RoundhousePM

Version 1.0 — Last update: 2016/02/26

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.

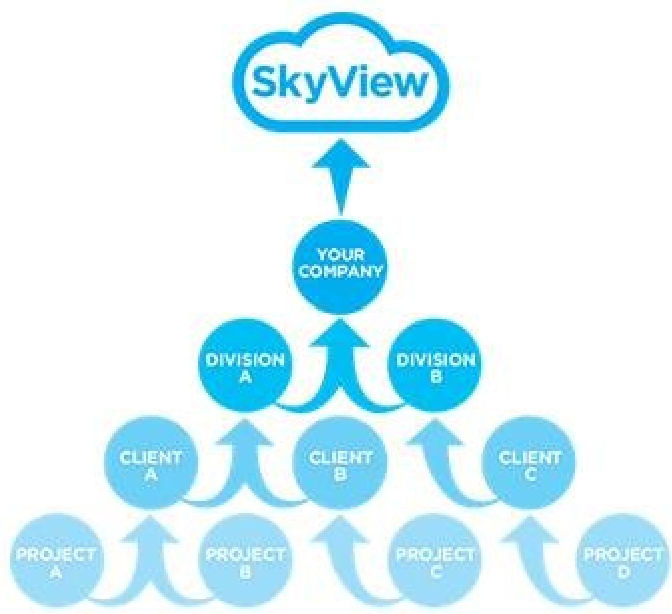
Modules

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



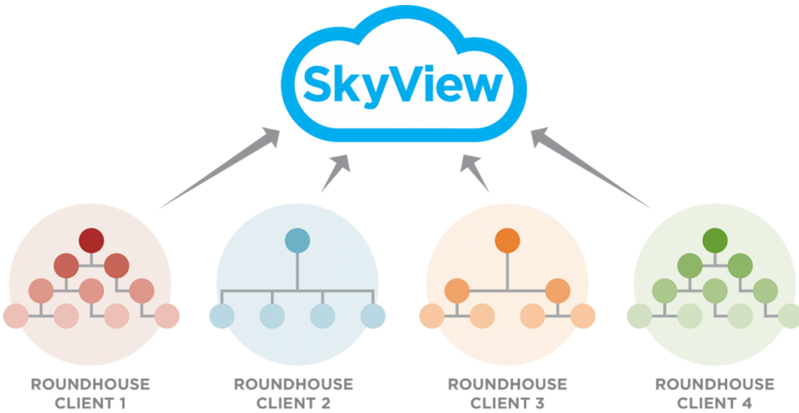
Example: Most log information rolls up the pyramid to Level 1 which allows you to see the big picture of what is due across your entire organization.

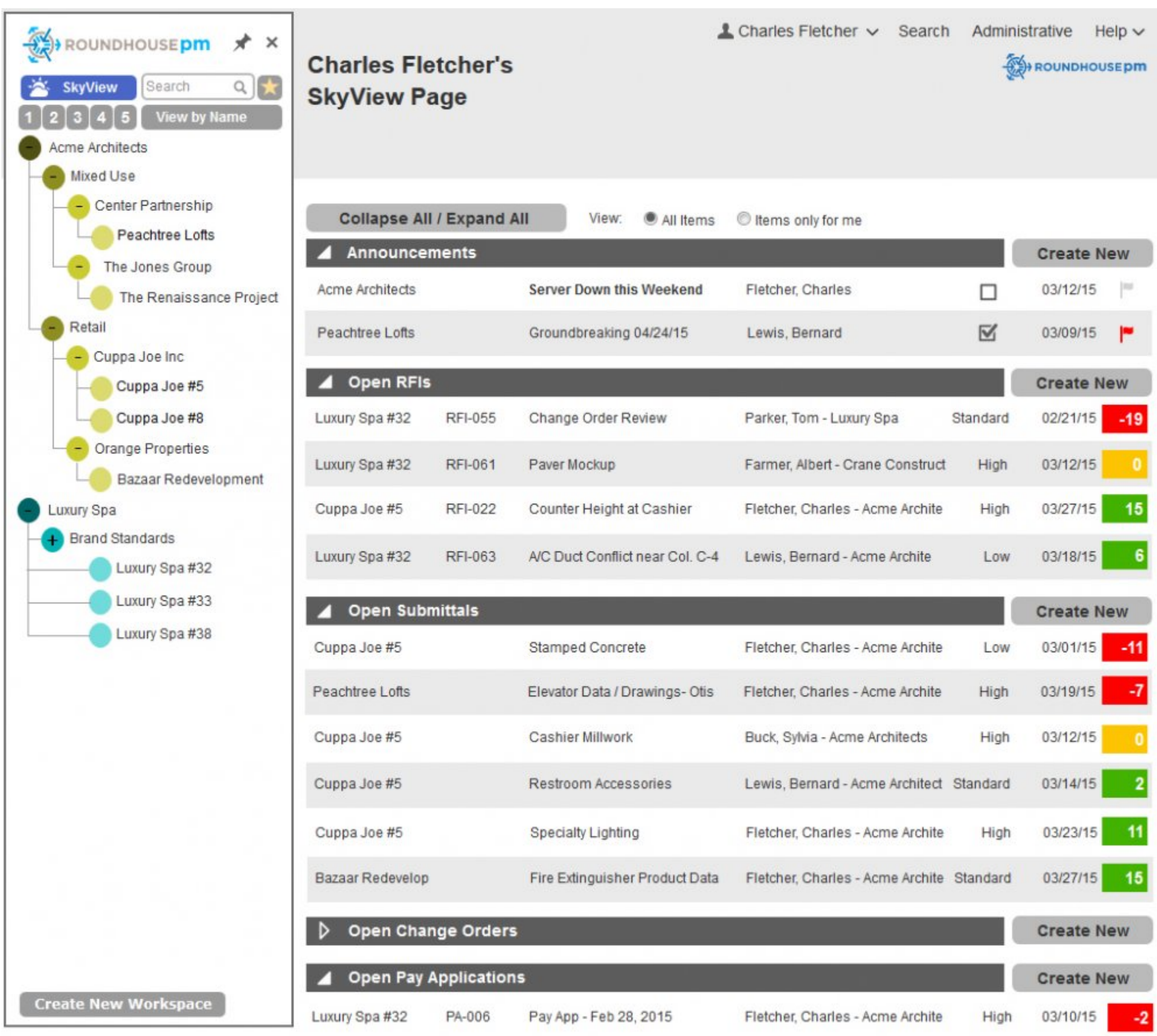
Roll Down

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.





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.

Luxury Spa

Notification - Luxury Spa 32 - RFIs

Message from: Tom Parker - tparker@luxspatest.com

The following record has been created or modified:

Charles can you please answer this RFI? Thanks. Tom.

Click here to view the record

The following people were also notified:

Charles Fletcher - Acme Architects - cf@acmetest.com

Please add support@roundhouselabs.com to ensure that you receive emails from RoundhousePM.

ROUNDHOUSEpm

RoundhousePM is an online communication tool for architects, engineers, owners and contractors…or just about anybody in the design or construction world who needs to communicate and track project information such as Construction Documents, RFIs, Submittals, Pay Applications, etc.
For more information visit www.roundhouselabs.com.

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.

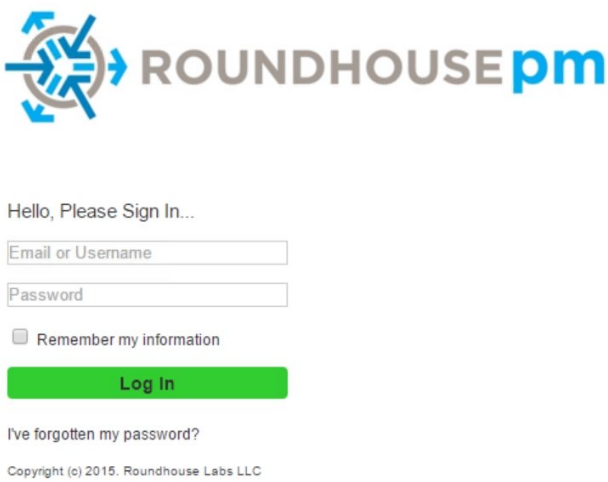
Below is an example of your custom login screen with company logo.

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**

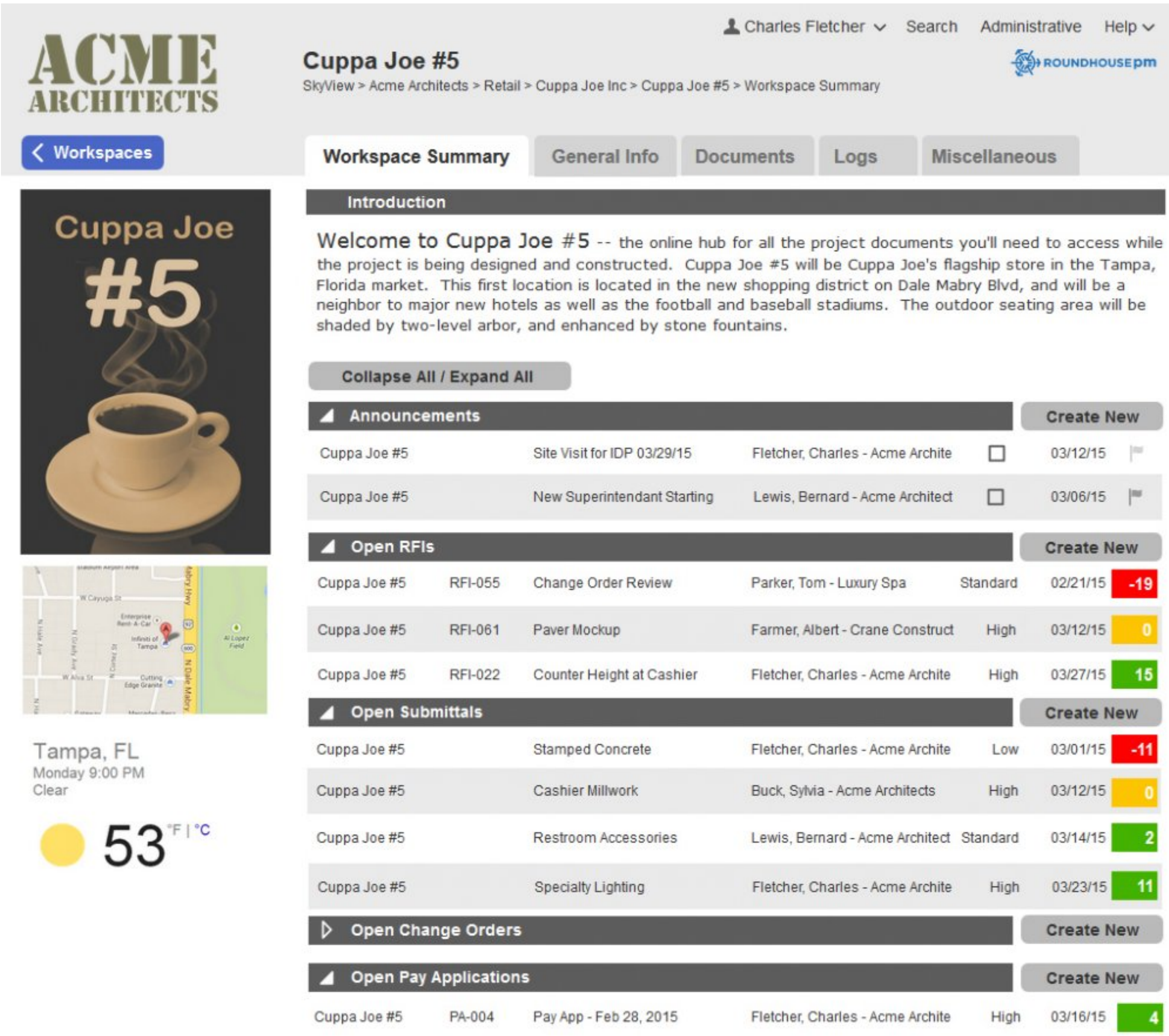
Click on the Login item in the top menu and the following page will open.



> * 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

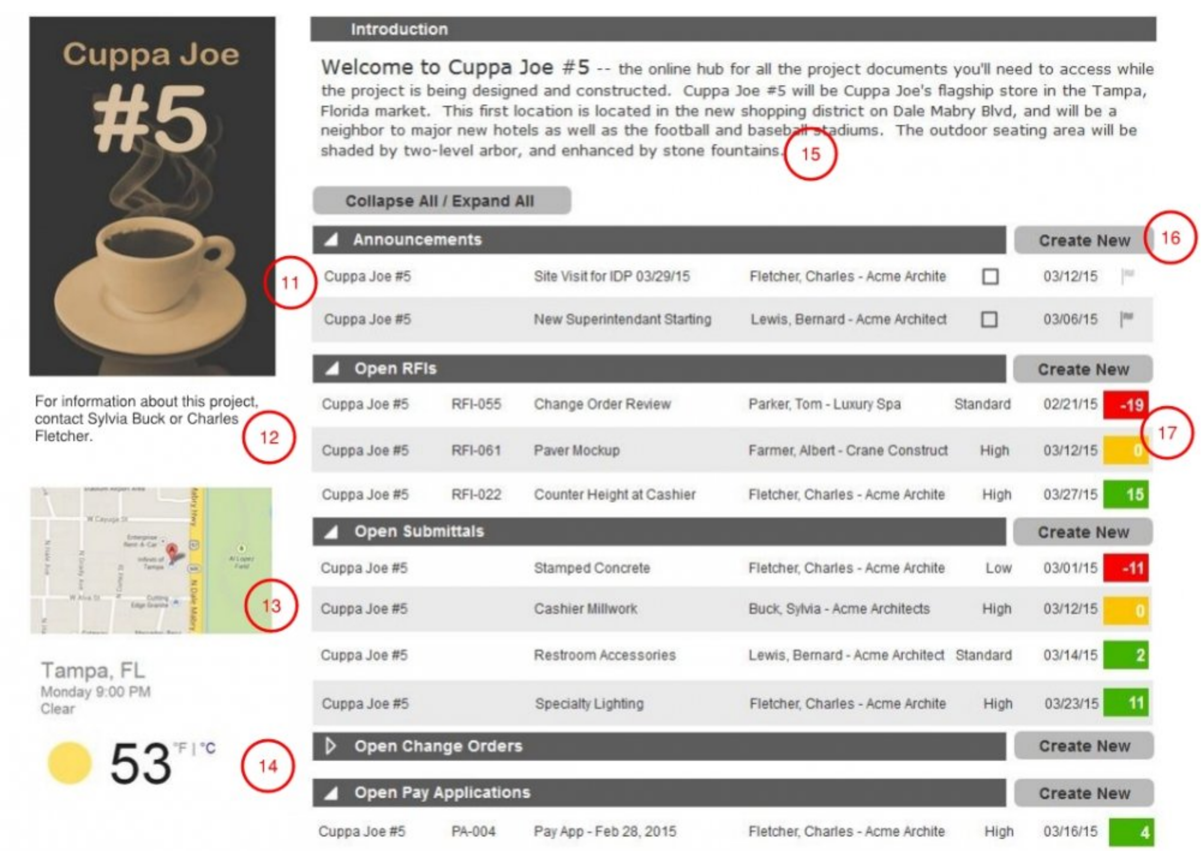


Above is the standard RoundhousePM interface. This is broken down into two areas: **the header** and **the area below the header**.

Header

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

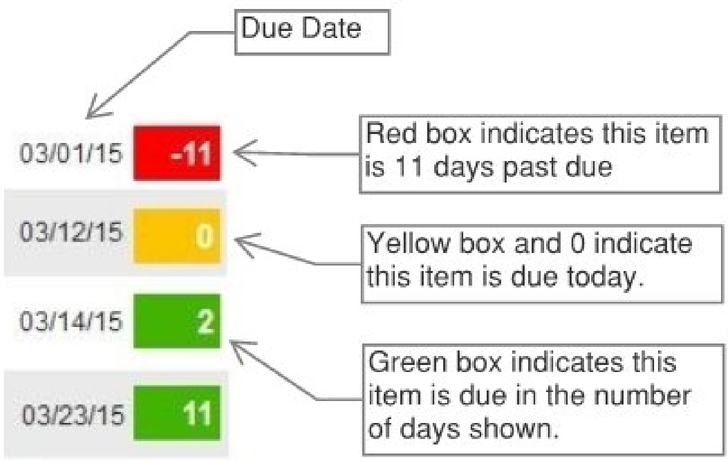


11. Workspace photo or logo
12. Text defined by the Site Administrator
13. Location map (optional)
14. Location weather (optional)

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

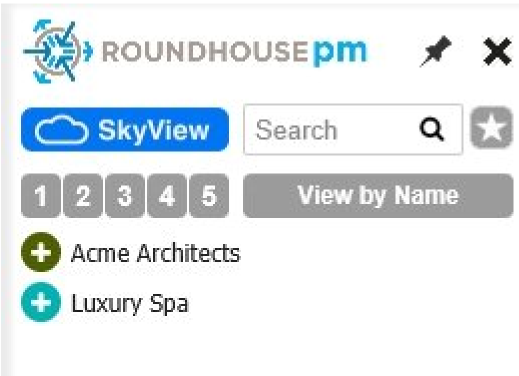
The numbers in the colored boxes indicate how many days until an item is due.



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

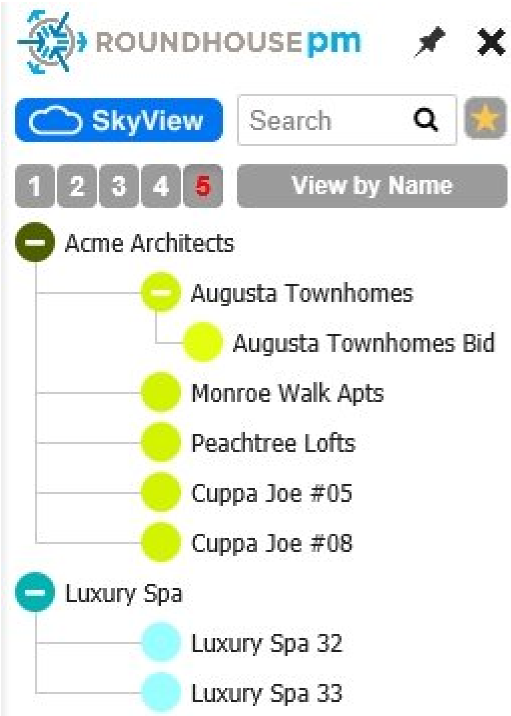
The numbers 1, 2, 3, 4, and 5 are the numbers of the workspace levels. Clicking on any of these numbers will expand or contract the explorer to that level:

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:

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

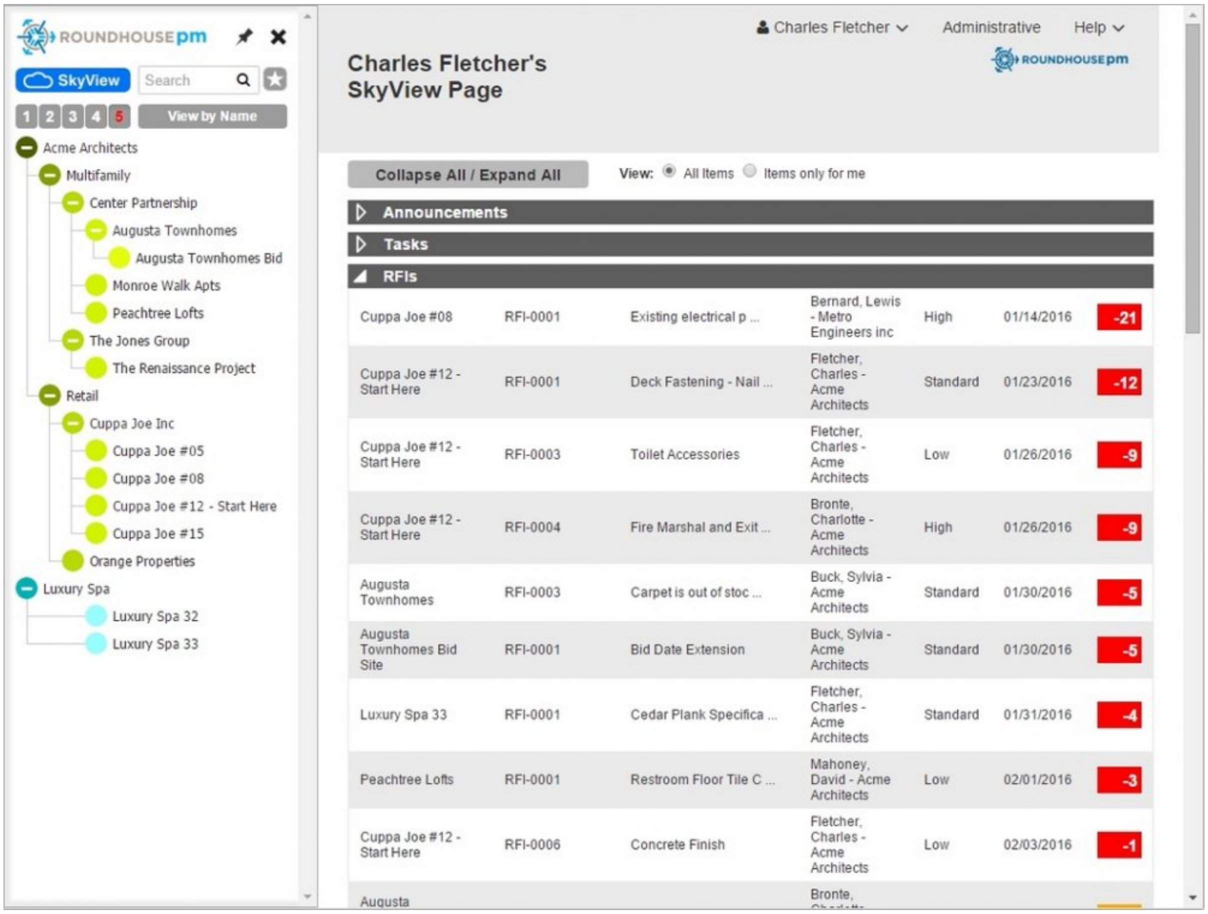
RoundhousePM allows you to identify ANY workspace as a Favorite so you can easily find what you're looking for in the Workspace Explorer.

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.

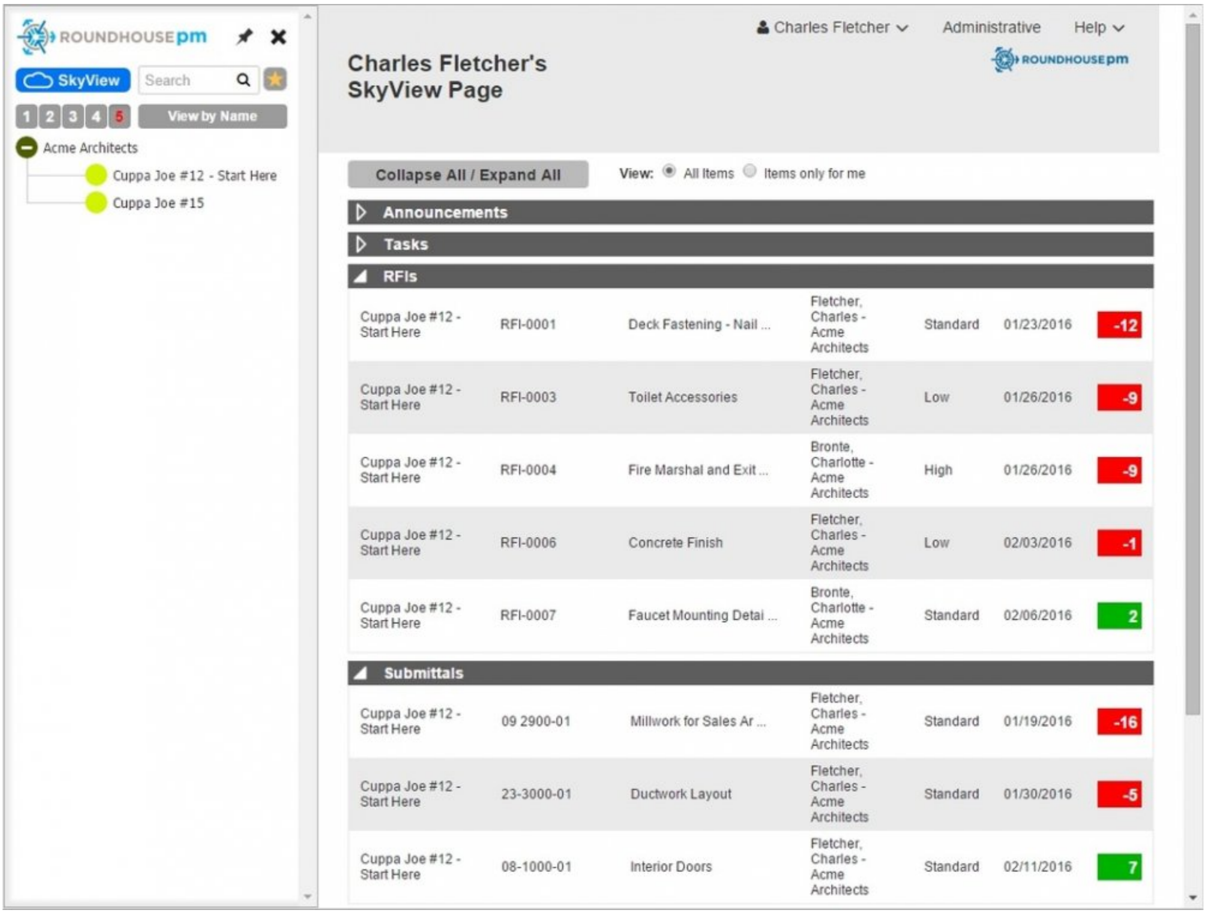
Below is an example from TestDrive of how Charles Fletcher's Skyview page changes when Favorites is turned on:

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.



