

RoundhousePM

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Roundhouse Labs

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Getting Started

RoundhousePM is an affordable project management solution that integrates all of the tools needed to optimize collaboration among project participants. This cloud-based solution makes project management easier, faster and more collaborative. RoundhousePM has multiple interacting Pyramids and a personal SkyView page to optimize the natural flow of information. This information includes: document sharing, tasks, announcements, request for information log (RFI log), submittals log, and photos.

This manual is intended to be an overview for new users as well as a more in-depth guide to assist administrators with the setup of RoundhousePM.

What new users should know

Make sure to review the section **Organization and Terminology** which will explain how RoundhousePM is organized, the meaning of the terms used, the SkyView page, and My Information and Preferences. The section [Standard Modules](#) will explain in greater detail how each module works.

What site administrators should know

Site Administrators should review the section on [Administration](#). This section explains how to create users, user groups, add workspaces, and how to control access to various modules.



Guided Setup – If you have not created your pyramid yet, make sure to read the section on the Guided Setup to help you get started quickly. For more information, [click here](#).

Next: [Organization and Terminology >>](#)

Organization and Terminology

The RoundhousePM Metaverse

The Metaverse is composed of all the companies and users who use RoundhousePM.

Pyramids

Each RoundhousePM subscriber creates their virtual office within the Roundhouse Metaverse. These are called pyramids since their organizational structure resembles that of a hierarchical pyramid with the subscriber at the top level.

Levels

Each subscribers' pyramid is made up of hierarchical levels. These levels are organized as follows (although the naming of levels has some flexibility):



- **Level 1 – Subscriber.** This is your company's private workspace at the uppermost level. Here you can access company-wide information relevant to all users in the company, such as personnel handbooks, policies, and general announcements.
- **Level 2 – Studio or Division.** Your company may be organized in groups or profit centers. The information for the groups at this level can be made accessible only to those within your company, or can also be made accessible to outside companies (consultants) working with your company.
- **Level 3 – Clients.** These are the companies or people you work for. If you, as the subscriber, are a corporation or developer, you may not have a use for this level.
- **Level 4 – Projects, Jobs, or Work.** Each of these workspaces is dedicated to an individual project or something your company is creating. These can be projects as large as a building or as small as a brochure.

Not required but usually needed.

- **Level 5 – Bid Sites or Phases.** These workspaces are useful if you need to break down a project into subcategories such as phases, but a particularly relevant application is to use this level as a Bid Site. Here you can upload only the specific information needed to bid a project. Once the bidding period is over, you can delete access from bidders no longer involved, but keep the information for future reference to documents and RFIs that were used in selecting the winning bidder.



Level 2 and 3 workspaces are optional and are provided to help you organize and present project information to internal studios or to external clients. As you increasingly reap the benefits of seeing the big picture of all your individual project items roll-up to your Level 1 workspace, you'll appreciate how the same holds true for a client who, at their own Level 3 workspace, can see all the open logs are under review for all their projects your company is working on.

Workspaces

A workspace is a collection of modules and all the data associated with those modules.

Modules

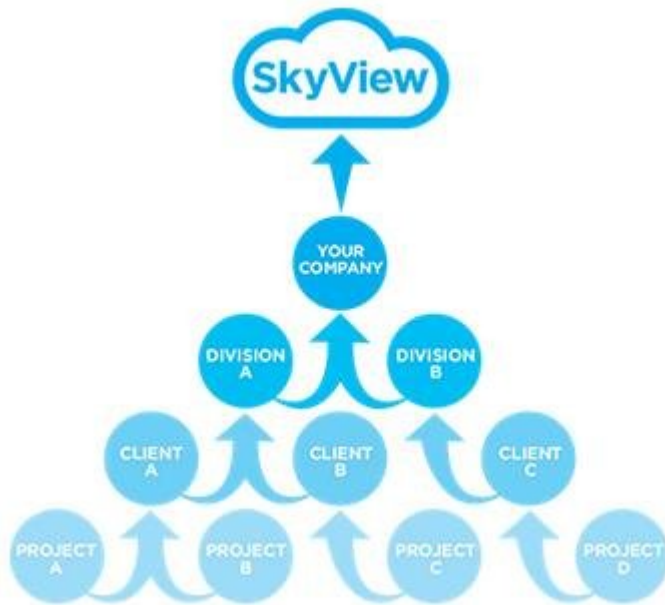
Within workspaces there are Modules. A module contains your data. There are two types of modules:

- RoundhousePM Standard Modules,
- Custom Modules you create (Future release of RoundhousePM)

Roll up / Roll Down

The information contained within modules can be seen at different places within your pyramid. Below are some diagrams and an example of roll-up / roll-down:

Roll Up



Example: Most log information rolls up the pyramid to Level 1 which allows you to see the big picture of what is due across your entire organization.

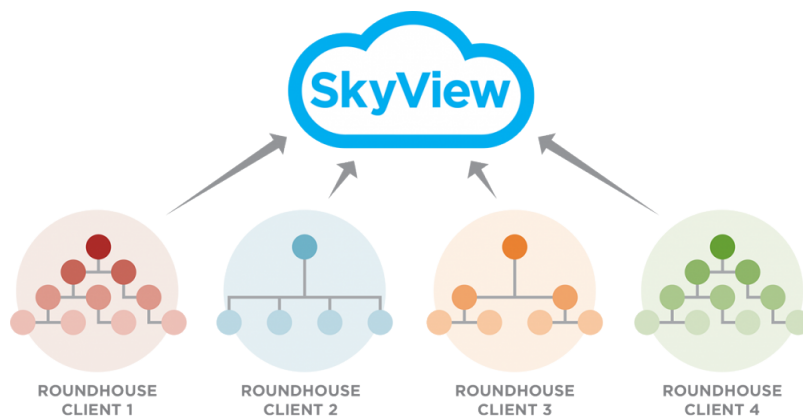
Roll Down



Example: Roll-down is not used as much as roll-up but there are instances where information like standards, or forms for consultants or contractors, need to be made available to other users. This can be accomplished by creating a copy of the Shared Documents module, or creating a custom module, and setting the module's roll-up / roll-down attribute to "roll down". When this module is added to any workspace at Levels 2-5 and roll-down is enabled, anyone who views this module will see these forms. For more information see the administrative section of this manual.

SkyView Page

The SkyView page is the user's personal home page, which allows the user to see across the metaverse all pyramids to which they have access.



SkyView

1 2 3 4 5 View by Name

- Acme Architects
 - Mixed Use
 - Center Partnership
 - Peachtree Lofts
 - The Jones Group
 - The Renaissance Project
 - Retail
 - Cuppa Joe Inc
 - Cuppa Joe #5
 - Cuppa Joe #8
 - Orange Properties
 - Bazaar Redevelopment
 - Luxury Spa
 - Brand Standards
 - Luxury Spa #32
 - Luxury Spa #33
 - Luxury Spa #38

Create New Workspace

Charles Fletcher

Search Administrative Help

Charles Fletcher's SkyView Page

Collapse All / Expand All

View: All Items Items only for me

Announcements

Create New

Acme Architects	Server Down this Weekend	Fletcher, Charles	<input type="checkbox"/>	03/12/15	
Peachtree Lofts	Groundbreaking 04/24/15	Lewis, Bernard	<input checked="" type="checkbox"/>	03/09/15	

Open RFIs

Create New

Luxury Spa #32	RFI-055	Change Order Review	Parker, Tom - Luxury Spa	Standard	02/21/15	-19
Luxury Spa #32	RFI-061	Paver Mockup	Farmer, Albert - Crane Construct	High	03/12/15	0
Cuppa Joe #5	RFI-022	Counter Height at Cashier	Fletcher, Charles - Acme Archite	High	03/27/15	15
Luxury Spa #32	RFI-063	A/C Duct Conflict near Col. C-4	Lewis, Bernard - Acme Archite	Low	03/18/15	6

Open Submittals

Create New

Cuppa Joe #5	Stamped Concrete	Fletcher, Charles - Acme Archite	Low	03/01/15	-11
Peachtree Lofts	Elevator Data / Drawings- Otis	Fletcher, Charles - Acme Archite	High	03/19/15	-7
Cuppa Joe #5	Cashier Millwork	Buck, Sylvia - Acme Architects	High	03/12/15	0
Cuppa Joe #5	Restroom Accessories	Lewis, Bernard - Acme Architect	Standard	03/14/15	2
Cuppa Joe #5	Specialty Lighting	Fletcher, Charles - Acme Archite	High	03/23/15	11
Bazaar Redevelop	Fire Extinguisher Product Data	Fletcher, Charles - Acme Archite	Standard	03/27/15	15

Open Change Orders

Create New

Open Pay Applications

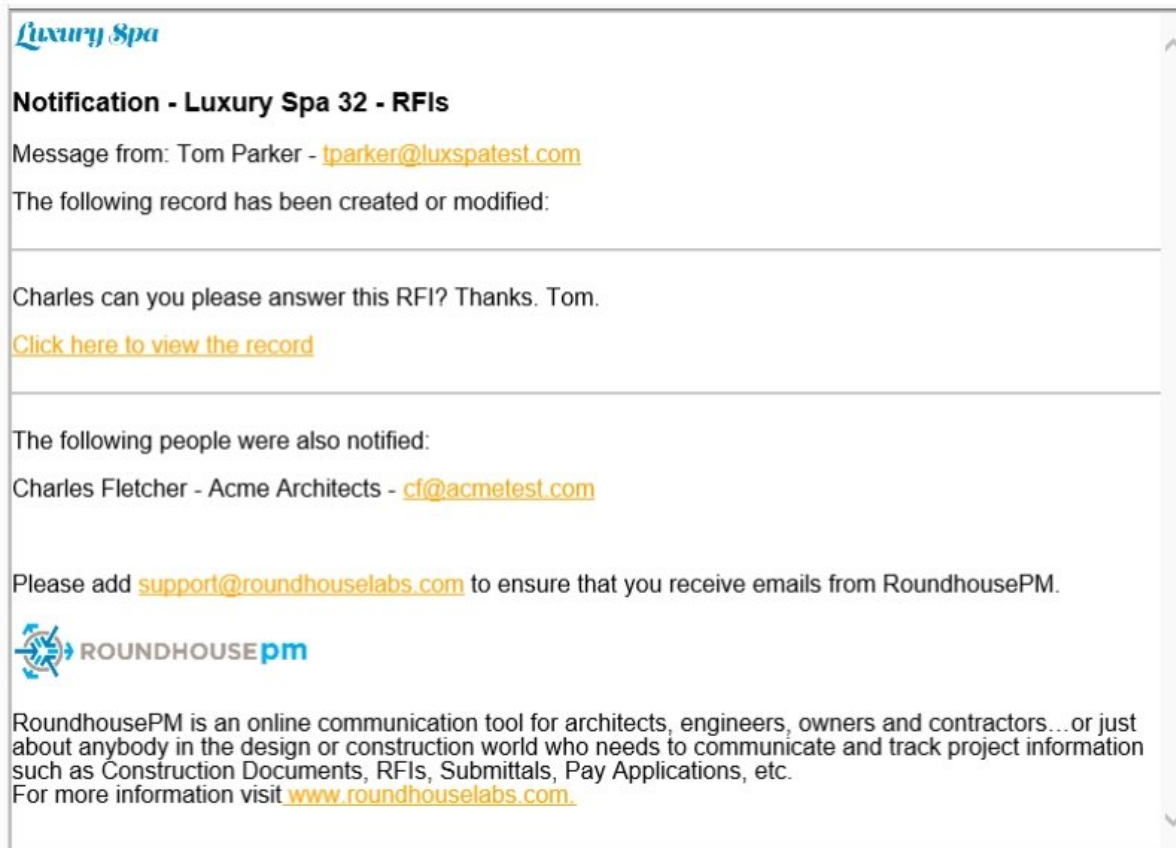
Create New

Luxury Spa #32	PA-006	Pay App - Feb 28, 2015	Fletcher, Charles - Acme Archite	High	03/10/15	-2
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For more information about SkyView pages [click here](#).

Notifications

A Notifications are sent via email by the creator or editor of a record, to inform others about the creation or change to that record.



From this email, users may press *Click here* and view a read-only version of this record and acknowledge receipt of the notification.

Next: [Login >>](#)

Login

There are two locations to login to RoundhousePM

1. Your Custom Login Page
2. RoundhousePM.com or Roundhouse Labs marketing site.

Your Custom Login Page

Each subscriber has their own custom URL for logging into RoundhousePM. This URL is similar to the following:

`https://yourcompanyname.roundhousepm.com`

Where “yourcompanyname” is unique and defined by your administrator.

Below is an example of your custom login screen with company logo.



Hello, Please Sign In...

☐ Remember my information

Log In

[I've forgotten my password?](#)

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RoundhousePM.com or Roundhouse Marketing Site

If you're not a subscriber and don't have a custom login page you can simply go to either of the URLs below:

<http://roundhousepm.com> or <http://roundhouselabs.com>

Click on the Login item in the top menu and the following page will open.



Hello, Please Sign In...

☐ Remember my information

Log In

[I've forgotten my password?](#)

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If you're a registered user of RoundhousePM your login is your email address. Only **Guest User** accounts are not email addresses.

Next: [RoundhousePM Main Screen >>](#)

RoundhousePM Main Screen

The screenshot shows the RoundhousePM interface for the 'Cuppa Joe #5' project. The header includes the user 'Charles Fletcher', search, administrative, and help links. The main content area is divided into sections: 'Introduction' with a welcome message, 'Announcements' with two entries, 'Open RFIs' with three entries, 'Open Submittals' with four entries, 'Open Change Orders', and 'Open Pay Applications' with one entry. A sidebar on the left shows the project name, a map of Tampa, FL, and the current temperature of 53°F.

ACME ARCHITECTS

Cuppa Joe #5
SkyView > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #5 > Workspace Summary

Workspaces | **Workspace Summary** | General Info | Documents | Logs | Miscellaneous

Introduction

Welcome to Cuppa Joe #5 -- the online hub for all the project documents you'll need to access while the project is being designed and constructed. Cuppa Joe #5 will be Cuppa Joe's flagship store in the Tampa, Florida market. This first location is located in the new shopping district on Dale Mabry Blvd, and will be a neighbor to major new hotels as well as the football and baseball stadiums. The outdoor seating area will be shaded by two-level arbor, and enhanced by stone fountains.

Collapse All / Expand All

Announcements | **Create New**

Cuppa Joe #5	Site Visit for IDP 03/29/15	Fletcher, Charles - Acme Archite	<input type="checkbox"/>	03/12/15	
Cuppa Joe #5	New Superintendent Starting	Lewis, Bernard - Acme Architect	<input type="checkbox"/>	03/06/15	

Open RFIs | **Create New**

Cuppa Joe #5	RFI-055	Change Order Review	Parker, Tom - Luxury Spa	Standard	02/21/15	-19
Cuppa Joe #5	RFI-061	Paver Mockup	Farmer, Albert - Crane Construct	High	03/12/15	0
Cuppa Joe #5	RFI-022	Counter Height at Cashier	Fletcher, Charles - Acme Archite	High	03/27/15	15

Open Submittals | **Create New**

Cuppa Joe #5	Stamped Concrete	Fletcher, Charles - Acme Archite	Low	03/01/15	-11
Cuppa Joe #5	Cashier Millwork	Buck, Sylvia - Acme Architects	High	03/12/15	0
Cuppa Joe #5	Restroom Accessories	Lewis, Bernard - Acme Architect	Standard	03/14/15	2
Cuppa Joe #5	Specialty Lighting	Fletcher, Charles - Acme Archite	High	03/23/15	11

Open Change Orders | **Create New**

Open Pay Applications | **Create New**

Cuppa Joe #5	PA-004	Pay App - Feb 28, 2015	Fletcher, Charles - Acme Archite	High	03/16/15	4
--------------	--------	------------------------	----------------------------------	------	----------	---

Tampa, FL
Monday 9:00 PM
Clear
53°F | °C

Above is the standard RoundhousePM interface. This is broken down into two areas: **the header** and **the area below the header**.

Header

The header section of the interface is shown with numbered callouts (1-10) highlighting key elements:

- ACME ARCHITECTS logo
- Cuppa Joe #5 project title
- Navigation breadcrumb: SkyView > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #5 > Workspace Summary
- User profile: Charles Fletcher
- Search button
- Administrative link
- Help link
- Workspace Summary tab
- General Info tab
- Documents tab
- Logs tab
- Miscellaneous tab

1. Subscriber Logo
2. Workspace Name
3. Breadcrumb path for where you are within your pyramid
4. Header menu bar which contains the current user name with a menu to access User Info and Preferences and Log out, Administration, and Help
5. Workspace Explorer tab to navigate to workspaces and projects you have in your pyramid
6. Project Summary tab for an overview of the workspace and it's modules
7. General menu for access to [Announcements](#), [Contacts](#), and [Tasks](#)
8. Documents menu to access [Drawings](#), [Specifications](#), and [Documents](#)
9. Logs menu to access [RFI Log](#), [Submittal Log](#), [Photos](#), [Field Reports](#), [Change Order Proposal Log](#), [Change Order Log](#), and [Pay Application Log](#)
10. Miscellaneous menu to access custom modules (future).

Area below the header

Cuppa Joe #5

For information about this project, contact Sylvia Buck or Charles Fletcher.

Tampa, FL
Monday 9:00 PM
Clear
53°F | °C

Introduction

Welcome to Cuppa Joe #5 -- the online hub for all the project documents you'll need to access while the project is being designed and constructed. Cuppa Joe #5 will be Cuppa Joe's flagship store in the Tampa, Florida market. This first location is located in the new shopping district on Dale Mabry Blvd, and will be a neighbor to major new hotels as well as the football and baseball stadiums. The outdoor seating area will be shaded by two-level arbor, and enhanced by stone fountains.

Collapse All / Expand All

Announcements **Create New**

Cuppa Joe #5	Site Visit for IDP 03/29/15	Fletcher, Charles - Acme Archite	<input type="checkbox"/>	03/12/15	15
Cuppa Joe #5	New Superintendant Starting	Lewis, Bernard - Acme Architect	<input type="checkbox"/>	03/06/15	16

Open RFIs **Create New**

Cuppa Joe #5	RFI-055	Change Order Review	Parker, Tom - Luxury Spa	Standard	02/21/15	-19	17
Cuppa Joe #5	RFI-061	Paver Mockup	Farmer, Albert - Crane Construct	High	03/12/15	0	
Cuppa Joe #5	RFI-022	Counter Height at Cashier	Fletcher, Charles - Acme Archite	High	03/27/15	15	

Open Submittals **Create New**

Cuppa Joe #5	Stamped Concrete	Fletcher, Charles - Acme Archite	Low	03/01/15	-11
Cuppa Joe #5	Cashier Millwork	Buck, Sylvia - Acme Architects	High	03/12/15	0
Cuppa Joe #5	Restroom Accessories	Lewis, Bernard - Acme Architect	Standard	03/14/15	2
Cuppa Joe #5	Specialty Lighting	Fletcher, Charles - Acme Archite	High	03/23/15	11

Open Change Orders **Create New**

Open Pay Applications **Create New**

Cuppa Joe #5	PA-004	Pay App - Feb 28, 2015	Fletcher, Charles - Acme Archite	High	03/16/15	4
--------------	--------	------------------------	----------------------------------	------	----------	---

11. Workspace photo or logo
12. Text defined by the Site Administrator
13. Location map (optional)
14. Location weather (optional)

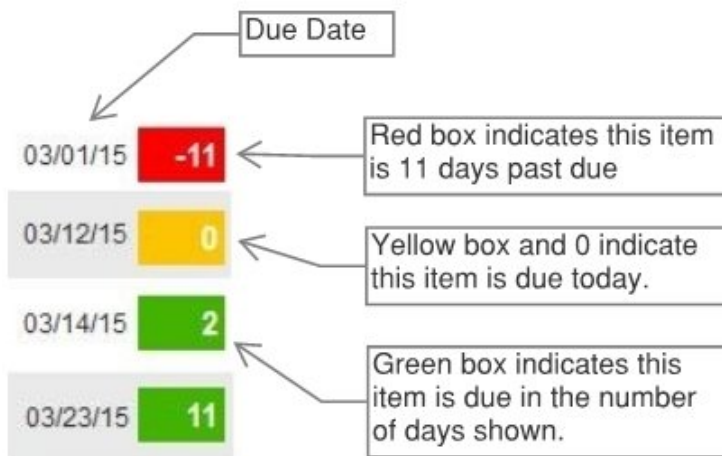
15. Introduction / Welcome / Instructions to Bidders is a text area where the Site Administrator can write information about this workspace.

16. Announcements (optional) can display recent announcements for this workspace.

17. Modules with open items displayed.

Due Dates

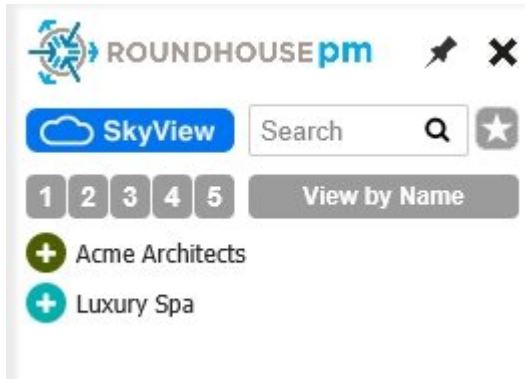
The numbers in the colored boxes indicate how many days until an item is due.



Next: [The Workspace Explorer >>](#)

The Workspace Explorer

The Workspace Explorer is used to navigate between your workspaces:



11. SkyView button opens your SkyView page
12. Search allows you to filter the workspaces
13. Favorites button will toggle between all the workspaces you have access to and those you identified as your favorites. For more information see User Preferences
14. Workspace Level buttons will collapse or expand the pyramid to the level selected
15. View by Name / View by Pyramid button toggles the display of workspaces between hierarchy or alphabetically by workspace name
16. Workspaces

View by Pyramid

The screen below shows the workspaces organized By Pyramid

The numbers 1, 2, 3, 4, and 5 are the numbers of the workspace levels. Clicking on any of these numbers will expand or contract the explorer to that level:



View by Name

The screen below shows the workspaces ordered alphabetically. If the user has access to more than one pyramid, the workspaces will be intermixed:

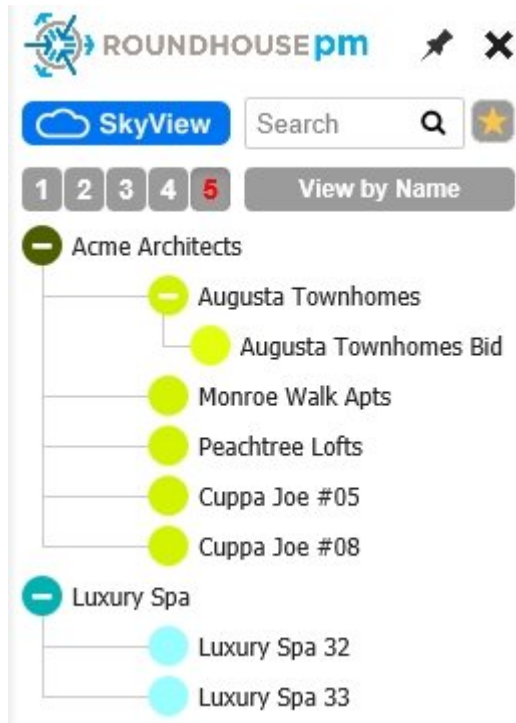


The screenshot shows the RoundhousePM web application interface. At the top left is the RoundhousePM logo, followed by a pin icon and a close icon. Below the logo is a 'SkyView' button with a cloud icon, a search bar with the text 'Search', a magnifying glass icon, and a star icon. A grey button labeled 'View by Pyramid' is selected. Below this button is a list of 20 workspaces, each preceded by a colored circle containing a number. The workspaces are: Acme Architects (1), Augusta Townhomes (4), Augusta Townhomes Bid Site (5), Center Partnership (3), Cuppa Joe #05 (4), Cuppa Joe #08 (4), Cuppa Joe #12 - Start Here (4), Cuppa Joe #15 (4), Cuppa Joe Inc (3), Luxury Spa 32 (4), Luxury Spa 33 (4), Monroe Walk Apts (4), Multifamily (2), Orange Properties (3), Peachtree Lofts (4), Retail (2), The Jones Group (3), and The Renaissance Project (4).

Count	Workspace Name
1	Acme Architects
4	Augusta Townhomes
5	Augusta Townhomes Bid Site
3	Center Partnership
4	Cuppa Joe #05
4	Cuppa Joe #08
4	Cuppa Joe #12 - Start Here
4	Cuppa Joe #15
3	Cuppa Joe Inc
4	Luxury Spa 32
4	Luxury Spa 33
4	Monroe Walk Apts
2	Multifamily
3	Orange Properties
4	Peachtree Lofts
2	Retail
3	The Jones Group
4	The Renaissance Project

Favorites

Clicking the Favorites button in either of the above views displays only the workspaces that have been identified as Favorites on the [User Info and Preferences](#) page:



Favorites Filters

RoundhousePM allows you to identify ANY workspace as a Favorite so you can easily find what you're looking for in the Workspace Explorer.

Now when you activate Favorites, RoundhousePM not only filters what you see in the Workspace Explorer, but it also filters the information shown on your SkyView Page, Workspace Summary pages, and/or within any module such as RFIs and Submittals. No longer do you have to be bothered with project information unrelated to you.

Below is an example from TestDrive of how Charles Fletcher's Skyview page changes when Favorites is turned on:

On the top, with Favorites Off, you will notice that the Workspace Explorer shows all the workspaces for these two pyramids, and the Skyview page is displaying all open RFIs for every project in both pyramids. There are so many RFIs displayed that the Submittals section does not even appear on the screen.

On the bottom, with Favorites On, you now see only the 2 workspaces Charles Fletcher tagged as Favorites. The only information shown on his Skyview page pertain to those 2 projects.

