not have the plug-in installed, follow the on-screen prompts to Save the file to your local workstation. After completing your edits you should re-upload the file using the add file button on the command bar.
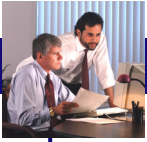
Q How can I control who can view and who can edit items I have placed on a project site?

A Permissions for a file, folder or other object may be accessed by right-clicking the item's icon and selecting Access Control. On the Access Control screen you can determine who can open and edit the item. To do this you must be listed as an owner of the item or as a Coordinator for the site.

Q Does ProjectSolve[2] provide a way to manage versions of a file?

A Yes, version tracking may be turned on for a file by right-clicking the file's icon and selecting Track Versions from the menu.

Q What is the file capacity of a ProjectSolve site?

A A firm capacity limit has not been set for ProjectSolve[2]. However, if you anticipate requiring more than 4 GB's of storage, we ask that you please contact support@projectsolve.com so that we can adequately plan for your team's needs.

Q How much data can I upload at one time, and can I upload multiple files?

A The ProjectSolve[2] plug-in allows you to drag and drop multiple files. The volume of data that can be successfully uploaded at one time is largely a function of workstation and network factors. Under typical conditions, users can generally upload 100 to 150 MB at a time. This may be affected by available bandwidth. If errors occur, try closing any applications that are not in use and clearing the browser's Temporary Internet Files.

Other Functions

Q Does ProjectSolve[2] work with Microsoft Outlook?

A Yes, provided you have installed the ProjectSolve[2] plug-in, you can set-up synchronization between ProjectSolve Calendars and your personal Outlook Calendars as well as between ProjectSolve Task databases and your Outlook Task List. For additional information, please download the *Outlook Integration Guidelines* from the Tools and Support Resources menu on the my projectsolve page.

Q How do I use the ProjectSolve[2] Online Meeting function?

A To start an Online Meeting for a Calendar Event, open the event, click on Start Meeting and follow the on-screen prompts.

To start an ad hoc meeting, click the meetings and events button on your project's home page, click new meeting and following the on-screen instructions.

To join a Meeting started by someone else, click the link received in your email invitation OR click the meetings and events button on your project's home page, check the box for the meeting you want to join and select enter meeting.

For additional information, please download the *Online Meeting Guidelines* from the Tools and Support Resources menu on the my projectsolve page.

Q How do I access the ProjectSolve[2] CADD View & Markup tool?

A To view a CADD drawing right-click the file's icon and select Preview from the drop-down menu. The CADD View & Markup tool will open in a new window and the contents of the selected file will appear there.

When you are finished viewing the file simply close the Viewer window. Your original browser session will still be open.

Online CADD View & Markup tutorials may be viewed from the Tools and Support Resources menu found on the my projectsolve page.

Operating System: Windows 95 (with Service Pack 2), Windows 98, NT 4.0 (with Service Pack 6a), Windows 2000, Windows XP.

Internet Browser: Microsoft Internet Explorer 5.0 or higher recommended.

Internet Access: High-speed Internet access recommended (DSL, Cable-modem, ISDN, T1 or similar).

For Assistance

To obtain access to a specific ProjectSolve[2] site or if have a question about site content, please contact the Site Coordinator:

Site Coordinator: _____

Email Address:_____

Telephone: _____

For technical support, please contact the
ProjectSolve Client Services Group at
support@projectsolve.com.

For emergency after-hours technical support, please call
1-866-390-5970
(Outside the U.S., please call 303-231-8025).

If you would like to inquire about obtaining a ProjectSolve[2] site for another project, please contact
info@projectsolve.com.

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