Favorites Off

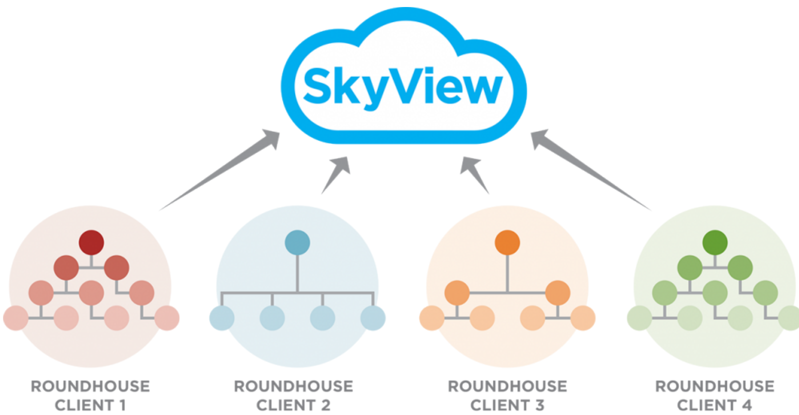


Favorites On

Next: [The Skyview Page >>]()

The Skyview Page

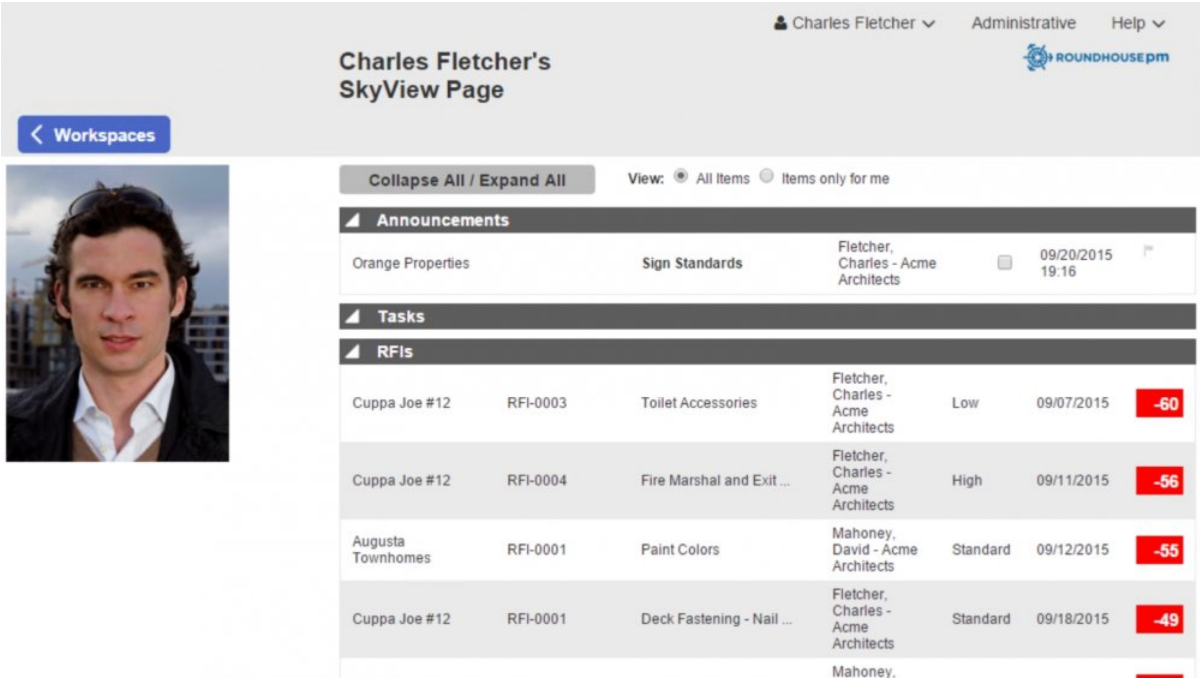
The SkyView Page is the user's personal area within RoundhousePM. It offers the user a view of all items in which they are involved, across all pyramids to which they have access:



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



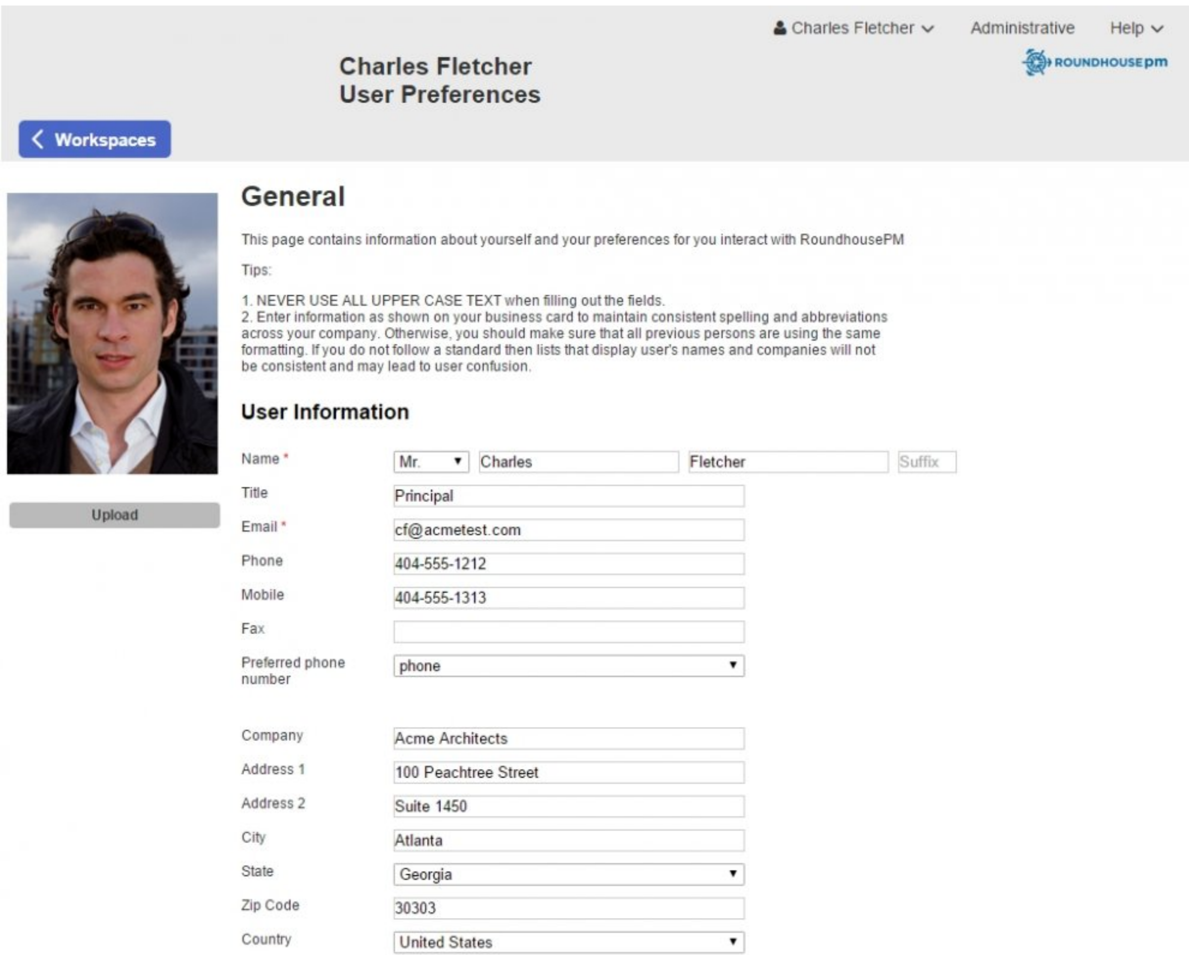
The SkyView page is very similar to the Project Summary page

Next: [My Information and Preferences >>]

My Information and Preferences

General

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



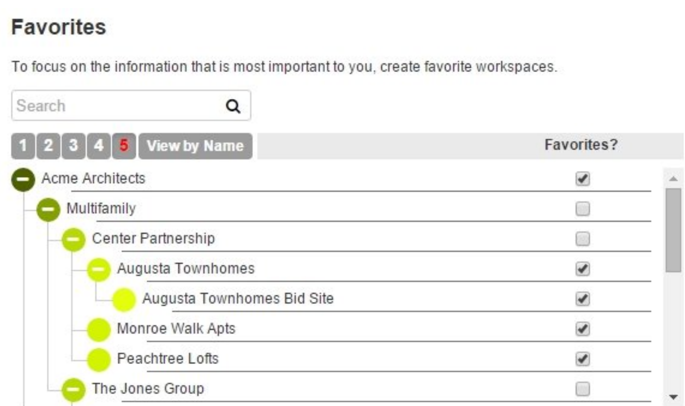
My Login Information

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

My Favorite Workspaces

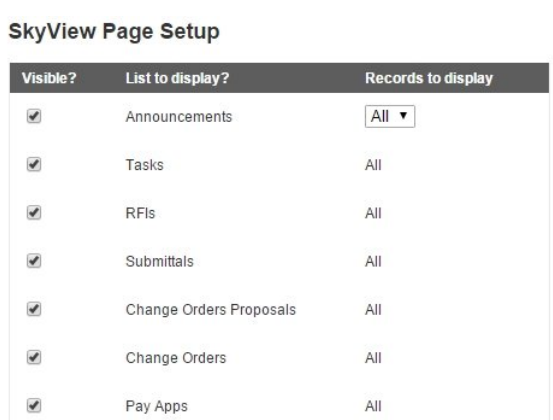
If you have access to a lot of projects, RoundhousePM allows you to quickly filter the Workspace Explorer to see only the workspaces you work with the most. Simply check the box for the workspaces you want to be included as a favorite.

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



SkyView Page Setup

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

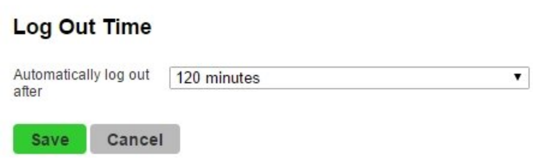


Daily Digest

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

Logout Time

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



Next: Communications – Announcements and Notifications >>

Communications – Announcements and Notifications

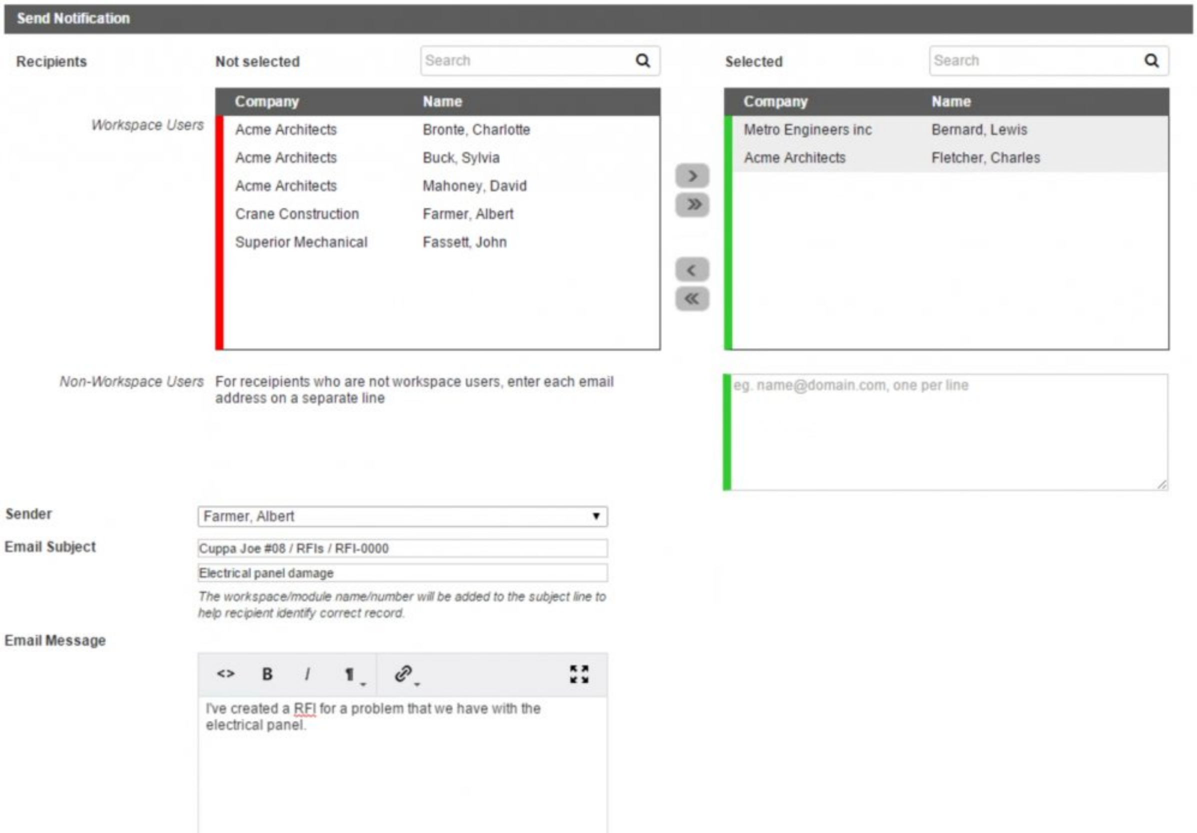
It is very easy to keep other project participants informed with Roundhouse's **Announcements** and **Notifications**.

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

Announcements

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



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.

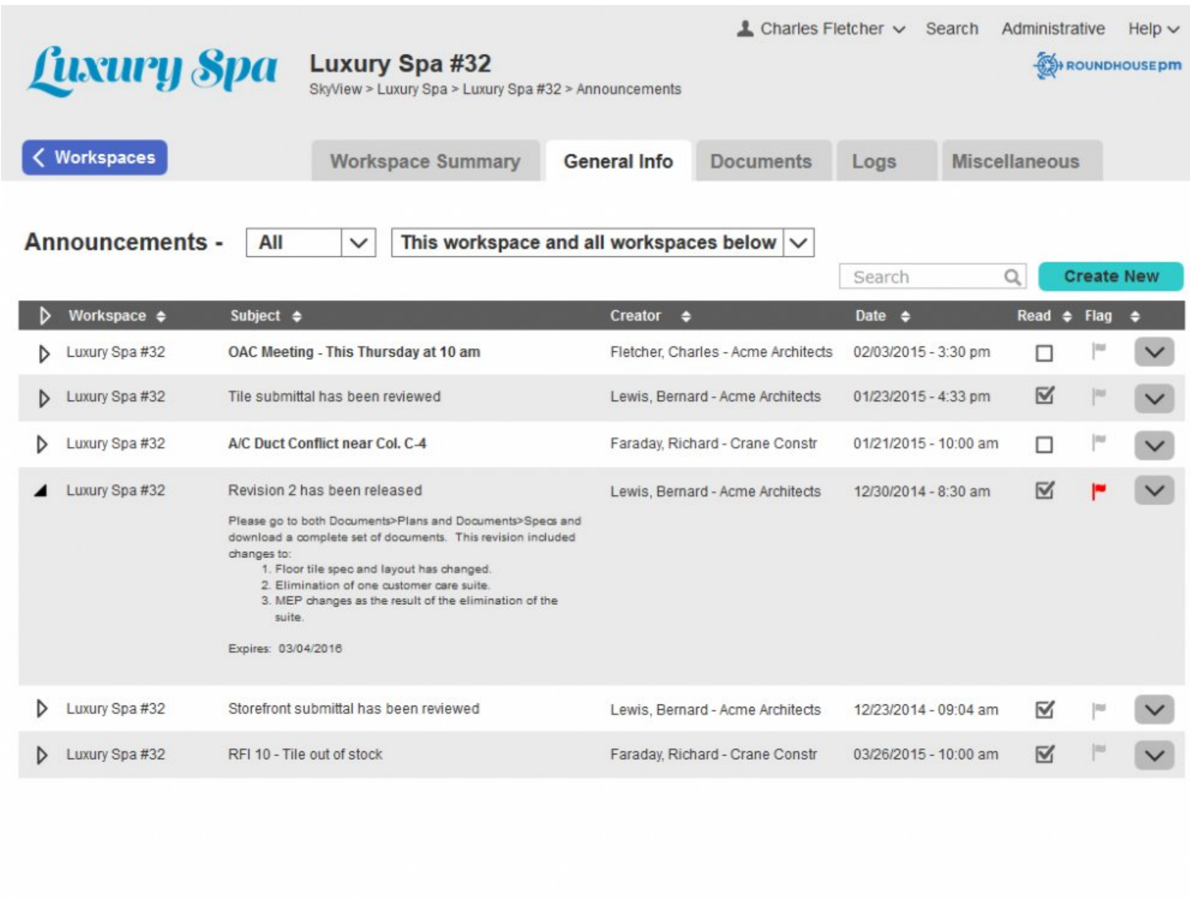
> ! The site administrator for your pyramid controls which modules are visible for each workspace and which user group has access to each type of module.

> ! 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.



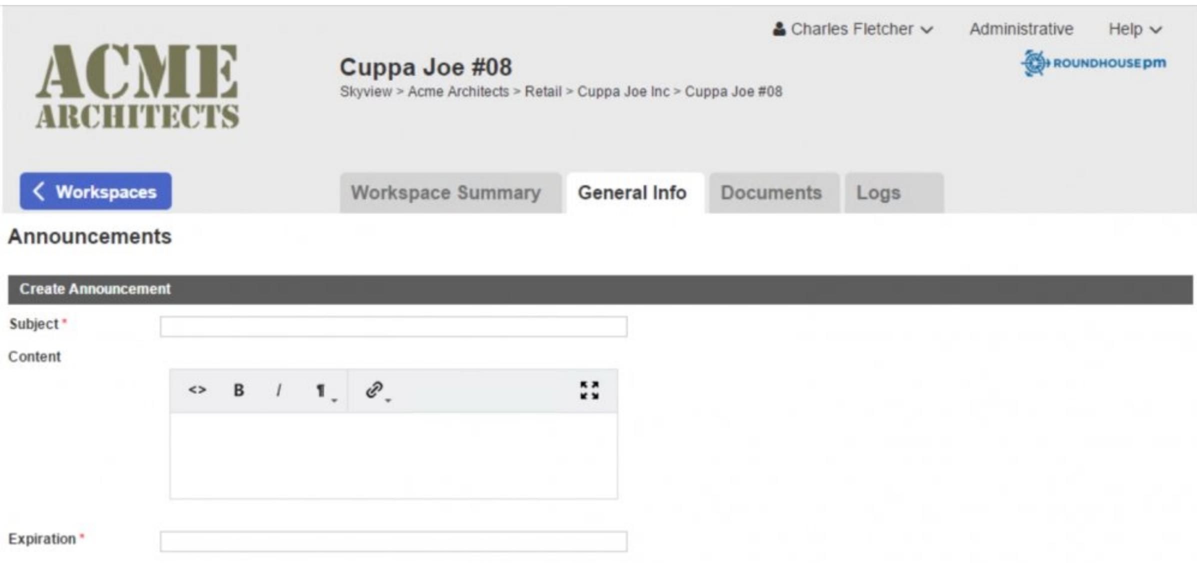
At the top are drop-down menus that allow you to filter the information shown:

- 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.

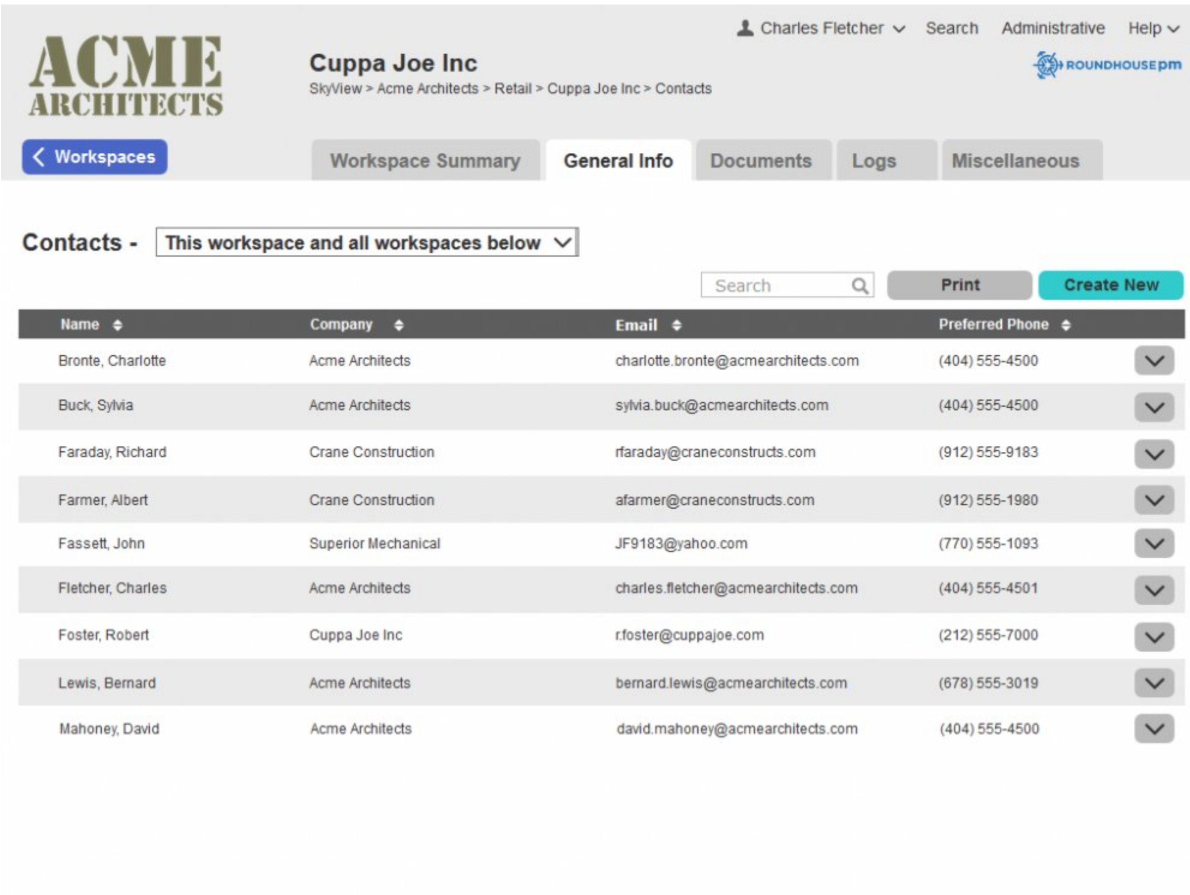


* All announcements must have an expiration date which removes them from the SkyView and Workspace Summary pages. After their expiration date these announcements can still be viewed in the Announcements module by selecting View: Expired.

Next: [Contacts >>]

Contacts

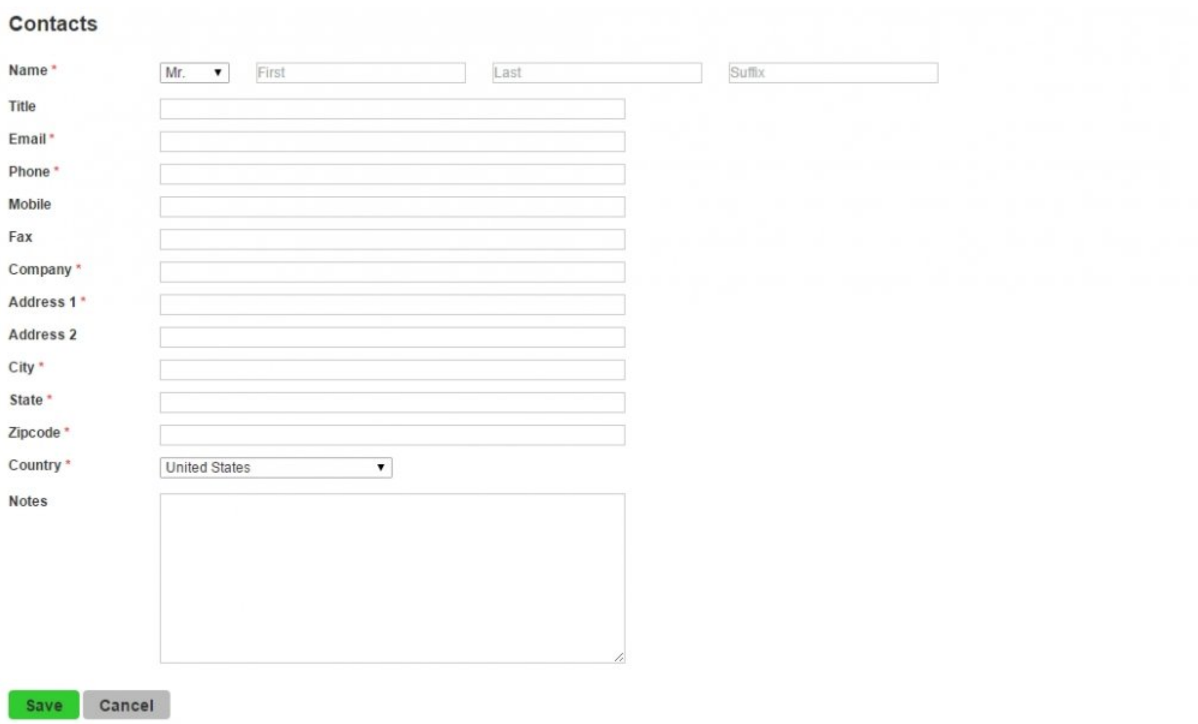
RoundhousePM's Contact module displays all users of the current workspace and all workspaces below.



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.

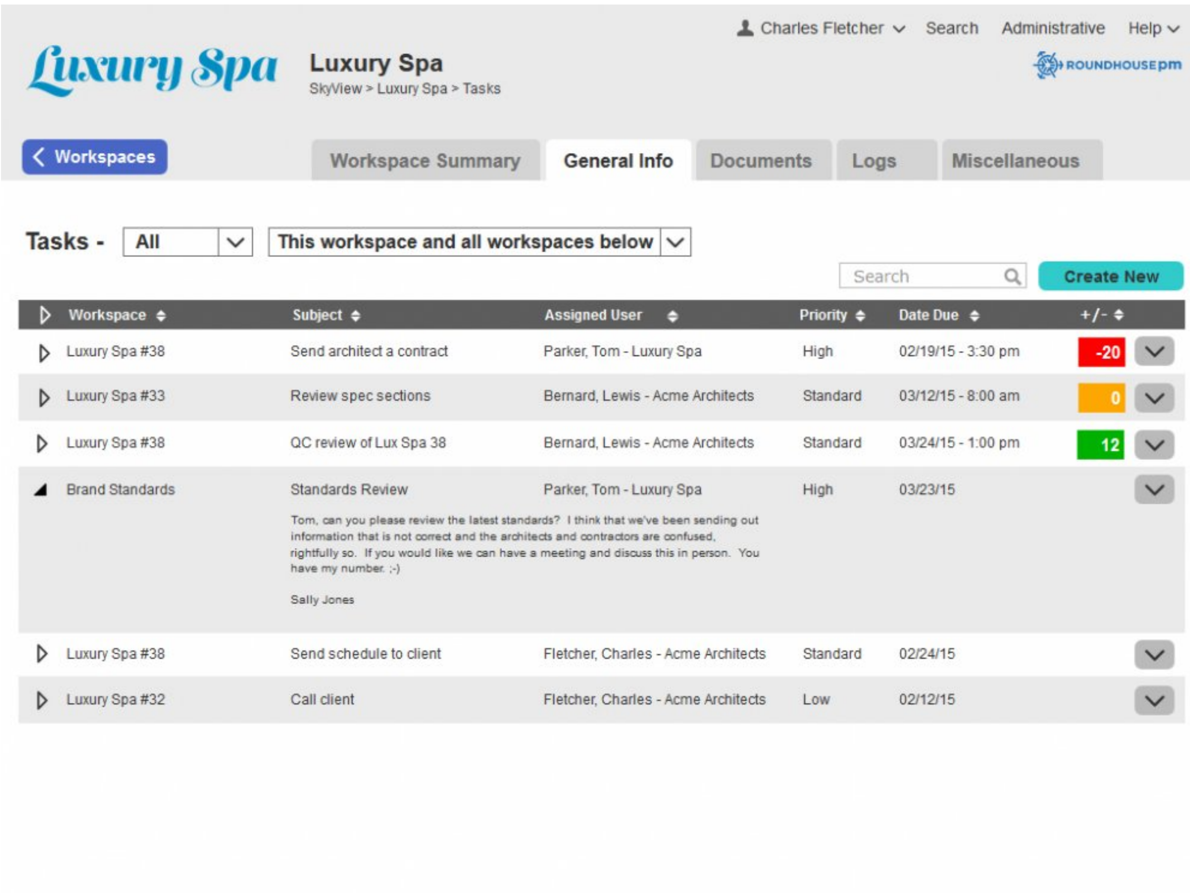


> * Tip: If you feel that a person should be a member of the workspace, do not manually add them to the Contacts module. Instead, ask your Site Administrator to invite them to join the workspace.