SkyView

Search

1 2 3 4 5

View by Name

- Acme Architects
 - Multifamily
 - Center Partnership
 - Augusta Townhomes
 - Augusta Townhomes Bid
 - Monroe Walk Apts
 - Peachtree Lofts
 - The Jones Group
 - The Renaissance Project
 - Retail
 - Cuppa Joe Inc
 - Cuppa Joe #05
 - Cuppa Joe #08
 - Cuppa Joe #12 - Start Here
 - Cuppa Joe #15
 - Orange Properties
 - Luxury Spa
 - Luxury Spa 32
 - Luxury Spa 33

Charles Fletcher's SkyView Page

Charles Fletcher

Administrative

Help

Collapse All / Expand All

View: ☒ All Items ☐ Items only for me

Announcements

Tasks

RFIs

Cuppa Joe #08	RFI-0001	Existing electrical p ...	Bernard, Lewis - Metro Engineers Inc	High	01/14/2016	-21
Cuppa Joe #12 - Start Here	RFI-0001	Deck Fastening - Nail ...	Fletcher, Charles - Acme Architects	Standard	01/23/2016	-12
Cuppa Joe #12 - Start Here	RFI-0003	Toilet Accessories	Fletcher, Charles - Acme Architects	Low	01/26/2016	-9
Cuppa Joe #12 - Start Here	RFI-0004	Fire Marshal and Exit ...	Bronte, Charlotte - Acme Architects	High	01/26/2016	-9
Augusta Townhomes	RFI-0003	Carpet is out of stoc ...	Buck, Sylvia - Acme Architects	Standard	01/30/2016	-5
Augusta Townhomes Bid Site	RFI-0001	Bid Date Extension	Buck, Sylvia - Acme Architects	Standard	01/30/2016	-5
Luxury Spa 33	RFI-0001	Cedar Plank Specifica ...	Fletcher, Charles - Acme Architects	Standard	01/31/2016	-4
Peachtree Lofts	RFI-0001	Restroom Floor Tile C ...	Mahoney, David - Acme Architects	Low	02/01/2016	-3
Cuppa Joe #12 - Start Here	RFI-0006	Concrete Finish	Fletcher, Charles - Acme Architects	Low	02/03/2016	-1
Augusta			Bronte, Charlotte			

Favorites Off

ROUNDHOUSEpm

SkyView

Search

12345

View by Name

Acme Architects

Cuppa Joe #12 - Start Here

Cuppa Joe #15

Charles Fletcher's SkyView Page

Charles Fletcher Administrative Help

ROUNDHOUSEpm

Collapse All / Expand All

View: All Items Items only for me

Announcements

Tasks

RFIs

Cuppa Joe #12 - Start Here	RFI-0001	Deck Fastening - Nail ...	Fletcher, Charles - Acme Architects	Standard	01/23/2016	-12
Cuppa Joe #12 - Start Here	RFI-0003	Toilet Accessories	Fletcher, Charles - Acme Architects	Low	01/26/2016	-9
Cuppa Joe #12 - Start Here	RFI-0004	Fire Marshal and Exit ...	Bronte, Charlotte - Acme Architects	High	01/26/2016	-9
Cuppa Joe #12 - Start Here	RFI-0006	Concrete Finish	Fletcher, Charles - Acme Architects	Low	02/03/2016	-1
Cuppa Joe #12 - Start Here	RFI-0007	Faucet Mounting Detai ...	Bronte, Charlotte - Acme Architects	Standard	02/06/2016	2

Submittals

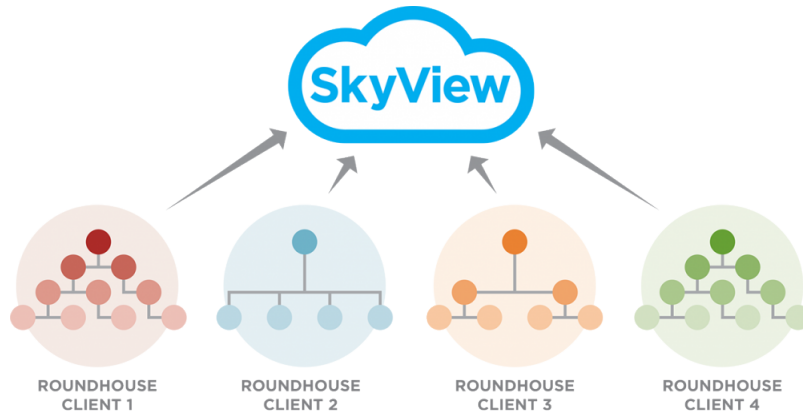
Cuppa Joe #12 - Start Here	09 2900-01	Millwork for Sales Ar ...	Fletcher, Charles - Acme Architects	Standard	01/19/2016	-16
Cuppa Joe #12 - Start Here	23-3000-01	Ductwork Layout	Fletcher, Charles - Acme Architects	Standard	01/30/2016	-5
Cuppa Joe #12 - Start Here	08-1000-01	Interior Doors	Fletcher, Charles - Acme Architects	Standard	02/11/2016	7

Favorites On

Next: [The Skyview Page >>](#)

The Skyview Page

The SkyView Page is the user's personal area within RoundhousePM. It offers the user a view of all items in which they are involved, across all pyramids to which they have access:



Why is the SkyView Page useful? This is where RoundhousePM outshines all other project management programs. Consider the following scenarios:

- Architects with joint ventures – Each JV firm has their own pyramid in the Roundhouse metaverse. From the user's SkyView page they see all the joint venture projects' open items for all the firms within the joint venture.
- Clients working with multiple architects – From their SkyView page, clients can see all open items for all their projects, regardless of which architecture firm is doing the work.
- Contractors who work with multiple architects – From their SkyView page contractors can see all open items for all their project,s regardless of which firm is the architect.


SkyView page contents

Charles Fletcher's SkyView Page

Charles Fletcher Administrative Help

ROUNDHOUSEpm

[Workspaces](#)



[Collapse All / Expand All](#)

View: ☒ All Items ☐ Items only for me

Announcements

Orange Properties	Sign Standards	Fletcher, Charles - Acme Architects	<input type="checkbox"/>	09/20/2015 19:16	
-------------------	----------------	-------------------------------------	--------------------------	------------------	--

Tasks

RFIs

Cuppa Joe #12	RFI-0003	Toilet Accessories	Fletcher, Charles - Acme Architects	Low	09/07/2015	-60
Cuppa Joe #12	RFI-0004	Fire Marshal and Exit ...	Fletcher, Charles - Acme Architects	High	09/11/2015	-56
Augusta Townhomes	RFI-0001	Paint Colors	Mahoney, David - Acme Architects	Standard	09/12/2015	-55
Cuppa Joe #12	RFI-0001	Deck Fastening - Nail ...	Fletcher, Charles - Acme Architects	Standard	09/18/2015	-49
			Mahoney,			

The SkyView page is very similar to the Project Summary page

Next: [My Information and Preferences >>](#)

My Information and Preferences


General

In this area the user submits their contact information for the workspace Contact List:

Charles Fletcher
User Preferences

Charles Fletcher Administrative Help

Workspaces



Upload

General

This page contains information about yourself and your preferences for you interact with RoundhousePM

Tips:

1. NEVER USE ALL UPPER CASE TEXT when filling out the fields.
2. Enter information as shown on your business card to maintain consistent spelling and abbreviations across your company. Otherwise, you should make sure that all previous persons are using the same formatting. If you do not follow a standard then lists that display user's names and companies will not be consistent and may lead to user confusion.

User Information

Name *	Mr. Charles Fletcher	Suffix
Title	Principal	
Email *	cf@acmetest.com	
Phone	404-555-1212	
Mobile	404-555-1313	
Fax		
Preferred phone number	phone	
Company	Acme Architects	
Address 1	100 Peachtree Street	
Address 2	Suite 1450	
City	Atlanta	
State	Georgia	
Zip Code	30303	
Country	United States	

My Login Information

In this area you can change your password and security question.

Login and Password

Login (display email address above)

Current Password

New Password

Re-enter Password

Security QuestionWhat is your pet name?

Answer

snoopy

My Favorite Workspaces

If you have access to a lot of projects, RoundhousePM allows you to quickly filter the Workspace Explorer to see only the workspaces you work with the most. Simply check the box for the workspaces you want to be included as a favorite.

To see your Favorites, toggle the Favorites button in the Workspace Explorer

Favorites

To focus on the information that is most important to you, create favorite workspaces.

Search

1 2 3 4 5 View by Name Favorites?

Acme Architects

Multifamily

Center Partnership

Augusta Townhomes

Augusta Townhomes Bid Site

Monroe Walk Apts

Peachtree Lofts

The Jones Group

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SkyView Page Setup

Here the user can set which modules they want to appear on their SkyView page.

SkyView Page Setup

Visible?	List to display?	Records to display
<input checked="" type="checkbox"/>	Announcements	All
<input checked="" type="checkbox"/>	Tasks	All
<input checked="" type="checkbox"/>	RFIs	All
<input checked="" type="checkbox"/>	Submittals	All
<input checked="" type="checkbox"/>	Change Orders Proposals	All
<input checked="" type="checkbox"/>	Change Orders	All
<input checked="" type="checkbox"/>	Pay Apps	All

Daily Digest

Check the box and RoundhousePM will email your SkyView page to you.

Daily Digest

☐ Email me daily digests about my RoundhousePM active items

Logout Time

Select the duration RoundhousePM will run before it automatically logs out.

Log Out Time

Automatically log out after

Save

Cancel

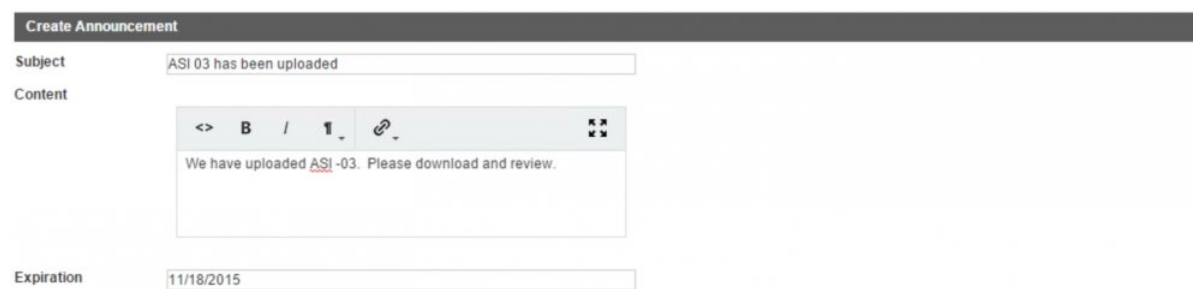
Next: [Communications – Announcements and Notifications >>](#)

Communications – Announcements and Notifications

It is very easy to keep other project participants informed with Roundhouse's **Announcements** and **Notifications**.

When creating or editing a record, the user has the option to create an announcement or send an email notification.

Announcements



The screenshot shows a 'Create Announcement' form. It has three main fields: 'Subject', 'Content', and 'Expiration'. The 'Subject' field contains the text 'ASI 03 has been uploaded'. The 'Content' field is a rich text editor with a toolbar containing icons for bold, italic, underline, link, and list. The text inside the editor reads 'We have uploaded ASI -03. Please download and review.' The 'Expiration' field contains the date '11/18/2015'.

To create an Announcement, enter a subject, description, and an expiration date for how long this announcement will be displayed. When you save the record, the announcement will be created and displayed in the Announcements module of the current workspace.

Notifications

Send Notification

Recipients

Not selected

Search

Workspace Users

Company	Name
Acme Architects	Bronte, Charlotte
Acme Architects	Buck, Sylvia
Acme Architects	Mahoney, David
Crane Construction	Farmer, Albert
Superior Mechanical	Fassett, John

Non-Workspace Users

For recipients who are not workspace users, enter each email address on a separate line

Selected

Search

Company	Name
Metro Engineers inc	Bernard, Lewis
Acme Architects	Fletcher, Charles

eg. name@domain.com, one per line

Sender

Farmer, Albert

Email Subject

Cuppa Joe #08 / RFIs / RFI-0000

Electrical panel damage

The workspace/module name/number will be added to the subject line to help recipient identify correct record.

Email Message

I've created a RFI for a problem that we have with the electrical panel.

To send an email Notification, you will see the names of all users of the current workspace listed on the left-hand side of the screen. Select the name(s) of the user(s) you want to send the notification, then press the ">" button to move those name(s) to the right-hand side of the screen. (See image above)

If you want to include recipients to the email Notification who are not users of this workspace, you can enter their email address manually.

Select the name of the person sending the notification. The default value here is the name of the current user. If another user is creating a record on behalf of someone else, the user can enter the name of that person instead.

Enter the email subject and a short description.

When the record is saved the email will be sent to all selected users, and the sender will be copied.



RoundhousePM automatically puts the name of the workspace and the record information in the email notification subject. Any additional text you enter will be appended after this information.

Next: [Standard Modules >>](#)

Standard Modules

The following modules are available for each workspace:

General Menu

- [Announcements](#)
- [Contacts](#)
- [Tasks / To-Do's](#)

Documents Menu

- [Drawings](#)
- [Specifications](#)
- [Documents](#)
- Duplicates of the Documents module created by the site administrator appear here.

Logs Menu

- [Request for Information Log](#) (RFI Log)
- [Submittal Log](#)
- [Photos](#)
- [Field Reports](#)
- [Emails](#)
- [Change Order Proposal Log](#)
- [Change Order Log](#)
- Pay Application Log

Miscellaneous Menu

- Custom Modules created by the site administrator appear here.



The site administrator for your pyramid controls which modules are visible for each workspace and which user group has access to each type of module.



The Plans and Specs modules can only be used in a Level4 or Level5 workspace. While this may seem like a limitation, it assures that the organization of the pyramid is consistent across all users of RoundhousePM.

Next: [Announcements >>](#)

Announcements

Do you have important information for the users of a workspace? Create an announcement. Below is the main screen for the Announcement module.

The screenshot shows the 'Announcements' module for 'Luxury Spa #32'. The interface includes a top navigation bar with the user 'Charles Fletcher', a search bar, and links for 'Administrative' and 'Help'. Below the navigation bar are tabs for 'Workspaces', 'Workspace Summary', 'General Info', 'Documents', 'Logs', and 'Miscellaneous'. The 'Announcements' section has a filter dropdown set to 'All' and a scope dropdown set to 'This workspace and all workspaces below'. A search bar and a 'Create New' button are also present. The main content is a table of announcements.

Workspace	Subject	Creator	Date	Read	Flag	
Luxury Spa #32	OAC Meeting - This Thursday at 10 am	Fletcher, Charles - Acme Architects	02/03/2015 - 3:30 pm	<input type="checkbox"/>	<input type="checkbox"/>	▼
Luxury Spa #32	Tile submittal has been reviewed	Lewis, Bernard - Acme Architects	01/23/2015 - 4:33 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
Luxury Spa #32	A/C Duct Conflict near Col. C-4	Faraday, Richard - Crane Constr	01/21/2015 - 10:00 am	<input type="checkbox"/>	<input type="checkbox"/>	▼
Luxury Spa #32	<p>Revision 2 has been released</p> <p>Please go to both Documents>Plans and Documents>Specs and download a complete set of documents. This revision included changes to:</p> <ol style="list-style-type: none"> 1. Floor tile spec and layout has changed. 2. Elimination of one customer care suite. 3. MEP changes as the result of the elimination of the suite. <p>Expires: 03/04/2016</p>	Lewis, Bernard - Acme Architects	12/30/2014 - 8:30 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Luxury Spa #32	Storefront submittal has been reviewed	Lewis, Bernard - Acme Architects	12/23/2014 - 09:04 am	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
Luxury Spa #32	RFI 10 - Tile out of stock	Faraday, Richard - Crane Constr	03/26/2015 - 10:00 am	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼

At the top are drop-down menus that allow you to filter the information shown:

- All
- Unread
- Flagged
- Expired
- This workspace
- This workspace and all workspaces below

Creating a New Announcement

Announcements can be created on the main page by clicking the **Create New** button, or when a record is created within another module.

Below is the screen for creating a new announcement.

The screenshot shows the 'Create Announcement' form within the RoundhousePM interface. The header includes the 'ACME ARCHITECTS' logo, the workspace name 'Cuppa Joe #08', and a breadcrumb trail: 'Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #08'. The user 'Charles Fletcher' is logged in, with 'Administrative' and 'Help' links. A navigation bar contains tabs: '< Workspaces', 'Workspace Summary', 'General Info' (selected), 'Documents', and 'Logs'. Below the tabs, the 'Announcements' section is active. The form itself has a title bar 'Create Announcement' and three fields: 'Subject *' (a text input), 'Content' (a rich text editor with bold, italic, link, and list icons), and 'Expiration *' (a date/time input).



All announcements must have an expiration date which removes them from the SkyView and Workspace Summary pages. After their expiration date these announcements can still be viewed in the Announcements module by selecting View: Expired.

Next: [Contacts >>](#)

Contacts

RoundhousePM's Contact module displays all users of the current workspace and all workspaces below.

Contacts - This workspace and all workspaces below

Name	Company	Email	Preferred Phone
Bronte, Charlotte	Acme Architects	charlotte.bronte@acmearchitects.com	(404) 555-4500
Buck, Sylvia	Acme Architects	sylvia.buck@acmearchitects.com	(404) 555-4500
Faraday, Richard	Crane Construction	rfaraday@craneconstructs.com	(912) 555-9183
Farmer, Albert	Crane Construction	afarmer@craneconstructs.com	(912) 555-1980
Fassett, John	Superior Mechanical	JF9183@yahoo.com	(770) 555-1093
Fletcher, Charles	Acme Architects	charles.fletcher@acmearchitects.com	(404) 555-4501
Foster, Robert	Cuppa Joe Inc	rfoster@cuppajoe.com	(212) 555-7000
Lewis, Bernard	Acme Architects	bernard.lewis@acmearchitects.com	(678) 555-3019
Mahoney, David	Acme Architects	david.mahoney@acmearchitects.com	(404) 555-4500

If you only want to see the members of the current workspace, select “Current Workspace Only”.

Creating a New Contact

Most people in the Contacts module are users that you’ve invited to participate in your pyramid or workspace. However, there are times when you want someone listed under Contacts but don’t need them to be participants. Examples of these may be code officials, vendors, or reproduction houses. For these contacts use the **Create New** button.

Contacts

Name *	Mr. ▼	First	Last	Suffix
Title				
Email *				
Phone *				
Mobile				
Fax				
Company *				
Address 1 *				
Address 2				
City *				
State *				
Zipcode *				
Country *	United States ▼			
Notes				

Save **Cancel**




Tip: If you feel that a person should be a member of the workspace, do not manually add them to the Contacts module. Instead, ask your Site Administrator to invite them to join the workspace.

Next: [Tasks \(To-Do's\) >>](#)


Tasks (To-Do's)

The Task module allows users to create, assign due dates, and prioritize to-do items for workspace users.



Luxury Spa
 SkyView > Luxury Spa > Tasks

Charles Fletcher ▾ Search Administrative Help ▾



[< Workspaces](#)
[Workspace Summary](#)
[General Info](#)
[Documents](#)
[Logs](#)
[Miscellaneous](#)

Tasks -

All ▾

This workspace and all workspaces below ▾

[Create New](#)

Workspace ▴	Subject ▴	Assigned User ▴	Priority ▴	Date Due ▴	+/- ▴
▶ Luxury Spa #38	Send architect a contract	Parker, Tom - Luxury Spa	High	02/19/15 - 3:30 pm	<div>-20</div> ▾
▶ Luxury Spa #33	Review spec sections	Bernard, Lewis - Acme Architects	Standard	03/12/15 - 8:00 am	<div>0</div> ▾
▶ Luxury Spa #38	QC review of Lux Spa 38	Bernard, Lewis - Acme Architects	Standard	03/24/15 - 1:00 pm	<div>12</div> ▾
▲ Brand Standards	Standards Review Tom, can you please review the latest standards? I think that we've been sending out information that is not correct and the architects and contractors are confused, rightfully so. If you would like we can have a meeting and discuss this in person. You have my number :-) Sally Jones	Parker, Tom - Luxury Spa	High	03/23/15	▾
▶ Luxury Spa #38	Send schedule to client	Fletcher, Charles - Acme Architects	Standard	02/24/15	▾
▶ Luxury Spa #32	Call client	Fletcher, Charles - Acme Architects	Low	02/12/15	▾

Creating a New Task

Tasks

Subject *

Description *

User Assigned *

Due Date *

Due Time *

Priority * ☐ Low ☒ Standard ☐ High

Complete * ☒ No ☐ Yes



Tasks are not only for tracking small items, tasks can also be used to track major project milestones such as the due date of a project phase, a permit release, or a date of construction completion.

Next: [Drawings >>](#)

Drawings

The Drawings module ensures everyone is accessing the most current release set. It also tracks all previous release set versions, which are always accessible for users to see the changes from one release set to the next.

The Main Screen

The screenshot shows the 'Drawings' module interface. At the top, the user 'Charles Fletcher' is logged in. The breadcrumb trail is 'SkyView > Acme Architects > Mixed Use > Center Partnership > Peachtree Lofts > Plans'. The 'Documents' tab is selected. Below the tabs, there are two drop-down menus: 'Active Release Set (Consolidated)' and 'All Disciplines'. A search bar and a 'Prepare New Release Set' button are also present. The main table lists 14 files, including architectural drawings and structural notes. A preview of a drawing is shown for sheet A502.

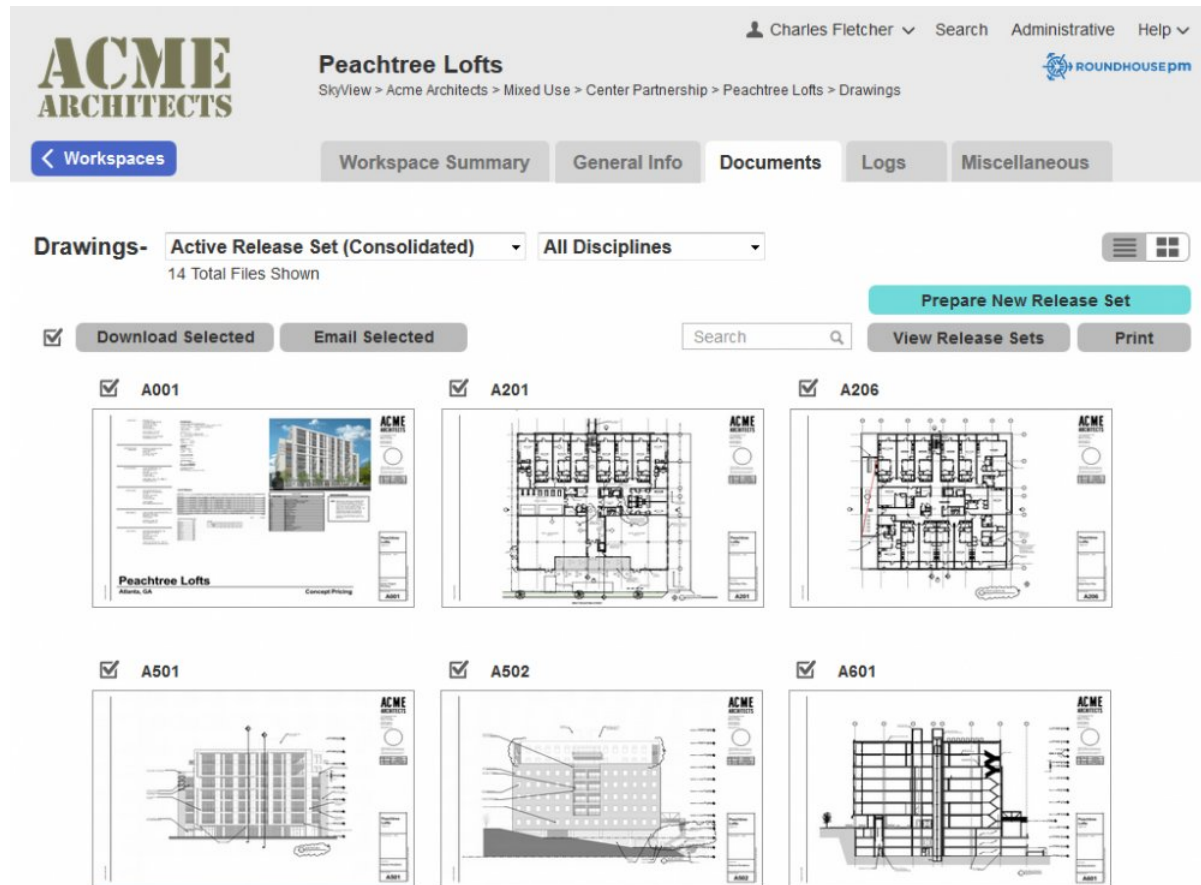
Sheet	Sheet Title	Discipline	Release Set	Filename
A001	Cover	Architectural	Concept Pricing 2	2014.45-a001.pdf
A201	First Floor Plan	Architectural	Concept Pricing	2014.45-a201.pdf
A206	Typical Floor Plan	Architectural	Concept Pricing 2	2014.45-a206.pdf
A501	Front Elevation	Architectural	Concept Pricing	2014.45-a501.pdf
A502	Rear Elevation	Architectural	Concept Pricing	2014.45-a502.pdf
A601	Building Section	Architectural	Concept Pricing	2014.45-a601.pdf
A602	Building Section	Architectural	Concept Pricing 2	2014.45-a602.pdf
S100	Structural Notes	Structural	Concept Pricing 2	S100.pdf

Uploaded by: Mahoney, David - Acme Architects
Size: 1.43 mb
Upload Date: 12/14/2014 - 09:13 am

At the top of the page there are two drop-down menus that allow you to change what is displayed. The left drop-down menu allows you to see previous release sets. The right drop-down menu allows filtering the current view by discipline.



To the right of these drop-down menus is a toggle button that allows the view to change from rows to large thumbnails of each sheet, as shown below.



Preparing a New Release Set

The screen below shows how to create a new release set. Until this set is **Published** *it is called a ***Pending Set**.

Release No.
0000

Release Set Date
11/07/2015

Release Set Name
Pending Set

Description

+ Upload Files

☐ SmartUpload ?

The Smart Upload tries to identify the sheet number, name and discipline based on the uploaded file name.

Save Set In Progress

Cancel Set In Progress

Publish / Release

Pre-Release Set - **All Disciplines** ▼

0000 Total Files Shown

Search

Sheet	Sheet Title	Discipline	File Name
▶		--Select--	A001 - Cover, Project Directory.pdf
▶		--Select--	A002 - Index - Code Info - Apbrev. - Occupancy.pdf
▶		--Select--	A101 - Existing - Demo Plan.pdf
▶		--Select--	A201 - Proposed Floor Plans.pdf
▶		--Select--	A251 - Proposed Finish Plans.pdf

File size: 953.11 KB
 Uploaded by: Fletcher, Charles - Acme Architects
 Uploaded on: 11/07/2015 19:44

Follow these steps to create a new release set:

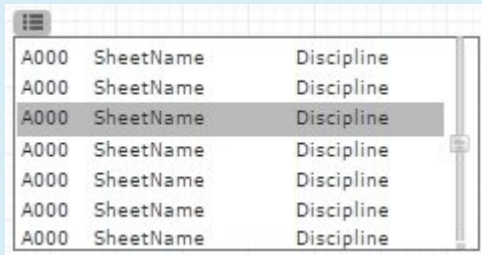
1. Enter the Release Date
2. Enter the Release Set Name (e.g. For Pricing, For Permitting, For Construction, Revision 1, ASI 1, etc.)
3. Enter the Release Description. (e.g. This release contains the change to the..., This is the pricing set and contains all disciplines needed to price the project.)
4. If using the SmartUpload Feature, check the box. For more information on SmartUpload see below.
5. Upload your files.
6. Enter the Sheet Number and Sheet Name
7. Select the Discipline from the dropdown.

It is a good idea to Save Set In Progress to make sure you do not lose any of your work.

When all files are uploaded and named correctly, press the **Publish / Release** button. This set will now appear as files on the main screen.



Tip: Once you have entered the documents number, name, and discipline, you can easily enter this information next time by clicking on the button on the left when you create the next release set.



A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline
A000	SheetName	Discipline

SmartUpload – The faster way to create a release set

The previous method of creating a release set works well, but RoundhousePM has an even faster way of doing this, as long as you follow some naming conventions for the PDF files. If you follow these guidelines, RoundhousePM will parse the file names and complete the Sheet Number, Sheet Title and even select the correct Discipline for the sheet. All that is left for you to do is to review that everything has been entered correctly.

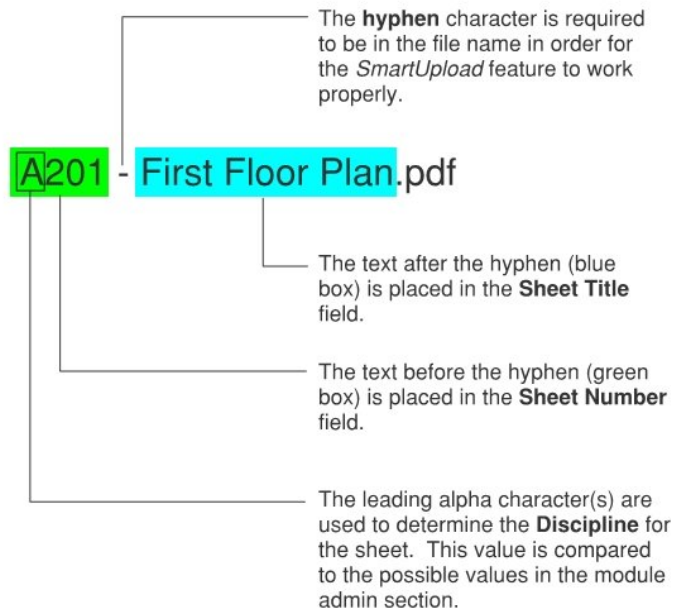
To use the SmartUpload feature you must check the “SmartUpload” checkbox PRIOR to uploading your files. Make sure you have named your files in the following format:

SmartUpload - How does it work?

If you format your file names as shown, the SmartUpload feature will parse the file name and input the sheet name, the sheet title and select the value for the discipline.

Tips:


1. You must include a hyphen / dash character in the file name.
2. By default RoundhousePM comes with some default discipline values but if you need to add a new discipline, simply go to the Admin section and enter both the leading characters (e.g. FP) and then enter the discipline name (e.g. Fire Protection).



If you use Bluebeam you can easily name each of your sheets in this format. For more information on how to do this see [SmartUpload – How to Use Bluebeam Revu to help](#) in the Appendix.


View Release Sets

The screen below allows you to see all the release sets and the documents issued with that set.



Cuppa Joe #12
Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12

Charles Fletcher ▾ Administrative Help ▾



[< Workspaces](#)[Workspace Summary](#)[General Info](#)[Documents](#)[Logs](#)

Drawings - All Release Sets

The items in this module are released in sets such as Pricing Sets, Permit Sets, For Construction Sets, Addendum Sets, Revision Sets or ASI Sets. What these are called is up to your firm.

Some things to remember

1. There can only be one Pending Set at a time. You must first lock the pending set in order to create a new one.
2. If you make a mistake in the files you've uploaded or the additional information you've added (e.g. mis-named a sheet) you can make changes after the Pending Set has been locked.

Download SelectedEmail SelectedCreate Link

Search

[Prepare Pending Set](#)

		No	Release Name	Release Date	Description	No. Sheets	
▶	<input type="checkbox"/>	0001	Demo Permit	10/11/2013 00:00	This was the set issued for a Demolition Permit	0001	▼
▶	<input type="checkbox"/>	0002	Permit Set	09/04/2015 00:00	The set that was issued for permit.	0028	▼
▶	<input type="checkbox"/>	0003	Permit Set 2	01/07/2014 00:00		0005	▼
▶	<input type="checkbox"/>	0004	Hand Sink Addition	02/07/2014 00:00	We had to add a hand sink for the Health Department	0003	▼
▶	<input type="checkbox"/>	0005	Comments	02/05/2014 00:00	Additional Code Comments were addressed	0008	▼

Next: [Specifications >>](#)

Specifications


Like the Drawings module, the Specifications module allows you to track all releases of these documents and make sure that everyone is working with the most current release. In addition all previous versions are accessible allowing users to see the changes from one release to the next.

The Main Screen

The screenshot shows the 'Specifications' module interface. At the top, the user 'Charles Fletcher' is logged in, with 'Administrative' and 'Help' links. The breadcrumb trail is 'Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12 - Start Here'. The 'ACME ARCHITECTS' logo is on the left. Below the header, there are tabs for 'Workspaces', 'Workspace Summary', 'General Info', 'Documents', and 'Logs'. The 'Specifications' section is active, showing 'Active Release Set (Consolidated)' with '10 Total Files Shown'. Action buttons include 'Download Selected', 'Email Selected', 'Create Link', 'Search', 'Prepare New Release Set', 'View Release Sets', and 'Print'. A table lists specifications with columns for Number, Section Name, Release Set, and FileName. The first row is expanded, showing a thumbnail of a 'Cover' page and its details: File size: 354.60 KB, Uploaded by: Fletcher, Charles - Acme Architects, and Uploaded on: 01/16/2016 16:30. Below this, a list of other specifications is shown, including Allowances, Administrative Requirements, Quality Requirements, Temporary Facilities, Product Requirements, Execution and Closeout Requirements, Cast-In-Place Concrete, Concrete Unit Masonry, and Structural Steel.


Number	Section Name	Release Set	FileName
00 0001	Cover	Revision 1	00 0001 - Cover.pdf
01 2100	Allowances	Permit Set	01 2100 - Allowances.pdf
01 3000	Administrative Requirements	Permit Set	01 3000 - Administrative Requirements.pdf
01 4000	Quality Requirements	Permit Set	01 4000 - Quality Requirements.pdf
01 5000	Temporary Facilities	Permit Set	01 5000 - Temporary Facilities.pdf
01 6000	Product Requirements	Permit Set	01 6000 - Product Requirements.pdf
01 7000	Execution and Closeout Requirements	Permit Set	01 7000 - Execution and Closeout Requirements.pdf
03 3000	Cast-In-Place Concrete	Revision 1	03 3000 - Cast-In-Place Concrete.pdf
04 2000	Concrete Unit Masonry	Revision 1	04 2000 - Concrete Unit Masonry.pdf
05 1200	Structural Steel	Revision 1	05 1200 - Structural Steel.pdf

At the top of the page there are two drop downs that allow you to change what is being displayed. The left drop down allows you to see previous release sets. The right drop down allows you to filter the current view by discipline.



Cuppa Joe #12 - Start Here
Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12 - Start Here

Charles Fletcher ▾ Administrative Help ▾



[Workspaces](#) [Workspace Summary](#) [General Info](#) [Documents](#) [Logs](#)

Specifications - Active Release Set (Consolidated) ▾ 10 Total Files Shown

[Download Selected](#) [Email Selected](#) [Create Link](#)

[Prepare New Release Set](#) [View Release Sets](#) [Print](#)

☐ 00 0001 / Cover

☐ 01 2100 / Allowances


☐ 01 3000 / Administrative Requirements

☐ 01 4000 / Quality Requirements


☐ 01 5000 / Temporary Facilities

☐ 01 6000 / Product Requirements


To the right of these drop downs is a toggle that allows you to change the view from rows to large thumbnails of each sheet as shown below.



Peachtree Lofts
SkyView > Acme Architects > Mixed Use > Center Partnership > Peachtree Lofts > Drawings




[Workspaces](#) | [Workspace Summary](#) | [General Info](#) | [Documents](#) | [Logs](#) | [Miscellaneous](#)

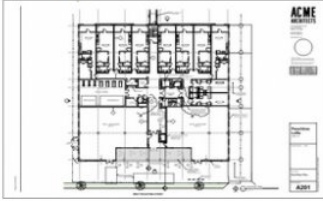
Drawings- [Active Release Set \(Consolidated\)](#) | [All Disciplines](#) | 


14 Total Files Shown

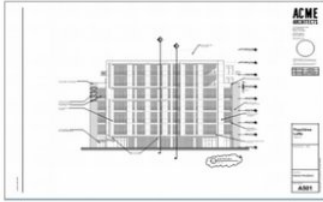
[Prepare New Release Set](#)

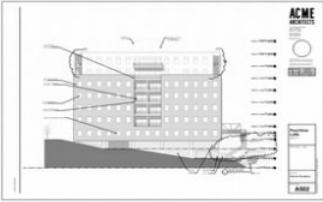
☒ [Download Selected](#) | [Email Selected](#) | | [View Release Sets](#) | [Print](#)

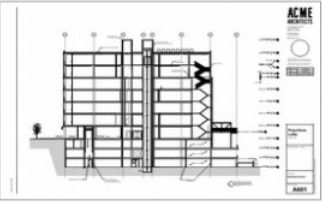
☒ **A001**


☒ **A201**


☒ **A206**


☒ **A501**


☒ **A502**


☒ **A601**


Preparing a New Release Set

The screen below is the one used when preparing a new release set. Until the set is **Published** *it is called a ***Pending Set**.

ACME ARCHITECTS

Cuppa Joe #12 - Start Here
Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12 - Start Here

Charles Fletcher Administrative Help

Workspaces Workspace Summary General Info Documents Logs

Release No. 0000 0000 Total Files Shown Search

▶	Number	Section Name	File Name	▶
▶	00 0001	Cover	00 0001 - Cover.pdf	🗑️
▶	03 3000	Cast-In-Place Concrete	03 3000 - Cast-In-Place Concrete.pdf	🗑️
▶	04 2000	Concrete Unit Masonry	04 2000 - Concrete Unit Masonry.pdf	🗑️
▶	05 1200	Structural Steel	05 1200 - Structural Steel.pdf	🗑️

Release Set Date 01/16/2016

Release Set Name Revision 1

Description

+ Upload Files

☒ SmartUpload ?

The Smart Upload tries to identify the sheet number, name and discipline based on the uploaded file name.

Save Set in Progress

Cancel Set In Progress

Publish / Release

To prepare a new release follow these steps:

1. Enter the Release Date
2. Enter the Release Set Name (e.g. For Pricing, For Permitting, For Construction, Revision 1, ASI 1, etc.)
3. Enter the Release Description. (e.g. This release contains the change to the..., This is the pricing set and contains all disciplines needed to price the project.)
4. Upload your files.
5. Enter the Specification Number and Section Name

During the process of doing this it is a good idea to Save Set In Progress to make sure that you do not lose any of your work.

When you've completed uploading all of your files and have them named correctly, press the **Publish / Release** button. This set will now appear as files on the main screen.



Tip: Once you have entered the specification section number and name you can easily enter this information next time by clicking on the button on the left when you create the next release set.



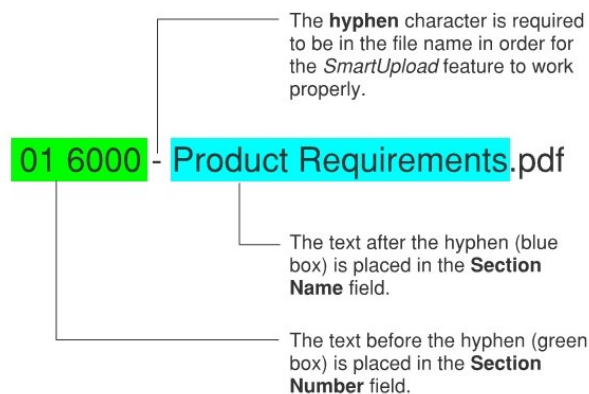
SmartUpload – The faster way to create a release set

The previous method of creating a release set works well, but RoundhousePM has an even faster way of doing this, but you need to follow some naming conventions for the PDF files you create. If you follow these guidelines, RoundhousePM will parse the file names and complete the Section Number and Section Name. All that is left for you to do is to review what has been entered and correct any possible mistakes.

To use the SmartUpload feature you must check the “SmartUpload” checkbox PRIOR to uploading your files. In addition you must have named your files in this format.


SmartUpload - How does it work?

If you format your file names as shown, the SmartUpload feature will parse the file name and input the section number and the section name.




View Release Sets

This screen allows you to see all of the release sets and the documents that were issued with that set.



Cuppa Joe #12 - Start Here
Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12 - Start Here



Charles Fletcher ▾

Administrative

Help ▾

< Workspaces

Workspace Summary

General Info

Documents

Logs

Specifications - All Release Sets

The items in this module are released in sets such as Pricing Sets, Permit Sets, For Construction Sets, Addendum Sets, Revision Sets or ASI Sets. What these are called is up to your firm.

Some things to remember

1. There can only be one Pending Set at a time. You must first lock the pending set in order to create a new one.
2. If you make a mistake in the files you've uploaded or the additional information you've added (e.g. mis-named a sheet) you can make changes after the Pending Set has been locked.

Download Selected

Email Selected

Create Link

Search

Prepare Pending Set

		No	Release Name	Release Date	Description	No. Sheets	
▶	<input type="checkbox"/>	0001	Permit Set	09/04/2015 00:00		0010	▼
▶	<input type="checkbox"/>	0002	Revision 1	01/16/2016 00:00		0004	▼

Next: [Documents >>](#)



Important: If a user has access to the Documents module, they also have access to all files within this module. If you want to limit access to some files but not others, have your site administrator duplicate the Documents module, rename it, and change the access permissions as needed. For more information about this [click here](#).

Next: [RFI Log >>](#)

RFI Log

The Request For Information (RFI) Log is the place where users ask questions and get answers. In most projects this usually is a contractor asking questions for the design team, but this can be used in any way imaginable.

Main Screen

Luxury Spa #32
SkyView > Luxury Spa > Luxury Spa #32 > RFI's

Charles Fletcher | Search | Administrative | Help

Workspaces | Workspace Summary | General Info | Documents | **Logs** | Miscellaneous

RFI's - All | This workspace and all workspaces below



Search [] Create New

Workspace	No.	Subject	Attention	Priority	Status	Return By	+/-
Luxury Spa #32	RFI-055	Change Order Review	Parker, Tom - Luxury Spa	Standard	Open	02/21/15	-19
Luxury Spa #32	RFI-061	Paver Mockup	Farmer, Albert - Crane Construction	High	Open	03/12/15	0
Luxury Spa #32	RFI-063	A/C Duct Conflict near Col. C-4	Bernard, Lewis - Acme Architects	Low	Open	03/18/15	6
Luxury Spa #32	RFI-054	Soffit Height at Rear Vestibule	Farmer, Albert - Crane Construction	High	Closed	03/23/15	
		Reviewer: Fletcher, Charles Uploaded: 02/18/2015 Action: Answered					
Luxury Spa #32	RFI-053	Aluminum Coping	Fletcher, Charles - Acme Architects	Standard	Closed	02/24/15	
Luxury Spa #32	RFI-052	Interior Storefront	Fletcher, Charles - Acme Architects	High	Closed	02/12/15	

Creating a New RFI

This screen has two areas — an area where question are asked, and an area where the questions are answered.

RFIs - Edit

Question	
Number	RFI-0002
Date Submitted *	09/02/2015
Priority *	<input type="radio"/> Low <input checked="" type="radio"/> Standard <input type="radio"/> High 
Respond By	09/05/2015
Attention *	Select a name 
Subject *	Floor Adhesive
Question	<p>We've encountered a problem with the floor adhesive. We can try to make it work without additional floor prep or would you like us to shot blast the slab?</p>
Attachment	<input type="button" value="Upload"/>
Person Asking *	Farmer, Albert - Crane Construction

Answer	
Date Answered	09/04/2015
Answer	<p>Assuming that this does not create a change order, please shot blast the slab. If a change order is desired please do not proceed without approval from owner.</p>
Attachment	<input type="button" value="Upload"/>
Responder	Bronte, Charlotte - Acme Architects

RFI Status	
RFI Complete?	<input type="radio"/> No <input checked="" type="radio"/> Yes

The steps for asking questions are:

1. Select the date to create the RFI
2. Select the RFI's priority. The Due Date is automatically calculated based on values that the subscriber company has established.
3. Select the name of the person you want to respond.
4. Enter the subject of the RFI.
5. Enter the question.
6. If needed, upload an attachment that explains more about the question being asked.
7. Select the name of the person asking the question. The default is the user's name, but if the user is posting the question on behalf of someone else, the user can change the default to that person's name.
8. If desired, create an announcement and/or send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
9. Save the record.

The steps for answering a questions are:

1. Select the date to answer the question.
2. Answer the question.
3. If needed, upload a file that further explains the answer provided.
4. Select the name of the person answering the question. The default is the user's name, but if the user is answering the question on behalf of someone else, the user can change the default to that person's name.
5. Change the value of the RFI Complete radio button to Yes.
6. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
7. Save the record.



When answering a question make sure to change the value of the RFI Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.

Next: [Submittal Log >>](#)

Submittal Log


In the Submittal Log contractors upload information to be reviewed by the design team.

Main Screen

The screenshot shows the 'Submittal Log' interface for 'Cuppa Joe #5'. The header includes the 'ACME ARCHITECTS' logo, the project name 'Cuppa Joe #5', and a breadcrumb trail: 'SkyView > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #5 > Submittals'. User information for 'Charles Fletcher' and navigation links for 'Search', 'Administrative', and 'Help' are also present. A 'ROUNDHOUSEPM' logo is in the top right.

Below the header is a navigation bar with tabs: 'Workspaces', 'Workspace Summary', 'General Info', 'Documents', 'Logs' (selected), and 'Miscellaneous'.

The 'Submittals' section has filters: 'All' (selected) and 'This workspace and all workspaces below'. A search bar and a 'Create New' button are also visible.



Workspace	No.	Description	Attention	Priority	Action	Return By	+/-
Cuppa Joe #5	033533.01	Stamped Concrete	Fletcher, Charles - Acme Architects	Low	None	03/01/15	-11
Cuppa Joe #5	123216.03	Cashier Millwork	Buck, Sylvia - Acme Architects	High	None	03/12/15	0
Cuppa Joe #5	224239.01	Restroom Faucet Trim	Bernard, Lewis - Acme Architects	Standard	None	03/14/15	2
Cuppa Joe #5	265113.02	Specialty Lighting	Fletcher, Charles - Acme Architects	High	None	03/23/15	11
Cuppa Joe #5	057500.01	Aluminum Coping	Fletcher, Charles - Acme Architects	Standard	Exceptions Noted	02/24/15	
 <p>Reviewer: Fletcher, Charles Uploaded: 02/18/2015 Action: Exceptions Noted</p>							
Cuppa Joe #5	085113.02	Interior Storefront	Fletcher, Charles - Acme Architects	High	Exceptions Noted	02/12/15	

Creating a New Submittal

This screen has three areas:

1. A place to upload the submittal after being reviewed by the Contractor.
2. If applicable, a place for a consultant to also review and upload their version of the submittal.
3. A place for the architect to review and upload the final version of the reviewed submittal.

Submittals - Edit

Contractor Review	
Number *	08 4113-01 ?
Name *	Storefront ?
Date *	09/22/2015
Via	Upload to RoundhousePM ?
Priority *	<input type="radio"/> Low <input checked="" type="radio"/> Standard <input type="radio"/> High ?
Return By	09/25/2015
Attention *	Select a name ?
GC Attachment	<div>Upload</div>
	<div><div></div><div><p>File size: 3,308.89 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 09/20/2015 20:46 File name: 088000.01Glass and Glazing.pdf</p></div></div>
Hard Copies Or Samples	<div></div> ?
GC Action *	Reviewed ▼
Submitted By *	Farmer, Albert - Crane Construction ▼
Engineer or Consultant Review	
Engineer Received	09/23/2015 ?
Engineer Comments	<div>We need to have them submit the structural calculations for our file</div> ?

Engineer
Attachment Upload

Upload



File size: 3,319.04 KB
 Uploaded by: Fletcher,
 Charles - Acme Architects
 Uploaded on: 09/20/2015
 20:46
 File name: 08800.01.pdf



Engineer Action

Engineer Reviewer

Engineer Returned

Engineer Returned Via

Architect or Consultant Review

Architect Received

Architect Comments

Architect
Attachment Upload

Upload



File size: 3,887.41 KB
 Uploaded by: Fletcher,
 Charles - Acme Architects
 Uploaded on: 09/20/2015
 20:48
 File name: 088000.01
 Exceptions Noted (2).pdf



Architect Action

Architect Reviewer

Architect Returned

Architect Returned Via

Submittal Status

Review Complete ☐ No ☒ Yes

The Contractor Review

1. Enter a submittal number. See Tips below for more information.
2. Enter the name of the submittal.
3. Select the date this submittal is made available for the design team to review.

4. Enter a value for how this submittal was given to the design team. (e.g. RoundhousePM, Hand, Overnight Courier, etc.)
5. Select the Priority for when you would like the submittal returned. Note, the return date is calculated by the values established by the subscriber in the Admin section of the Submittal module.
6. Select the name of the person to review this submittal.
7. Upload the PDF file of the document you have reviewed.
8. If this submittal contains physical samples, enter the information of what you are sending in this area.
9. Select the action that is found on your submittal stamp. (e.g. Reviewed, Exceptions Noted, etc.)
10. Select the name of the person who reviewed this submittal. The default is the user's name, but if the user is posting the question on behalf of someone else, the user can change the default to that person's name.
11. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
12. Save the record.



Submittal Numbering Tip: The submittal number can be anything, but the preferred method is to use the CSI specification section number followed by a number to indicate which submittal or version you are submitting from this section of the specs. For example, in the image above the CSI section for Storefront is 08 4113, the first review sent for review by the design team is numbered "08 4113-01". If a resubmittal is required, it would be numbered "08 4113-02".

The Engineer or Consultant Review

1. Enter the date you received the submittal. Typically this would be the same date as the contractor completed their review, but if this was a submittal that contained physical samples, the date could be a few days after the contractor completed their review.
2. Enter any comments you have about the submittal received. Note, this is not where you enter your review comments, but rather for information like broken samples, etc. Your submittal review comments should be contained within the PDF you reviewed.
3. Upload the PDF file you reviewed.
4. Select the action of your review.
5. Select the name of the person who reviewed the submittal.
6. Select the date that you completed your review. The default is the user's name, but if the user is posting on behalf of someone else, the user can change the default to that person's name.
7. If applicable, select how you forwarded the submittal to the architect for their review.
8. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
9. Save the record.

The Architect Review

1. Enter the date you received the submittal. Typically this is the same date as the date the contractor or consultant completed their review, but if this submittal contained physical samples, the date could be a few days after the previous person completed their review.
2. Enter any comments you have about the submittal received. Note, this is not where you enter your review comments, but rather for information like broken samples, etc. Your submittal review comments should be contained within the PDF reviewed.
3. Upload the PDF file you reviewed.
4. Select the action of your review.
5. Select the name of the person who reviewed the submittal. The default is the user's name, but if the user is posting on behalf of someone else, the user can change the default to that person's name.
6. Select the date you completed your review.
7. If applicable, select how you forwarded the submittal to the contractor for their use.
8. Change the value of the Submittal Complete radio button to Yes.
9. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
10. Save the record.



When the submittal review is complete make sure to change the value of the Submittal Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.

Next: [Photos >>](#)

Photos

The Photos module allows you to upload any photos. This can be inspiration photos for your design or photos from a site visit. Each of these is uploaded in **Sessions**.

The Main Screen

When opening the Photos module, you are shown all the sessions created for this workspace.

The screenshot shows the main interface of the Photos module. At the top, the 'ACME ARCHITECTS' logo is on the left, and the workspace name 'Augusta Townhomes' is in the center, with a breadcrumb trail: 'Skyview > Acme Architects > Multifamily > Center Partnership > Augusta Townhomes'. On the right, the user 'Charles Fletcher' is logged in, with 'Administrative' and 'Help' links. Below the header, there are tabs: 'Workspaces' (selected), 'Workspace Summary', 'General Info', 'Documents', and 'Logs'. The 'Photos' section shows a dropdown menu set to 'This workspace and all workspaces below'. Below this are buttons for 'Download Selected', 'Email Selected', 'Create Link', a search bar, 'Print', and 'Create New'. A table lists the photo sessions:

Workspace	Subject	Date Taken	Creator	Photos
Augusta Townhomes	Site Visit 1	11/03/2015	Fletcher, Charles - Acme Architects	3
Augusta Townhomes	Site Visit 2	11/25/2015	Fletcher, Charles - Acme Architects	8

Below the table, a grid of photo thumbnails is displayed, showing various aerial and ground-level views of construction sites.

The Session Information

There are three ways to view the photos in a session:

1. Detail and Rows View
2. Grid View
3. Slideshow View

Detail and Rows View

Photos

Detail and Rows

Workspace

Augusta Townhomes

Subject

Site Visit 1




Date Taken

11/03/2015

Taken By

Fletcher, Charles - Acme Architects

Download Selected

File Name	Title and Comments	Details
<div><div>DJI_0034.JPG</div><div></div></div>	Aerial from SW	File size: 4,119.75 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:41
<div><div>DJI_0037.JPG</div><div></div></div>	Aerial from West	File size: 3,840.56 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:41
<div><div>DJI_0038.JPG</div><div></div></div>	Aerial from SE	File size: 3,789.46 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:41

Grid View

Photos

Grid

Workspace

Augusta Townhomes

Subject

Site Visit 1

Date Taken


11/03/2015

Taken By


Fletcher, Charles - Acme Architects

Download Selected


DJI_0034.JPG



DJI_0037.JPG



DJI_0038.JPG



Slideshow View

Page 58 of 157

Photos

Slideshow ▾

Print

Edit

Workspace

Augusta Townhomes

Subject

Site Visit 1

Date Taken

11/03/2015

Taken By

Fletcher, Charles - Acme Architects

3 Seconds ▾



Creating a Photo Session

Photos

Photos - Detail and Rows




Workspace: Augusta Townhomes

Subject: Site Visit 1

Date Taken: 11/03/2015

Taken By: Buck, Sylvia - Acme Architects

Download Selected Delete Selected Search +Add Photos

File Name	Title and Comments	Details
<input type="checkbox"/> DJI_0034.JPG 	Aerial from SW Comments	File Size: 4,023.19 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:40
<input type="checkbox"/> DJI_0037.JPG 	Aerial from West Comments	File Size: 3,750.55 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:40
<input type="checkbox"/> DJI_0038.JPG 	Aerial from SE Comments	File Size: 3,700.65 KB Uploaded by: Fletcher, Charles - Acme Architects Uploaded on: 11/07/2015 20:40

Follow these steps to create a new photo session:

1. Press the Create New button.
2. Enter the Subject of the session.
3. Select the date the photos were taken.
4. Select the name of the person who took the photos. The default is the user's name, but if the user is posting on behalf of someone else, the user can change the default to that person's name.
5. Upload the photos.
6. Enter the Title and Description for each photo.
7. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
8. Save the record.



Field Report Photos must first be uploaded to a photo session, then linked to a Field Report.

Next: [Field Reports >>](#)

Field Reports

The Field Reports module allows you to create a record of visits to the job site. In addition to having fields for describing the construction progress, you can link photos that taken on site visits and comment on what is being shown.

The Main Screen

The screenshot shows the main interface of the RoundhousePM Field Reports module. At the top, there is a header bar with the ACME ARCHITECTS logo on the left, the title 'Cuppa Joe #12 - Start Here' in the center, and user information 'Charles Fletcher' and 'Administrative' on the right. Below the header, there is a navigation bar with tabs: 'Workspaces', 'Workspace Summary', 'General Info', 'Documents', and 'Logs'. The 'Workspaces' tab is active. Below the navigation bar, there is a section titled 'Field Reports' with a search bar and a 'Create New' button. Below this, there is a table with the following columns: 'Workspace', 'Date and Time', 'Report No.', and 'Name'. The table contains one row with the following data: 'Cuppa Joe #12 - Start Here', '11/03/2015 17:09', 'FR-0001', and 'Fletcher, Charles - Acme Architects'. Below the table, there is a section titled 'Linked Images' with three image thumbnails labeled 'Interior', 'Rear entrance', and 'Loading dock'.

ACME ARCHITECTS

Cuppa Joe #12 - Start Here

Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12 - Start Here

Charles Fletcher Administrative Help

ROUNDHOUSEPM

Workspaces Workspace Summary General Info Documents Logs

Field Reports

Search Create New

Workspace	Date and Time	Report No.	Name
Cuppa Joe #12 - Start Here	11/03/2015 17:09	FR-0001	Fletcher, Charles - Acme Architects










Linked Images

Interior Rear entrance Loading dock

Creating a Field Report

To create a new Field Report press the Create New button on the main screen and the following window will appear.