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.



Creating a New Task

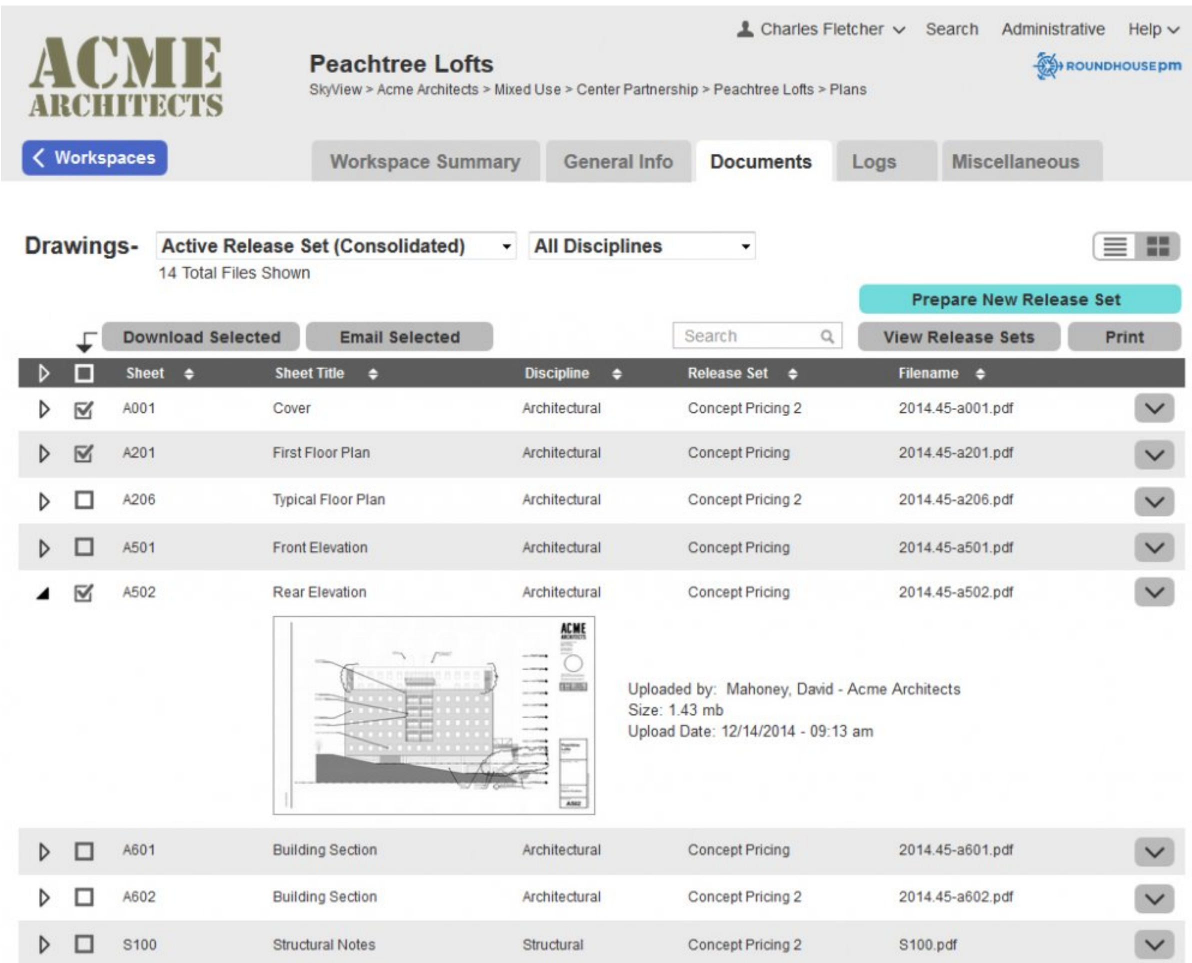
* Tasks are not only for tracking small items, tasks can also be used to track major project milestones such as the due date of a project phase, a permit release, or a date of construction completion.

Next: Drawings >>

Drawings

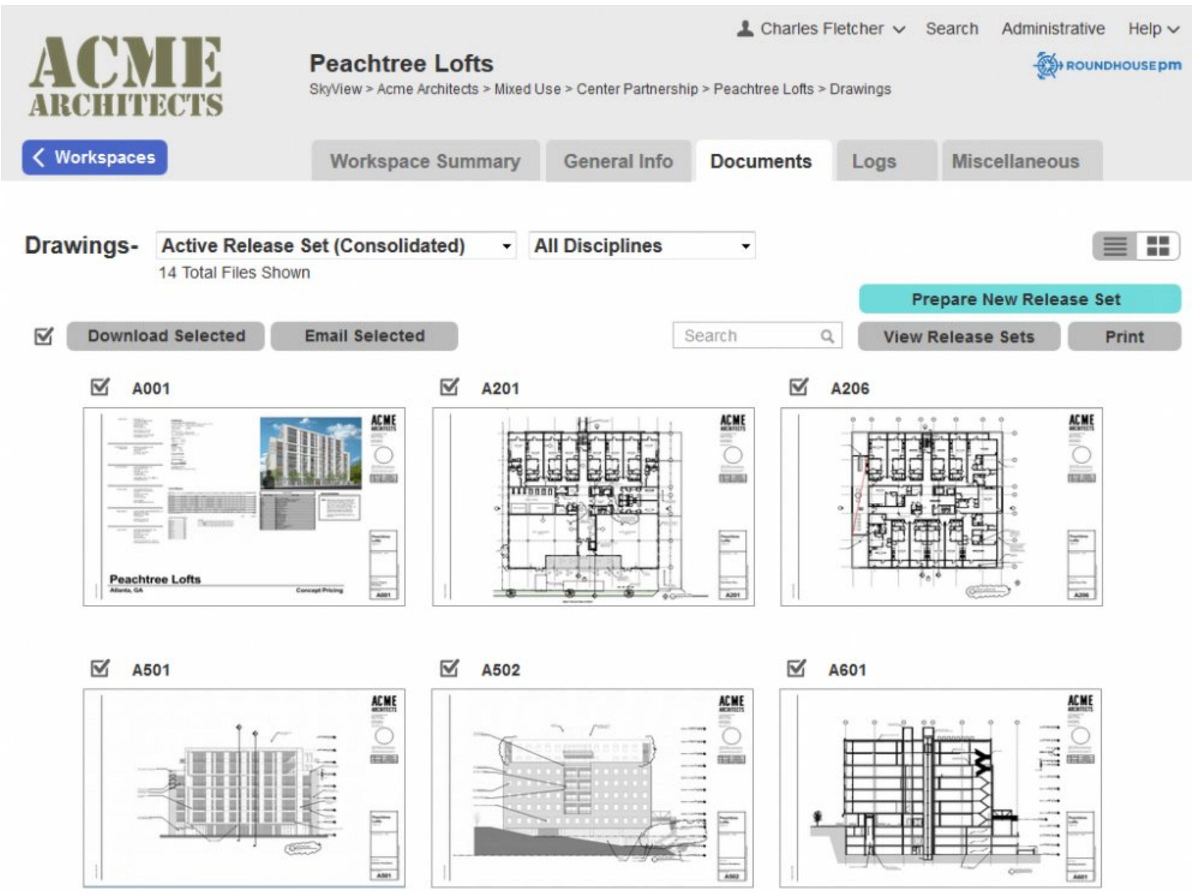
The Drawings module ensures eveyone is accessing the most current release set. It also tracks all previous release set versions, which are always accessible for users to see the changes from one release set to the next.

The Main Screen



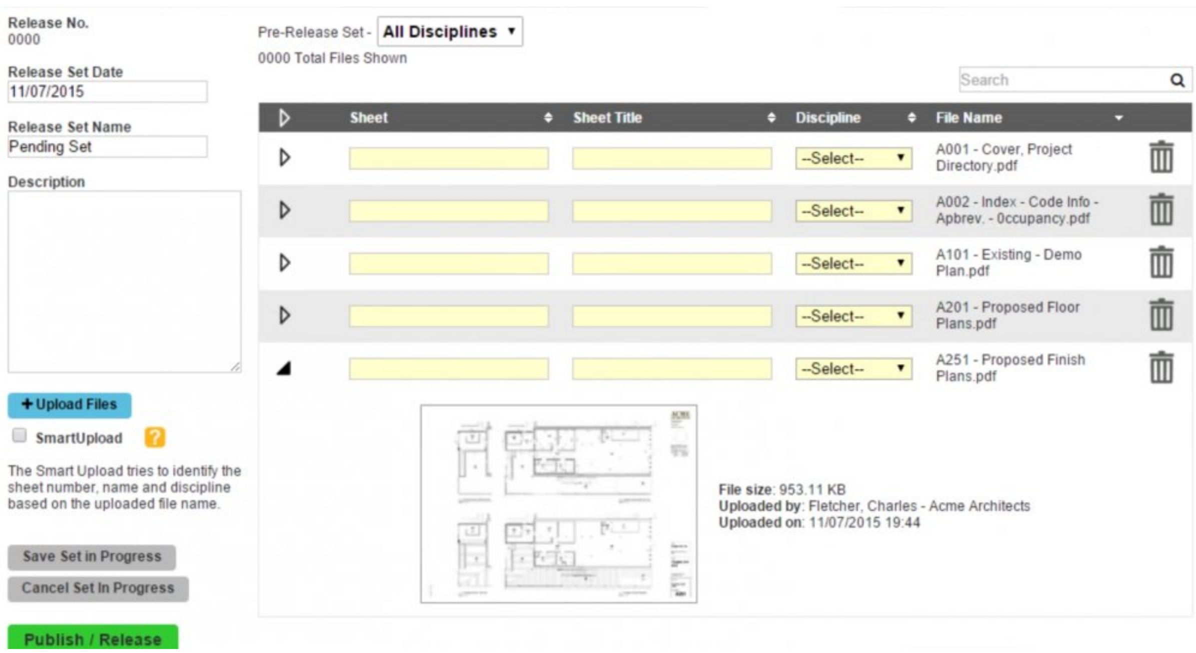
At the top of the page there are two drop-down menus that allow you to change what is displayed. The left drop-down menu allows you to see previous release sets. The right drop-down menu allows filtering the current view by discipline.

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**.



Follow these steps to create a new release set:

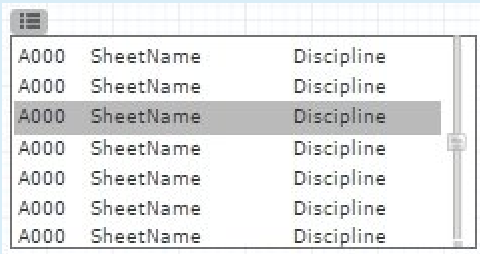
1. Enter the Release Date
2. Enter the Release Set Name (e.g. For Pricing, For Permitting, For Construction, Revision 1, ASI 1, etc.)
3. Enter the Release Description. (e.g. This release contains the change to the…, This is the pricing set and contains all disciplines needed to price the project.)
4.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

*

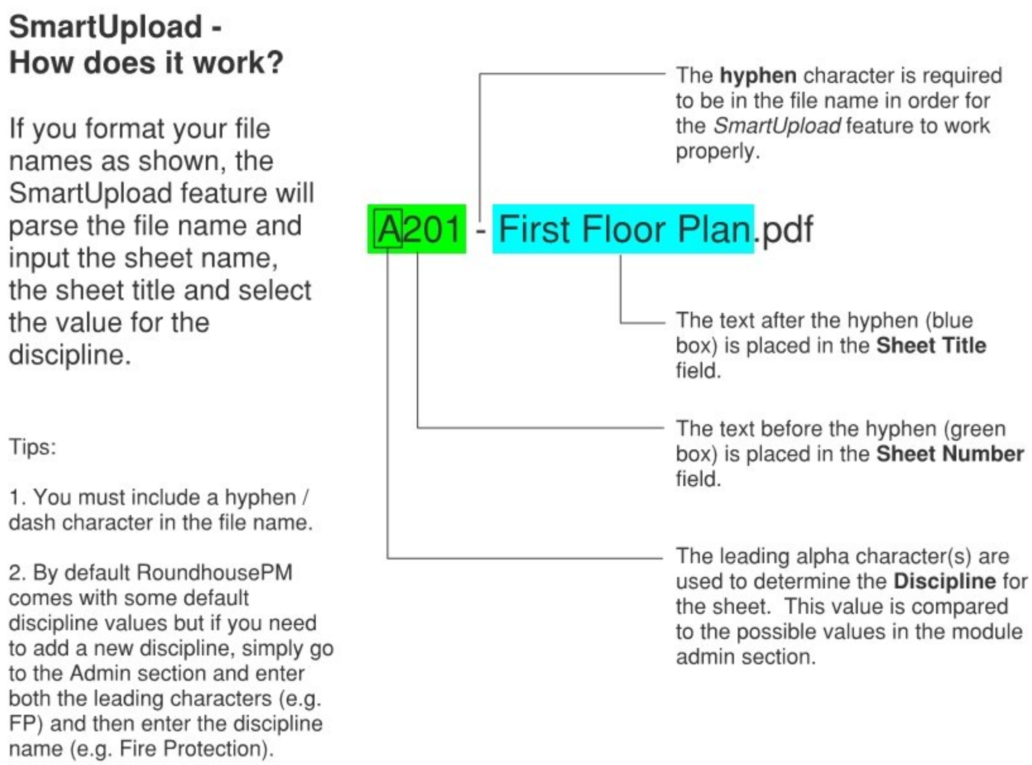
Tip: Once you have entered the documents number, name, and discipline, you can easily enter this information next time by clicking on the button on the left when you create the next release set.



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.

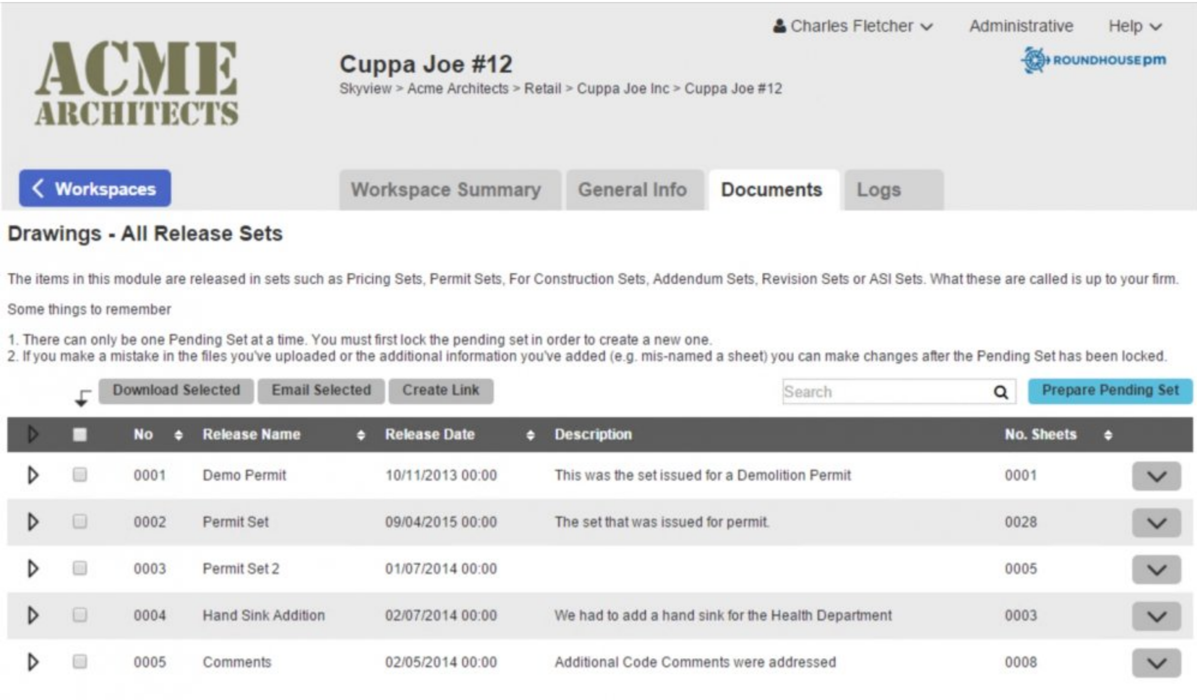
To use the SmartUpload feature you must check the “SmartUpload” checkbox PRIOR to uploading your files. Make sure you have named your files in the following format:



* 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.

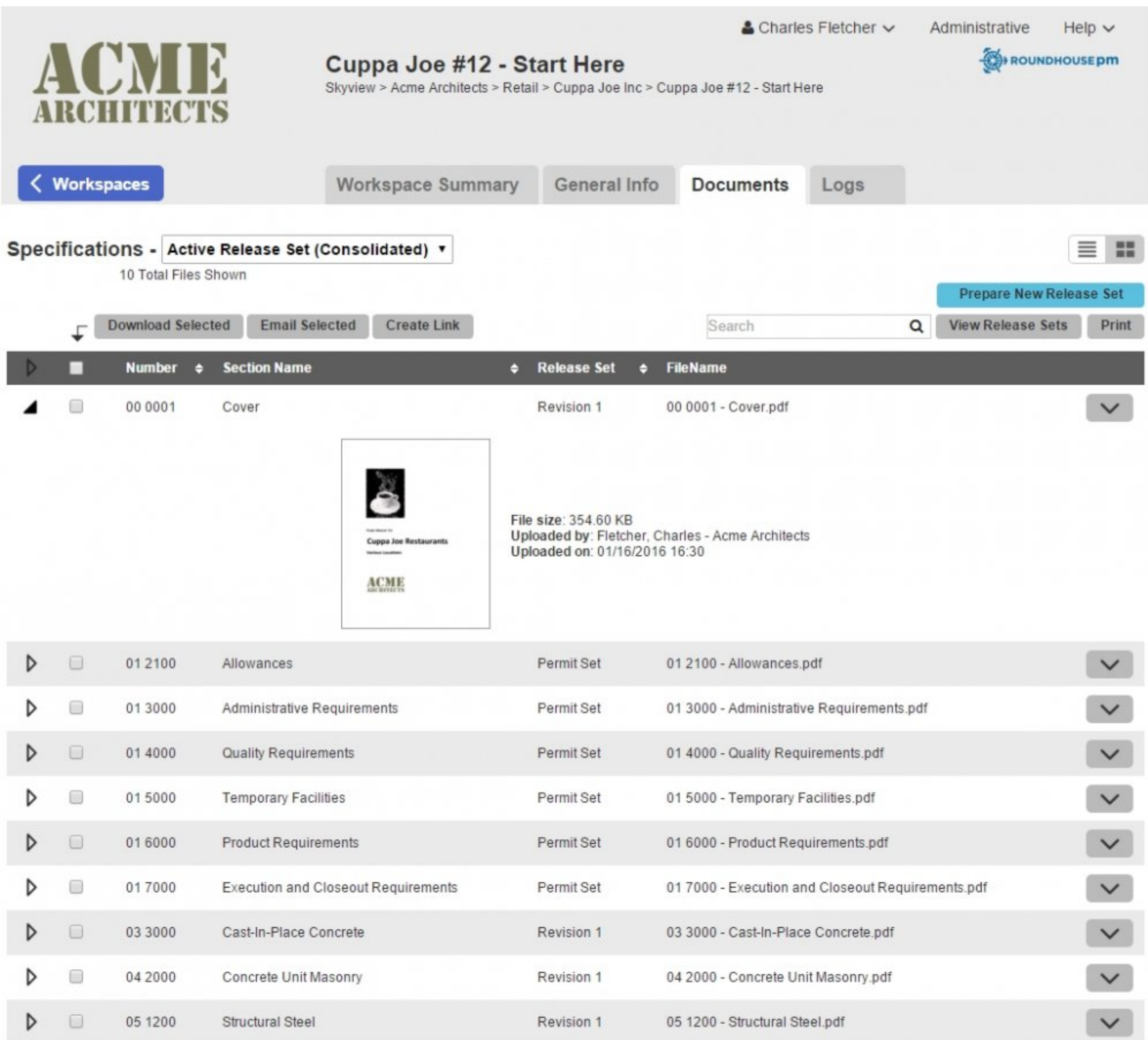


Next: Specifications >>

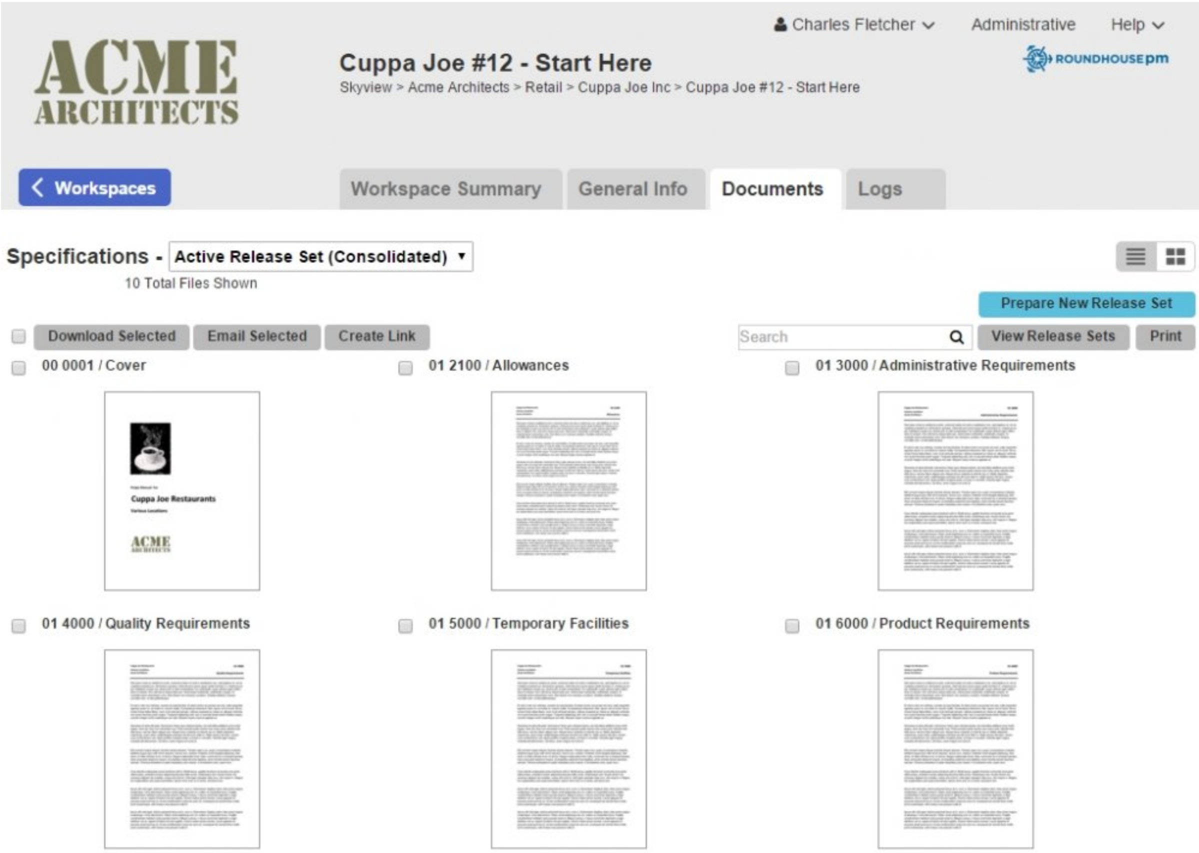
Specifications

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.

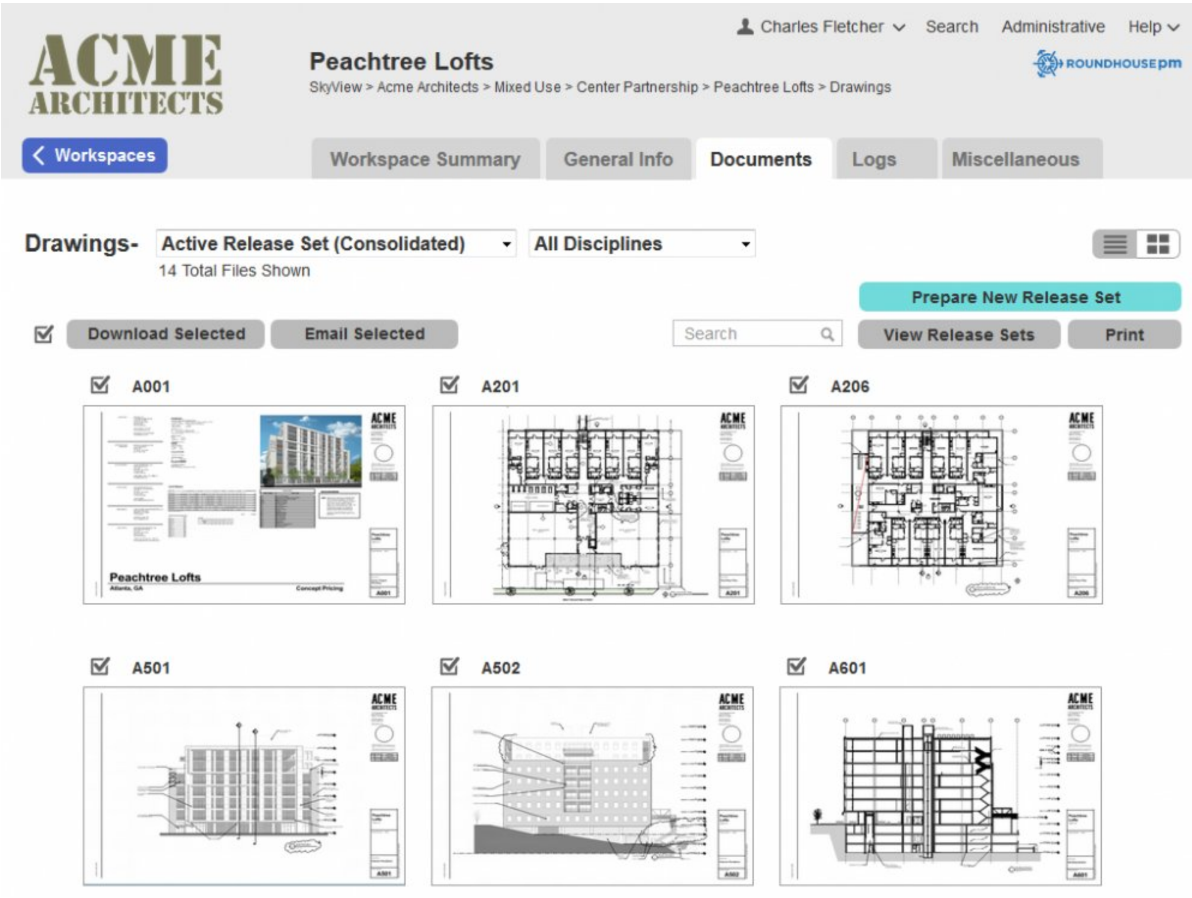
The Main Screen



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.

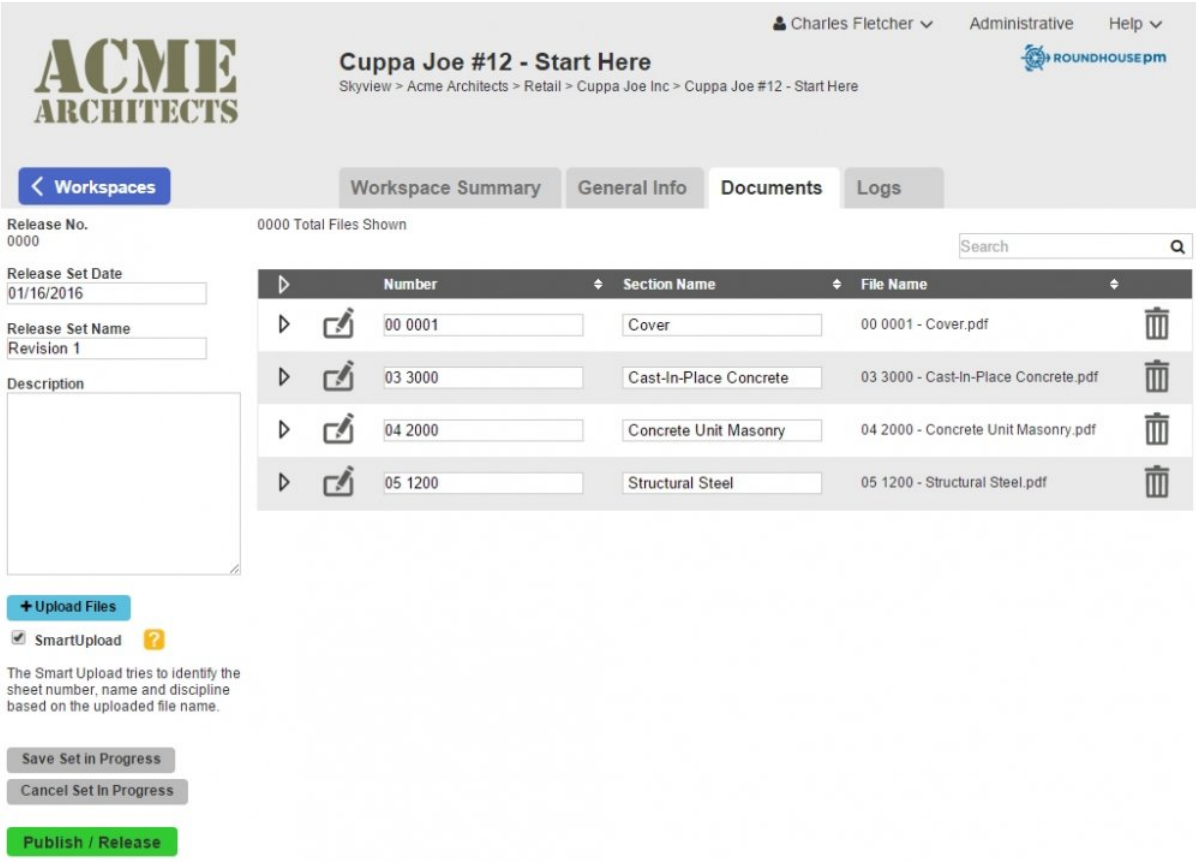


To the right of these drop downs is a toggle that allows you to change the view from rows to large thumbnails of each sheet as shown below.



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**.



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.

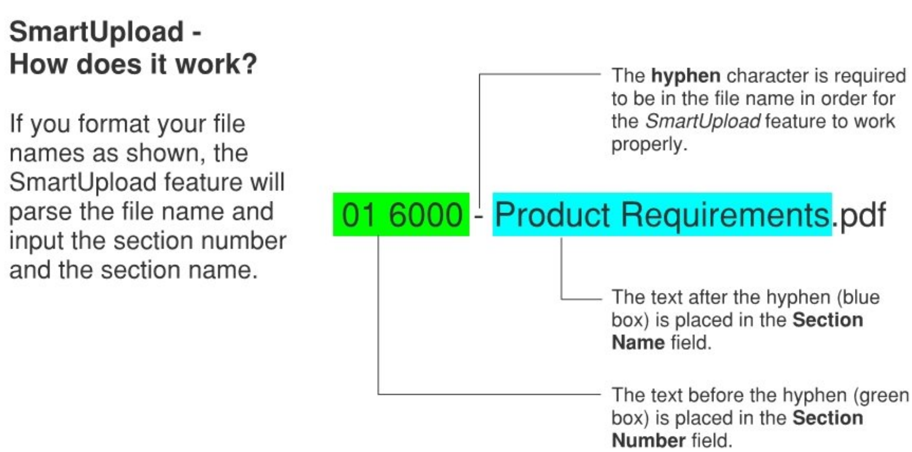
When you've completed uploading all of your files and have them named correctly, press the **Publish / Release** button. This set will now appear as files on the main screen.

* 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

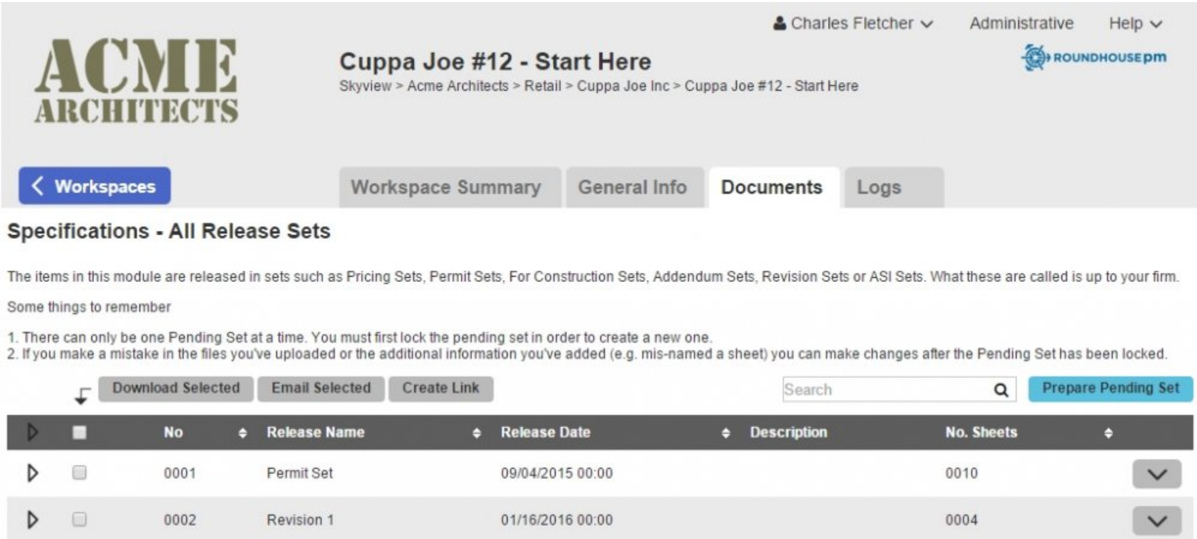
The previous method of creating a release set works well, but RoundhousePM has an even faster way of doing this, but you need to follow some naming conventions for the PDF files you create. If you follow these guidelines, RoundhousePM will parse the file names and complete the Section Number and Section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



View Release Sets

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

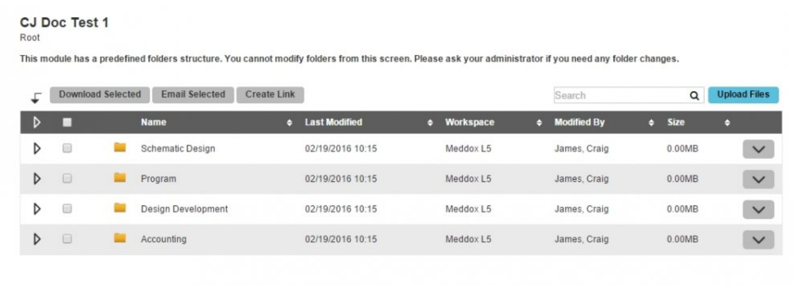


Next: Documents >>

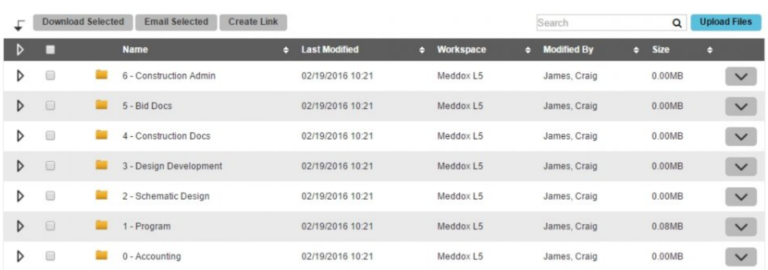
Documents

With RoundhousePM you can upload and share any type of document with other users of your workspace. There are two different types of Documents module:

1. **Free form folder structure**
2. **Predefined folder structure**



Free Form Folder Structure



Predefined Folder Structure

RoundhousePM automatically uploads all files and names accordingly. If any information needs editing, it can be done after the record is created.

> * The Predefined Folder structure assures that people place files in a consistent location as defined by your company. For more information on how to create these folders see Non-Typical Module Admin Pages.

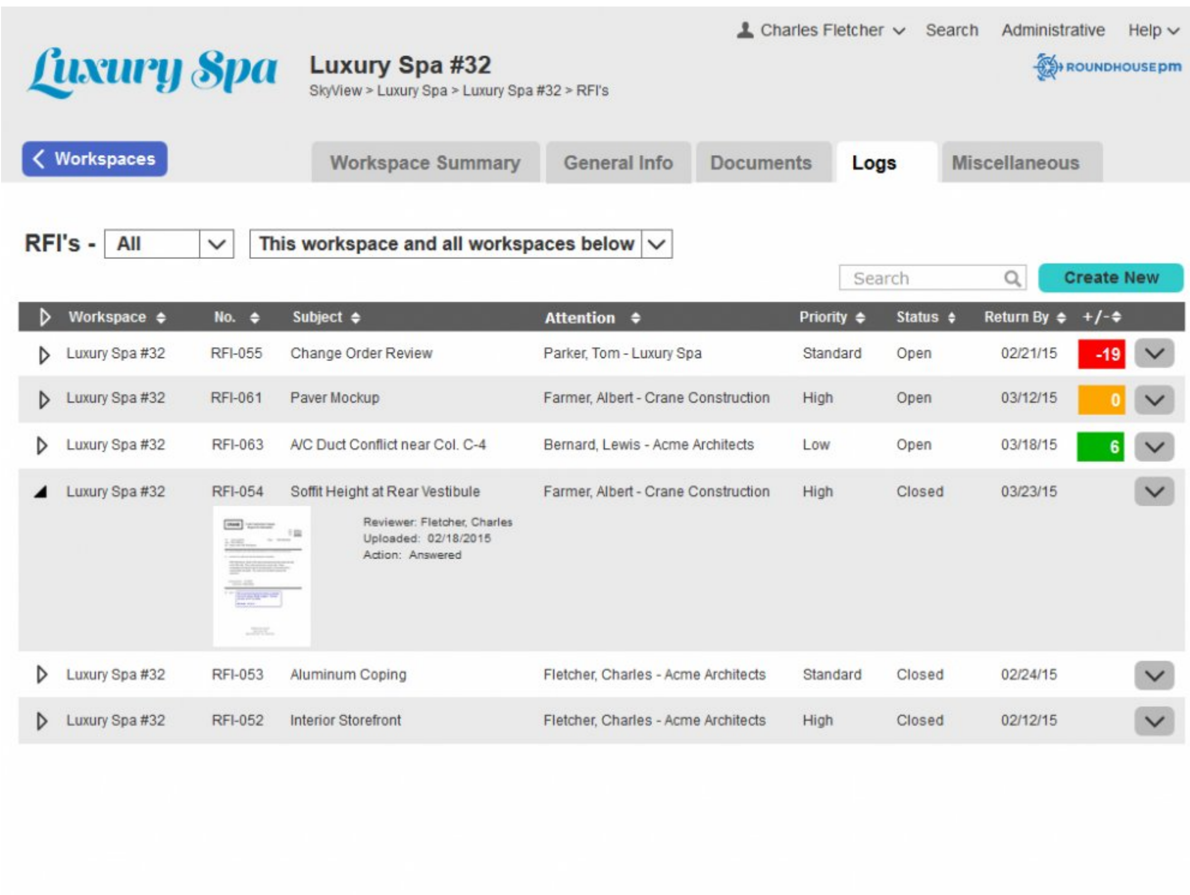
! Important: If a user has access to the Documents module, they also have access to all files within this module. If you want to limit access to some files but not others, have your site administrator duplicate the Documents module, rename it, and change the access permissions as needed. For more information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

Next: RFI Log >>

RFI Log

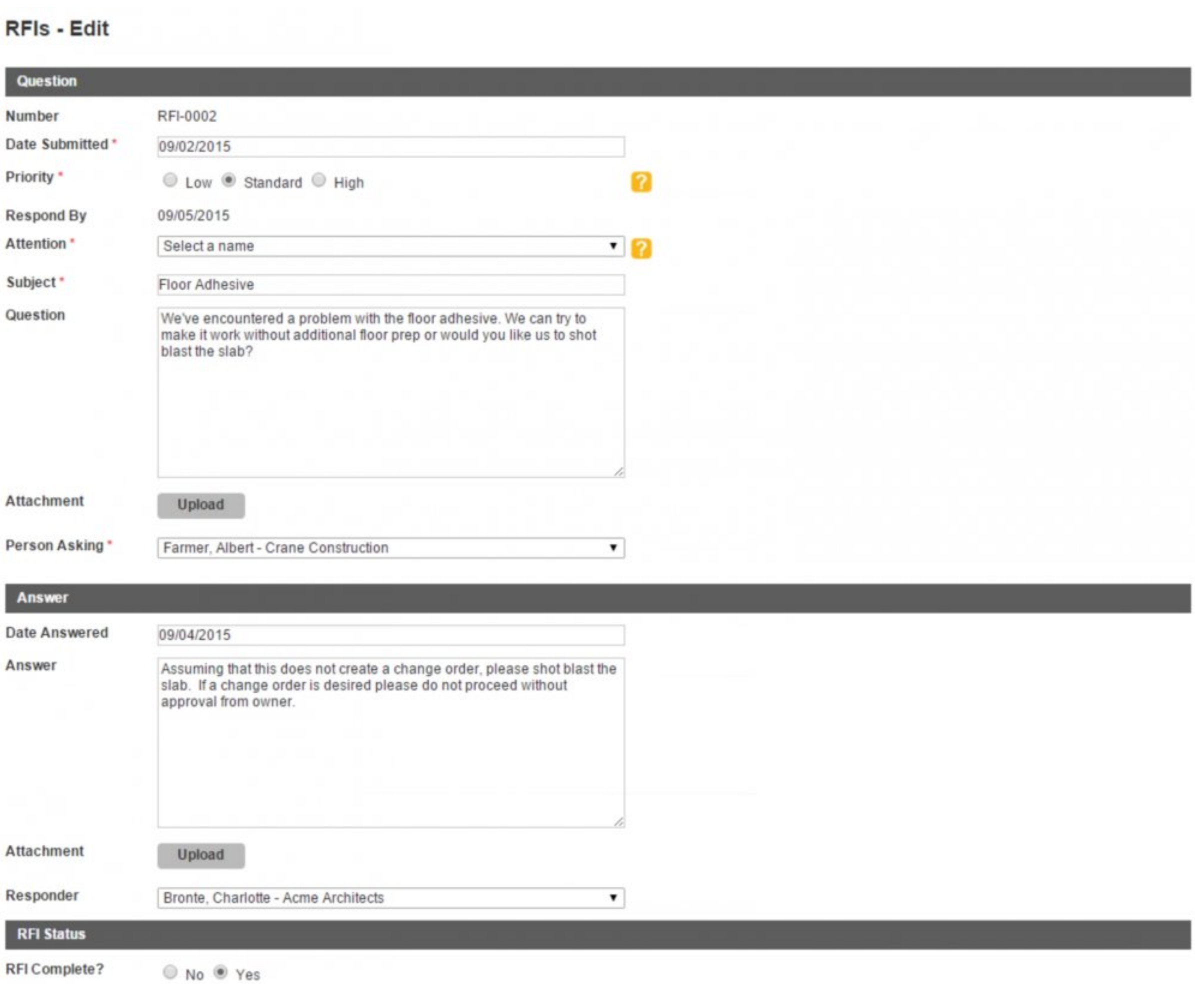
The Request For Information (RFI) Log is the place where users ask questions and get answers. In most projects this usually is a contractor asking questions for the design team, but this can be used in any way imaginable.

Main Screen



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 *: Low / Standard / High
Respond By: 09/05/2015
Attention *: Select a name
Subject *: Floor Adhesive
Question: 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?
Attachment: Upload
Person Asking *: Farmer, Albert - Crane Construction

Answer

Date Answered: 09/04/2015
Answer: 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.
Attachment: Upload
Responder: Bronte, Charlotte - Acme Architects

RFI Status

RFI Complete?: No / 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.

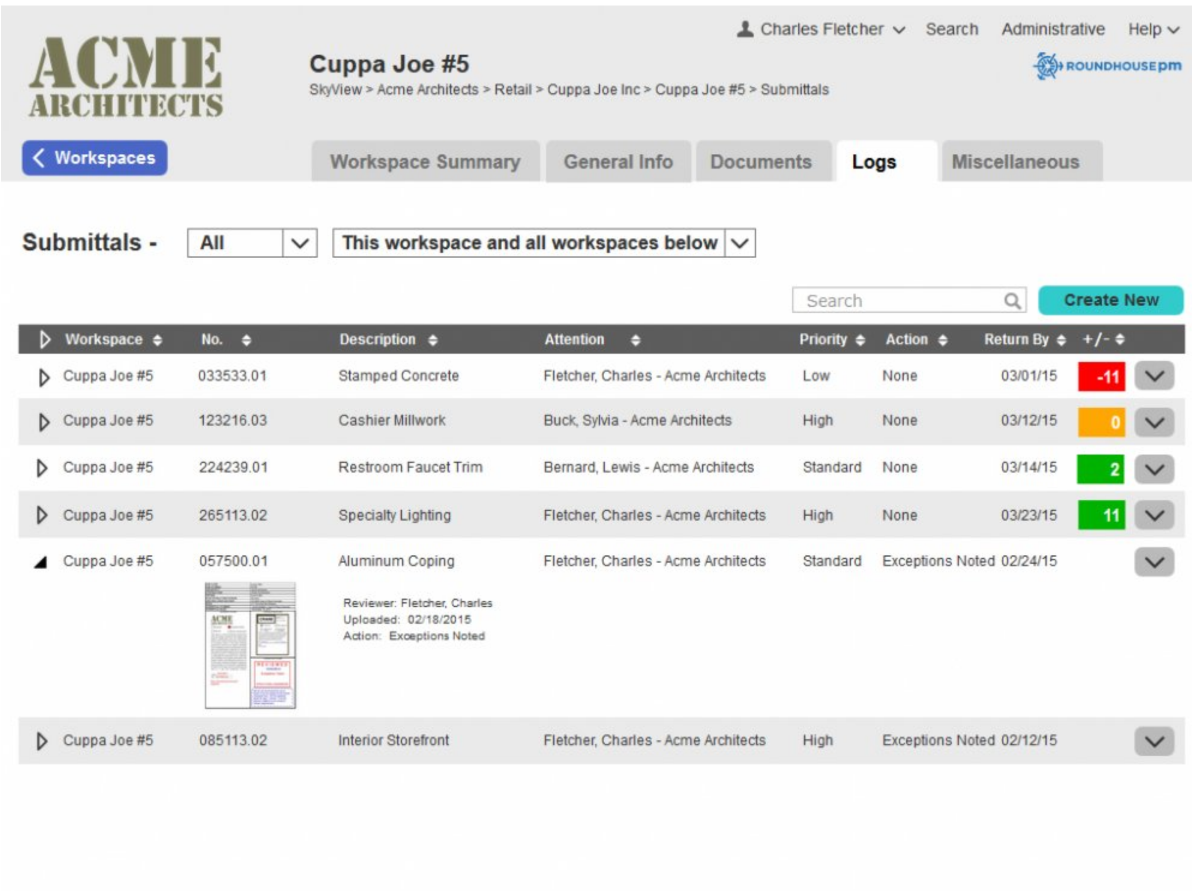
> * When answering a question make sure to change the value of the RFI Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.

Next: Submittal Log >>

Submittal Log

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

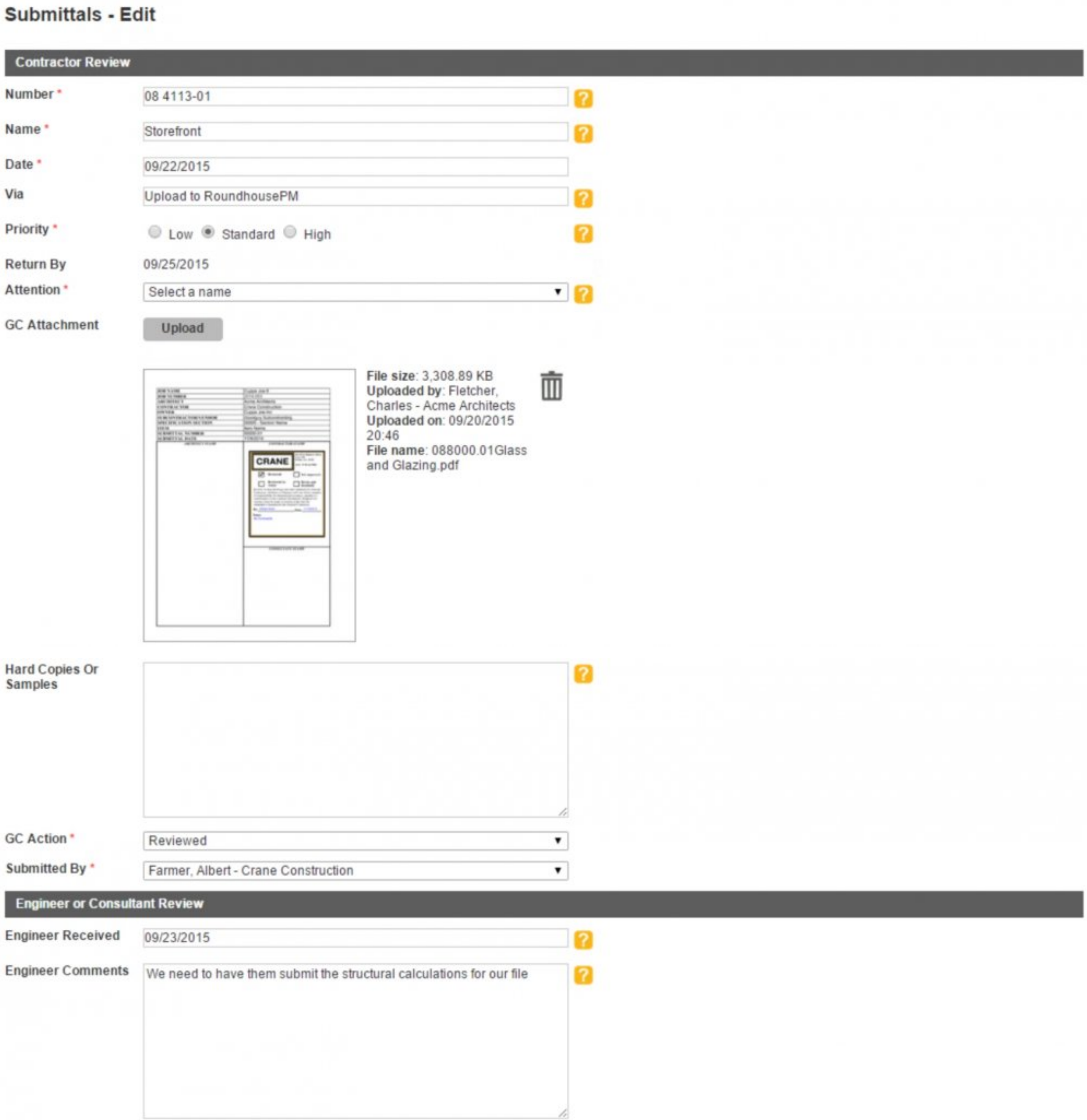
Main Screen



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.