Field Reports

Details													
Report Number	Auto Assigned												
Reported By *	Fletcher, Charles - Acme Architects												
Date and Time *	11/03/2015 17:09												
Weather *	Sunny												
Temp Range	55 F												
Est % Complete	40%												
Conforms with Schedule?	Yes												
Work In Progress	Interior demolition												
Present At Site	Super and demo sub												
Observations													
Items To Verify	Review location of the door to the storage room												
Info or Action Required													
Attachments	Upload												
Photos	<div> <div> Link Images Unlink Selected </div> <div> Search </div> </div> <table border="1"> <thead> <tr> <th>File Name</th> <th>Title and Comments</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td> <input type="checkbox"/> DSC06820.JPG  </td> <td> Interior You can see that they've started to demo the existing bar. </td> <td> File size: 91.87 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51 </td> </tr> <tr> <td> <input type="checkbox"/> IMG_5933.JPG  </td> <td> Rear entrance No work has begun in this area. </td> <td> File size: 136.29 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51 </td> </tr> <tr> <td> <input type="checkbox"/> IMG_5934.JPG  </td> <td> Loading dock No work here. </td> <td> File size: 91.88 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51 </td> </tr> </tbody> </table>	File Name	Title and Comments	Details	<input type="checkbox"/> DSC06820.JPG 	Interior You can see that they've started to demo the existing bar.	File size: 91.87 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51	<input type="checkbox"/> IMG_5933.JPG 	Rear entrance No work has begun in this area.	File size: 136.29 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51	<input type="checkbox"/> IMG_5934.JPG 	Loading dock No work here.	File size: 91.88 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51
File Name	Title and Comments	Details											
<input type="checkbox"/> DSC06820.JPG 	Interior You can see that they've started to demo the existing bar.	File size: 91.87 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51											
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<input type="checkbox"/> IMG_5934.JPG 	Loading dock No work here.	File size: 91.88 KB Uploaded by: Bronte, Charlotte - Acme Architects Uploaded on: 01/14/2016 19:51											

1. A Field Report Number is automatically created by RoundhousePM.
2. Select the name of the person creating this Field Report. The default is the user's name, but if the user is posting on behalf of someone else, the user can change the default to that person's name.
3. Select the date and time of the site visit.
4. Enter the weather at the job site (e.g. sunny, rainy, overcast, etc.)
5. Enter the temperature range (e.g. 45F and rising)

6. Enter an estimate of the percent of the construction completed.
7. Enter your opinion as to whether or not the work completed conforms with the published schedule.
8. Enter the work in progress.
9. Enter the names of the people or trades present at the site.
10. Enter any observations about the work being constructed.
11. Enter any items that need to be verified.
12. Enter any additional information or action items that need to be addressed. This could be items the contractor needs to verify, questions the owner needs to answer, or things you need to research when you return to the office.
13. Upload any files you may have obtained during your visit. For instance, if there was an agenda, project schedule, or reports, scan these in as a PDF and upload the file to the report.
14. Link photos taken while visiting the site.
15. If desired, create an announcement and/or send a notification. For more information about Announcements and Notifications when creating a record, [click here](#).
16. Save the record.



Tip about Photos. Photos used in the Field Report should be first uploaded to the Photos module and then linked to the Field Report. This allows you to upload numerous photos in the Photos module and then select (link) only a few photos to include in the Field Report.

Next: [Change Order Proposal Log >>](#)

Change Order Proposal Log

RoundhousePM includes modules for uploading and tracking the status of Change Order Proposals and Change Orders.



Nomenclature If your company uses a descriptor other than *Change Order Proposal*, such as *Potential Change Order*, you can change this descriptor in the module's administration page. For more information click [here](#).

The Change Order Proposal and Change Order workflow process

While projects vary in complexity and amount of paperwork required, RoundhousePM was designed with the following workflow in mind. You are free to modify or simplify this workflow for each project. For instance, some companies do not have Change Order Proposals so any potential changes are done through Change Orders.

Change Order Proposal Log

COP Number	Action
COP-001	Revise and Resubmit
COP-001.1	Approved
COP-002	Rejected
COP-003	Approved
COP-004	Revise and Resubmit
COP-004.1	Revise and Resubmit
COP-004.2	Approved
COP-005	Rejected
COP-006	Approved
COP-007	Approved
COP-008	Rejected
COP-009	Approved

Change Order Log

CO Number	COP's included
CO-001	COP-001.1 COP-003
CO-002	COP-004.2
CO-003	COP-006 COP-007 COP-009

Change Order Proposals (COP)

A change to the project is identified. A contractor estimates the cost or savings as a result of this change. This estimate is called a Change Order Proposal, which is reviewed by the design team and the owner, and is either accepted or returned for modifications. The initial request would be called Change Order Proposal #1 (e.g. COP-001). If approved without changes, the final version of this document is signed and uploaded to the architects' section. If changes are to be made, the COP is sent back to the contractor with a "Revise and Resubmit" action. A new COP is created and named Change Order Proposal #1 Revised (e.g.

COP-001.1 or COP-001 Revised). If approved, the final document with signatures is uploaded to the architects' section.

Change Orders

Once Change Order Proposals are approved, the contractor creates a Change Order. As with Change Order Proposal, the contractor creates Change Order #1 (e.g. CO-001). This is reviewed by the design team one final time, approved, signed, and uploaded to the architects section of the record.

The Main Screen

The screenshot shows the main interface of the RoundhousePM application. At the top, the user 'Charles Fletcher' is logged in with 'Administrative' permissions. The breadcrumb trail is 'Skyview > Acme Architects > Retail > Cuppa Joe Inc > Cuppa Joe #12'. The 'ACME ARCHITECTS' logo is on the left. Below the header, there are tabs for 'Workspaces', 'Workspace Summary', 'General Info', 'Documents', and 'Logs'. The 'Workspaces' tab is active, showing a list of 'Change Orders Proposals'. A search bar and a 'Create New' button are also present. The table below lists two proposals for 'Cuppa Joe #12'.

Workspace	No.	\$ Approved	Attention	Priority	Date	+/-
Cuppa Joe #12	COP-0001	\$16650.00	Bernard, Lewis - Metro Engineers inc	Standard	11/20/2015	
Cuppa Joe #12	COP-0002	\$0.00	Bernard, Lewis - Metro Engineers inc	Standard	11/20/2015	13

Create a new Change Order Proposal document

Each document contains three sections:

- Contractor Input
- A/E Review
- Owner Review

Change Orders Proposals

Contractor Input	
Number	Auto Assigned
Created *	<input type="text"/>
Respond By *	<input type="text"/>
Priority *	<input type="text" value="Standard"/>
A/E Attention *	<input type="text" value="Select a name"/>
Owner Attention *	<input type="text" value="Select a name"/>
GC Attachment	<input type="button" value="Upload"/>
Description	<div><div></div></div>
Comments	<div><div></div></div>
Proposed Amount *	<input type="text" value="0.00"/>
Proposed Days *	<input type="text"/>
Contractor Name *	<input type="text" value="Select a name"/>
A/E Response	
A/E Response Date	<input type="text"/>
A/E Action	<input type="text" value="Not Reviewed"/>
A/E Comments	<div><div></div></div>
A/E Attachment	<input type="button" value="Upload"/>
A/E Name	<input type="text" value="Select a name"/>
Owner Response	
Owner Response Date	<input type="text"/>
Owner Action	<input type="text" value="Not Reviewed"/>
Owner Comments	<div><div></div></div>
Owner Attachment	<input type="button" value="Upload"/>
Owner Name	<input type="text" value="Select a name"/>
Review Complete?	<input checked="" type="radio"/> No <input type="radio"/> Yes

Contractor Input

1. Enter a Change Order Proposal number, such as COP-000. The naming convention can be changed to match your company's standards, as long as it is kept consistent throughout all entries.
2. Enter a brief description of the subject of this COP.
3. Enter the date submitted for review.
4. Enter how this document will be sent for review. (e.g. RoundhousePM, courier, hand, etc.)
5. Enter a return by date for COP's approval.
6. Enter the name of the person to review this COP.
7. Enter the total amount of money requested or saved as a result of the COP.
8. Attach a PDF document of the official COP paperwork, including the cover and any supporting documentation.
9. If hard copies were included, enter a description of the documents provided.
10. Select the name of the person submitting the COP request.
11. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
12. Save the record.

A/E Review

Many Change Order Proposals require the review of the architect or consultants. This section is where they provide their input.

1. Select the date you received the COP.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Enter the amount of money you approve for this COP. If you disagree with the amount requested, but don't know how much should be approved, leave this field empty.
4. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
5. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
6. Select the name of the person who reviewed this COP.
7. Select the date this review was completed and returned to the contractor or forwarded to the owner for their review.
8. If hard copies were included, enter a description of the documents provided.
9. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
10. Save the record.

Owner Review

1. Select the date you received the COP.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Enter the amount of money you approve for this COP. If you disagree with the amount requested, but don't know how much should be approved, leave this field empty.
4. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
5. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
6. Select the name of the person who reviewed this COP.
7. Select the date this review was completed and returned or forwarded to the contractor for their review or next steps.
8. If hard copies were included, enter a description of the documents provided.
9. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
10. If the review is complete, change the value of the Review Complete from No to Yes.
11. Save the record.



When the review of a Change Order Proposal is complete, make sure to change the value of the Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.p(banner tip). p(banner tip).

Next: [Change Order Log >>](#)

Change Order Log

RoundhousePM includes modules for you to upload and track the approvals of Change Order Proposals and Change Orders.



The Process. For more information about the Change Order Proposal and Change Order process, [click here](#).

The Main Screen

Workspace	No.	\$ Approved	Attention	Priority	Date	+/-	
Cuppa Joe #12	CO-0001	\$0.00	Fassett, John - Superior Mechanical	Standard	11/24/2015	17	▼

Create a new Change Order document

Each document contains three sections:

- Contractor Input
- A/E Review
- Owner Review

Change Orders

Contractor Input	
Number	Auto Assigned
Created *	<input type="text"/>
Respond By *	<input type="text"/>
Priority *	<input type="text" value="Standard"/>
A/E Attention *	<input type="text" value="Select a name"/>
Owner Attention *	<input type="text" value="Select a name"/>
GC Attachment	<input type="button" value="Upload"/>
Description	<div><div></div></div>
Comments	<div><div></div></div>
Proposed Amount *	<input type="text" value="0.00"/>
Proposed Days *	<input type="text"/>
Contractor Name *	<input type="text" value="Select a name"/>
A/E Response	
A/E Response Date	<input type="text"/>
A/E Action	<input type="text" value="Not Reviewed"/>
A/E Comments	<div><div></div></div>
A/E Attachment	<input type="button" value="Upload"/>
A/E Name	<input type="text" value="Select a name"/>
Owner Response	
Owner Response Date	<input type="text"/>
Owner Action	<input type="text" value="Not Reviewed"/>
Owner Comments	<div><div></div></div>
Owner Attachment	<input type="button" value="Upload"/>
Owner Name	<input type="text" value="Select a name"/>
Review Complete?	<input checked="" type="radio"/> No <input type="radio"/> Yes

Contractor Input

1. RoundhousePM automatically creates the CO number.
2. Enter a brief description of the subject of this CO.
3. Enter the date submitted for review.
4. Enter how this document will be sent for review. (e.g. RoundhousePM, courier, hand, etc.)
5. Enter a return by date for the CO's approval.
6. Enter the name of the person to review this COP.
7. Enter the total amount of money requested or saved as a result of the CO.
8. Attach a PDF document of the official CO paperwork, including the cover and any supporting documentation.
9. If hard copies were included, enter a description of the documents provided.
10. Select the name of the person submitting this CO request.
11. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
12. Save the record.

A/E Review

Many Change Order Proposals require the review of the architect or consultants. This section is where they provide their input.

1. Select the date you received the CO.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
4. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
5. Select the name of the person who reviewed this CO.
6. Select the date this review was completed and returned to the contractor or forwarded to the owner for their review.
7. If hard copies were included, enter a description of the documents provided.
8. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
9. Save the record.

Owners Review

1. Select the date you received the CO.

2. Enter any comments about the documents you received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
4. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
5. Select the name of the person who reviewed this CO.
6. Select the date this review was completed and returned to the contractor.
7. If hard copies were included, enter a description of the documents provided.
8. If the review is complete, change the value of the Review Complete from No to Yes.
9. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
10. Save the record.



When the review of a Change Order is complete, make sure to change the value of the Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.p(banner tip). p(banner tip).

Next: [Pay Application Log >>](#)

Pay Application Log

RoundhousePM includes modules for you to upload and track the approval of Pay Applications.


The Main Screen

Luxury Spa #32
SkyView > Luxury Spa > Luxury Spa #32 > Pay Applications

Charles Fletcher Search Administrative Help

Workspaces Workspace Summary General Info Documents **Logs** Miscellaneous

Pay Applications - All This workspace and all workspaces below Search Create New

Workspace	No.	Subject	Attention	Priority	Status	Return By	+/-
Luxury Spa #32	PA-006	Pay App - Feb 28, 2015	Fletcher, Charles - Acme Architects	Standard	Pending	03/10/15	-2
Luxury Spa #32	PA-005	Pay App - Jan 31, 2015	Fletcher, Charles - Acme Architects	Standard	Approved	02/10/15	
Luxury Spa #32	PA-004	Pay App - Dec 31, 2014	Fletcher, Charles - Acme Architects	Standard	Approved	01/10/15	
Luxury Spa #32	PA-003	Pay App - Nov 30, 2014	Fletcher, Charles - Acme Architects	Standard	Approved	12/10/14	
		 <p>Reviewer: Fletcher, Charles Uploaded: 02/18/2015 Action: Answered</p>					
Luxury Spa #32	PA-002	Pay App - Oct 31, 2014	Fletcher, Charles - Acme Architects	Standard	Approved	11/10/14	
Luxury Spa #32	PA-001	Pay App - Sep 30, 2014	Fletcher, Charles - Acme Architects	Standard	Approved	10/10/14	

Create a new Change Order document

Each document contains three sections:

- Contractor Input
- 3rd Party Review
- Architect Review

Pay Apps

Contractor Input

Number	Auto Assigned
Description *	<input type="text"/> ?
Date *	<input type="text"/>
Via	<input type="text"/> ?
Return By *	<input type="text"/> ?
Attention *	<input type="text" value="Select a name"/> ▼ ?
Money Requested *	<input type="text" value="0.00"/> ?
GC Attachment	<input type="button" value="Upload"/>
Hard Copies	<div><div></div></div>
Person Submitting *	<input type="text" value="Select a name"/> ▼

3rd Party Review

Third Party Date Received	<input type="text"/> ?
Third Party Receipt Comments	<div><div></div></div> ?
Third Party Money Approved	<input type="text" value="0.00"/> ?
Third Party Attachment	<input type="button" value="Upload"/>
Third Party Action	<input type="text" value="Not Reviewed"/> ▼
Third Party Reviewer	<input type="text" value="Select a name"/> ▼
Third Party Date Returned	<input type="text"/>
Third Party Returned Via	<input type="text"/>

Architect Review	
Architect Date Received	<input type="text"/>
Architect Receipt Comments	<div><div></div></div>
Architect Money Approved	<input type="text" value="0.00"/>
Architect Attachment	<input type="button" value="Upload"/>
Architect Action	<input type="text" value="Not Reviewed"/>
Architect Reviewer	<input type="text" value="Select a name"/>
Architect Returned Via	<input type="text"/>
Pay Application Status	
Review Complete?	<input checked="" type="radio"/> No <input type="radio"/> Yes

Contractor Input

1. Roundhouse automatically creates a Pay Application number.
2. Enter a brief description of the subject of this Pay Application.
3. Enter the date submitted for review.
4. Enter how this document will be sent for review. (e.g. RoundhousePM, courier, hand, etc.)
5. Enter a return by date for the Pay Application approval.
6. Enter the name of the person to review this Pay Application.
7. Enter the total amount of money requested in the Pay Application.
8. Attach a PDF document of the official Pay Application paperwork, including the cover and any supporting documentation.
9. If hard copies were included, enter a description of the documents provided.
10. Select the name of the person submitting this Pay Application.
11. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
12. Save the record.

3rd Party Review

Many Pay Applications require the review of consultants or construction managers. If applicable, they would provide their input in this section.

1. Select the date you received the Pay Application.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.

3. Enter the amount of money approved.
4. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
5. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
6. Select the name of the person who reviewed this Pay Application.
7. Select the date this review was completed and returned to the architect for review.
8. If this review contained hard copies, enter the way the documents were delivered.
9. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
10. Save the record.

Architects Review

1. Select the date you received the Pay Application.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Enter the amount of money approved.
4. Upload an attachment with your comments. This could be a scan of a handwritten note, a memo, or a markup of a PDF document.
5. Select an action for your review. (e.g., Reviewed, Not Reviewed, Exceptions Noted, Revise and Resubmit, Rejected)
6. Select the name of the person who reviewed this Pay Application.
7. Select the date this review was completed and returned to the contractor.
8. If this review contained hard copies, enter the way the documents were delivered.
9. If the review is complete, change the value of the Review Complete from No to Yes.
10. If desired, create an announcement and send an email notification. For more information about Announcements and Notifications when creating a record, [click here](#).
11. Save the record.

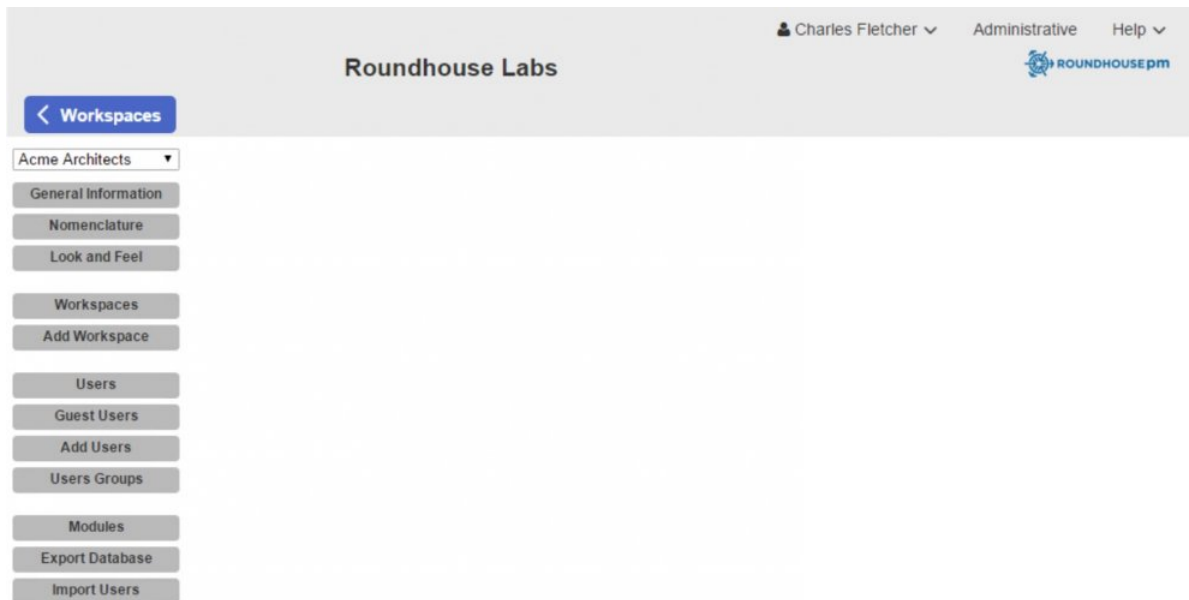


When the review of a Pay Application is complete, make sure to change the value of the Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.p(banner tip). p(banner tip).

Next: [Administration >>](#)

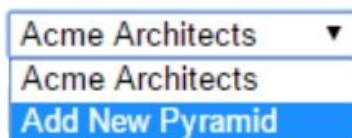
Administration

The Administration area is only accessible to users with administrative privileges for the pyramid. Within the administrative area is where you control the structure of your pyramid, who has access, and what these users have access to.



Pyramid Selector

If you are an administrator for more than one pyramid, before you select one of the items below, you must first select the pyramid you want to work on from the top drop-down menu. If you are an administrator for more than one pyramid, you will see it listed here.



If you choose "Add New Pyramid", you will see the following window. Please read and make sure you understand before creating a new pyramid.

New Pyramid Caution

You have selected to create a new pyramid for this subscriber account. This may be beneficial if you have a Joint Venture company that should appear as a Level 1 workspace with children workspaces.

If you're creating a new pyramid for any other reason please think twice about this. Perhaps you should create a new Level 2 workspace.

Warning: If you create a new pyramid, they can never be merged if you realize that you have made a mistake.

Warning: If you create a new pyramid, and wish to separate it for any reason such as to create a separate invoice, this cannot be done in the future.

☐ I have read and understand these warnings above

Cancel

Create a New Pyramid

Next: [Where to Start – The Guided Setup >>](#)

Where to Start – The Guided Setup

The Guided Setup makes setting up your new RoundhousePM account easy and straightforward. Start by creating your account in the following URL:

<https://www.roundhousepm.com/welcome/>

When the following screen appears, enter your email address.



Create a New Account

Enter email address

Next

New Subscriber Setup – Personal and Company Information

Enter here the Personal and Company Information requested.



Welcome new Subscriber. We need to get some basic information about you and your company before you can log in for the first time.

Fields marked with a red asterisk (*) are required. Other fields are optional and can be entered at a later time.

Your Company Information

Company Name: *

In the field below enter a simple company name or abbreviation that you would like to be the custom URL for your login page.

Create URL Name: * .roundhousepm.com

In the fields below enter the main address of your company.

Address 1 *

Address 2

City *

State *

Zip Code *

Country *

RoundhousePM will create default User Groups based on the type of company that you have. If none of these are applicable select "Other". For more information about which user groups are created [click here](#).

Company Type *

Your Personal Information

Contact Name *

Title

In the fields below enter your email address. Please note, that your email address is your login name for RoundhousePM.

Email *

Re-enter Email *

In the fields below enter your work and mobile phone number. You can select which number you prefer to be used.

Phone *

Mobile

Fax

Preferred Phone Number

In the fields below enter your password and select a security question and response that you will need to use when contacting RoundhousePM support.

Login Your login name is your email address above

Password *

Re-enter Password *

Security Question *

Answer *

[Continue to Next Page](#)



Company Type: By selecting a company type, RoundhousePM will create some default User Groups. Most likely these default User Groups will work for your company, but they can be modified according to your preference. To see the list of default user groups [click here](#).

New Subscriber Setup – Guided Setup or Manual Setup?

You are now given the option to continue with the Guided Setup or go to Manual Setup. We **strongly** recommend using the Guided Setup if you are new to RoundhousePM.



Welcome to RoundhousePM

We feel that this tool can revolutionize how you currently work.

From here you have two choices of how to proceed. We strongly suggest you use the **Guided Setup** if this is your first time using RoundhousePM.

Guided Setup (Recommended)

Over the next few screens you will be asked several questions in order to create your first users and workspaces. After you create these you can login and see the beginnings of your new pyramid.

Keep in mind that we recommend watching the videos on the left to understand even more about the inner workings of RoundhousePM.

[Start the Guided Setup](#)

Manual Setup

If you've worked with RoundhousePM you may want to skip the Guided Setup although it is a great way to get started quickly.

[Login in RoundhousePM](#)

New Subscriber Setup – Nomenclature

Define the nomenclature of your company structure here. These can be changed later if needed.

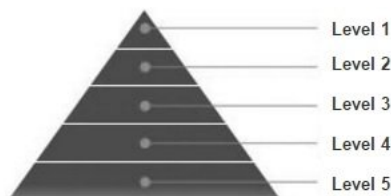


Define your organizational structure

Roundhouse is organized like a pyramid as shown below. However, your company may or may not use each of the levels.

Tip: if you select "Not Used" you will not be given this level of workspace as an option when creating a new workspace.

If you're not familiar with the concept of Pyramids and Levels, please visit our website at RoundhouseLabs.com



Acme Architects

Studio	▼
Client	▼
Project	▼
Bid Site	▼

[Next, Create Workspaces](#)



Customizing Your Levels. If a level is not needed, for example, if your company is not subdivided into departments or studios, select the Not Used option for that level. **DO NOT CHANGE THE LEVEL STRUCTURE.** Even if you don't use a level, say Level 2 for departments or studios, Projects should remain on Level 4 instead of setting them up on Level 2.

New Subscriber Setup – Adding Workspaces

On this page you start to define the workspaces that make up your pyramid. There are two ways of adding workspaces:

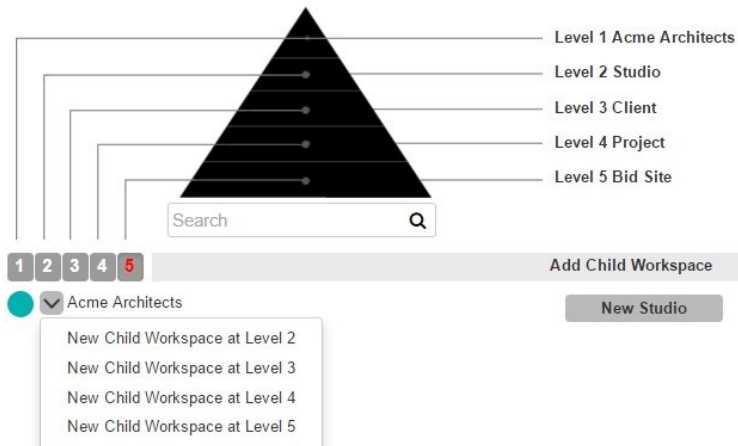
- 1) click on the button at the right that will add a workspace at the next lowest level of the pyramid. You'll note that RoundhousePM is using the terminology that you defined in the previous step.
- 2) click on the small triangle next to the Level1 workspace name. A drop down will appear allowing you to create a workspace at any lower level of the pyramid.



Create a few workspaces

Based on how you've described your company previously when you defined the names of the workspace levels, we're providing an organisational pyramid for you to complete. Just fill in the blanks and the pyramid with workspaces will be created. If you don't have a name in each cell, that's okay, no workspace will be created.

For security purposes would you like to require a password to download any file from any module? ☐



Previous

Next, Invite People to Join

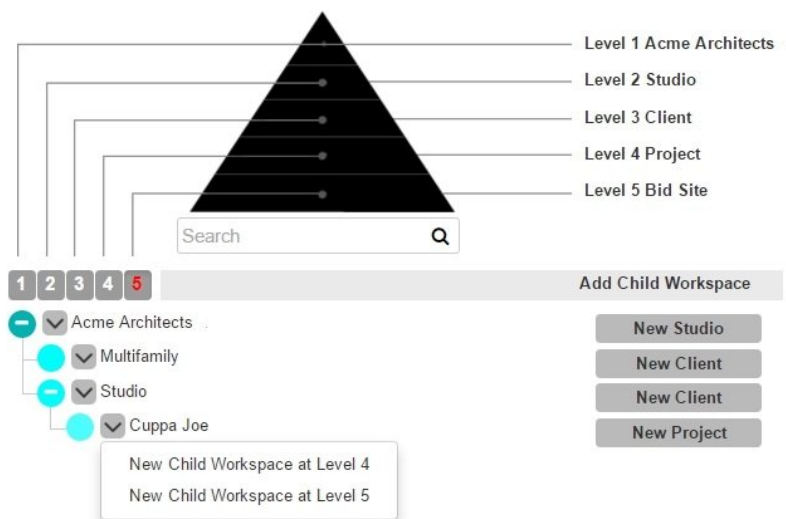
Continue to build your pyramid by adding workspaces. You can always add workspaces as you need them. Workspaces can also be edited at any time if you need to move or delete them.



Create a few workspaces

Based on how you've described your company previously when you defined the names of the workspace levels, we're providing an organisational pyramid for you to complete. Just fill in the blanks and the pyramid with workspaces will be created. If you don't have a name in each cell, that's okay, no workspace will be created.

For security purposes would you like to require a password to download any file from any module? ☐



[Previous](#)

[Next, Invite People to Join](#)

New Subscriber Setup – Invite people in your company

It is now time to invite people within your company to join RoundhousePM. On page 1 of this setup you were asked your company type. This selection determined the user groups that now appear for your company. Enter the email address of each person (one email address per line) for each user group. Don't worry if you don't want to add every user at this time. Users can be invited after you have finished setting up your pyramid.



Invite the people to your company to join

Below you will see the default User Groups for the type of company that you selected earlier. Enter one email address per line and they'll be sent an invitation to join.

Sender (you) will receive a copy of each invitation email.

If you make a mistake, or need to make changes, that's easy to do later. This step is to just get you started.