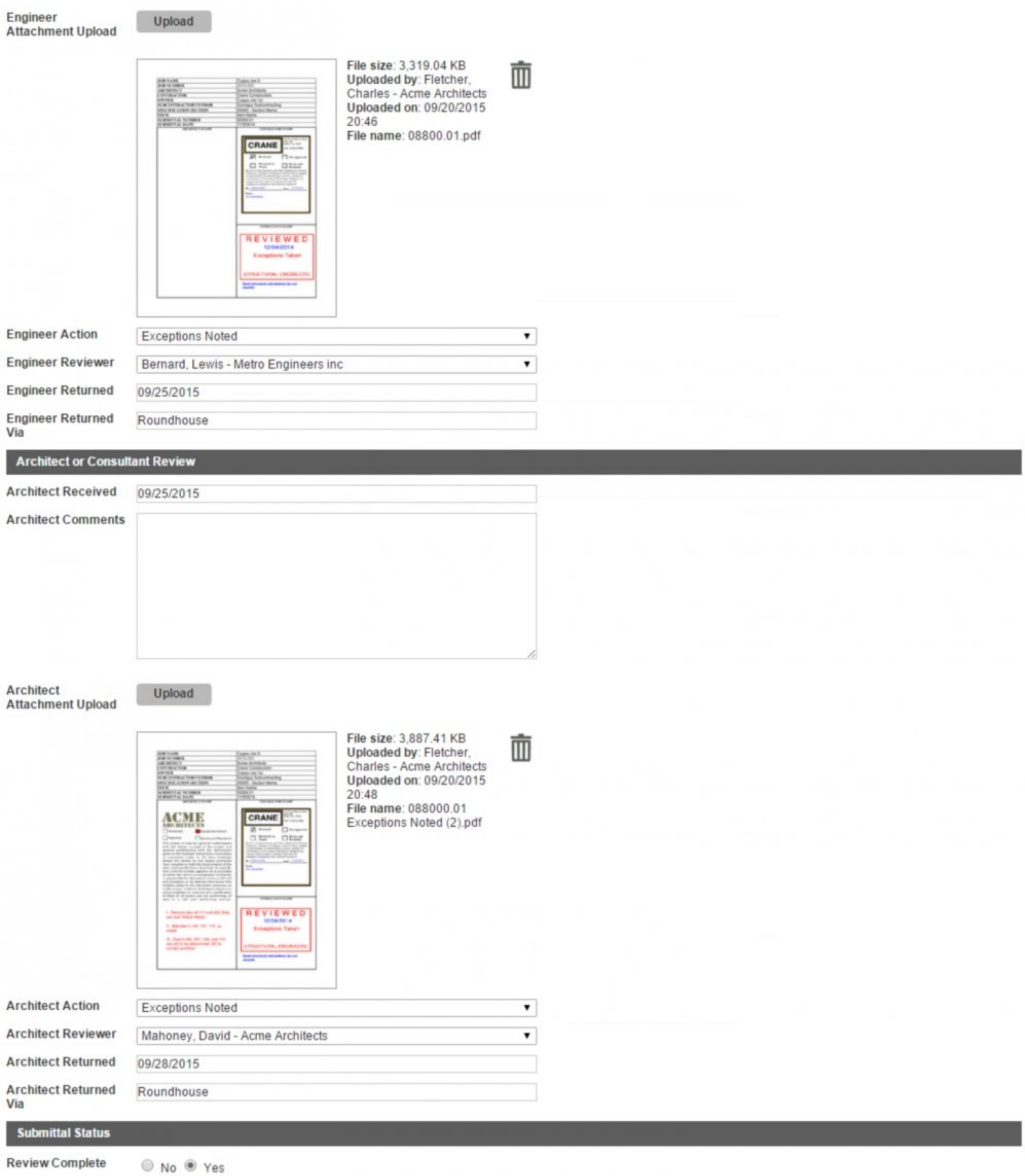
Submittals - Edit

Contractor Review

Number *	08 4113-01
Name *	Storefront
Date *	09/22/2015
Via	Upload to RoundhousePM
Priority *	Low / Standard (selected) / High
Return By	09/25/2015
Attention *	Select a name
GC Attachment	Upload
	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
Hard Copies Or Samples	
GC Action *	Reviewed
Submitted By *	Farmer, Albert - Crane Construction

Engineer or Consultant Review

Engineer Received	09/23/2015
Engineer Comments	We need to have them submit the structural calculations for our file



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	Exceptions Noted
Engineer Reviewer	Bernard, Lewis - Metro Engineers inc
Engineer Returned	09/25/2015
Engineer Returned Via	Roundhouse

Architect or Consultant Review

Architect Received	09/25/2015
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	Exceptions Noted
Architect Reviewer	Mahoney, David - Acme Architects
Architect Returned	09/28/2015
Architect Returned Via	Roundhouse

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.

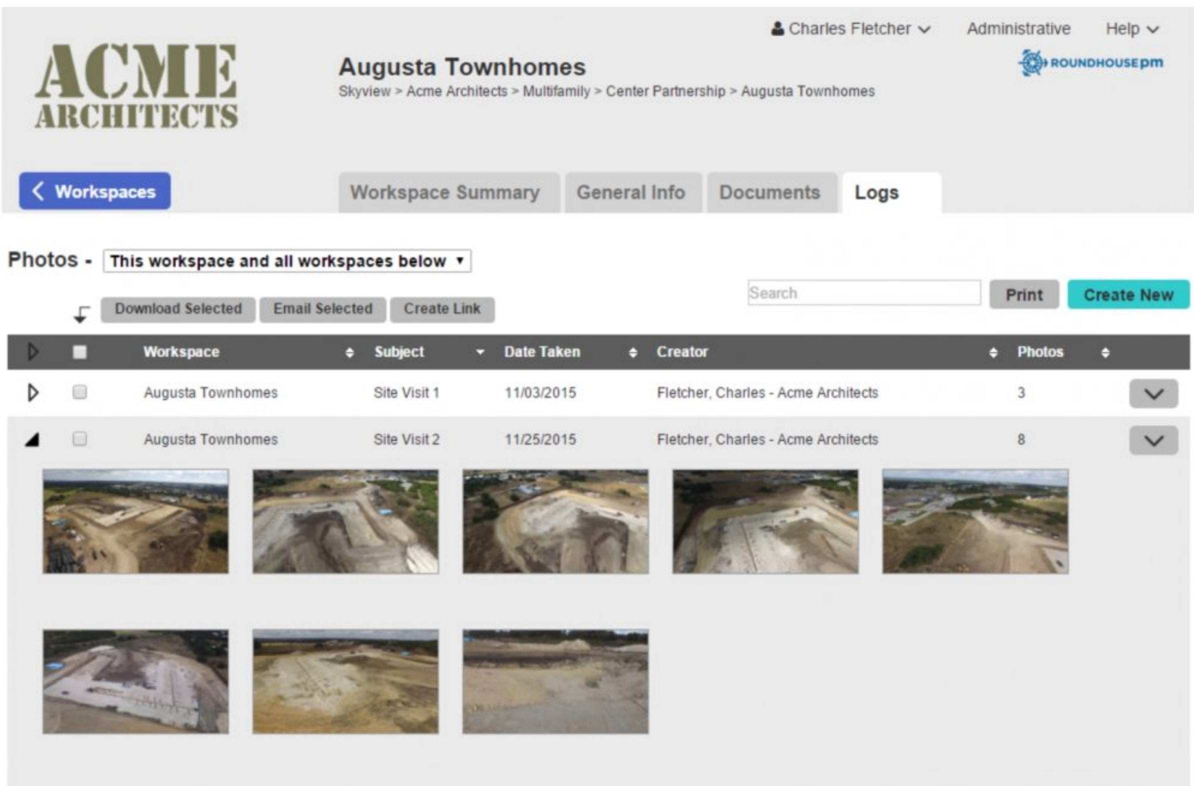
Next: Photos >>

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.

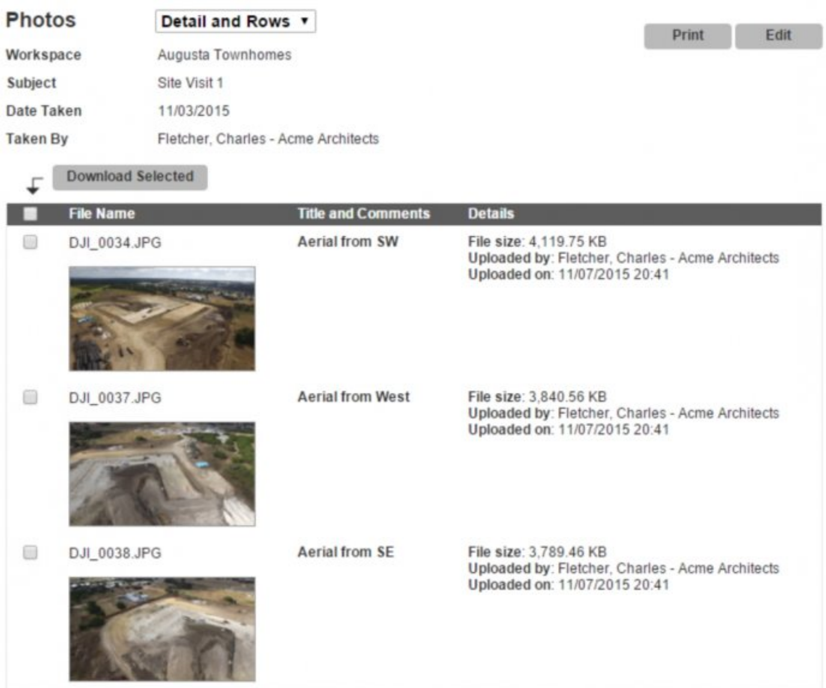


The Session Information

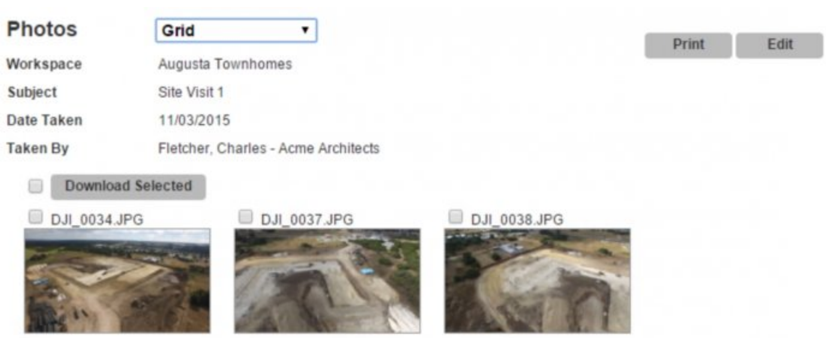
There are three ways to view the photos in a session:

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

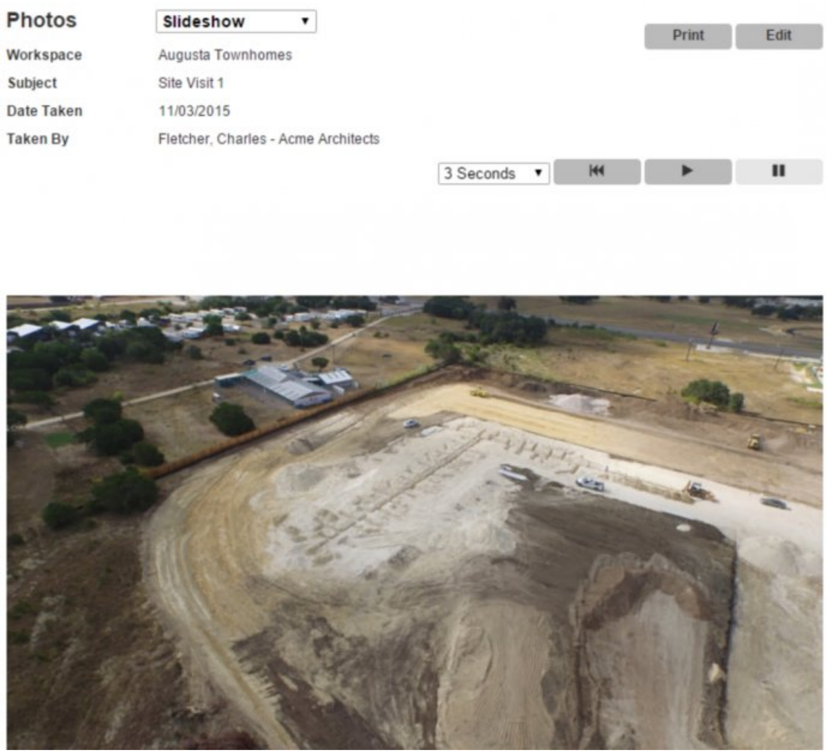
Detail and Rows View



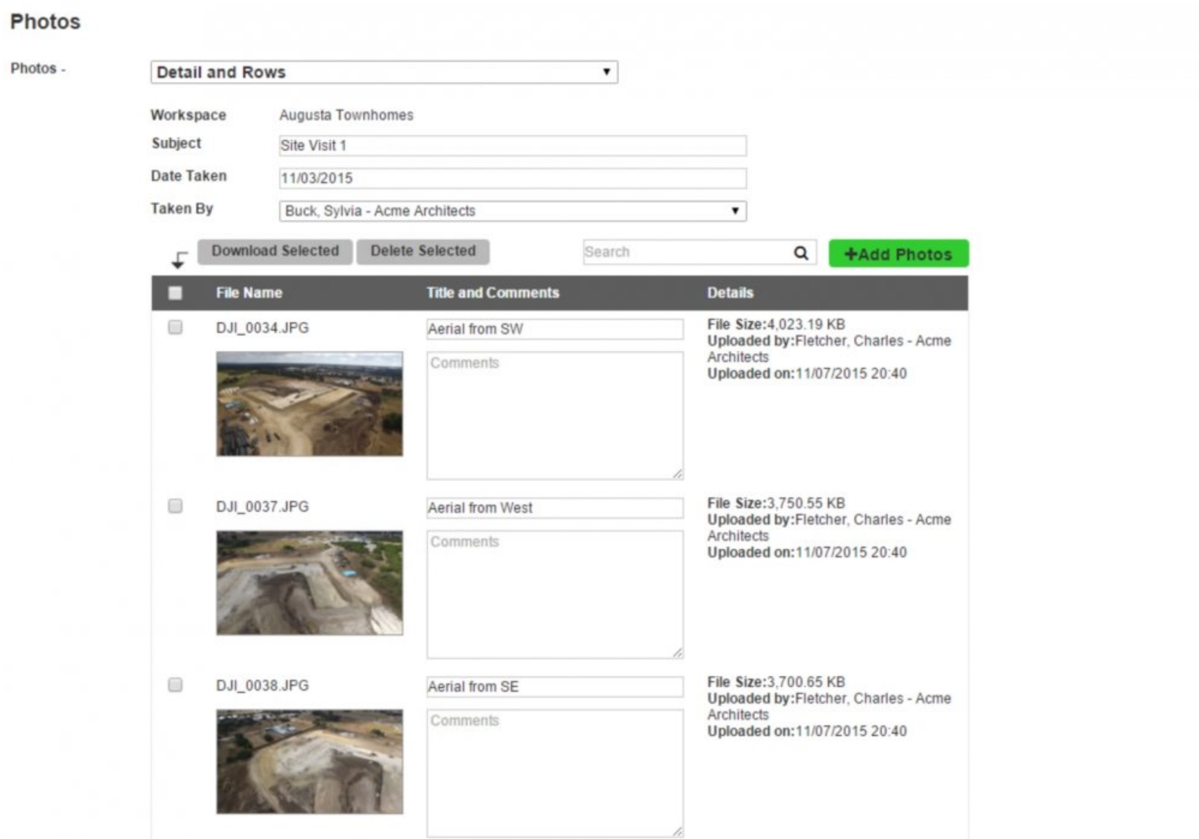
Grid View



Slideshow View



Creating a Photo Session



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.

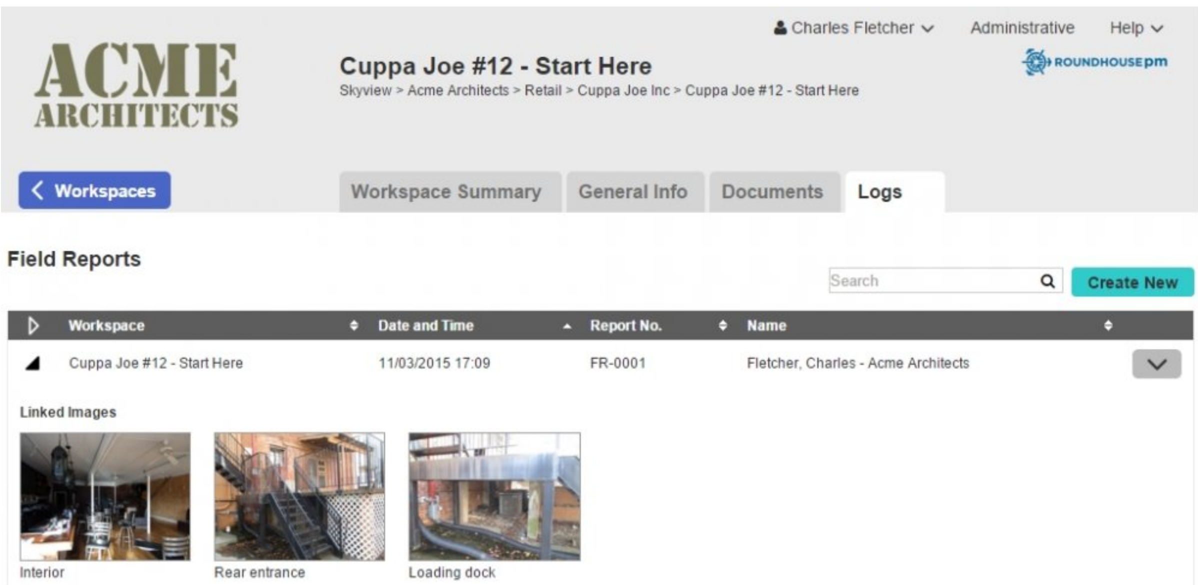
> * **Field Report Photos** must first be uploaded to a photo session, then linked to a Field Report.

Next: Field Reports >>

Field Reports

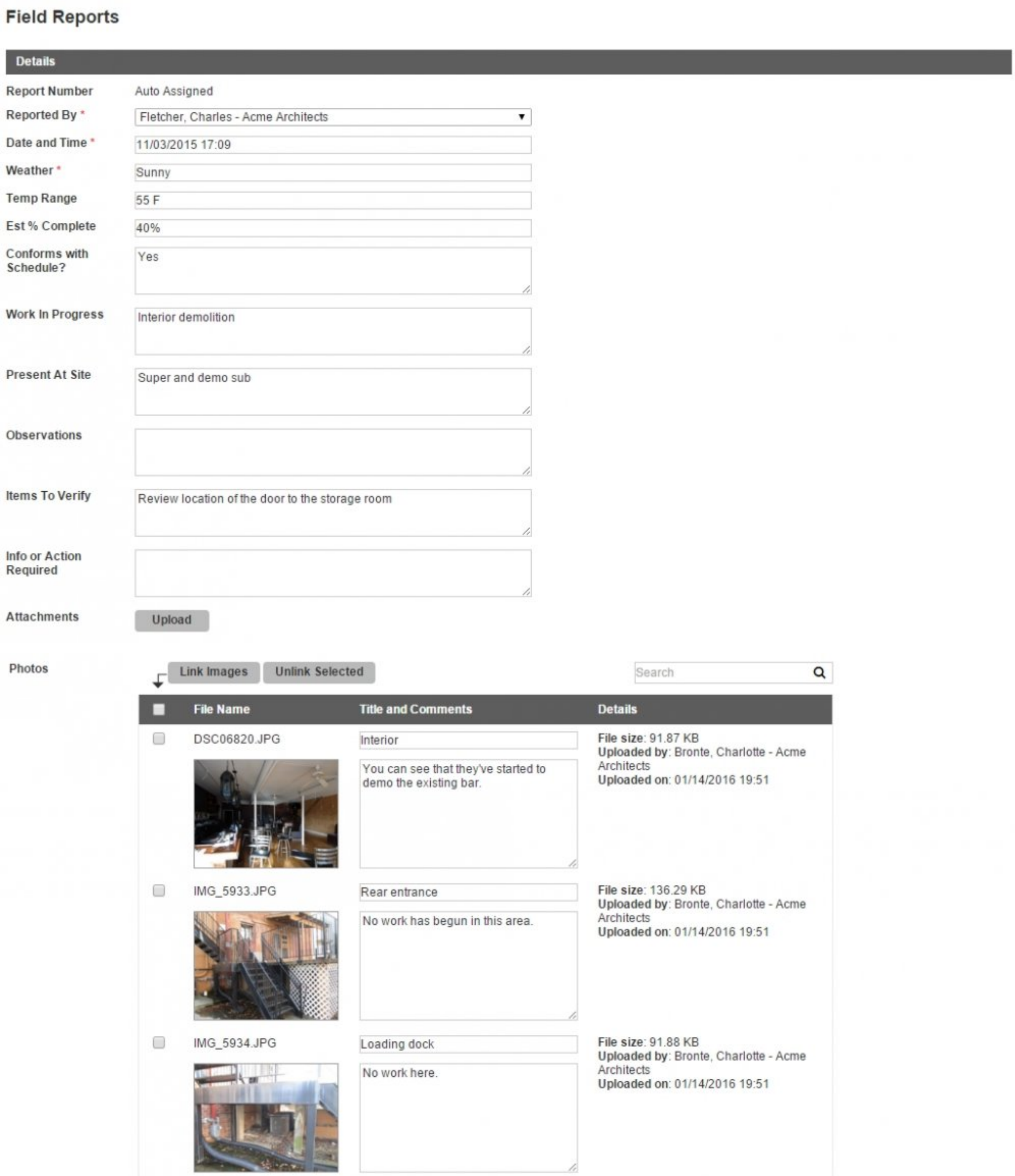
The Field Reports module allows you to create a record of visits to the job site. In addition to having fields for describing the construction progress, you can link photos that taken on site visits and comment on what is being shown.

The Main Screen



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.



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)

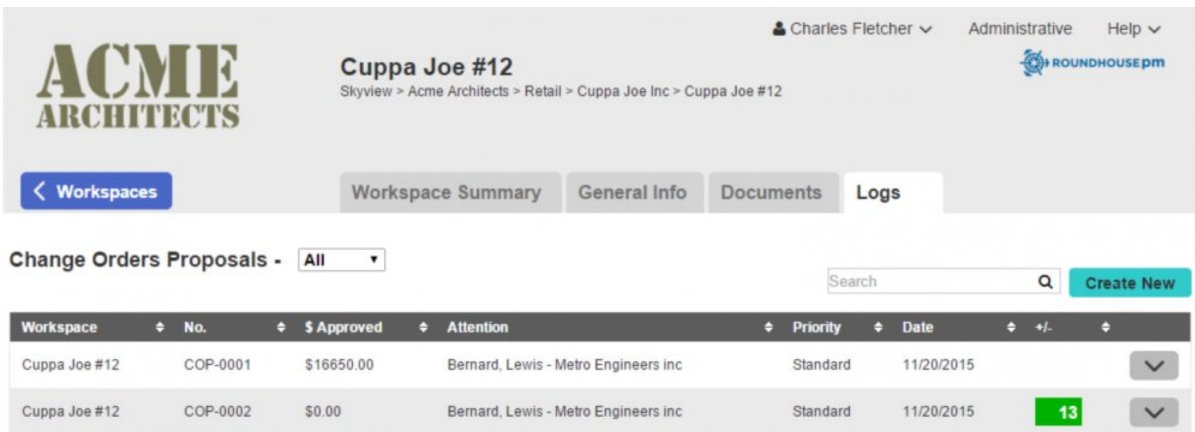
A change to the project is identified. A contractor estimates the cost or savings as a result of this change. This estimate is called a Change Order Proposal, which is reviewed by the design team and the owner, and is either accepted or returned for modifications. The initial request would be called 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



Create a new Change Order Proposal document

Each document contains three sections:

- Contractor Input
- A/E Review
- Owner Review

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).

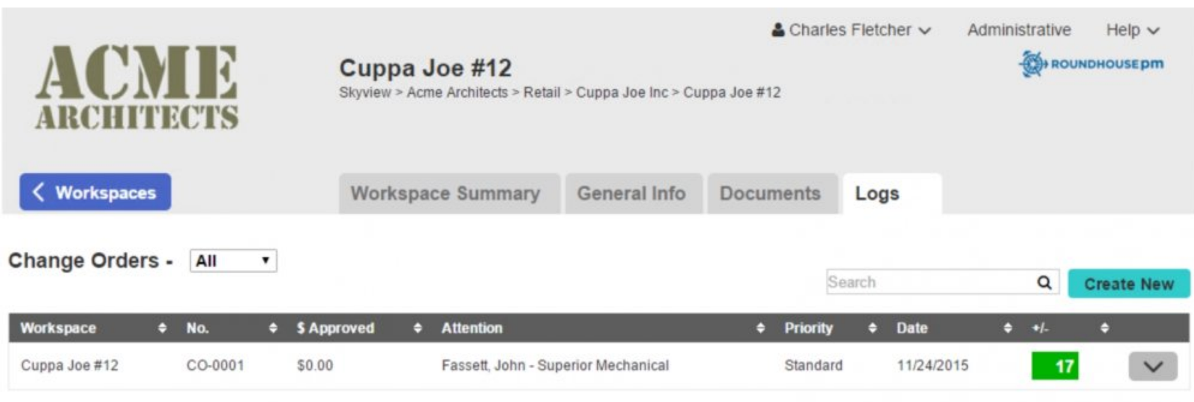
Next: Change Order Log >>

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.