Administrator	<input type="text" value="name@domain.com"/>
Architect - Principal	<input type="text" value="name@domain.com"/>
Architect - Project Admin	<input type="text" value="name@domain.com"/>
Architect - Project Mgr	<input type="text" value="name@domain.com"/>
Architect - Staff	<input type="text" value="name@domain.com"/>

[Previous](#)[Next, Summary](#)

The people you invite to become RoundhousePM users during this setup process will have access to all of the workspaces you just created. If for any reason you need to remove user access to a workspace, you can do so within that workspace's settings.

New Subscriber Setup – Next Steps

At this point you will see a summary of the steps you have completed and suggestions on what to do next.



Summary

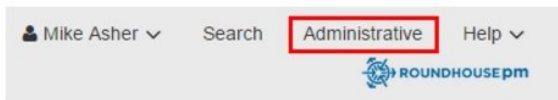
You've just made a great start in setting up your pyramid. So far you've:

1. Defined your organizational structure
2. Created some workspaces
3. Invited people in your company to join

What's Next?

- Customize the look and feel of RoundhousePM by uploading your logo and changing the default color scheme.
- Customize each workspace's Project Summary page with introductory text, logos, location map and weather.
- Customize what modules are visible to each of your workspaces.
- Invite other people (Clients, Contractors, Consultants) to join your workspaces.

All of these can be done in the Administration area by clicking on this button:



Need more help?

Don't forget, we've provided a lot of tutorial videos to help you get started. You can find them [here on our website](#).

[Previous](#)

[Login to RoundhousePM](#)

Non-Guided Setup

If you decided to skip the Guided Setup, there's no one-way to set up your pyramid. Generally it's best to make a diagram or list of how your pyramid is to be structured with the levels and decide which workspaces you need to create.

Below are some steps that work well:

1. Workspaces
2. Customization
3. User Groups
4. Users
5. Monitor Users

Workspaces – Once you have the pyramid structure in your head you can start by creating the workspaces. The first thing you do is to create the Level 2 workspace(s) by adding a child workspace to your Level 1 workspace. Once you have these workspaces, move on to the Level 3 and then Level 4 workspaces. See [Workspaces](#).

Customization (optional) – If you like you can change the default color of your pyramid and upload your company logos. To do this see Look and Feel.

User Groups – Next review the User Groups to make sure that you have enough granularity between the types of users that you work with on a daily basis. In User Groups you will find examples of possible User Groups depending on whether you're an architect, contractor, developer / owner. Keep in mind you can always add more groups and users can be moved from one group to another should you make a mistake or find that you need to control access for certain users.

Users – Next add the Users. You may do this in several ways depending on the size of your company and how much time you want to spend. From the Users screen you may Add User and fill in all of their data for each person in your company, or you may use the Invite User function and let them complete their personal information during their login.

Modules – Next add the modules to the workspaces. From the Modules administration screen edit each of the (word unknown here) and set which User Group should access (see) this list and also select which workspace should contain this module. Review all the standard setting to make sure they're as you like. Especially make sure to check and possibly adjust the roll up / roll down and notification settings to fit your needs.

Monitor Invited Users – Continue to monitor the invited users. As they join their information will appear in the Users list. Once they join you may edit them and give them access to additional workspaces if you like.

Next: [General Information >>](#)

General Information

If you created your pyramid using the Guided Setup feature the information on this page should be completed. If you need to make changes you can adjust it here.

General

Company Name *	<input type="text" value="Acme Architects"/>
URL Name *	<input type="text" value="AcmeArchitects"/> .roundhousepm.com
Address 1 *	<input type="text" value="100 Peachtree Street"/>
Address 2	<input type="text" value="Suite 1450"/>
City *	<input type="text" value="Atlanta"/>
State *	<input type="text" value="Georgia"/>
Zip Code *	<input type="text" value="30303"/>
Country *	<input type="text" value="United States"/>
Contact *	<input type="text" value="Charles Fletcher"/>
Email *	<input type="text" value="cf@acmearchitects.com"/>
Phone	<input type="text" value="404-555-1212"/>

Company Name used in the URL

Each subscriber has a custom URL to login to their pyramid. With this URL any person who has access to the subscriber's pyramid may login. The URL for this is:

http://companyname.roundhousepm.com

In the field enter then name that you want to use following the guidelines shown.



Tip: When you and your guests utilize the custom URL your logo will appear on the login screen. This logo is added in the [Look and Feel](#) page.



Warning: You cannot use a period (.) in the URL Name field.

Next: [Usage >>](#)

Usage

Within the Administration area of your account you will find the Usage page. This page contains a chart similar to the one below.

Workspaces	Active	Inactive
Level 1 -	1	0
Level 2 - Studio	6	0
Level 3 - Client	22	1
Level 4 - Project	107	17
Level 5 - Bid Site	10	9
Total	146	27
Storage (GB)	Active	Inactive
Total	92.45Gb	1.86Gb
Factor	100%	30%
Factored Total	92.45	0.56
Total GB for invoice calculation	93.01	

The upper portion of the screen shows the number of workspaces at each level of the pyramid. The left column are the Active Workspaces and the right column are the Inactive Workspaces.

The lower portion of the screen shows the data stored in your pyramid. The left column is Active Storage and the right column is Inactive Storage. In this example there are 92.45 Gb of active storage and 1.86 Gb of inactive storage.

The line below this is the Factor percentage. Active storage is factored at 100% and inactive storage is factored at 30%.

Below this is the factored storage totals and at the very bottom, inside the red box, is the "Total Gb for Invoice Calculation" of 93.01Gb.

Next: [Nomenclature >>](#)


Nomenclature

If you created your pyramid using the Guided Setup feature the information on this page should be completed. If you need to make changes you can adjust it here.

Workspace Nomenclature

Because RoundhousePM can share pyramids from several companies, we strongly recommend that you keep the organizational chart as shown below. While you may feel you don't need a particular level and you may be inclined to eliminate it, we suggest that you don't because when your users see your pyramid next to the pyramids of other companies, the information won't align correctly in the expanding workspace list.

Tip: If you select "Not Used" you will not be given this level of workspace as an option when creating a new workspace.



Level 1

Level 2

Level 3

Level 4

Level 5

Acme Architects

Studio

Client

Project

Bid Site

Save Cancel

All companies are different and the terminology that you use varies slightly from one company to another. However, the general hierarchy of RoundhousePM subscribers is essentially the same. Your company may have groups or divisions within your company. Next you generally have clients which pay you to perform work.

The Nomenclature page allows you to customize the names for these terms.



Tip: If your company does not utilize one of these Levels simply name it "Not Used". For example if you're a real estate developer and you're the client for your own work, you may not utilize Level 3 which is typically reserved for the people you work for. Simply skip this level and create your projects on Level 4 and do not create any workspaces at Level 3. For more information about skipping levels see [Workspaces](#).

Next: [Look and Feel >>](#)

Look and Feel

On this page you can upload your company logos and select the color scheme for the "Workspace Explorer": [#the-workspace-explorer](#).

Look and Feel

Your Company Logo

Upload your company logo to appear on the login page and the header of every page and please note the dimension requirements (in pixels).

Login Page
350w x 120h
JPG, GIF, or PNG

Upload

ACME
ARCHITECTS

File size: 13.63 KB
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200w x 60h
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ACME
ARCHITECTS

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Your Color Scheme

Select the color that matches your companies corporate color scheme. Keep in mind that the colors darken as the level numbers increase so you may need to adjust this in order to make it look correct. Select the Level1 color and RoundhousePM selects the other colors, but you can determine if the text is black or white.

Color selection interface showing 12 rows of color swatches. Each row has a radio button to its left. The 8th row (brown/orange) is selected. Below the swatches are 'Save' and 'Cancel' buttons.

Radio	Swatch 1	Swatch 2	Swatch 3	Swatch 4	Swatch 5
<input type="radio"/>	Light Blue	Medium Blue	Dark Blue	Very Dark Blue	Black
<input type="radio"/>	Light Cyan	Medium Cyan	Dark Cyan	Very Dark Cyan	Black
<input type="radio"/>	Light Green	Medium Green	Dark Green	Very Dark Green	Black
<input type="radio"/>	Light Yellow	Medium Yellow	Dark Yellow	Very Dark Yellow	Black
<input type="radio"/>	Light Orange	Medium Orange	Dark Orange	Very Dark Orange	Black
<input checked="" type="radio"/>	Light Brown	Medium Brown	Dark Brown	Very Dark Brown	Black
<input type="radio"/>	Light Purple	Medium Purple	Dark Purple	Very Dark Purple	Black
<input type="radio"/>	Light Pink	Medium Pink	Dark Pink	Very Dark Pink	Black
<input type="radio"/>	Light Red	Medium Red	Dark Red	Very Dark Red	Black
<input type="radio"/>	Light Grey	Medium Grey	Dark Grey	Very Dark Grey	Black
<input type="radio"/>	Light Blue	Medium Blue	Dark Blue	Very Dark Blue	Black
<input type="radio"/>	Light Cyan	Medium Cyan	Dark Cyan	Very Dark Cyan	Black

Save Cancel

Next: [Workspaces >>](#)

Search

Q

12345View by Name

Active?

-

Acme Architects

-

Multifamily

-

Center Partnership

New Child Workspace at Level 4

townhomes

New Child Workspace at Level 5

townhomes Bid Site

Monroe Walk Apts

Peachtree Lofts

☒

☐

*** Skipped Levels.** If you selected “Not Used” on the Nomenclature page, you will not see the option to create a workspace at some levels.
Select Action Menu

Row Action Menu

Search

Q

12345View by Name

Active?

-

Acme Architects

-

Multifamily

-

Center Partnership

-

Augusta Townhomes

Augusta Townhomes Bid Site

Monroe Walk Apts

Peachtree Lofts

-

The Jones Group

The Renaissance Project

+

Retail

☒

☒

☒

☒

☒

☒

☒

☒

☒

☒

Edit

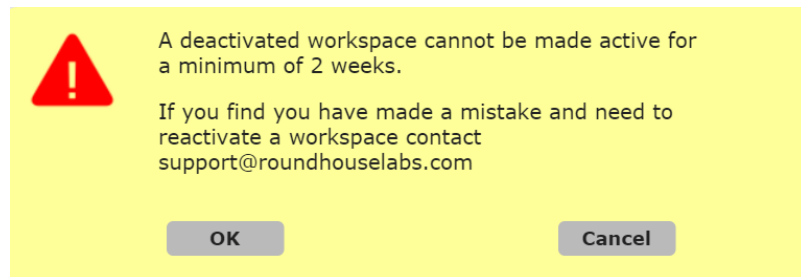
Make Inactive / Active

☐

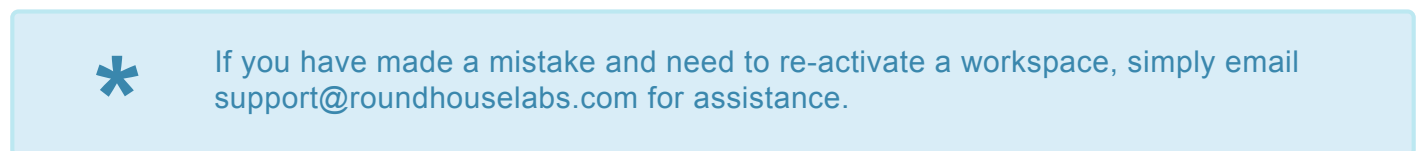
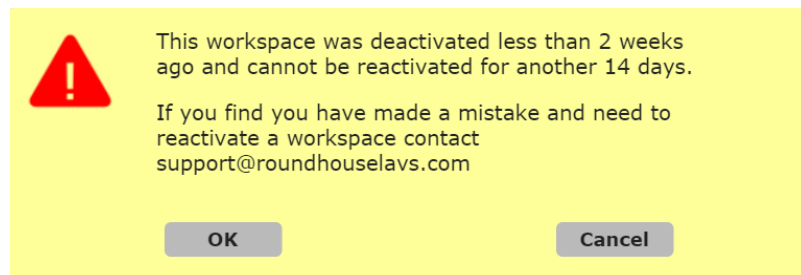
☐

Edit allows you to configure the workspace. For more information see Editing a Workspace.

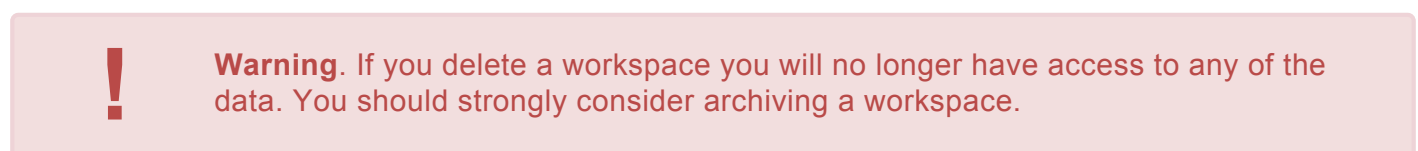
Make Active / Inactive toggles the state of a workspace. In doing so this changes how the storage of this workspace is invoiced for this month. If you make a workspace inactive you will see the following dialog warning you that if you make a workspace inactive you cannot re-activate it for 14 days.



If you try to activate a workspace within the 14 day period you will see the following dialog.



Delete Workspace allows you to delete a workspace. If you select this action you will be presented with the following dialog.



Next: [Adding a new Workspace >>](#)

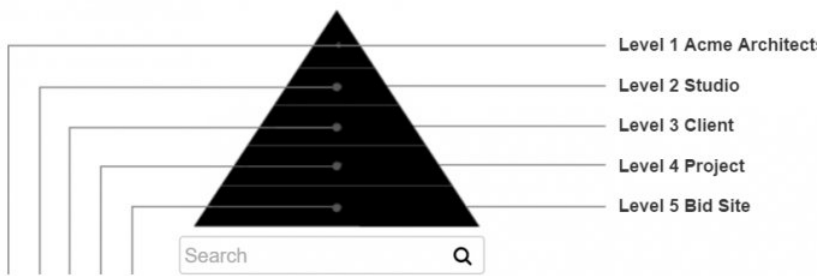
Adding a new Workspace

If you used the Guided Setup some of these attributes will already have been set for you. There are two locations in RoundhousePM to create a new workspace:

1. The Administration [Workspace](#), and
2. The Add Workspace screen. This is what we will review below.

Step 1 – Workspace Name and Level

Add a New Workspace - Step 1 of 3



Search

1	2	3	4	5	Active?	Add Child Workspace
[-]	Acme Architects				Yes	New Studio
[-]	Multifamily				Yes	New Client
	[-]	Center Partnership			Yes	New Project
		[-]	Augusta Townhomes		Yes	New Bid Site
			[-]	Augusta Townhomes Bid Site	Yes	
				Monroe Walk Apts	Yes	New Bid Site
				Peachtree Lofts	Yes	New Bid Site
				Roswell Apartments		

Abbrev Workspace Name *

Project Number (if any)

Clone Existing Workspace? ☒ No ☐ Yes, which includes modules and users


Workspace Status

Step 2 – Workspace Users

In this area you can select the names of the existing users that have access to this workspace. If a user is not a member of your pyramid you must add them by invitation or by adding them manually. For more information on this see Adding Users.


Add a New Workspace - Step 2 of 3

Not selected



Company	Name
Cuppa Joe, Inc	Coffee, Joe
Crane Construction	Farmer, Albert
Superior Mechanical	Fassett, John

Selected



Company	Name
Acme Architects	Charlotte Bronte
Acme Architects	Sylvia Buck
Acme Architects	Charles Fletcher
Acme Architects	David Mahoney
Center Partnership	John Abbot
Metro Engineers inc	Lewis Bernard

>

>>

<

<<

Back

Next



Easily Finding Users. As your pyramid grows and the number of users grow, you may have hundreds of users. Use the Search box to find an individual name or search for a company name which will display all users of a particular company allowing you to easily select the ones you want.

Step 3 – Modules of the Workspace

In this area select which Modules are part of this workspace.

Add a New Workspace - Step 3 of 3

Accessible Modules

General Info	Documents
<input checked="" type="checkbox"/> Announcements	<input checked="" type="checkbox"/> Drawings
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Specifications
<input checked="" type="checkbox"/> Tasks	<input checked="" type="checkbox"/> Shared Documents
	<input type="checkbox"/> Cuppa Joe Standards (Rolls Down from L3)
	<input checked="" type="checkbox"/> Contracts (roll-up example)

Logs

- ☒ RFIs
- ☒ Submittals
- ☒ Photos
- ☒ Field Reports
- ☒ Change Orders Proposals
- ☒ Change Orders
- ☒ Pay Apps

Note: The screen above is from TestDrive and contains names of modules which are duplicates of the Documents module.




Module Access Eventhough a module appears in a workspace it does not mean that all users will have access to that module. Each module contains an over-riding attribute that allows the administrator to select which User Groups have access to a module. So, if you have made a duplicate of the Documents module to contain only Architect/Client contracts, and the module only allows architect users and owner users to have access, then eventhough the module is active within the workspace other users such as Contractors or SubContractors will not have access.

Workspace Summary Page Layout

In this area you define which elements are to appear on the Summary page.

Summary Page Layout



Upload (275 width JPG, GIF, or PNG)

Display Map

Display Weather(zip code)

Welcome ▼

<> B / 1 ↕ 🔗

Visible?	List to display?	Records to display
<input checked="" type="checkbox"/>	Announcements	All ▼
<input checked="" type="checkbox"/>	Tasks	
<input checked="" type="checkbox"/>	RFIs	
<input checked="" type="checkbox"/>	Submittals	
<input checked="" type="checkbox"/>	Change Orders Proposals	
<input checked="" type="checkbox"/>	Change Orders	
<input checked="" type="checkbox"/>	Pay Apps	

Back **Save**

Upper Left Image – Upload logos, renderings or what ever type of graphic you want to appear on the Summary Page.



Image Proportions – Experiment with the images you upload. These do not have to be a standard 4:3 landscape image. Roundhouse PM allows you upload tall images that might make your Summary Page more dynamic.

Left side text box – This text field can be used for a variety of information but is typically for things like project numbers, etc.



*Spacer *- If you utilize the location map or weather feature, you may find that these graphics look better further down the page because they crowd the upper left graphic. To move the map or weather image down the page, simply enter returns in this field.

Map

If you enter an address here a map will display with a pin marking the address location.

Weather

If you enter a zipcode the current weather will appear appear on the Summary page.

Main Text Box

At the top of this box you can select the header text. The choices are: **Introduction**, **Welcome** *and ***Instructions to Bidders**.

In the large text box you are free to enter any text that you may like and format the text using the tools provided.

Modules and Open Items

In this area you can select which items you want to display on the Summary page. Only the Announcements module allows you to select the number of most recent items you want displayed. The remaining modules, if displayed, will show all open items.

Next: [Users >>](#)


Users










The Users page allows you to see all users that have access to your pyramid, any invitations that have been sent to people that you would like to join your pyramid, and any expired invitations.

Existing Users

This section displays the names and user groups of all the people that have access to your pyramid.

Existing Users

 [Add New](#)

Name	Email	Company	User Group	Active	
Abbot, John	jabbot@centerpartnershipatl.com	Center Partnership	Client	<input checked="" type="checkbox"/>	
Bernard, Lewis	bernard.lewis@metroengineers.com	Metro Engineers inc	Administrator	<input checked="" type="checkbox"/>	
Bronte, Charlotte	cb@acmetest.com	Acme Architects	Administrator	<input checked="" type="checkbox"/>	
Buck, Sylvia	sb@acmetest.com	Acme Architects	Architect - Project Mgr	<input checked="" type="checkbox"/>	
Coffee, Joe	jcoffee@cuppajoeinc.com	Cuppa Joe, Inc	Client	<input checked="" type="checkbox"/>	
Farmer, Albert	afarmer@craneconstructs.com	Crane Construction	GenContractor	<input checked="" type="checkbox"/>	
Fassett, John	jfassett@yahoo.com	Superior Mechanical	Consultant	<input checked="" type="checkbox"/>	
Fletcher, Charles	cf@acmetest.com	Acme Architects	Administrator	<input checked="" type="checkbox"/>	
Mahoney, David	dm@acmetest.com	Acme Architects	Architect - Project Mgr	<input checked="" type="checkbox"/>	



Finding a User As your pyramid grows the number of users you manage gets quite large. Rather than scrolling the list use the Search box to help you find the name or company that you are looking for.



Make Inactive and Deleting Users In general, if you have a user that should no longer have access to your pyramid you should set their user group to “No Access” and change their status to Inactive. Changing the status to Inactive removes their name as an option from selection fields. However, if you’ve manually created a user by mistake you may need to use the Delete User function.

Open and Expired Invitations

This section displays all of the open and expired invitations that have been sent.

Open Invitations

Resend Open Invitations: Never (Do not Resend) ▼

Name	Email	Group	Expires	
	sattis@centerpartnershipatl.com	Client	2016-01-30	▼

Expired Invitations

Delete All Expired Invitations

Name	Email	Group	Expired	
	akelly@centerpartnershipatl.com	Client	2015-11-22	▼
	ldavenport@centerpartnershipatl.com	Client	2015-11-22	▼

The row action menu in each of these sections allows you to **Resend** or **Delete** the invitation.



Invitation Problems If you click on the triangle at the left of the row, you can find a URL of the invitation. This is sometimes helpful if a user has a problem in receiving an invitation. If this happens, copy the URL and send them an email with this information.



Resend Open Invitations Roundhouse also has an option to automatically resend invitations until they expire. The choices are: Every Day, Every 2 Days, Every 3 Days, and Never.

Next: [Adding Users >>](#)

Adding Users

On this page you select how to add a user.

Add Users

Invite Users

Use this option to send an email invitation to one or more users. Users then accept the invitation and complete their personal information.

Manually Add User

Use this option to manually create a user without sending an invitation. This can be useful if you have a user that's just too busy to read their email and setup their own account.

Add Guest User

Use this option to create a Guest User account. These accounts are primarily used during the bidding of jobs and are created for a specific project and issued to many users (i.e. subcontractors). The Guest User account should have read only and download rights.

Users and Guest Users – What is the difference?

A typical user is one that has a personal account that allows them, based on the permissions granted, to create and edit records. A guest user account is one provided multiple people for the purpose of accessing data for a specific period of time, typically for the duration of a bid or for the construction period of a project.

Adding a user by Invitation

Below is the screen for sending an invitation to a user or several users at one time. This screen contains instructions and tips on how to easily send invitations.

Add Users by sending an Invitation

Inviting people to become a member of RoundhousePM is easy. Just follow these steps:

1. Enter the email address for the people that you want to invite
2. Select a user group for these people
3. Select the workspace that these people will have access to
4. Compose the email to be sent with a subject and body
5. Click the "Invite Users" button

Tips:

- a. Group your invitees by user group and send as many invitations as possible at one time.
- b. Use a subject such as " has invited you to join the workspace."
- c. The more personal you make the subject and body, the less likely that the invites will not overlook the email and throw it in the trash.

Email Addresses: *

sjohnson@craneconstructs.com
tsaverin@craneconstructs.com
bgriffith@craneconstructs.com

User Group:

GenContractor ▼

Workspaces

Search 

1	2	3	4	5	View by Name	<input type="checkbox"/> Access?
—	Acme Architects					<input type="checkbox"/>
—	— Multifamily					<input type="checkbox"/>
—	— Center Partnership					<input type="checkbox"/>
—	— Augusta Townhomes					<input checked="" type="checkbox"/>
—	— Augusta Townhomes Bid Site					<input checked="" type="checkbox"/>
—	— Monroe Walk Apts					<input checked="" type="checkbox"/>
—	— Peachtree Lofts					<input checked="" type="checkbox"/>
—	— The Jones Group					<input type="checkbox"/>

Sent on the behalf of:

Fletcher, Charles - Acme Architects ▼

Email Body:

I'd like you to join us on RoundhousePM to participate in the Acme Architects workspaces.

Blind copy me:



Send Invitation

Cancel



Importing Users – There is an additional way of inviting users by importing a CSV file. This technique is generally used when you first subscribe to RoundhousePM and are trying to add a lot of users quickly. For more information on this feature see [Import Users](#).

Adding a user manually

While it is always easiest to send an invitation it may sometimes be necessary to manually add a user. Perhaps your boss is just too busy to find time to create their account and you need to have them listed as a participant of a workspace, you may need to create their account for them. If this happens you use this screen. Once you create the account provide them the password and security question and answer.

Manually Add User

WARNING! It is not advisable to create user accounts for other people. Instead, potential users should be sent an invitation and let them create their own accounts.

Name *	<div><div>▼</div><div>First Name</div><div>Last Name</div><div>Suffix</div></div>
Title	<input type="text"/>
Email *	<input type="text"/>
Phone	<input type="text"/>
Mobile	<input type="text"/>
Fax	<input type="text"/>
Preferred phone number	<div>phone ▼</div>
Company	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<div>▼</div>
Zip Code	<input type="text"/>
Country	<div>United States ▼</div>

Login and Password

Login	Your login name is your email address above
Password *	<input type="password"/>
Re-enter Password	<input type="password"/>
Security Question	<div>What is your pet name? ▼</div>
Answer	<input type="text"/>

Access and Workspace

User Group	<div>Administrator ▼</div>																
Workspaces	<div><input type="text" value="Search"/> <input type="button" value="Q"/></div>																
<div><div><div>1 2 3 4 5 View by Name</div><div><input type="checkbox"/> Access?</div></div><table><tr><td>— Acme Architects</td><td><input type="checkbox"/></td></tr><tr><td>— Multifamily</td><td><input type="checkbox"/></td></tr><tr><td>— Center Partnership</td><td><input type="checkbox"/></td></tr><tr><td>— Augusta Townhomes</td><td><input type="checkbox"/></td></tr><tr><td>— Augusta Townhomes Bid Site</td><td><input type="checkbox"/></td></tr><tr><td>— Monroe Walk Apts</td><td><input type="checkbox"/></td></tr><tr><td>— Peachtree Lofts</td><td><input type="checkbox"/></td></tr><tr><td>— The Jones Group</td><td><input type="checkbox"/></td></tr></table></div>		— Acme Architects	<input type="checkbox"/>	— Multifamily	<input type="checkbox"/>	— Center Partnership	<input type="checkbox"/>	— Augusta Townhomes	<input type="checkbox"/>	— Augusta Townhomes Bid Site	<input type="checkbox"/>	— Monroe Walk Apts	<input type="checkbox"/>	— Peachtree Lofts	<input type="checkbox"/>	— The Jones Group	<input type="checkbox"/>
— Acme Architects	<input type="checkbox"/>																
— Multifamily	<input type="checkbox"/>																
— Center Partnership	<input type="checkbox"/>																
— Augusta Townhomes	<input type="checkbox"/>																
— Augusta Townhomes Bid Site	<input type="checkbox"/>																
— Monroe Walk Apts	<input type="checkbox"/>																
— Peachtree Lofts	<input type="checkbox"/>																
— The Jones Group	<input type="checkbox"/>																
<div><div>Save</div><div>Cancel</div></div>																	

Adding a guest user

Creating a Guest User is very similar to manually adding a user with a few exceptions:

1. **Only has access to one workspace**
2. **Only has access for a defined period of time.**

Below is the screen for a guest user account. This screen contains instructions and tips on how to easily send invitations.

Create a Guest User Account

Guest user accounts are useful for inviting multiple participants to a workspace, but giving them limited rights, such as reading or downloading. For example, if you want to send a [level4name] out to bid you can create a Guest user account and publish this to all bidders by giving them the guest user account name, password and the URL:

<http://companyname.roundhousepm.com>

Tips:


- Create a user name and password that are simple. Use a logical naming convention that you can use on other guest user accounts, such as: "00000-bidder" where the "00000" would be the Project number. Unlike Individual users, Guest User accounts are not email addresses.
- Only allow the guest user account access to one workspace.
- Define an expiration date, otherwise, people that should not have access to a workspace may have one after the bid period ends.
- Be very careful about the permissions you give a guest user account. Typically, they should not have the ability to create or edit records since many people will be using the same account. If these people need the ability to create or edit records, you should invite them individually to be a user in the workspace. It is best not to give the guest account create or edit permissions.

Account Name *

Login Name *

Password *

Expiration Date *

Workspaces 

1 2 3 4 5 View by Name

- Acme Architects
 - Multifamily
 - Center Partnership
 - Augusta Townhomes
 - Augusta Townhomes Bid Site
 ☒
 - Monroe Walk Apts
 ☐
 - Peachtree Lofts
 ☐
 - The Jones Group
 ☐

Accessible Modules

<div>General Info</div> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Announcements <input checked="" type="checkbox"/> Contacts <input type="checkbox"/> Tasks <div>Logs</div> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> RFIs <input type="checkbox"/> Submittals <input type="checkbox"/> Photos <input type="checkbox"/> Field Reports <input type="checkbox"/> Change Orders Proposals <input type="checkbox"/> Change Orders <input type="checkbox"/> Pay Apps 	<div>Documents</div> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Drawings <input checked="" type="checkbox"/> Specifications <input type="checkbox"/> Shared Documents <input type="checkbox"/> Cuppa Joe Standards (Rolls Down from L3) <input type="checkbox"/> Contracts (roll-up example)
---	---

Create Guest User

Cancel



Guest User Permissions A guest user account is typically an account given limited access such as read and download which is what is needed by a subcontractor bidding a project. However it is possible to provide a guest user account with more permissions, but be careful when doing this because there if you allow a guest user to create or edit a record there is no way to distinguish which guest user was the one who created or edited a record. If you want a user to have Add and Edit permissions you should create them as a regular user by sending them an invitation or adding them manually to your pyramid.

Next: [Guest Users >>](#)

Guest Users

The page below displays the Guest User accounts that have been created for a pyramid.

Guest Users

				<input type="text" value="Search"/>		Add New
Guest	Guest Login	Expiration Date	Active			
Augusta Townhome Guest	15093-bidder	2020-01-01	<input checked="" type="checkbox"/>			

Users and Guest Users – What is the difference?

A typical user is one that has a personal account that allows them, based on the permissions granted, to create and edit records. A guest user account is one provided multiple people for the purpose of accessing data for a specific period of time, typically for the duration of a bid or for the construction period of a project.

To find out more about how to add a Guest User account [click here](#).

Next: [User Groups >>](#)

User Groups

RoundhousePM allows you to control a users ability to see or do things by putting them into User Groups with other people with similar privileges.

When you created your pyramid, you were asked for they type of company you have (e.g. architectural, contractor, owner, etc.). RoundhousePM then creates a default set of User Groups for a company of your type. You may edit these at any time or create new User Groups as needed. [Click here](#) to see the user groups that were created depending upon the selection you chose.

Groups

Name	Admin	Acctg	Add	Edit	Delete	Down	Read	
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Architect - Principal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Architect - Project Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Architect - Project Mgr	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Architect - Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Client	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Consultant	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
GenContractor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Subcontractor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Construction Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
No Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼

Downloading of files thru emailed Links

If a Link to a download a file is sent via email to a user, do you want to require the person downloading the file to provide credentials (user name and password) before the file can be downloaded? Some things to think about:

1. Not requiring credentials means that this link can be sent to anyone, even people who are not users of your RoundhousePM account, and these people can download the file.
2. Not requiring credentials also means that RoundhousePM will not track the history of who downloads a file.

☐ Require a username and password to download a file from a link.



RoundhousePM allows a user to create a link for a file to be downloaded. This link can be emailed to anyone and the file can be downloaded just by clicking on the link. However, this means that anyone who has this link can download the file. In order to protect this from happening you may restrict the download only to users or RoundhousePM by checking the box found here. Once checked, a username and password will be required before the download begins.

Creating a New User Group

If you find that you need to create a new user group in order to control access to your pyramid select the Create New button and the screen below will appear.

Add User Group

Group Name:

Permissions:

Admin	Acctg	Add	Edit	Delete	Download	Read
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

There are seven levels of control to RoundhousePM.

Administrative – When checked a user may control all aspects of Roundhouse including workspaces, lists and users.

Accounting – When checked this allows a user to access the Admin Page for “Invoices and Billing”. Typically this level of access is only used by the owners of the firm or by the accounting staff.

Add / Upload – When checked a user may add new records or upload files to a list.

Edit – When checked a user may edit records.

Delete – When checked a user may delete records.



Use the delete permission carefully. Typically only senior level members or people who administer your pyramid are given this ability.

Download – When checked a user has the ability to download files from lists.




If a user has the ability to open a PDF file there's nothing preventing them from saving this file to their hard drive even if you have not given them download permissions. This is beyond the control of RoundhousePM.

Read – When checked a user has the ability to view a list and the contents of the list.

Existing Users and their User Groups

Displays the users of your pyramid who are members of this group. You can use this window to search by user name or by user group to compare and possibly make adjustments to which user group people belong to.

Existing Users and their User Groups



Name	Company	User Group	Active
Abbot, John	Center Partnership	<input type="text" value="Client"/>	<input checked="" type="checkbox"/>
Bernard, Lewis	Metro Engineers Inc	<input type="text" value="Administrator"/>	<input checked="" type="checkbox"/>
Bronte, Charlotte	Acme Architects	<input type="text" value="Architect - Project Mgr"/>	<input checked="" type="checkbox"/>
Buck, Sylvia	Acme Architects	<input type="text" value="Architect - Project Mgr"/>	<input checked="" type="checkbox"/>
Coffee, Joe	Cuppa Joe, Inc	<input type="text" value="Client"/>	<input checked="" type="checkbox"/>
Farmer, Albert	Crane Construction	<input type="text" value="GenContractor"/>	<input checked="" type="checkbox"/>
Fassett, John	Superior Mechanical	<input type="text" value="Consultant"/>	<input checked="" type="checkbox"/>
Fletcher, Charles	Acme Architects	<input type="text" value="Administrator"/>	<input checked="" type="checkbox"/>
Mahoney, David	Acme Architects	<input type="text" value="Architect - Project Mgr"/>	<input checked="" type="checkbox"/>

Next: [Modules >>](#)

Modules

There are two types of modules within RoundhousePM: **Standard Modules** and **Custom Modules** that you create.

Standard Modules

The following modules are Included with your subscription to RoundhousePM as grouped by the menu which each appear are:

General Menu

- [Announcements](#)
- [Contacts](#)
- [Tasks / To-Do's](#)

Documents Menu

- [Drawings](#)
- [Specifications](#)
- [Documents](#)
- Duplicates of the Documents module that your administrator has created appear here.


Logs Menu














- [Request for Information Log](#) (RFI Log)
- [Submittal Log](#)
- [Photos](#)
- [Field Reports](#)
- [Change Order Proposal Log](#)
- [Change Order Log](#)
- [Pay Application Log](#)

Module Administration Page

The following screen appears when you select Modules in the Administration are. This screen shows all of the modules that make up your pyramid.

Modules

 [New Documents Module](#)

Module Name ↕	Description	Creator ↕	Status ↕	
Announcements	This module is for basic announcements to keep users current.	Roundhouse Labs	Active	
Change Orders	This module is where Change Order PDFs are uploaded, due dates are assigned and progress is tracked.	Roundhouse Labs	Active	
Change Orders Proposals	This module is where Change Order Proposals PDFs are uploaded, due dates are assigned and progress is tracked.	Roundhouse Labs	Active	
Contacts	This module is your basic contacts directory.	Roundhouse Labs	Active	
Drawings	This module is where you upload drawings for the project. This module organizes releases into sets and easily allows a user to see the most current drawings.	Roundhouse Labs	Active	
Field Reports	This module is for the creation of a Field Report. Create a new record and link pictures from the Photos module.	Roundhouse Labs	Active	
Pay Apps	This module is where Pay Application PDFs are uploaded, due dates are assigned and progress is tracked.	Roundhouse Labs	Active	
Photos	Use this module to store and manage workspace photos.	Roundhouse Labs	Active	
RFIs	Create, assign and keep track of Requests for Information (RFIs) here.	Roundhouse Labs	Active	
Shared Documents	This module is a place to upload a variety of files. These files can be organized by folders just like you would on your computer desktop.	Roundhouse Labs	Active	
Specifications	This module is where you upload specifications for the project. This module organizes releases into sets and easily allows a user to see the most current specifications.	Roundhouse Labs	Active	
Submittals	Use this module to collaboratively track the approval process of submittals. The contractor creates the record, and RoundhousePM keeps track of each time the record is reviewed. Due dates are tracked and can easily be seen by all.	Roundhouse Labs	Active	
Tasks	This module is your basic To-Do list. Use this module to create tasks, assign them and establish deadlines.	Roundhouse Labs	Active	

Configure
Make Active / Inactive

Configure – Allows you to edit the attributes of a module, select which workspaces the module appears, and which user groups have access to the module. For more information on this, [click here](#).

Make Active / Inactive – Allows you to turn off a module across your pyramid at one location.

New Documents Module – The button at the top of the page allows you to create a duplicate of the Documents module. For more information about why it may be beneficial to do this, see [Non-Typical Modules](#).

Next: [Typical Module Admin Page >>](#)

Typical Module Admin Page

Every module in Roundhouse has an administration page. On this page you control things such as:

Name of the Module – Some modules allow you to rename the module to one that is more common to your company. (e.g. Submittals / Shop Drawings; Change Order Proposals / Proposed Change Orders; Field Reports / Site Visits)

Control User Group Access – This allows you to define which user group can access, or can “see”, this module.

Select Workspaces – This allows you to select which workspaces have this module.

Most of the admin pages will all be very similar. Below we will review the various sections.

Admin – General

In this section you will see the various attributes that a module has. Most of these attributes are pre-defined by Roundhouse Labs and cannot be changed. However, there are some modules that allow you to change the name of the module as discussed above. For more information on these attributes, see the [Module Attribute Matrix](#) in the Appendix.

General Settings

Module Name	Announcements
Module Description	This module is for basic announcements to keep users current.
Tips	Announcements can also be created from within most modules when creating a record.
Author	Roundhouse Labs
Status	Active
Roll Up/Down	Up
Field link	Subject
Menu	General
Announcements	No
Notifications	Yes
L1, L2 and L3 New Record Confirmation	Some new users may not understand the pyramid structure of RoundhousePM and attempt to create new records for Levels 1, 2 and 3 when in fact, they were intending the new record to be for Levels 4 or 5. In an effort to reduce these mistakes it is possible to confirm this action prior to the creation of the new record.
New Record Confirmation Message	<div> <div>You are creating a new record for the [WorkspaceName] workspace.</div> <div></div> </div> <div> <input checked="" type="radio"/> Confirm New Record Creation for L1, L2 and L3 <input type="radio"/> Do not confirm New Record Creation for any level workspace </div>
Release date	
Release notes	



New Record Confirmation Message allows you to confirm the creation of a new record for Level1, Level2 and Level3 workspaces. This is useful if you find users accidentally creating new records in the wrong workspace level.

Admin – User Group Access

In this section select which user groups have access to this module.

Visibility

Select which User Groups can see this Module

Administrator	<input checked="" type="checkbox"/>
Architect - Principal	<input checked="" type="checkbox"/>
Architect - Project Admin	<input checked="" type="checkbox"/>
Architect - Project Mgr	<input checked="" type="checkbox"/>
Architect - Staff	<input checked="" type="checkbox"/>
Client	<input checked="" type="checkbox"/>
Consultant	<input checked="" type="checkbox"/>
GenContractor	<input checked="" type="checkbox"/>
Subcontractor	<input checked="" type="checkbox"/>
Construction Manager	<input checked="" type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>
No Access	<input type="checkbox"/>
	<input type="checkbox"/>

Admin – Workspaces

In this section you select which workspaces contain this module.

Workspaces

Select the Workspaces to have this Module

1 2 3 4 5 View by Name

☐ Access?

<input checked="" type="checkbox"/> Acme Architects	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Multifamily	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Center Partnership	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Augusta Townhomes	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Augusta Townhomes Bid Site	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Monroe Walk Apts	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Peachtree Lofts	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> The Jones Group	<input checked="" type="checkbox"/>

☒ By default, add this module to any new workspace.**Save**

Cancel



Some modules have more attributes that the pyramid administer can change. For more about these see [Non-Typical Admin Pages](#).

Next: [Non-Typical Module Admin Pages >>](#)

Non-Typical Module Admin Pages

Several modules allow for more custom features than the typical modules. Below are each of these modules and the unique features that these have.

[Drawings Module](#)

[Specifications Module](#)

[Documents Module and Duplicates of Documents Module](#)

[RFI Module](#)

[Submittals Module](#)

Next: [Drawings module >>](#)

Drawings module

The Drawings module allows you to categorize sheets by discipline and determine the proper sort order for how the files are used within the module.

Terminology	Sheet ▼	Other
	Release Set ▼	Other
Disciplines	<div>Cover Civil Landscape Architectural Structural Mechanical Plumbing Electrical</div>	
Discipline Codes	<div>Cover: G Civil: C Landscape: L Architectural: A Structural: S Mechanical: M Plumbing: P Electrical: E</div>	

RoundhousePM has some default values created for the Disciplines field but you may add or subtract these as needed. Place them in the order that you want them sorted in a set. These default values are:

- Cover
- Civil
- Landscape
- Architectural
- Structural
- Mechanical
- Plumbing
- Electrical

The single letter field is used for the SmartUpload feature. For more information about the SmartUpload feature [click here](#).

The Drawings module also has additional control over who can see files or create a Release Set. The default values are shown below:

Visibility

Group Name	View	Add / Edit
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Principal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Project Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Project Mgr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Consultant	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GenContractor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subcontractor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Construction Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
No Access	<input type="checkbox"/>	<input type="checkbox"/>

Next: [Specifications module >>](#)

Specifications module

The Specifications module is similar to the Drawings module in that it has Release Sets to make sure that users are typically viewing the Current Release Set but unlike the Drawings module, the documents are not assigned to a Discipline.

The Specifications module also has additional control over who can see files or create a Release Set. The default values are shown below:

Visibility		
Group Name	View	Add / Edit
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Principal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Project Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Project Mgr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Architect - Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Consultant	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GenContractor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subcontractor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Construction Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>
No Access	<input type="checkbox"/>	<input type="checkbox"/>

Next: [Documents Module and Duplicates of Document Module >>](#)

Documents Module and Duplicates of Document Module

The Documents Module allows you to create folders and store files of any type you choose. This makes this a very versatile module. However this module is accessible to any user who can see it. However, there may be types of documents that you don't want just anyone to see. For instance, you may want to have contracts saved on RoundhousePM and you certainly don't want everyone seeing those. In order to control the access to these types of documents you duplicate the Documents module and rename it something more appropriate such as "Contracts". You then set the UserGroup access permission to those people within your company who should have access.

In addition to this, you can control whether the Documents module rolls-up or rolls-down the pyramid as shown here

Roll Up/Down	<input type="text" value="Up"/>
Roll to what level?	<input type="text" value="Level 1"/>

The reason for providing you control over this is that there are times where you don't want the document to roll and other times where it's beneficial to roll. Here's some examples of each

No Roll – This may be a documents module of files that are specific only to this project such as geotech reports, product information that you have collected that are only pertinent to this project. There is no reason for these documents to be accessible to workspaces at any level on the pyramid other than the current workspace.

Roll-up – These may be documents such as the contracts mentioned above. You would create a copy of the Documents module, name it "Contracts", set the access to only those within your company and possibly clients, and then set it to roll-up. Inside of this you upload contracts, invoices and other architect / owner documents. This allows the client to view the project specific documents at Level4 and view all of their project specific documents at Level3. You then can view all project specific documents at Level1 across your entire company.

Roll-down – There are several examples of how roll-down can be used:

Example 1: Consultants Forms – These documents are uploaded to your Level1 workspace and describe how consultants are to work with your company. This module contains forms used by consultants when submitting their invoices or additional service proposals. This module would be set to roll-down and the user group permission would be set to people within your firm plus the consultants user group.

Example 2: Client Standards – May clients develop prototypical standards that they want to be used across all of their projects. Create a duplicate of the Documents module and have it accessible on Levels3 and below. Then set the module to roll down. You then upload the standard documents to Level3 and all project workspaces can now access this common library of standards. Change a document at Level3 and everyone working on projects has the most current information.

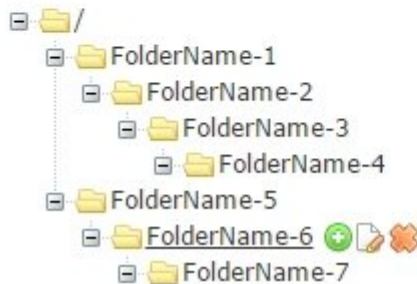
Free Form vs Predefined Folder Structure

By default, RoundhousePM allows users to create folders as needed but there may be times when a subscriber wants the Documents module to contain a common set of predefined folders. To activate this feature go to the Administration page of the documents module where you will find this section.

Predefined Folder Structure

Folders options

- ☐ Allow users to create folders as needed. Any folders created will be only for that workspace.
- ☐ Use the predefined folder structure below for all workspaces in which this module appears. Users may not create or delete folders. Any modification to the folder structure must be done by an administrator in the module's administration page (i.e. this page).



As you can see in the image above you need to select which folder structure you would like, but CAUTION. Once you select one of these options you can NOT change to the other option.

The folders shown are starter folders. You can add a sub folder by selecting the “+” button. You can rename a folder by selecting the page icon with the pencil. You can delete a folder by selecting the “X” button.

Next: [RFI Module >>](#)

RFI Module

Return Date Durations	Low Priority	<input type="text" value="5"/>	Days
	Standard Priority	<input type="text" value="3"/>	Days
	High Priority	<input type="text" value="1"/>	Days
Warning Notification	<div>You have selected High Priority which means you'd like the <u>RFI</u> returned within 1 day. Standard response time is 3 days. Please be patient with us.</div>		

The RFI module allows you to define how many days you are given to respond. The default values are:

- Low – 5 calendar days
- Standard – 3 calendar days
- High – 1 calendar day

In addition to this, a dialog box is presented if a person asking the question selects the High priority. You may customize the message that you want to display.

Next: [Submittal Module >>](#)

Submittal Module

Action Choices	<div>Not Reviewed Reviewed Exceptions Noted Revise and Resubmit Rejected</div>	
Return Date Duration	Low Priority	<input type="text" value="30"/> Days
	Standard Priority	<input type="text" value="14"/> Days
	High Priority	<input type="text" value="5"/> Days
Warning Notification	<div>You have selected High Priority which means you'd like the submittal returned within 5 days. Standard response time is 14 days. Please be patient with us.</div>	

The Submittal module allows you create your own Action Items. The default values are:

- Reviewed
- Exceptions Noted
- Revise and Resubmit
- Rejected
- Not Reviewed

Like the RFI module, you are also able to define how many days you are given to respond. The default values are:

- Low – 30 calendar days
- Standard – 14 calendar days
- High – 5 calendar days

In addition to this, a dialog box is presented if a person selects the High priority. You may customize the message that you want to display.

Next: [Export Modules >>](#)

Export Modules

RoundhousePM allows you to export the records that you create. There are two steps to this process:

1. Export a CSV file
2. Download the attachments



When you export the CSV file you will export all fields including a field that has the name of any file that was attached or uploaded. It is for this reason that you must manually download any attachments in order to have all of the information that was contained for a record.

The Main Screen

1. Select the workspaces that you want to be exported.
2. Select the modules that you want to be exported.



It is possible to export all modules for all workspaces in a single CSV file, but this may take a long time. It is advisable to break down these exports into smaller files by either a) one workspace, one module, b) several workspaces, one module, or c) one workspace, all modules.

If you open the CSV file this is what you see. The fields with the ##### values need to be widened to see the data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	RFIs																
2	Workspac No.		Date Subm	Priority	Respond E	Attention	GC Attach	Subject	Question	Person As	Date Ansv	Answer	Attachme	Responde	RFI Compl	Creation date	
3	Cuppa Joe RFI-0001	#####	Standard	#####	Fletcher, Charles - A	Deck Fast	Can we us	Farmer, A	N/A					Bronte, Cl	No	#####	
4	Cuppa Joe RFI-0002	9/2/2015	Standard	9/5/2015			Floor Adh	We've enc	Farmer, A	9/4/2015	Assuming that this d			Bronte, Cl	Yes	#####	
5	Cuppa Joe RFI-0003	9/2/2015	Low	9/7/2015	Fletcher, Charles - A	Toilet Acc	Do you mi	Fletcher, C	N/A					Bronte, Cl	No	#####	
6	Cuppa Joe RFI-0004	#####	High	#####	Fletcher, C	ScreenShc	Fire Mars	The fire m	Farmer, A	N/A				Bronte, Cl	No	#####	
7	Cuppa Joe RFI-0005	#####	Standard	#####			Mounting	What are	Farmer, A	#####	They're or	Electrical		Bronte, Cl	Yes	#####	
8	Cuppa Joe RFI-0006	#####	Low	#####	Fletcher, C	554e61c03	Concrete	Is this whi	Farmer, A	N/A				Bronte, Cl	No	#####	



Exporting a CSV file is a good way to backup your data, but keep in mind that if you download your data it can not be re-imported into RoundhousePM. If you are trying to reduce what you pay for RoundhousePM you should first make a workspace Inactive. .

Next: [Import Users >>](#)

Import Users

The Import User feature allows you to import a large quantity of users and send invitations. In order to do this you must have a CSV (Comma Separated Value) text file which can be created from most contact management software or email programs.

The sample file that we have exported looks like this when viewed in a spreadsheet.

	A	B	C	D
1	First Name	Last Name	Company	E-mail Address
2	Andrew	Jefferson	Baker Engineering	andrew@bakereng.com
3	Brian	Edwards	B.C. Engineering, Inc.	brian.edwards@bcengineering.com
4	Erin	Stanley	Big City Ford	erin.stanley@bigcityford.com
5	George	Abraham	Ohare	g.abraham@ohare.com
6	Hunter		Hunter Group	hunter@huntergroup.net
7	James (Jim)	London	LAJ Engineering	jlondon@LAJengineering.com
8	Jason	Winters	Big Sky Design	jason.winters@bigskydesign.com
9	Juan		Vantage	juan@vantage.com
10	Mark	Richards	Equitable Bldg	mrichards@equitablebldg.com
11	Monte	Noles	LEWISON AND ACCOC.	mnoles@lewison.com
12	Rebecca	Hightower	The PEAK Companies	rebecca.hightower@peakcompanies.net
13	Sarah	Kaplan	United Sun Control - Commercial Di	skaplan@unitedsuncontrol.com
14	Stan	Pinckney	Integrity Group	stan@integritygroup.com
15	Stephen	Bostic	Brinkston Construction	bostic@brinkstonconst.com
16	Thomas	Noles	Vantage	thomas@vantage.com
17	Ulysses	Marine		usmarine@yahoo.com

When selecting **Import Users** you will first see this screen:

Users Import

Please, choose CSV-formatted file:

No file chosen

After you import the file you will see the fields from your imported file on the left and the fields that RoundhousePM needs on the right. As you can see in the image below there were additional fields for the address of the person in the exported file.

Users Import - Please Match Fields

Please click and drag the import fields on the left to match the desired RoundhousePM User fields on the right.

Import File	RoundhousePM User Fields
First Name ✕	Last Name ✕
Last Name ✕	First Name ✕
Company ✕	E-Mail *
E-mail Address ✕	Company ✕
Street ✕	
City ✕	
State ✕	
Zip ✕	

Next Page

First click on the “X” on the extra fields to remove them.

Users Import - Please Match Fields

Please click and drag the import fields on the left to match the desired RoundhousePM User fields on the right.


Import File	RoundhousePM User Fields
First Name ✕	Last Name ✕
Last Name ✕	First Name ✕
Company ✕	E-Mail *
E-mail Address ✕	Company ✕

Next Page

Next, move the fields boxes on the left side up and down so they line up with the field boxes on the right side. Then click Next.

Users Import - Please Match Fields

Please click and drag the import fields on the left to match the desired RoundhousePM User fields on the right.

Import File	RoundhousePM User Fields
Last Name 	Last Name 
First Name 	First Name 
E-mail Address 	E-Mail 
Company 	Company 

[Next Page](#)

The following screen opens and you will see all of the imported records placed into editable fields. There's also a field for selecting the User Group and a checkbox for RoundhousePM to send an invitation when we finish the process.

Before Importing Users

The table below contains data from your CSV file.

Please review user fields and correct them (if needed). Values in columns with red asterisk are required.

Click on "Present in pyramid" link to assign workspace access.

Last Name	First Name	E-Mail *	Company	User Group *	<input checked="" type="checkbox"/> Invite	
Jefferson	Andrew	andrew@bakere	Baker Enginee	Select one ▼	<input checked="" type="checkbox"/>	
Edwards	Brian	brian.edwards@	B.C. Engineer	Select one ▼	<input checked="" type="checkbox"/>	
Stanley	Erin	erin.stanley@big	Big City Ford	Select one ▼	<input checked="" type="checkbox"/>	
Abraham	George	g.abraham@oha	Ohare	Select one ▼	<input checked="" type="checkbox"/>	
	Hunter	hunter@huntergi	Hunter Group	Select one ▼	<input checked="" type="checkbox"/>	
London	James (Jim)	jlonon@LAJenc	LAJ Engineeri	Select one ▼	<input checked="" type="checkbox"/>	
Winters	Jason	jason.winters@b	Big Sky Design	Select one ▼	<input checked="" type="checkbox"/>	
	Juan	juan@vantage.c	Vantage	Select one ▼	<input checked="" type="checkbox"/>	
Richards	Mark	mrichards@equi	Equitable Bldg	Select one ▼	<input checked="" type="checkbox"/>	
Noles	Monte	mnoles@lewisor	LEWISON AN	Select one ▼	<input checked="" type="checkbox"/>	
Hightower	Rebecca	rebecca.hightow	The PEAK Co	Select one ▼	<input checked="" type="checkbox"/>	
Kaplan	Sarah	skaplan@uniteds	United Sun Co	Select one ▼	<input checked="" type="checkbox"/>	
Pinckney	Stan	stan@integritygr	Integrity Group	Select one ▼	<input checked="" type="checkbox"/>	
Bostic	Stephen	bostic@brinkstor	Brinkston Con	Select one ▼	<input checked="" type="checkbox"/>	
Noles	Thomas	thomas@vantag	Vantage	Select one ▼	<input checked="" type="checkbox"/>	
Marine	Ulysses	usmarine@yaho		Select one ▼	<input checked="" type="checkbox"/>	

[Import Users](#)
[Cancel](#)

After cleaning up the records and assigning User Groups you should have something like this:

Before Importing Users

The table below contains data from your CSV file.
Please review user fields and correct them (if needed). Values in columns with red asterisk are required.
Click on "Present in pyramid" link to assign workspace access.

Last Name	First Name	E-Mail *	Company	User Group *	<input checked="" type="checkbox"/> Invite	
Jefferson	Andrew	andrew@bakere	Baker Enginee	Consultant ▼	<input checked="" type="checkbox"/>	
Edwards	Brian	brian.edwards@	B.C. Engineeri	Consultant ▼	<input checked="" type="checkbox"/>	
Stanley	Erin	erin.stanley@big	Big City Ford	Vendor ▼	<input checked="" type="checkbox"/>	
Abraham	George	g.abraham@oha	Ohare	Subcontractor ▼	<input checked="" type="checkbox"/>	
	Hunter	hunter@hunterg	Hunter Group	Vendor ▼	<input checked="" type="checkbox"/>	
London	James (Jim)	jlonon@LAJeng	LAJ Engineeri	Consultant ▼	<input checked="" type="checkbox"/>	
Winters	Jason	jason.winters@b	Big Sky Desig	Consultant ▼	<input checked="" type="checkbox"/>	
	Juan	juan@vantage.c	Vantage	Subcontractor ▼	<input checked="" type="checkbox"/>	
Richards	Mark	mrichards@equi	Equitable Bldg	Client ▼	<input checked="" type="checkbox"/>	
Noles	Monte	mnoles@lewisor	Lewis & Assoc	Vendor ▼	<input checked="" type="checkbox"/>	
Bostic	Stephen	bostic@brinkstor	Brinkston Con	GenContractor ▼	<input checked="" type="checkbox"/>	
Noles	Thomas	thomas@vantag	Vantage	Subcontractor ▼	<input checked="" type="checkbox"/>	

Click the **Import Users** to complete the process and send the invitations.