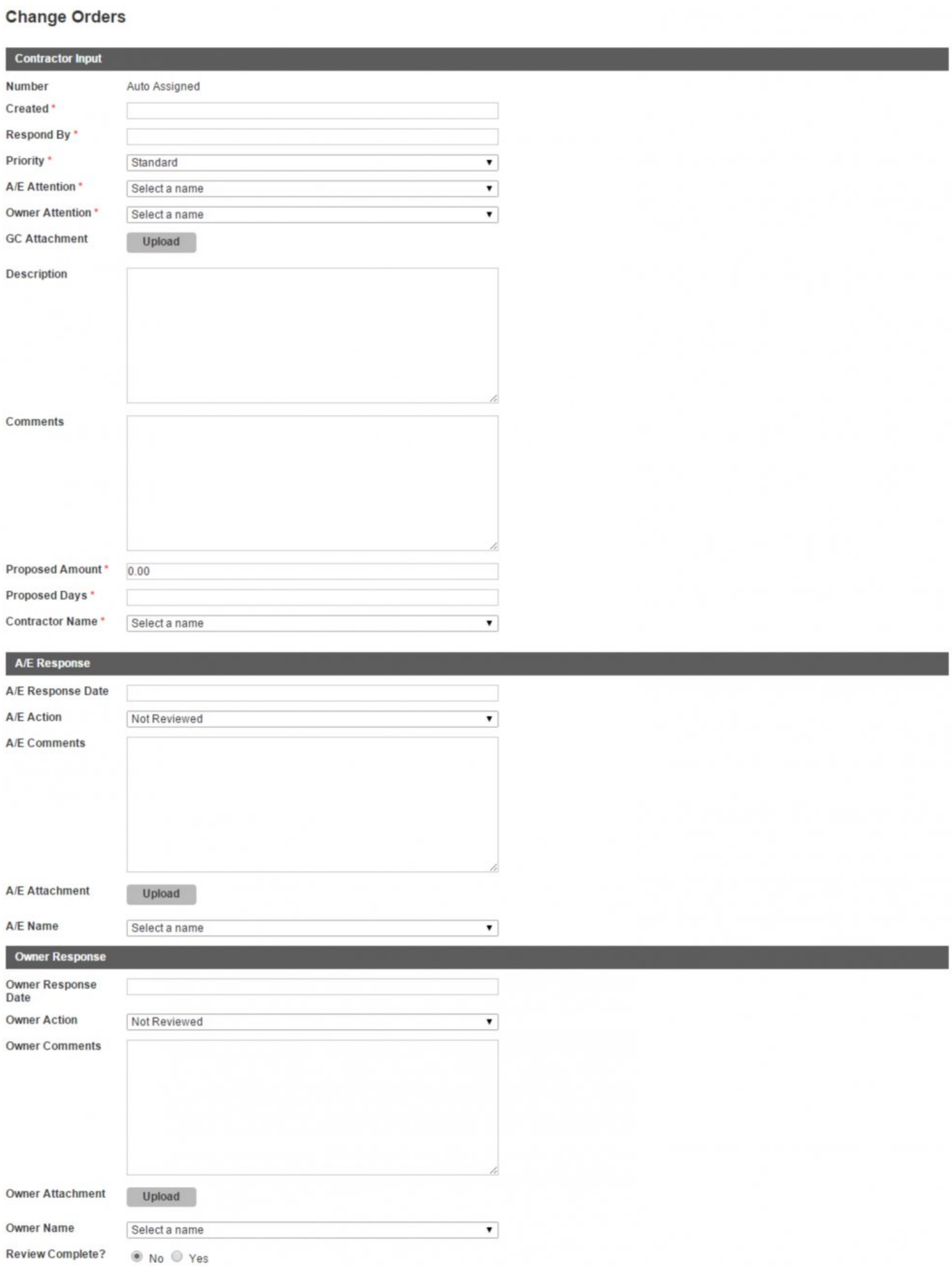
The Main Screen



Create a new Change Order document

Each document contains three sections:

- Contractor Input
- A/E Review
- Owner Review



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.

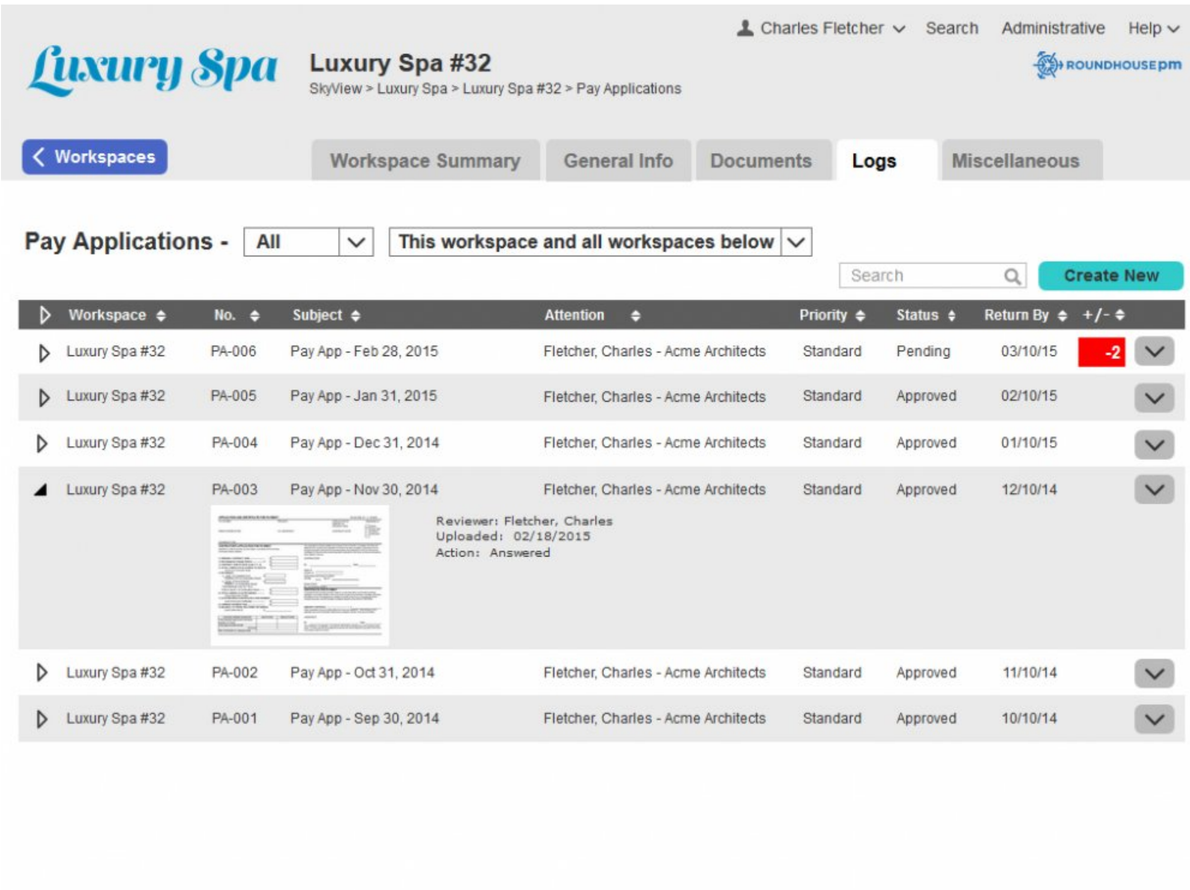
> * When the review of a Change Order is complete, make sure to change the value of the Complete radio button to Yes. If you do not, the record is considered Open and the clock continues to tick.p(banner tip). p(banner tip).

Next: Pay Application Log >>

Pay Application Log

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

The Main Screen

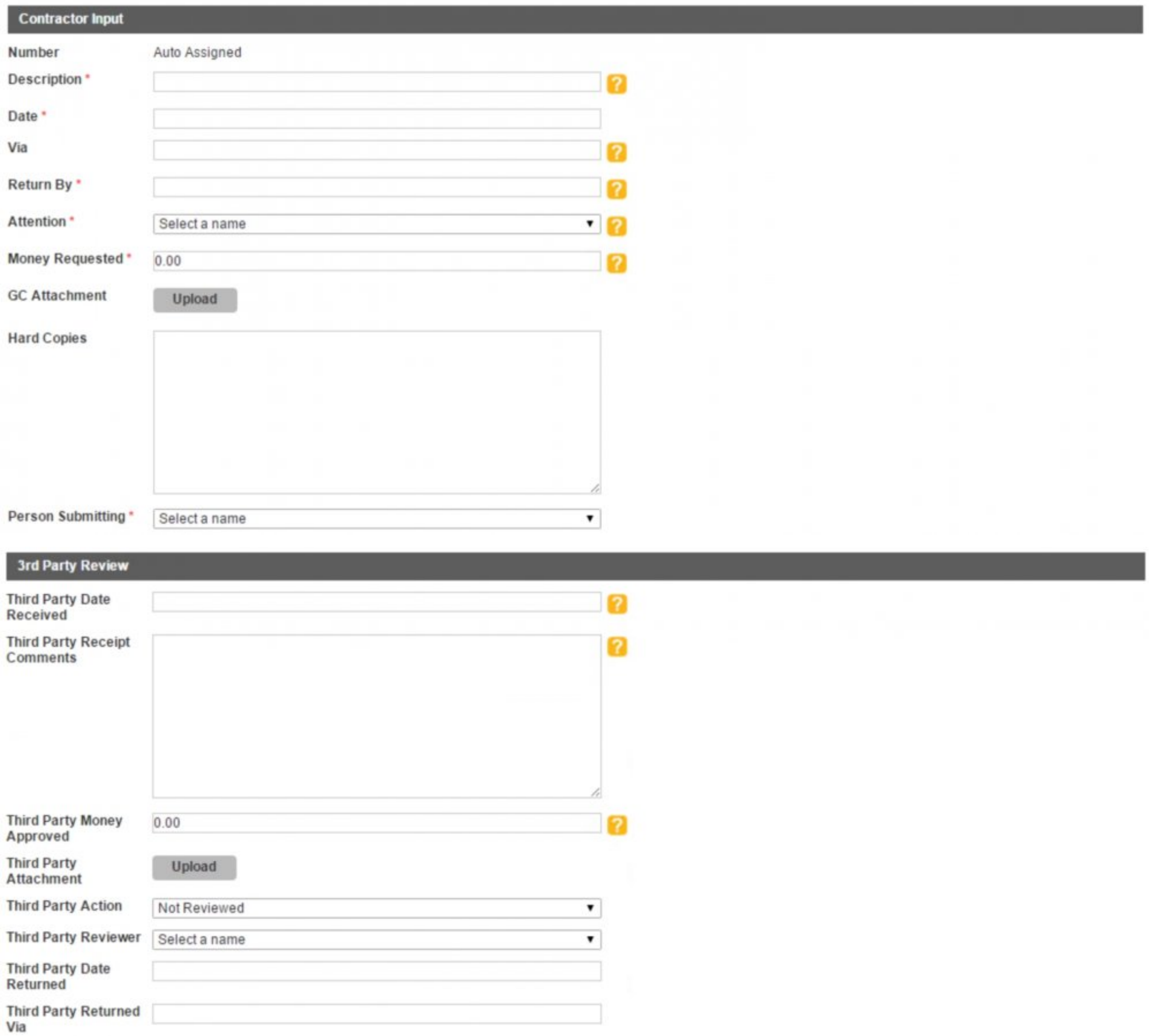


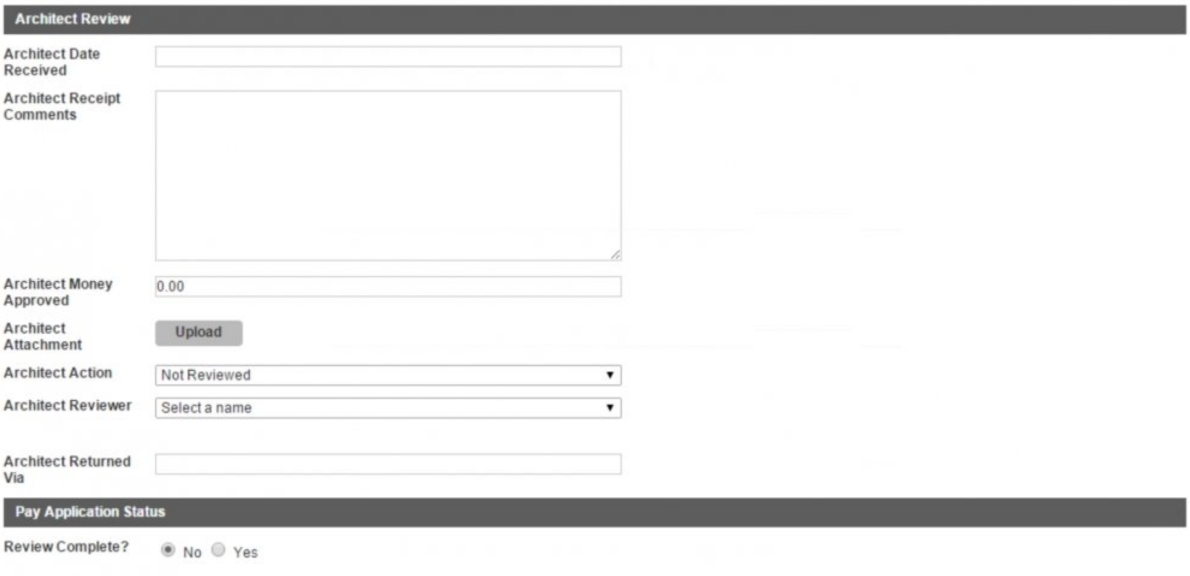
Create a new Change Order document

Each document contains three sections:

- Contractor Input
- 3rd Party Review
- Architect Review

Pay Apps


Contractor Input
Number
Auto Assigned
Description *
Date *
Via
Return By *
Attention *
Select a name
Money Requested *
0.00
GC Attachment
Upload
Hard Copies
Person Submitting *
Select a name
3rd Party Review
Third Party Date Received
Third Party Receipt Comments
Third Party Money Approved
0.00
Third Party Attachment
Upload
Third Party Action
Not Reviewed
Third Party Reviewer
Select a name
Third Party Date Returned
Third Party Returned Via



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

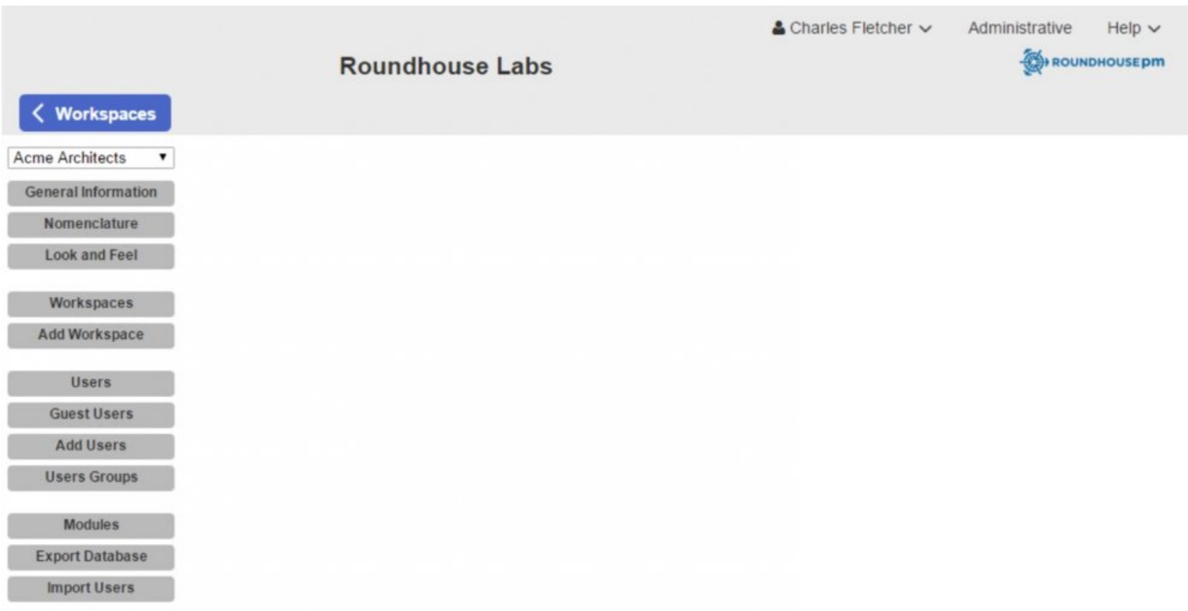
1. Select the date you received the Pay Application.
2. Enter any comments about the documents received. Typically this field is left empty unless you received hard copies and some information was missing or incomplete.
3. Enter the amount of money approved.
4. Upload an attachment with your comments. 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

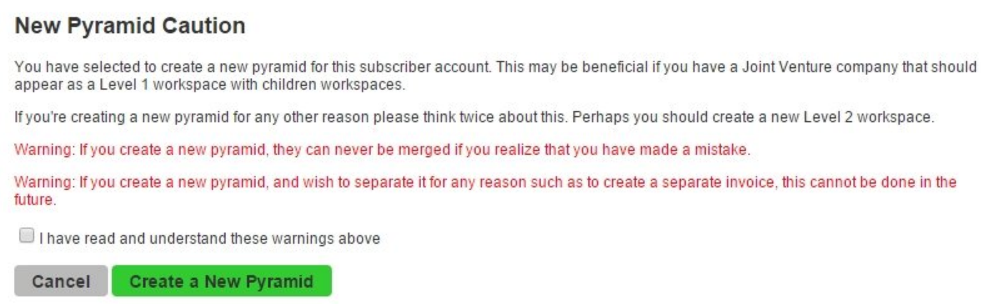
The Administration area is only accessible to users with administrative privileges for the pyramid. Within the administrative area is where you control the structure of your pyramid, who has access, and what these users have access to.



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.



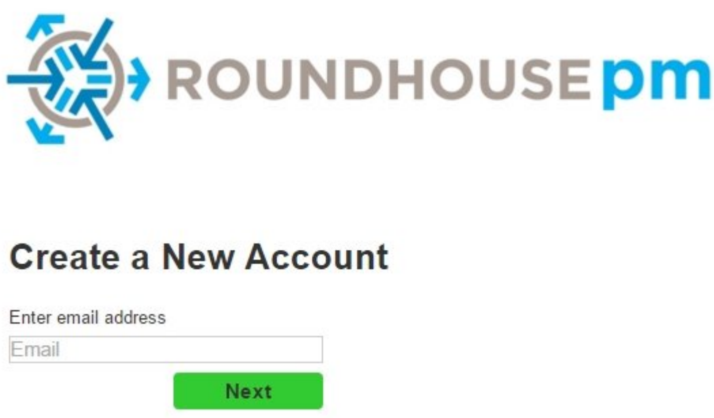
Next: Where to Start – The Guided Setup >>

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:

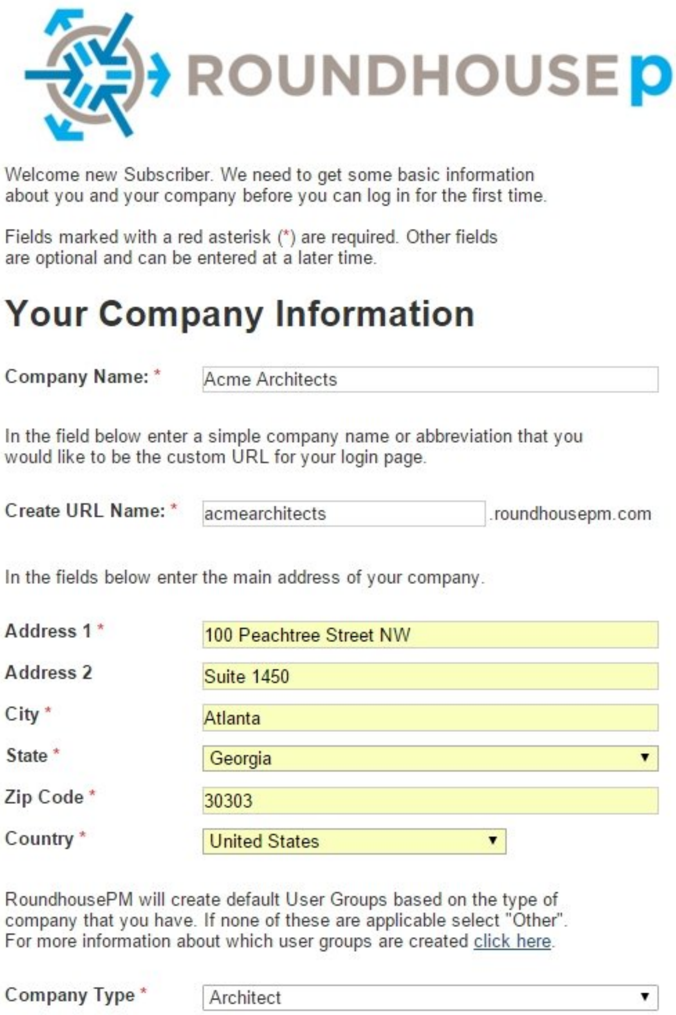
https://www.roundhousepm.com/welcome/

When the following screen appears, enter your email address.



New Subscriber Setup – Personal and Company Information

Enter here the Personal and Company Information requested.


ROUNDHOUSEpm

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: *	Acme Architects

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

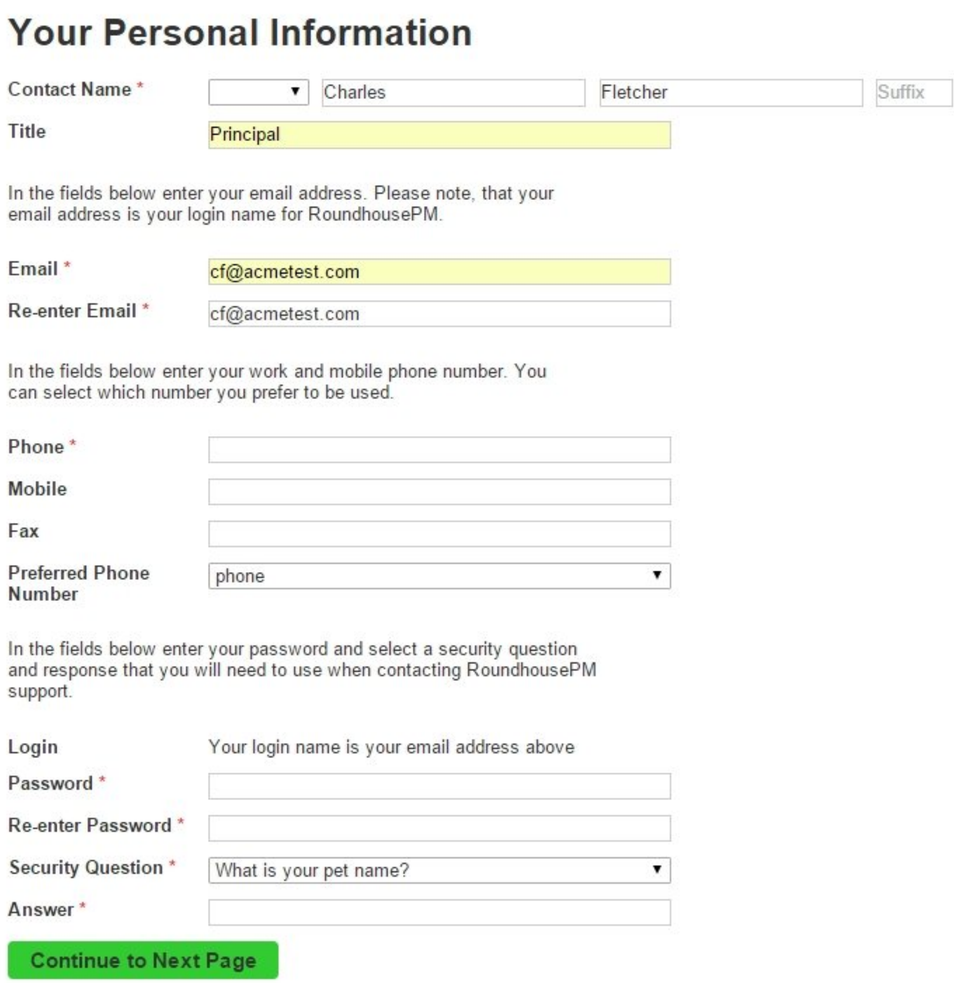
Create URL Name: *	acmearchitects .roundhousepm.com

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

Address 1 *	100 Peachtree Street NW
Address 2	Suite 1450
City *	Atlanta
State *	Georgia
Zip Code *	30303
Country *	United States

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 *	Architect



Your Personal Information

Contact Name *	Charles Fletcher Suffix
Title	Principal

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

Email *	cf@acmetest.com
Re-enter Email *	cf@acmetest.com

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	phone

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

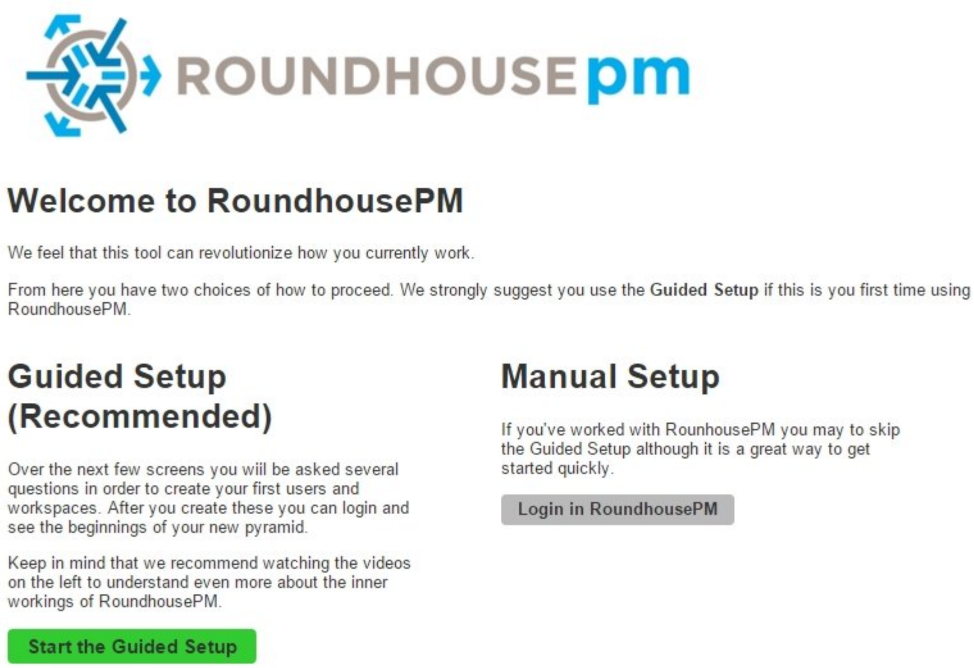
Login	Your login name is your email address above
Password *	
Re-enter Password *	
Security Question *	What is your pet name?
Answer *	

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.

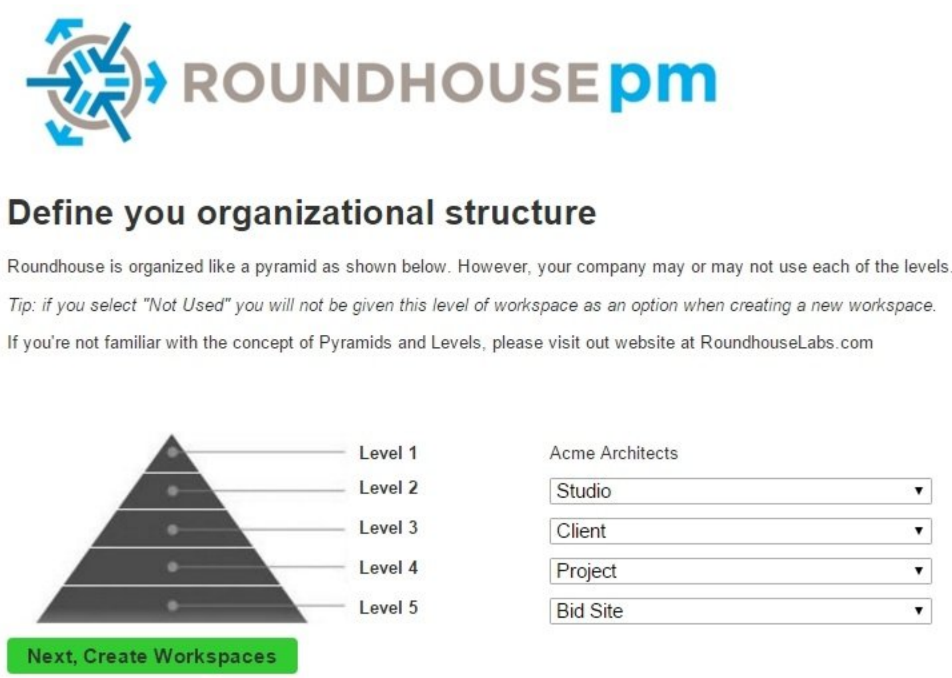
New Subscriber Setup – Guided Setup or Manual Setup?