User Groups are not assigned – Please note that these users are automatically active and added to your pyramid. However they do not have access to any workspaces. If one were to log in, they would see the Level1 workspace but could not select it. The first thing you need to do, and do quickly, is to assign these users to workspaces. You can do this in two ways: 1) Open each workspace and select all of the users who should participate, or 2) Open each user and select which workspaces that this person should participate. Which method you use depends on how many users you import and how many workspaces you have. Select the method that has the least number (i.e. workspaces vs users).

Appendix

[End User License Agreement](#)

Billing In Detail

[Default User Groups](#)

Module Attribute Matrix

Legal

The current licenses can be found on the Roundhouselabs.com website or by clicking on the links below:

- [End User Agreement](#)
- [Terms of Service](#)
- [Privacy Policy](#)

Default User Groups

Below are the default user groups that RoundhousePM creates depending on the choice you select during the creation of your pyramid.

	Default User Group Permissions							Default Dwgs and Specs Permissions		
	Admin	Acctg	Add	Edit	Delete	D'load	Read	Add / Edit	Unlock / Delete	D'load / Read
Architect										
Administrator	x	x	x	x	x	x	x	x	x	x
Architect - Principal		x	x	x	x	x	x	x	x	x
Architect - Project Admin	x		x	x	x	x	x	x	x	x
Architect - Project Mgr			x	x	x	x	x	x	x	x
Architect - Staff			x	x		x	x	x		x
Client			x	x		x	x			x
Consultant			x	x		x	x			x
GenContractor			x	x		x	x			x
Subcontractor						x	x			x
Construction Manager			x	x		x	x			x
Vendor						x	x			x
No Access										
Owner / Developer										
Administrator	x	x	x	x	x	x	x	x	x	x
Owner - Principal		x	x	x	x	x	x	x	x	x
Owner - Project Admin	x		x	x	x	x	x	x	x	x
Owner - Project Mgr			x	x	x	x	x	x	x	x
Owner - Staff			x	x		x	x	x		x
Architect			x	x		x	x			x
Consultant			x	x		x	x			x
GenContractor			x	x		x	x			x
Subcontractor						x	x			x
Construction Manager			x	x		x	x			x
Vendor						x	x			x
No Access										
Contractor										
Administrator	x	x	x	x	x	x	x	x	x	x
GenContractor - Owner		x	x	x	x	x	x	x	x	x
GenContractor - Project Admin	x		x	x	x	x	x	x	x	x
GenContractor - Project Mgr			x	x	x	x	x	x	x	x
GenContractor - Staff			x	x		x	x	x		x
Architect			x	x		x	x			x
Consultant			x	x		x	x			x
Client			x	x		x	x			x
Subcontractor						x	x			x
Construction Manager			x	x		x	x			x
Vendor						x	x			x
No Access										
Other										
Administrator	x	x	x	x	x	x	x	x	x	x
User w/ Delete			x	x	x	x	x	x	x	x
User w/o Delete			x	x		x	x	x		x
User w/ Download and Read Only						x	x			x
No Access										

During Guided Setup you may invite users of the blue background User Groups.

Module Attribute Matrix

The following matrix provides an overview of all of the modules and their features.

Module's Main Page			Module Admin Action Menu			Items from the Module Admin Page									
View options to be displayed on main page			Configure Duplicate Delete			Admin can rename the module Status Rolls Up or Dn To what level Field to display in Linked Lists Menu Can create Announcements when saving Can send Notifications when saving Default View (3)									
Announcements	All, Unread, Flagged, Expired	Y	Y	N	N	N	Active	Up	Sky	Subject	G	n/a	Y	All	
Change Order Proposals	Open, All	N	Y	N	N	Y	Active	Up	Sky	COP No	L	Y	Y	Open	
Change Orders	Open, All	N	Y	N	N	Y	Active	Up	Sky	CO No	L	Y	Y	Open	
Contacts	N/A	Y	Y	N	N	N	Active	Up	Sky	Last Name	G	N	N	N/A	
Documents	N/A	Y	Y	Y	N	Y	Active	4	4	N/A	D	Y	Y	N/A	
Field Reports	N/A	N	Y	N	N	Y	Active	Up	Sky	Field Report No	L	Y	Y	N/A	
Pay Applications	Open, All	N	Y	N	N	Y	Active	Up	Sky	Pay App No	L	Y	Y	Open	
Photos	N/A	Y	Y	N	N	Y	Active	Up	Sky	N/A	L	Y	Y	Session List	
Plans	See spec	N	Y	N	N	Y	Active	No	n/a	N/A	D	Y	Y	Active / All Disc	
RFIs	Open, All	N	Y	N	N	Y	Active	Up	Sky	Subject	L	Y	Y	Open	
Specifications	See spec	N	Y	N	N	Y	Active	No	n/a	N/A	D	Y	Y	Active / All Disc	
Submittals	Open, All	N	Y	N	N	Y	Active	Up	Sky	Description	L	Y	Y	Open	
Tasks	Open, All	Y	Y	N	N	N	Active	Up	Sky	Subject	G	N	N	Open	
Duplicated SharedDocs	N/A	Y	Y	Y	Y	Y	Varies	2	2	N/A	D	Y	Y	N/A	

Footnotes and Legend

- 1= (Not Used)
 2= Roll up or down and to what level is determined by the Admin
 3- Defaults to value shown but it can be changed by Admin
 4=Definable by Admin. Default value should be NO

G= General menu
 D=Documents menu
 L=Logs menu
 M=Misc menu

Sky = SkyView Page

SmartUpload – Using Bluebeam Revu to help





























Bluebeam Revu is a PDF markup tool and much more created by [Bluebeam Software Inc.](#)

Bluebeam has numerous tools but the ones used here allow us to:

1. Combine multiple PDFs into a single PDF file.
2. Rename the pages by using Bluebeams OCR tools.
3. Extract each page into individual files ready to upload to RoundhousePM.

Step 1 – Combining Files

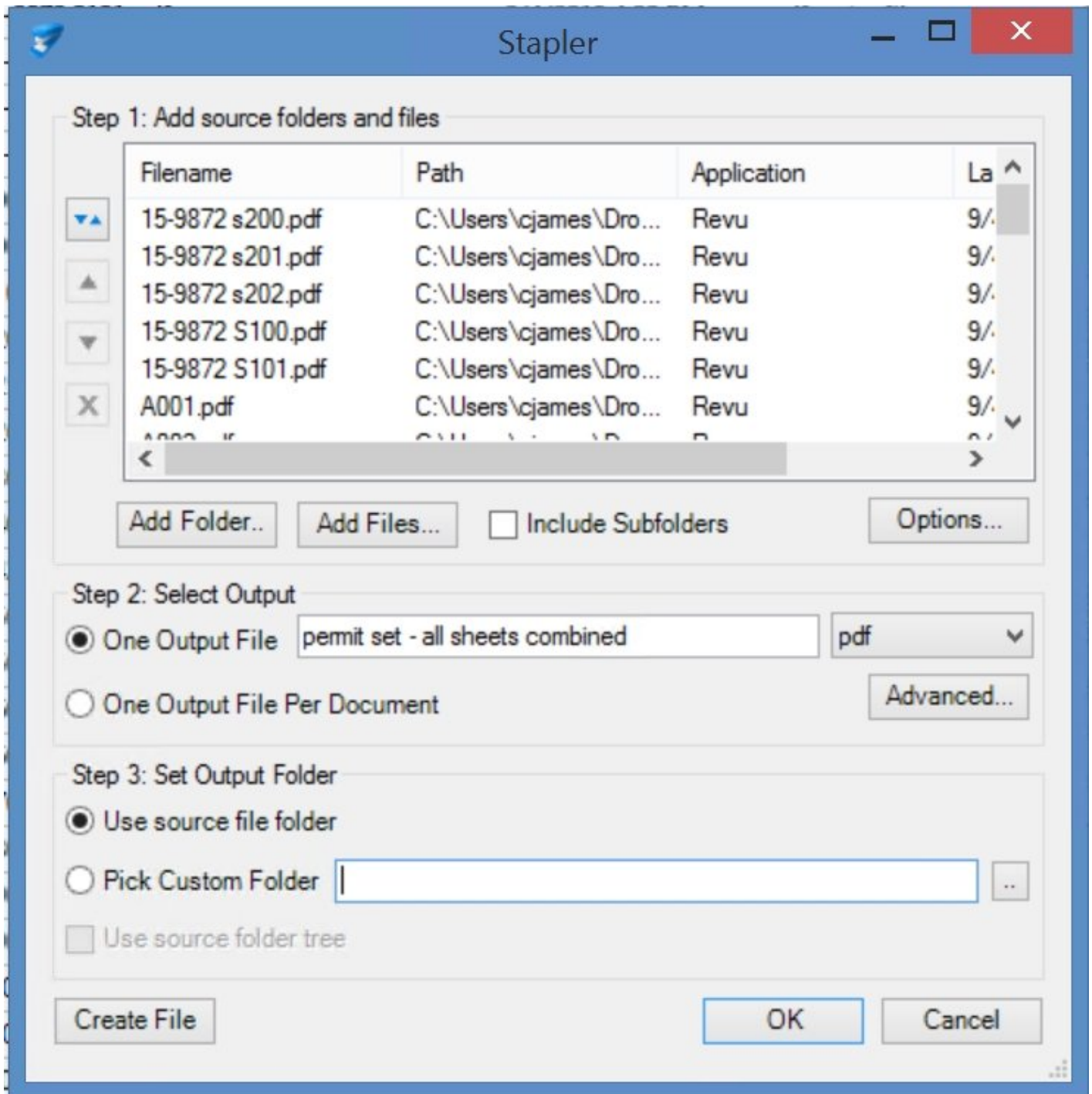
Before you release a set of files to the world you create PDF files from the CAD / BIM software that you use and you receive files from consultants. These files are probably named using different naming conventions as shown below.

<input type="checkbox"/> Name	Date modified	Type	Size
 15-9872 S100	9/4/2015 4:39 PM	PDF Document	2,550 KB
 15-9872 S101	9/4/2015 4:39 PM	PDF Document	1,139 KB
 15-9872 s200	9/4/2015 4:39 PM	PDF Document	1,087 KB
 15-9872 s201	9/4/2015 4:39 PM	PDF Document	3,657 KB
 15-9872 s202	9/4/2015 4:39 PM	PDF Document	555 KB
 A001	9/4/2015 4:39 PM	PDF Document	488 KB
 A002	9/4/2015 4:39 PM	PDF Document	1,890 KB
 A101	9/4/2015 4:39 PM	PDF Document	451 KB
 A201	9/4/2015 4:39 PM	PDF Document	1,081 KB
 A251	9/4/2015 4:39 PM	PDF Document	931 KB
 A261	9/4/2015 4:39 PM	PDF Document	956 KB
 A301	9/4/2015 4:39 PM	PDF Document	979 KB
 A401	9/4/2015 4:39 PM	PDF Document	556 KB
 A421	9/4/2015 4:39 PM	PDF Document	623 KB
 A501	9/4/2015 4:39 PM	PDF Document	2,911 KB
 A502	9/4/2015 4:39 PM	PDF Document	576 KB
 A601	9/4/2015 4:39 PM	PDF Document	708 KB
 A602	9/4/2015 4:39 PM	PDF Document	661 KB
 A701	9/4/2015 4:39 PM	PDF Document	365 KB
 A801	9/4/2015 4:39 PM	PDF Document	753 KB
 A901	9/4/2015 4:39 PM	PDF Document	620 KB
 A902	9/4/2015 4:39 PM	PDF Document	540 KB
 e201 sheet	9/4/2015 4:39 PM	PDF Document	701 KB
 E301 sheet	9/4/2015 4:39 PM	PDF Document	1,101 KB
 m001 sheet	9/4/2015 4:39 PM	PDF Document	1,398 KB
 m301 sheet	9/4/2015 4:39 PM	PDF Document	458 KB
 p001 sheet	9/4/2015 4:39 PM	PDF Document	1,132 KB
 p211 sheet	9/4/2015 4:39 PM	PDF Document	1,046 KB

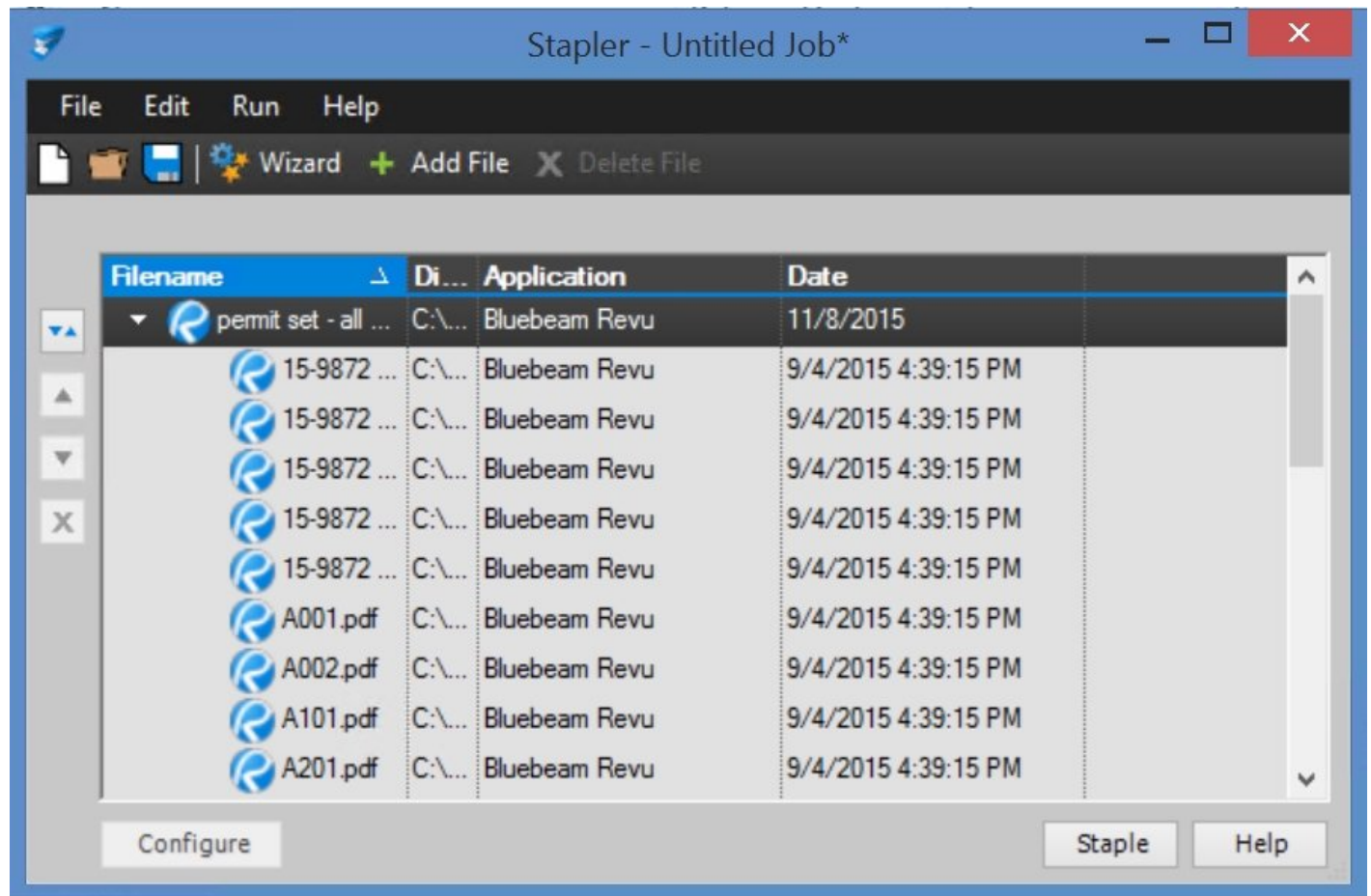
Select all files, right mouse and select **Combine Files in Revu.**

15-9872 s101.pdf	9/4/2015 4:39 PM	pdf_auto_file	1,139 KB
15-9872 s200.pdf	9/4/2015 4:39 PM	pdf_auto_file	1,087 KB
15-9872 s201.pdf		file	3,657 KB
15-9872 s202.pdf		file	555 KB
A001.pdf		file	488 KB
A002.pdf		file	1,890 KB
A101.pdf		file	451 KB
A201.pdf		file	1,081 KB
A251.pdf		file	931 KB
A261.pdf		file	956 KB
A301.pdf		file	979 KB
A401.pdf		file	556 KB
A421.pdf		file	623 KB
A501.pdf		file	2,911 KB
A502.pdf		file	576 KB
A601.pdf		file	708 KB
A602.pdf	9/4/2015 4:39 PM	pdf_auto_file	661 KB

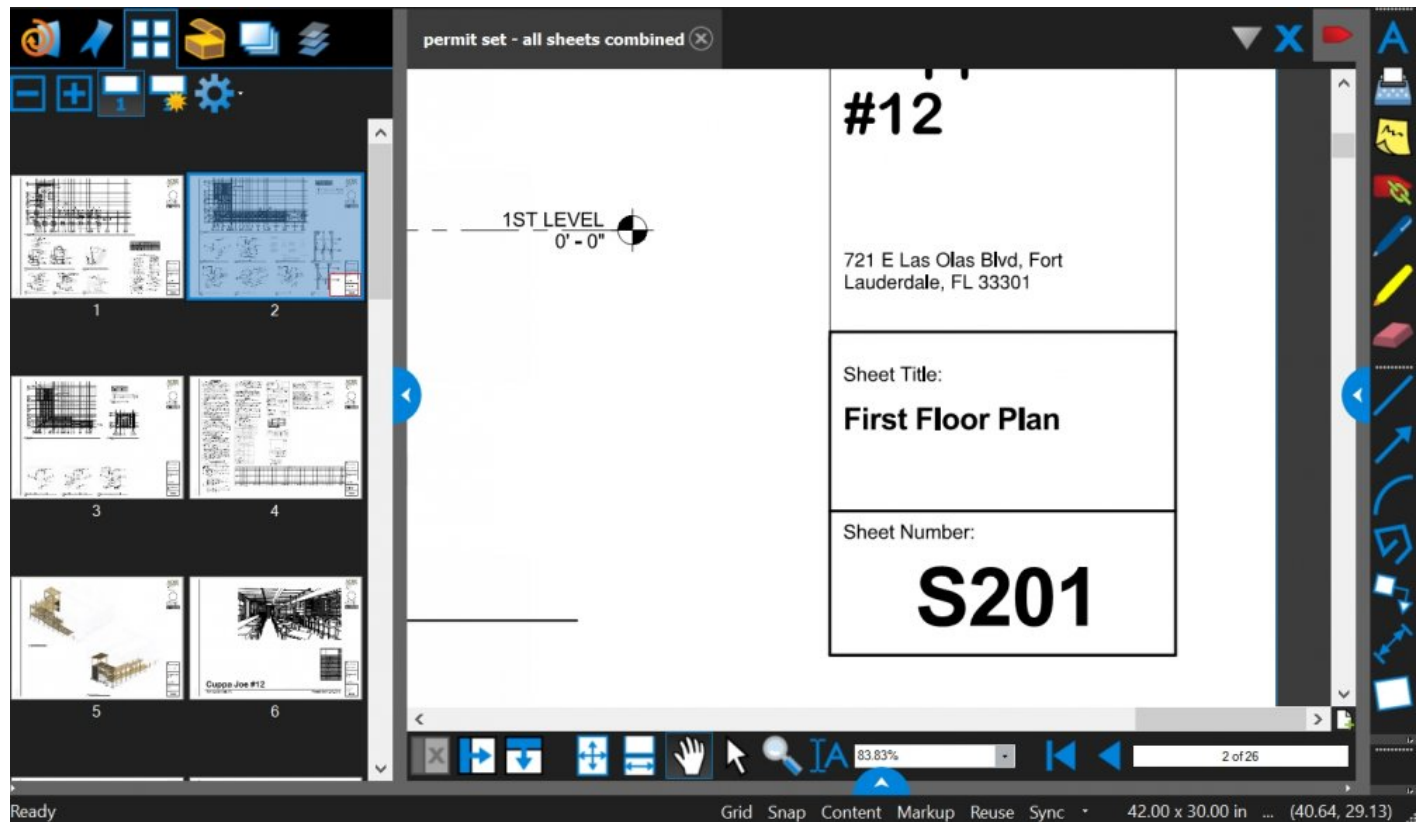
Name the file and select the location for saving and press **OK**.




On the following dialog press **Staple**.



Bluebeam then processes the files and opens with all of the individual files combined as shown below, but as as you can see the sheets are numbered, 1,2,3 etc.



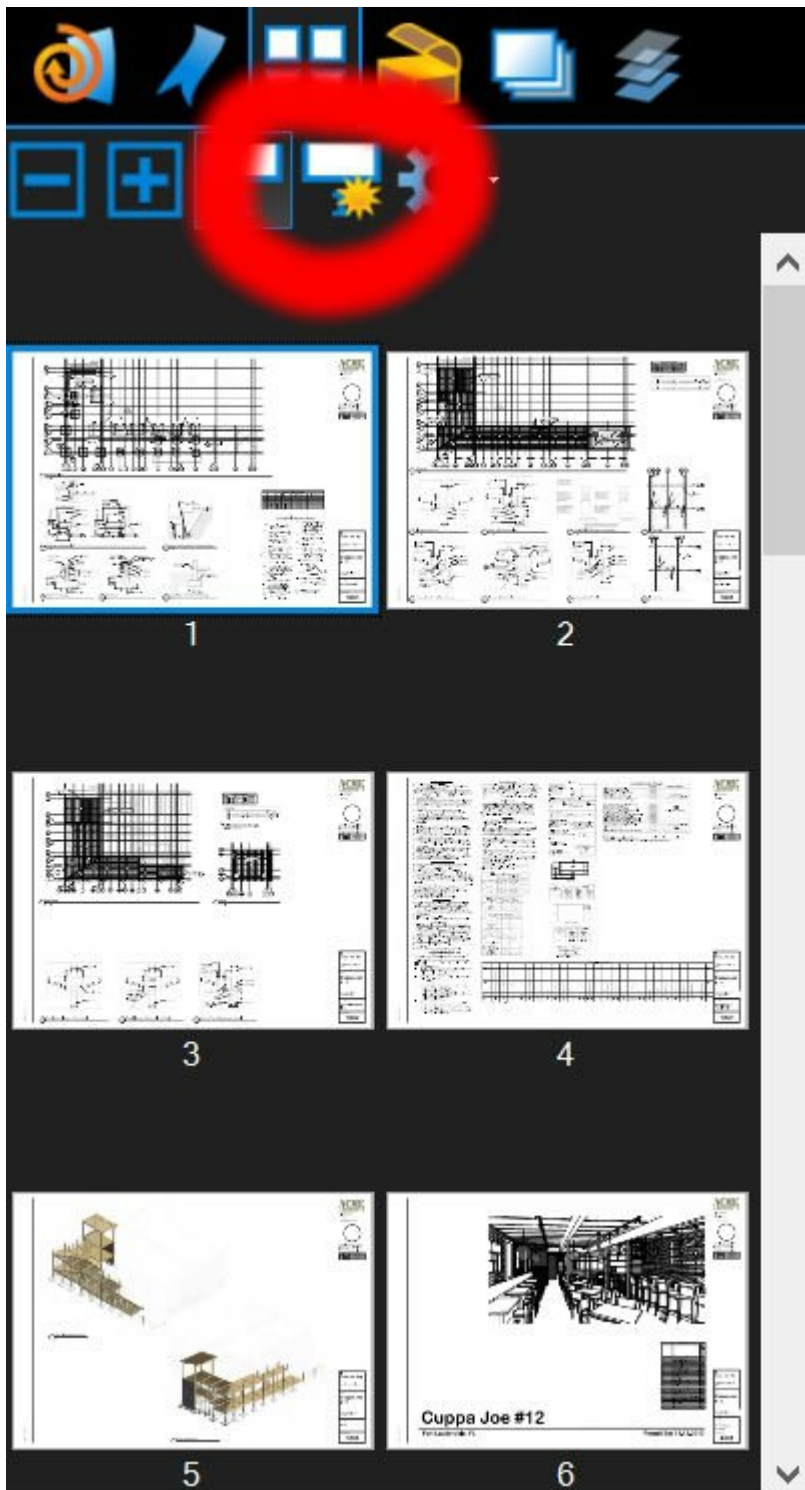
Save this combined file to your computer.

<input type="checkbox"/> Name	Date modified	Type	Size
 permitset all sheets combined	9/4/2015 4:54 PM	PDF Document	29,898 KB

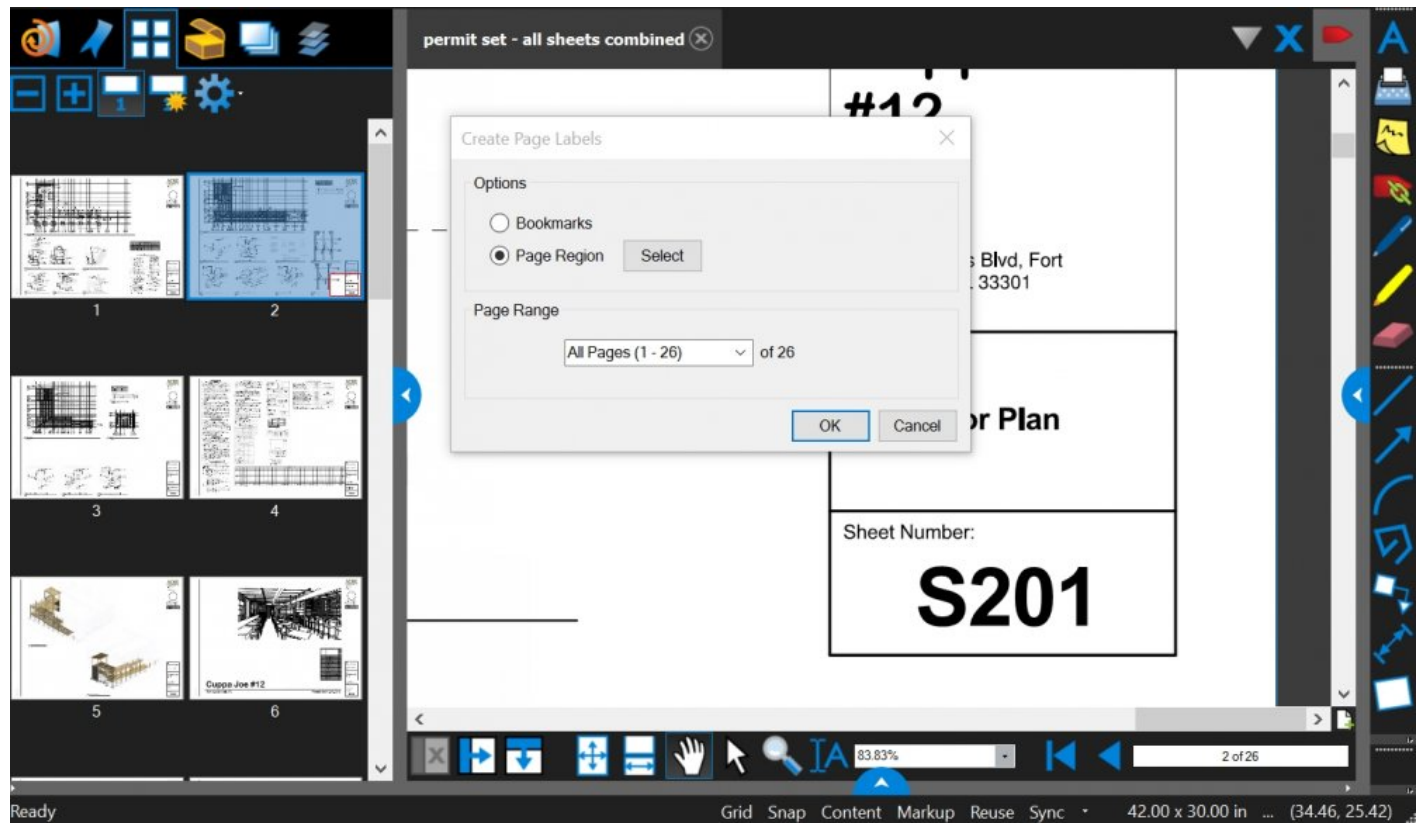
Step 2 – Renaming the Pages to match the Sheet Number and Title

In this step we will use Bluebeams OCR tools to rename the page number to that of the information found in the title block of each sheet. In order to do this we first have to tell Bluebeam which area of the sheet contains the sheet number and which area contains the sheet title.

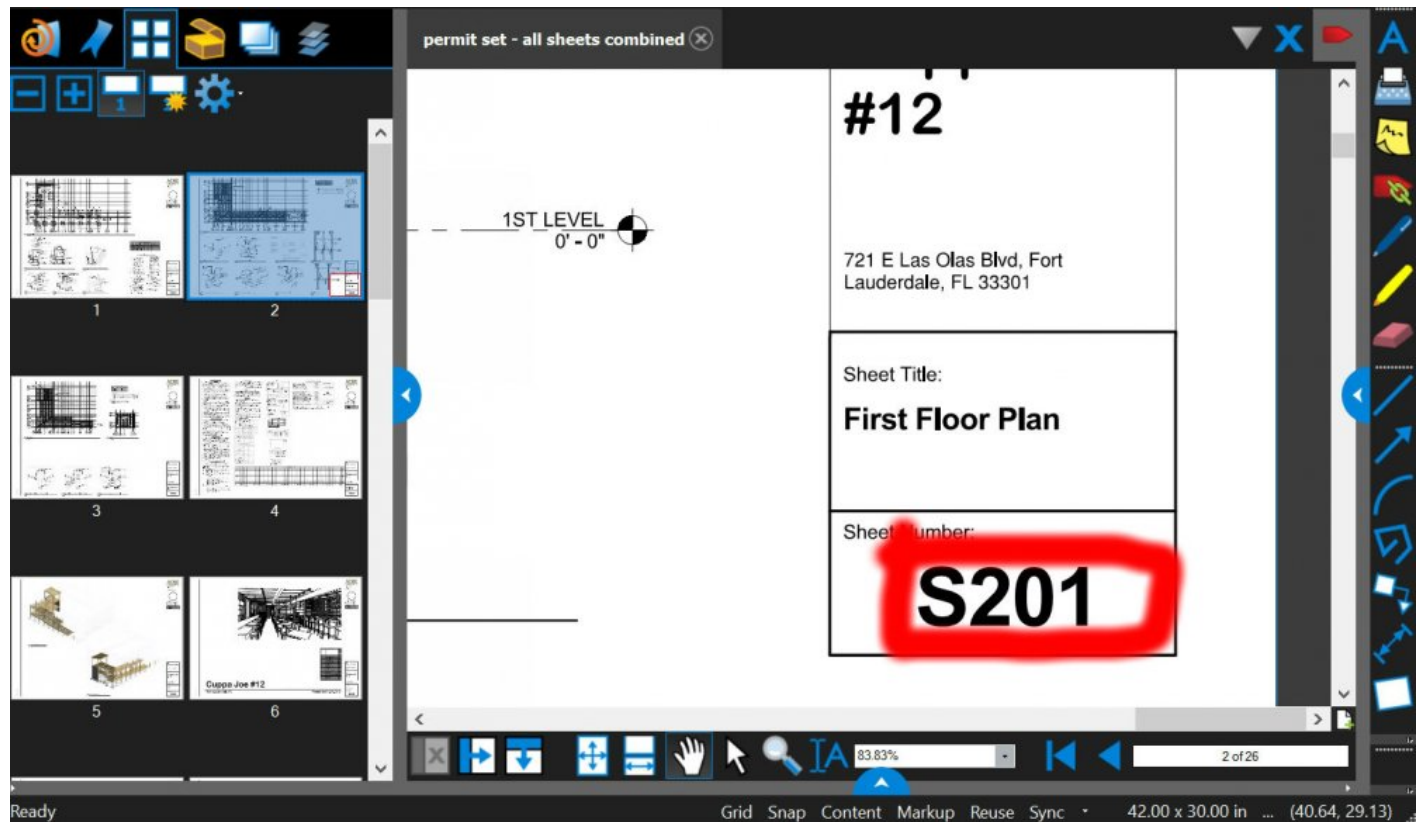
Select the **Create Page Labels** tool circled below.



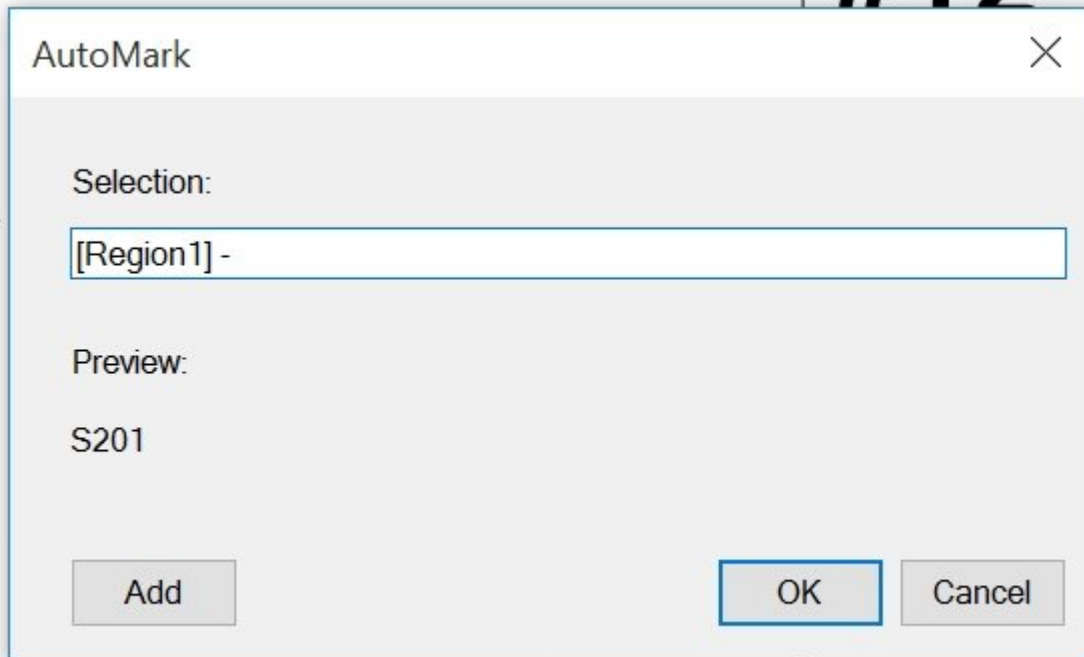
The following dialog will open. Make sure that All Pages are selected and then click on the *Add *button.



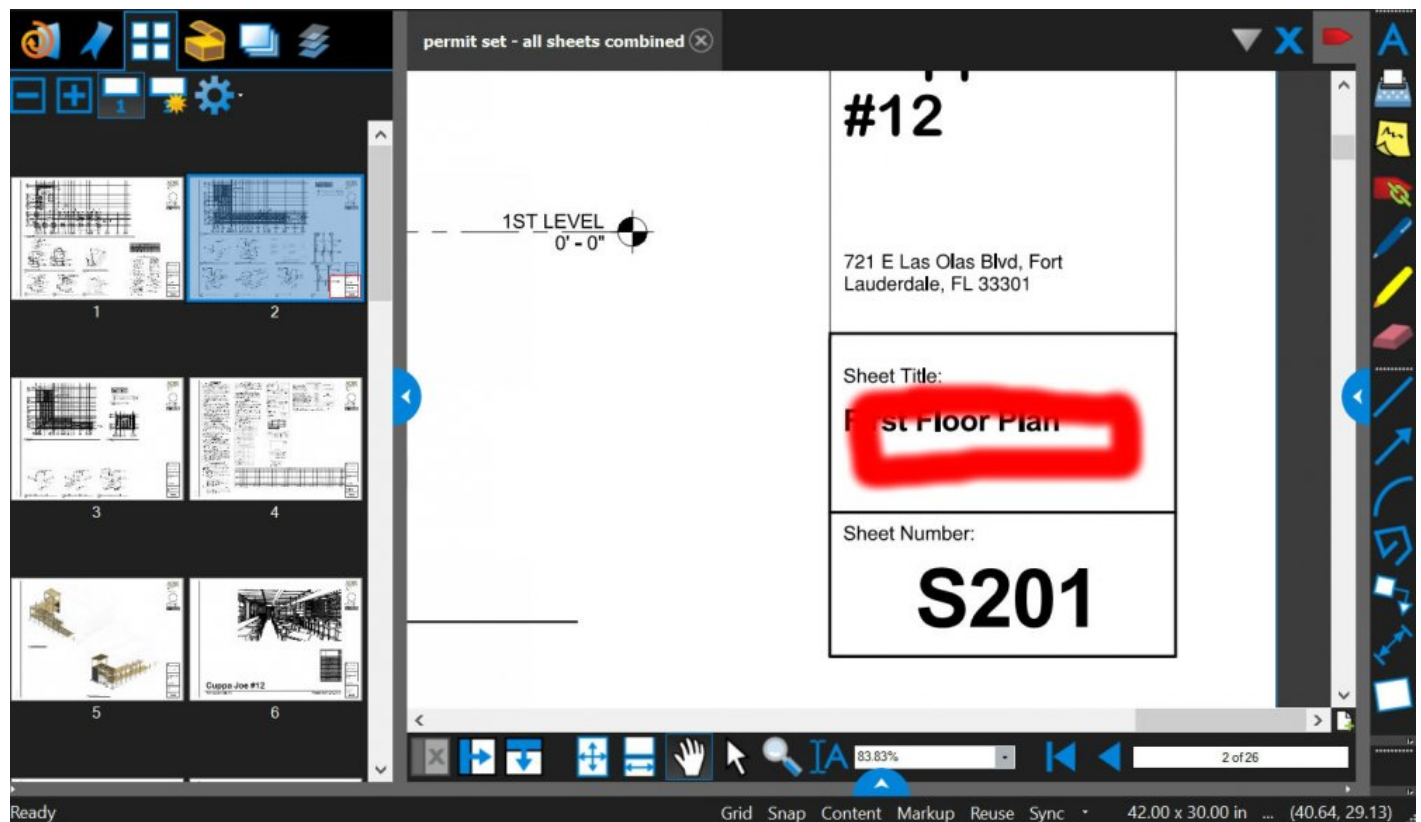
The dialog will disappear and draw a rectangle around the sheet number.



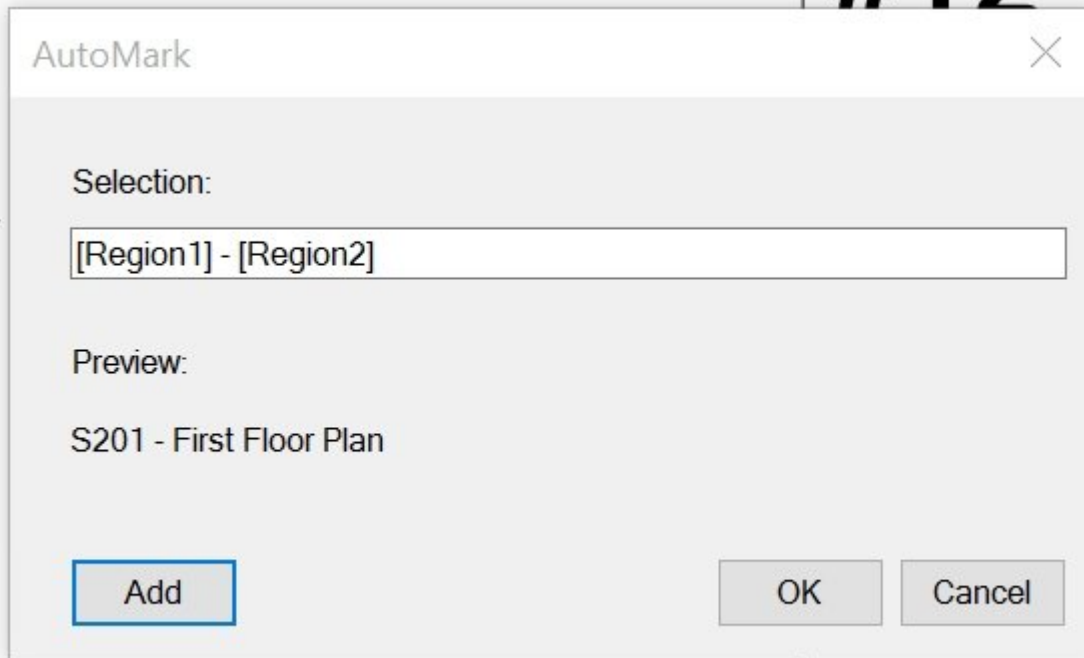
The AutoMark dialog now appears. You can see that **[Region1]** is entered and a preview of what it has scanned is shown below. At this time you need to manually enter a " - " (space hyphen space) and then click the **Add** button again to select the text of the sheet title. **Do NOT** click **OK**.



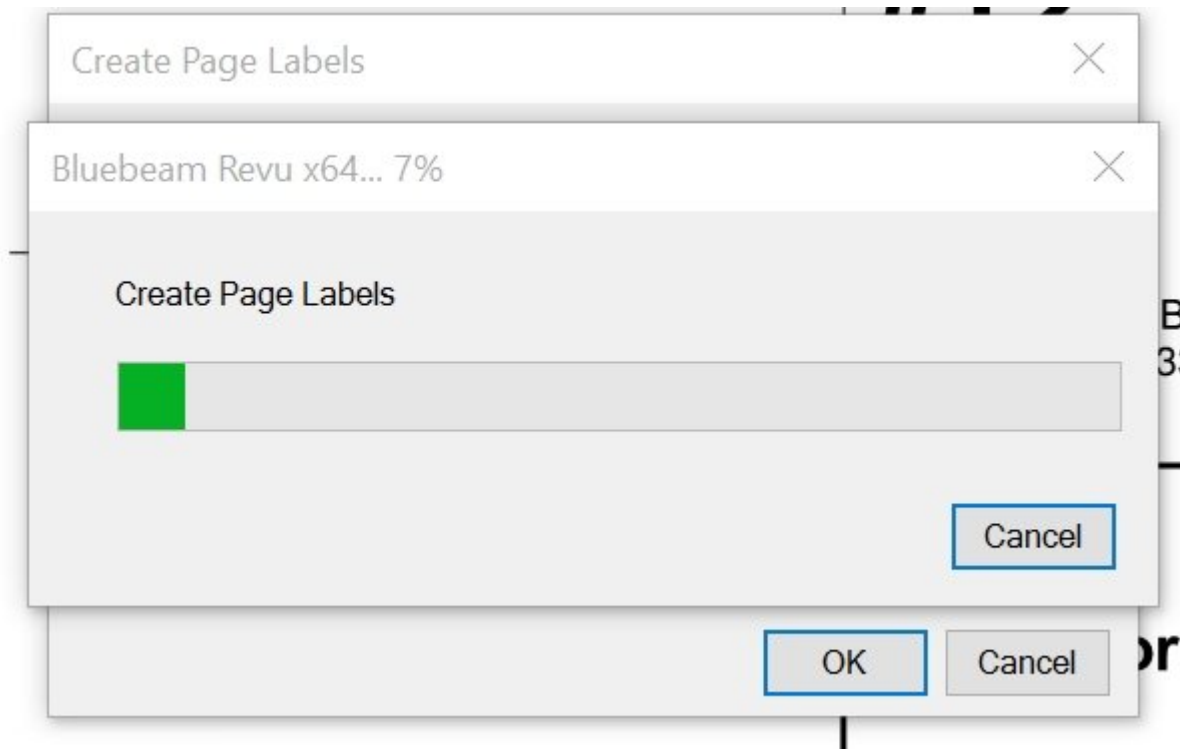
The AutoMark dialog disappears. Draw a rectangle around the sheet title text.



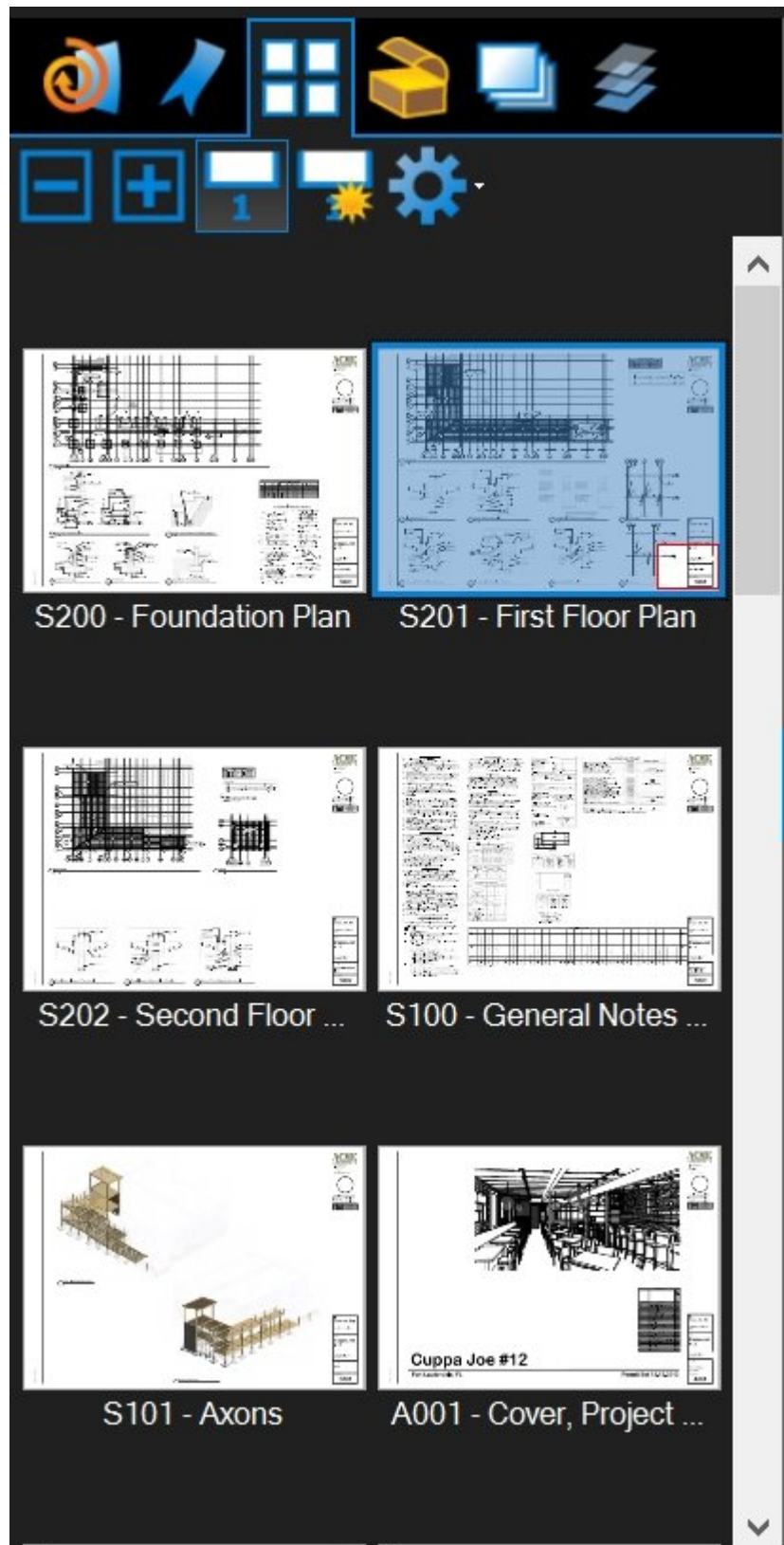
The AutoMark dialog reappears and you can see that **[Region2]** has been added to the field and the preview shows you the text that has been scanned.



Now you can click the OK button and Revu will OCR all of your sheets. While this is happening you will see this dialog.

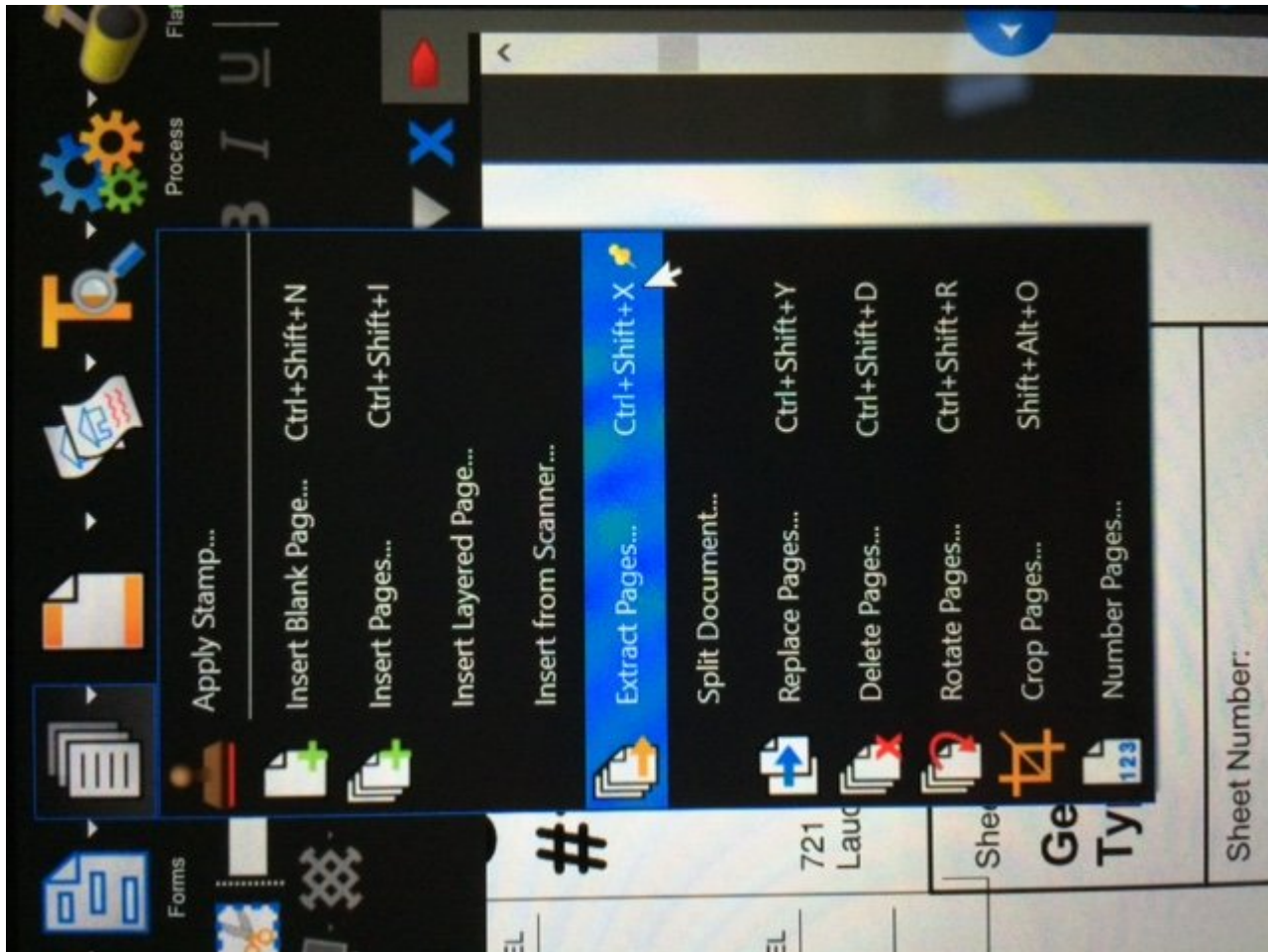


When the process is finished you will see that all of the page names have been changed to the new formatting. You should take a few minutes at this time and review the text that was created. While Revu does a great job it's not 100% perfect and you may need to manually edit a few of the page names.































Step 3 – Extract each page to individual files

Now that we have all of the pages named correctly we need to extract each sheet to a separate file of their own. From the Page menu select the **Extract Pages** action.



You will then be prompted to select a folder on the server to contain these files. Once you select this your files will be extracted and you will have a folder that looks like this with the file names formatted correctly and ready for uploading to RoundhousePM using the SmartUpload feature.

<input type="checkbox"/> Name	Date modified	Type	Size
 A001 - Cover, Project Directory	9/4/2015 4:54 PM	PDF Document	488 KB
 A002 - Index - Code Info - Apbrev. - Occupa...	9/4/2015 4:54 PM	PDF Document	1,890 KB
 A101 - Existing - Demo Plan	9/4/2015 4:54 PM	PDF Document	452 KB
 A201 - Proposed Floor Plans	9/4/2015 4:54 PM	PDF Document	1,081 KB
 A251 - Proposed Finish Plans	9/4/2015 4:54 PM	PDF Document	931 KB
 A261 - Proposed Kitchen Equipment Plan	9/4/2015 4:54 PM	PDF Document	956 KB
 A301 - Proposed Ceiling Plan	9/4/2015 4:54 PM	PDF Document	979 KB
 A401 - Finish & Material Schedule, Partition T...	9/4/2015 4:54 PM	PDF Document	557 KB
 A421 - Door & Hardware Schedule	9/4/2015 4:54 PM	PDF Document	623 KB
 A501 - Exterior Elevations	9/4/2015 4:54 PM	PDF Document	2,912 KB
 A502 - Interior Elevations	9/4/2015 4:54 PM	PDF Document	576 KB
 A601 - Deck and Kitchen Sections	9/4/2015 4:54 PM	PDF Document	708 KB
 A602 - Section Details	9/4/2015 4:54 PM	PDF Document	661 KB
 A701 - Stair Plans, Sections and Details	9/4/2015 4:54 PM	PDF Document	366 KB
 A801 - Enlarged Restroom Plans	9/4/2015 4:54 PM	PDF Document	753 KB
 A901 - Misc. Plans, and Elevations	9/4/2015 4:54 PM	PDF Document	620 KB
 A902 - Sign Details	9/4/2015 4:54 PM	PDF Document	540 KB
 E3201 - Floor Plan - Electrical	9/4/2015 4:54 PM	PDF Document	701 KB
 E3301 - Floor Plan - Lighting	9/4/2015 4:54 PM	PDF Document	1,101 KB
 M001 - Mechanical Symbols, Legend, Notes, ...	9/4/2015 4:54 PM	PDF Document	1,398 KB
 M301 - Floor Plans - Mechanical	9/4/2015 4:54 PM	PDF Document	459 KB
 P001 - Plumbing Symbols, Notes, and Details	9/4/2015 4:54 PM	PDF Document	1,132 KB
 P211 - Floor Plan - Plumbing	9/4/2015 4:54 PM	PDF Document	1,046 KB
 S100 - General Notes & Typical Details	9/4/2015 4:54 PM	PDF Document	2,550 KB
 S101 - Axons	9/4/2015 4:54 PM	PDF Document	1,139 KB
 S200 - Foundation Plan	9/4/2015 4:54 PM	PDF Document	1,087 KB
 S201 - First Floor Plan	9/4/2015 4:54 PM	PDF Document	3,657 KB
 S202 - Second Floor & Roof Plans	9/4/2015 4:54 PM	PDF Document	555 KB