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.



New Subscriber Setup – Nomenclature

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



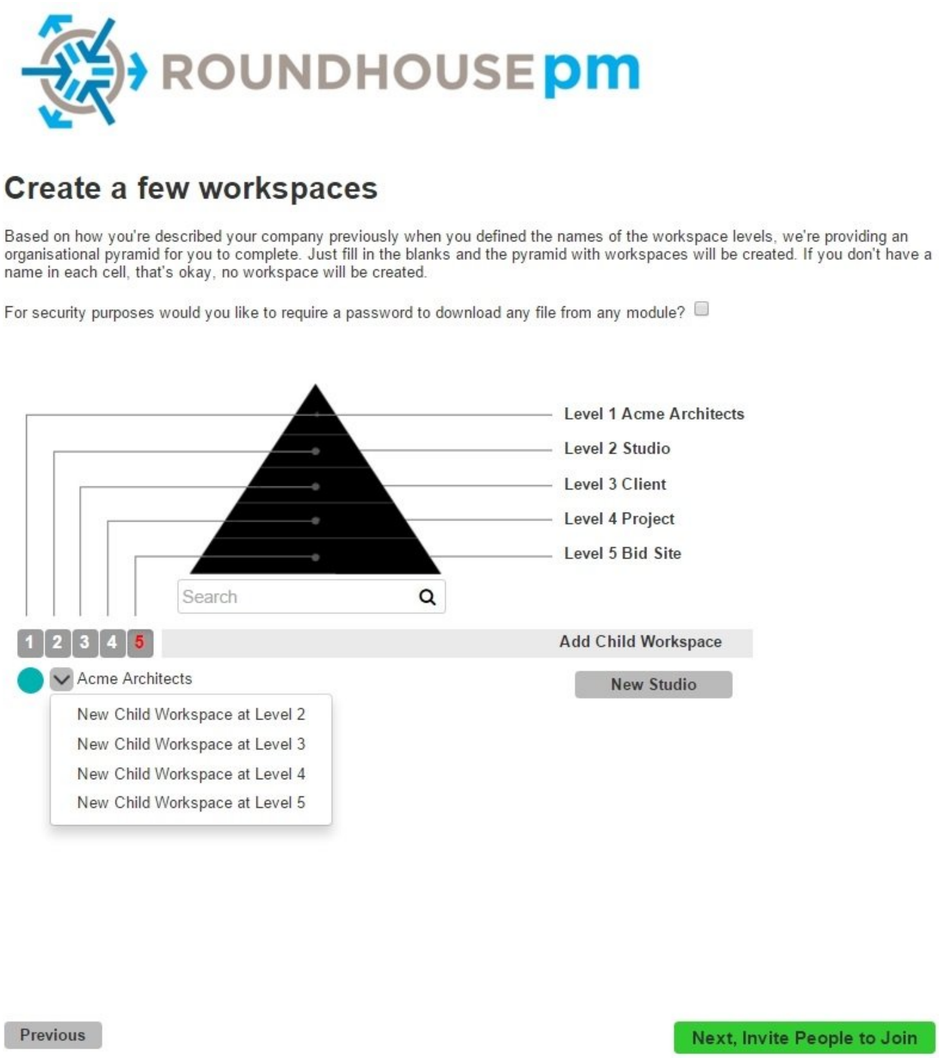
*

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.

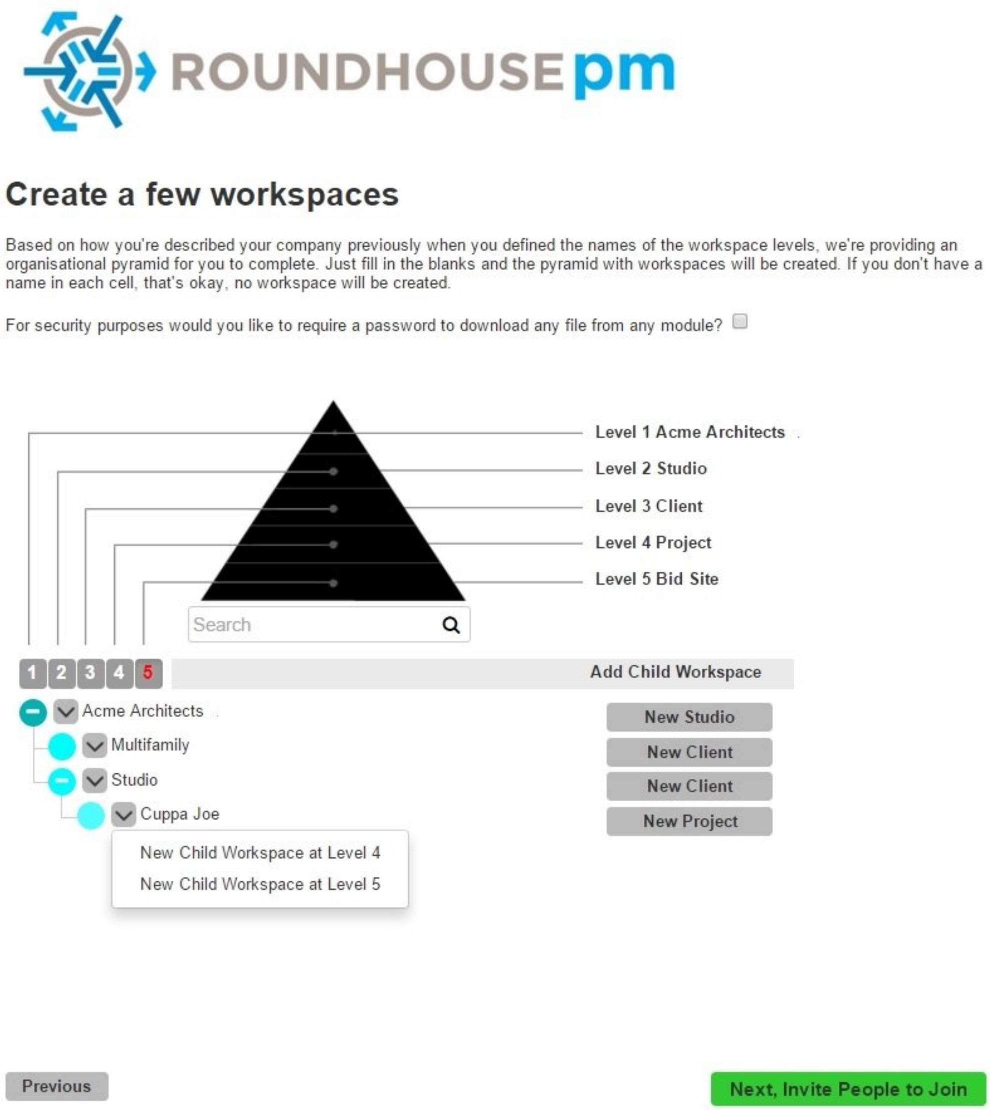
New Subscriber Setup – Adding Workspaces

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.

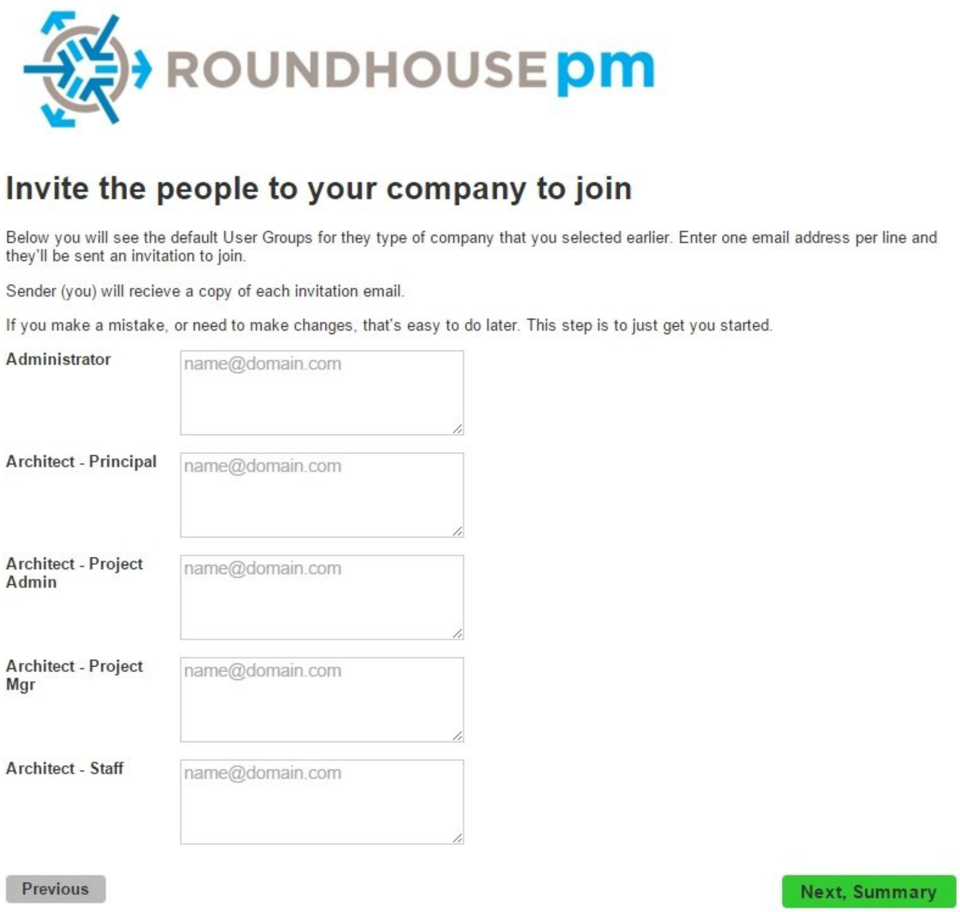


Continue to build your pyramid by adding workspaces. You can always add workspaces as you need them. Workspaces can also be edited at any time if you need to move or delete them.



New Subscriber Setup – Invite people in your company

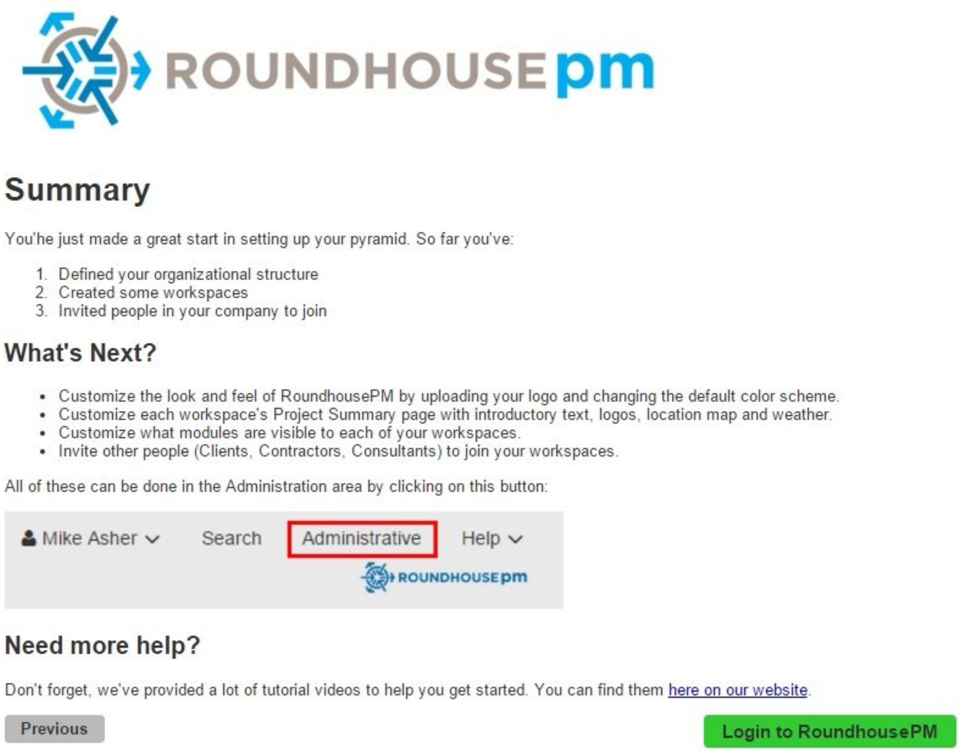
It is now time to invite people within your company to join RoundhousePM. On page 1 of this setup you were asked your company type. This selection determined the user groups that now appear for your company. Enter the email address of each person (one email address per line) for each user group. Don't 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.



* 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.



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.

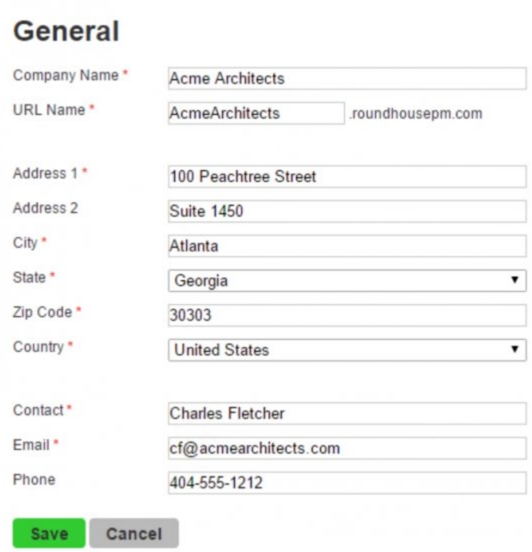
Modules – Next add the modules to the workspaces. From the Modules administration screen edit each of the (word unknown here) and set which User Group should access (see) this list and also select which workspace should contain this module. Review all the standard setting to make sure they're as you 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.



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.

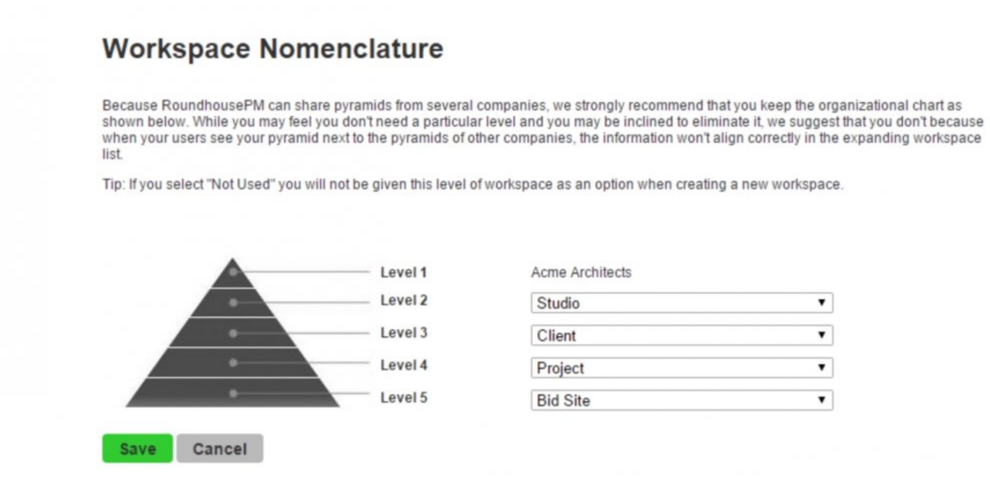
The line below this is the Factor percentage. Active storage is factored at 100% and inactive storage is factored at 30%.

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.



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.

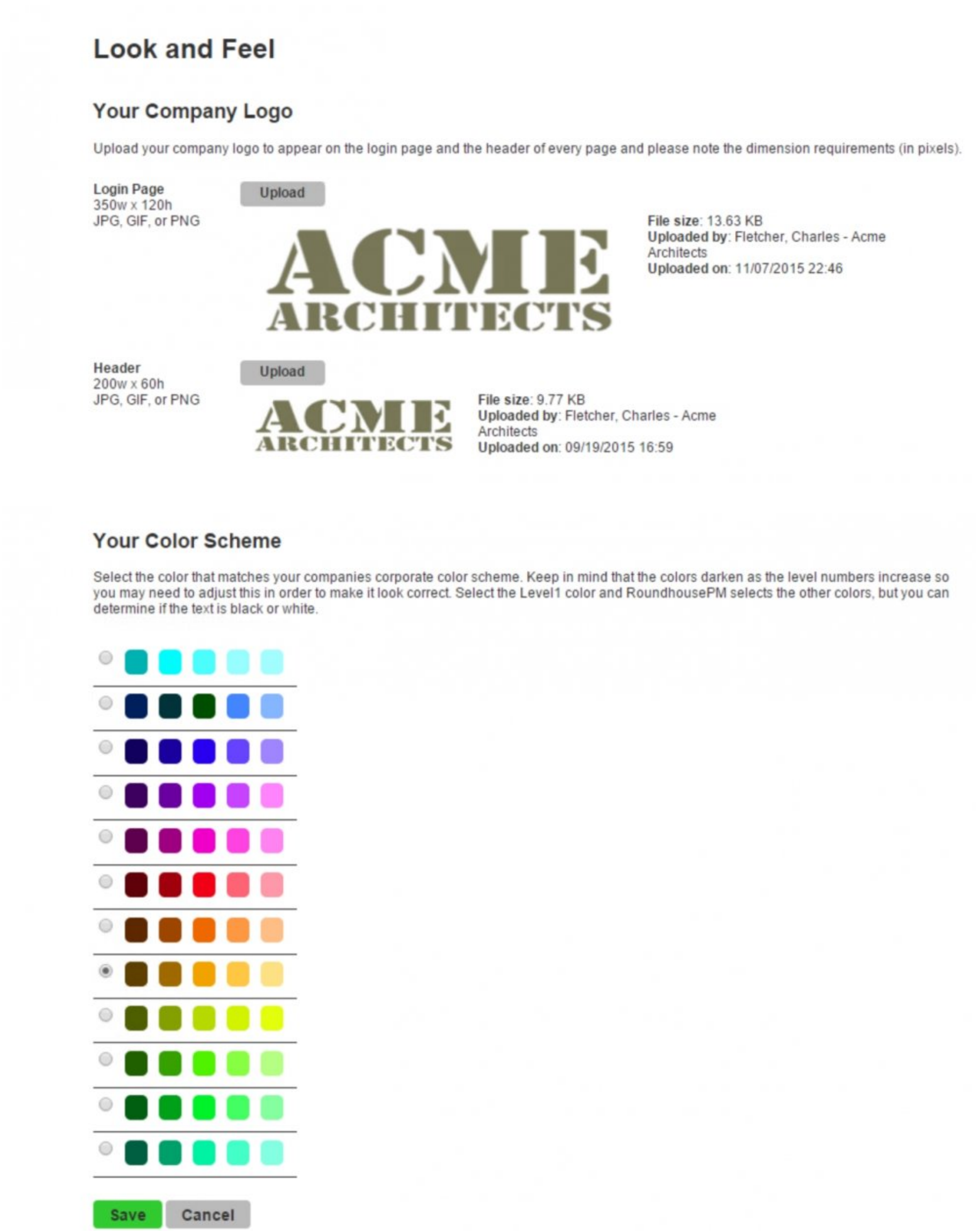
The Nomenclature page allows you to customize the names for these terms.

> 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

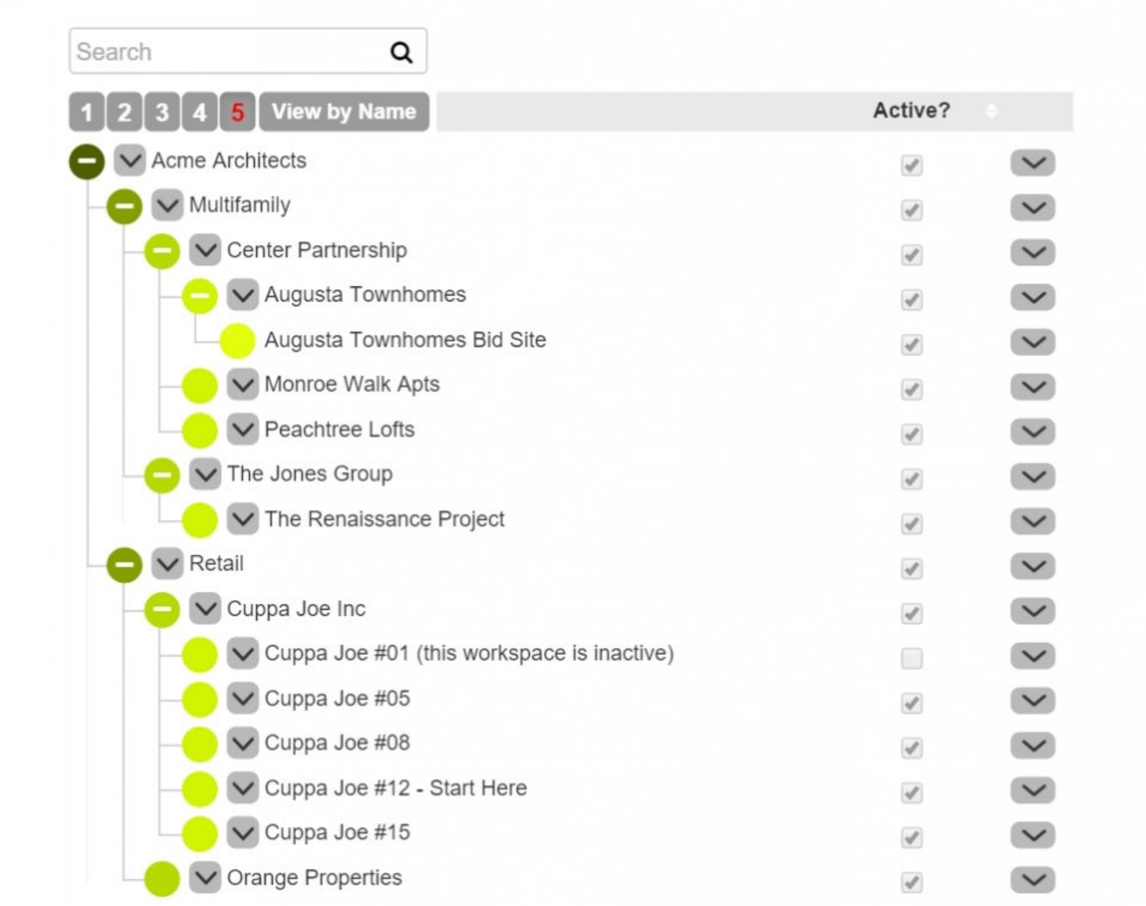
On this page you can upload your company logos and select the color scheme for the" Workspace Explorer":#the-workspace-explorer.



Next: [Workspaces >>](#)

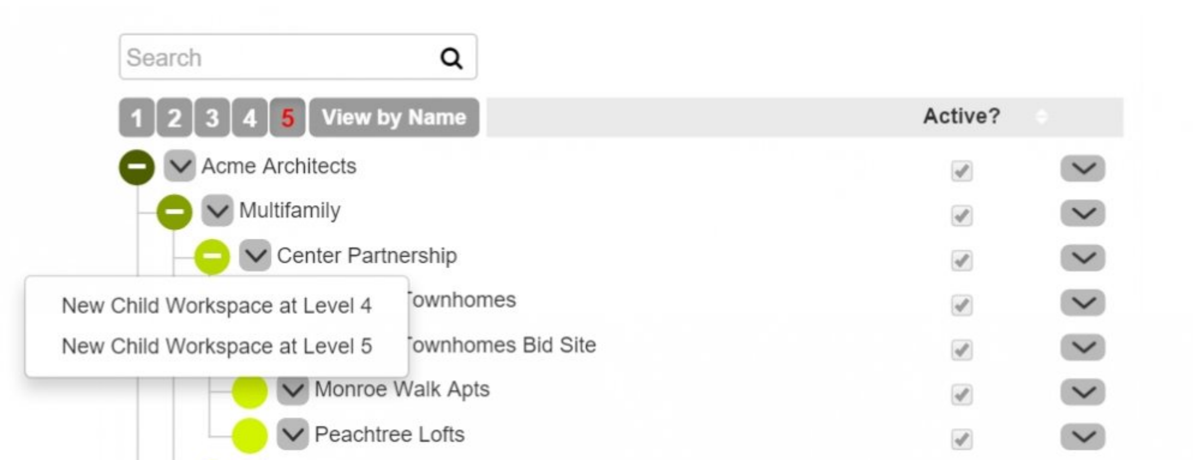
Workspaces

After you select Workspaces from the Administration main page, you'll see all the workspaces for your pyramid. If you used the Guided Setup you will see the workspaces that you previously created. If you skipped Guided Setup you will only see your Level1 workspace.



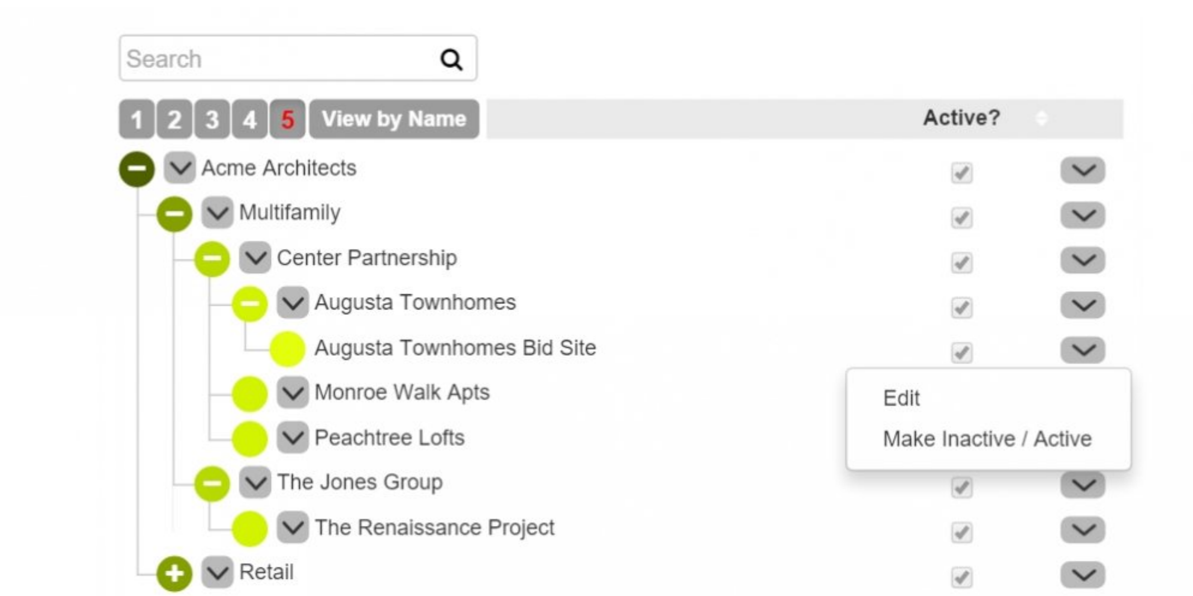
Creating a New Workspace

To create a new workspace you must create a child of another workspace. On each row to the right of the colored workspace square, you will see a New workspace button which creates a child to the current workspace. The options of what level of workspace you can create varies depending on the level of the workspace for which you are creating a child for. In the example below you are creating a child for a Level3 workspace. Your options are a child at Level4 or a child at Level5.



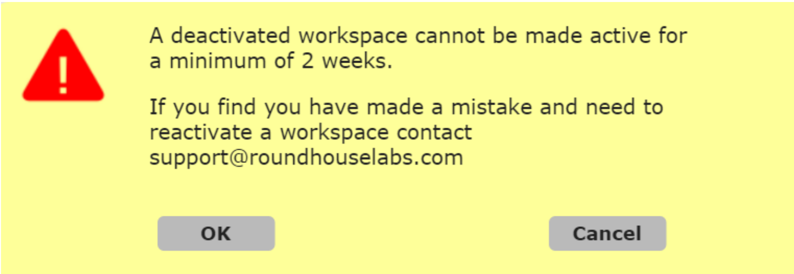
> * **Skipped Levels**. If you selected “Not Used” on the Nomenclature page, you will not see the option to create a workspace at some levels.
> Select Action Menu

Row Action Menu

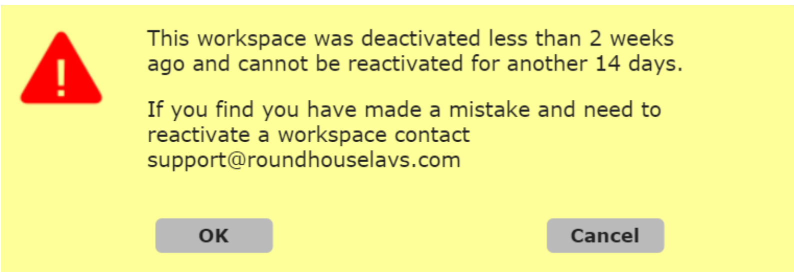


Edit allows you to confiture the workspace. For more information see Editing a Workspace.

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.



* If you have made a mistake and need to re-activate a workspace, simply email support@roundhouselabs.com for assistance.

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

! **Warning.** If you delete a workspace you will no longer have access to any of the data. You should strongly consider archiving a workspace.

Next: [Adding a new Workspace >>]

Adding a new Workspace

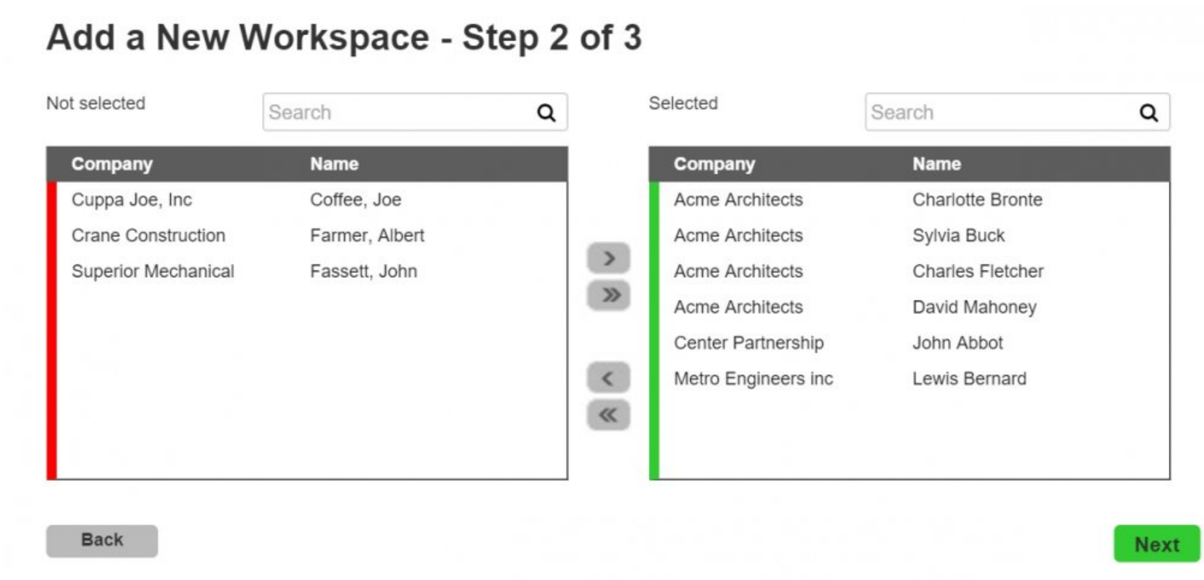
If you used the Guided Setup some of these attributes will already have been set for you. There are two locations in RoundhousePM to create a new worksspace:

1. The Administration Workspace, and
2. The Add Workspace screen. This is what we will review below.

Step 1 – Workspace Name and Level

Step 2 – Workspace Users

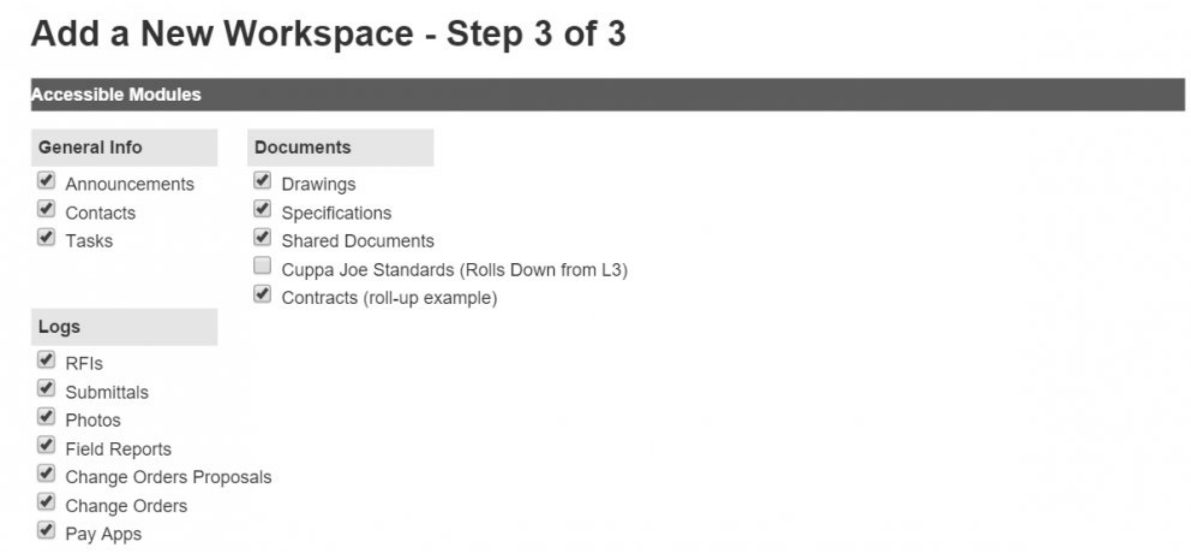
In this area you can select the names of the existing users that have access to this workspace. If a user is not a member of your pyramid you must add them by invitation or by adding them manually. For more information on this see Adding Users.



* **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.

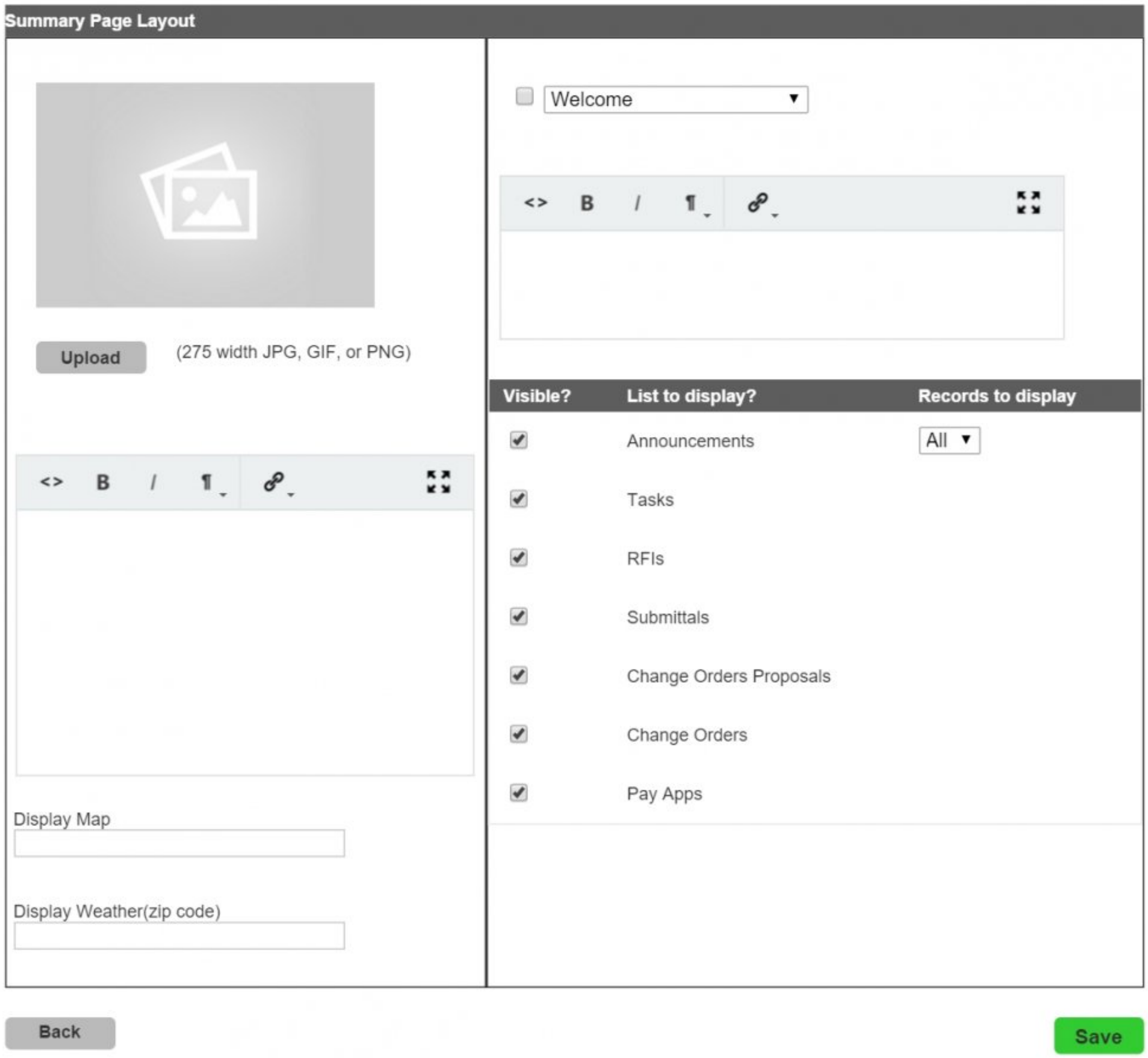


Note: The screen above is from TestDrive and contains names of modules which are duplicates of the Documents module.

> * **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.



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.

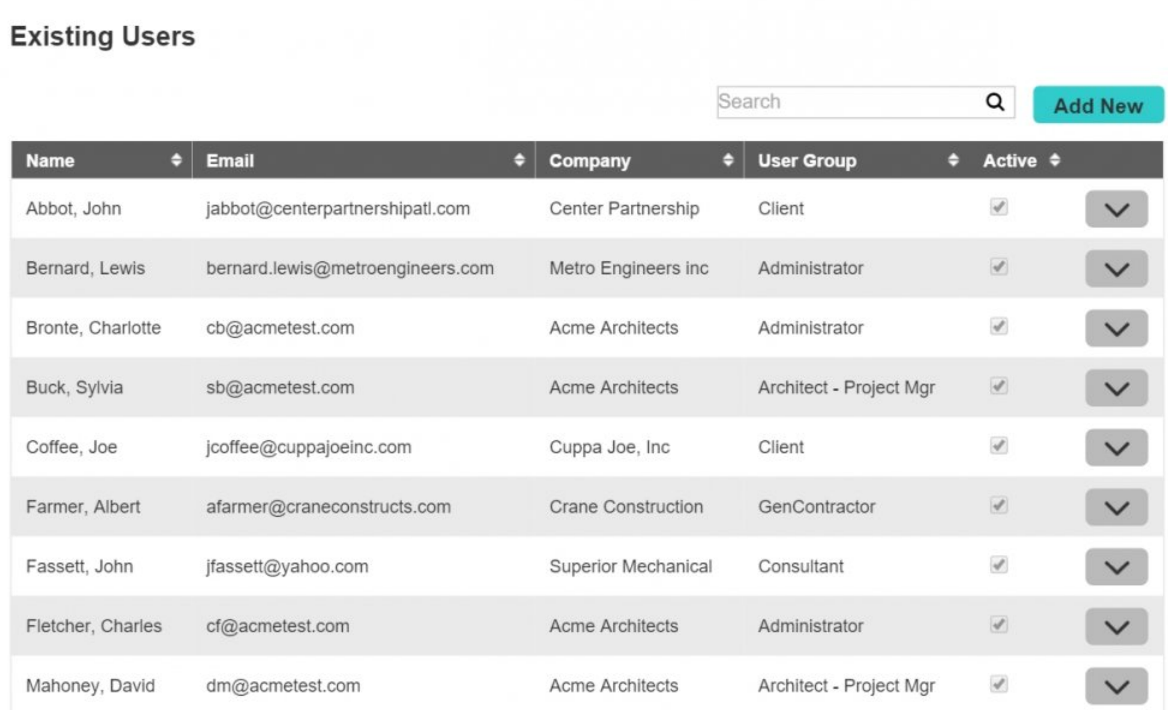
Next: Users >>

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

Search
Add New

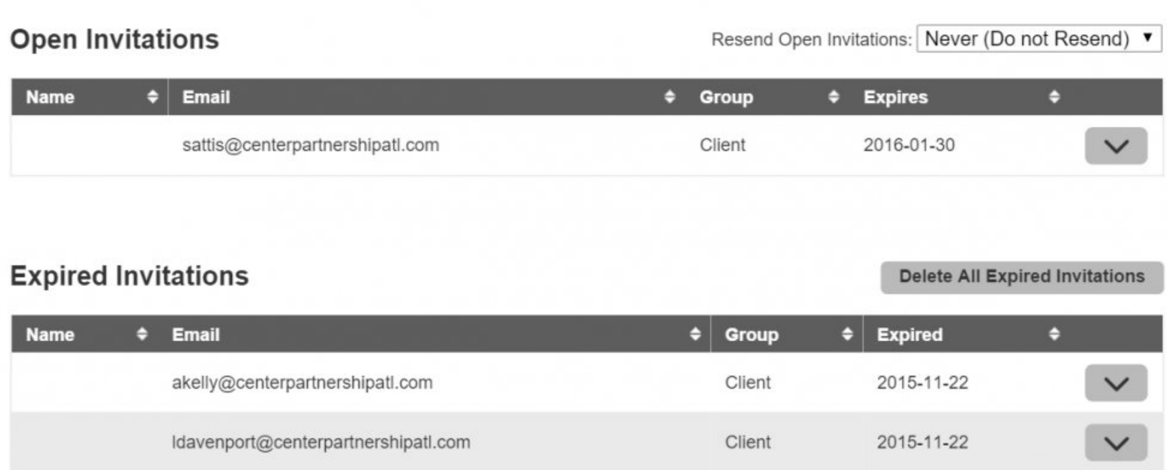
Name	Email	Company	User Group	Active	
Abbot, John	jabbot@centerpartnershipatl.com	Center Partnership	Client	✓	
Bernard, Lewis	bernard.lewis@metroengineers.com	Metro Engineers inc	Administrator	✓	
Bronte, Charlotte	cb@acmetest.com	Acme Architects	Administrator	✓	
Buck, Sylvia	sb@acmetest.com	Acme Architects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

* **Finding a User** As your pyramid grows the number of users you mange 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.



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

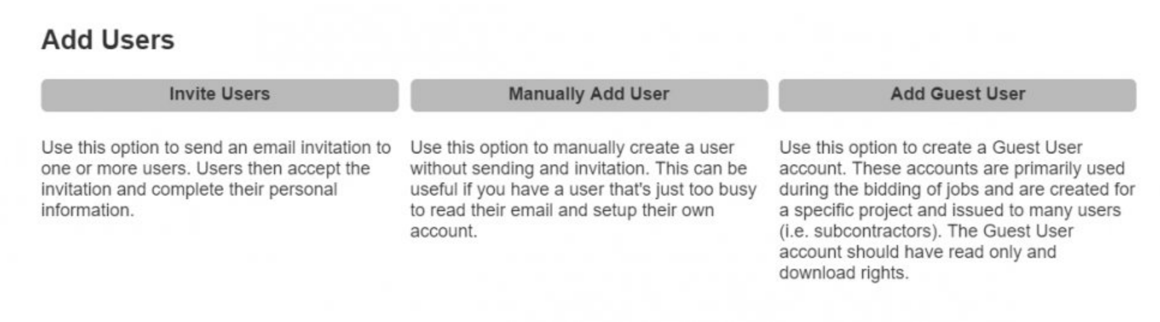
* **Invitation Problems** If you click on the triangle at the left of the row, you can find a URL of the invitation. This is sometimes helpful if a user has a problem in receiving an invitation. If this happens, copy the URL and send them an email with this information.

* **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.



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 Access?

	Access?
Acme Architects	☐
Multifamily	☐
Center Partnership	☐
Augusta Townhomes	☑
Augusta Townhomes Bid Site	☑
Monroe Walk Apts	☑
Peachtree Lofts	☑
The Jones Group	☐

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.

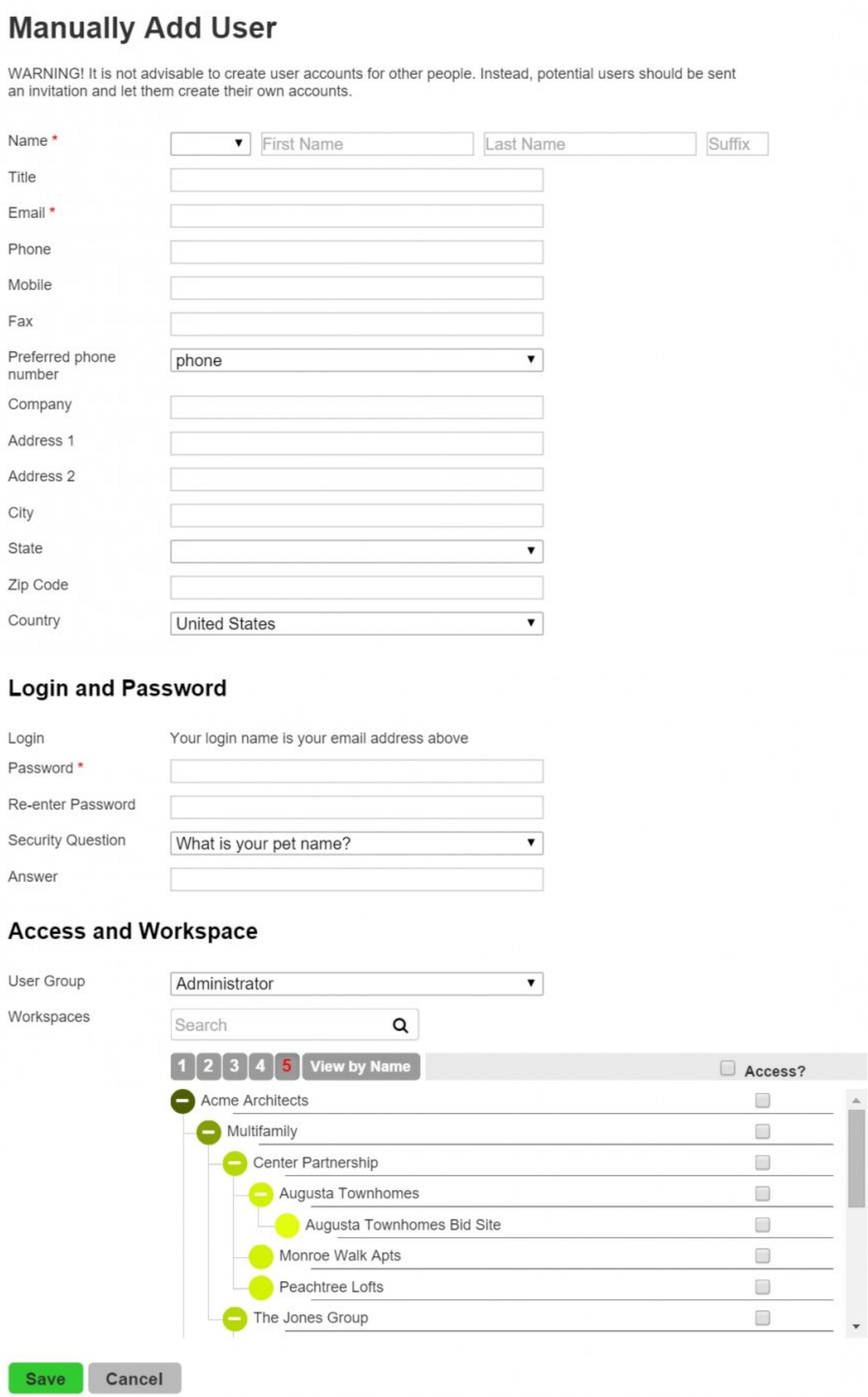
Blind copy me: ☑

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 *
First Name
Last Name
Suffix
Title
Email *
Phone
Mobile
Fax
Preferred phone number
phone
Company
Address 1
Address 2
City
State
Zip Code
Country
United States
Login and Password
Login
Your login name is your email address above
Password *
Re-enter Password
Security Question
What is your pet name?
Answer
Access and Workspace
User Group
Administrator
Workspaces
Search
1 2 3 4 5 View by Name
Access?
Acme Architects
Multifamily
Center Partnership
Augusta Townhomes
Augusta Townhomes Bid Site
Monroe Walk Apts
Peachtree Lofts
The Jones Group
Save
Cancel

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:

a. 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.
b. Only allow the guest user account access to one workspace.
c. Define an expiration date, otherwise, people that should not have access to a workspace may have one after the bid period ends.
d. 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 * Augusta Townhomes Bidder

Login Name * 15019-Bidder

Password * *******

Expiration Date * 02/26/2016

Workspaces Search

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

General Info

- [x] Announcements
- [x] Contacts
- [ ] Tasks

Documents

- [x] Drawings
- [x] Specifications
- [ ] Shared Documents
- [ ] Cuppa Joe Standards (Rolls Down from L3)
- [ ] Contracts (roll-up example)

Logs

- [x] RFIs
- [ ] Submittals
- [ ] Photos
- [ ] Field Reports
- [ ] Change Orders Proposals
- [ ] Change Orders
- [ ] Pay Apps

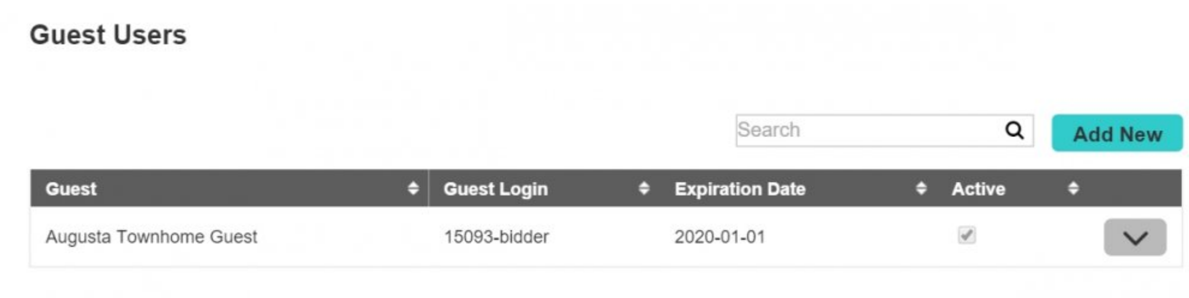
Create Guest User Cancel

! **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.



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

Search | Add New User Group

Name	Admin	Acctg	Add	Edit	Delete	Down	Read	
Administrator	✓	✓	✓	✓	✓	✓	✓	
Architect - Principal		✓	✓	✓	✓	✓	✓	
Architect - Project Admin	✓		✓	✓	✓	✓	✓	
Architect - Project Mgr			✓	✓	✓	✓	✓	
Architect - Staff			✓	✓		✓	✓	
Client			✓	✓		✓	✓	
Consultant			✓	✓		✓	✓	
GenContractor			✓	✓		✓	✓	
Subcontractor						✓	✓	
Construction Manager			✓	✓		✓	✓	
Vendor						✓	✓	
No Access								

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:

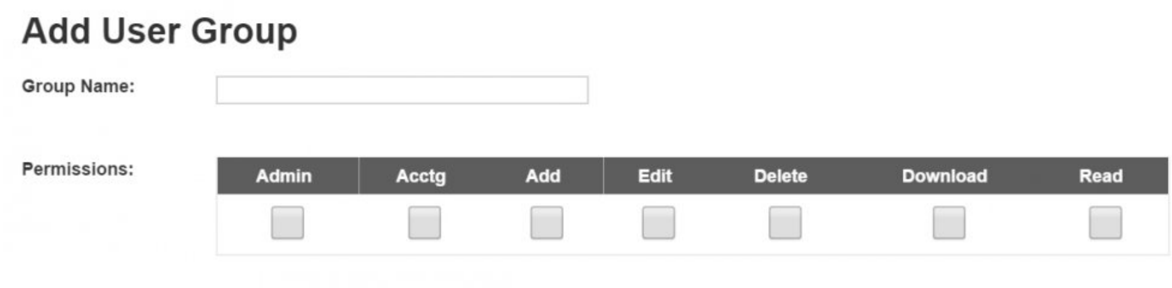
1. Not requiring credentials means that this link can be sent to anyone, even people who are not users of your RoundhousePM account, and these people can download the file.
2. Not requiring credentials also means that RoundhousePM will not track the history of who downloads a file.

☐ 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.



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.

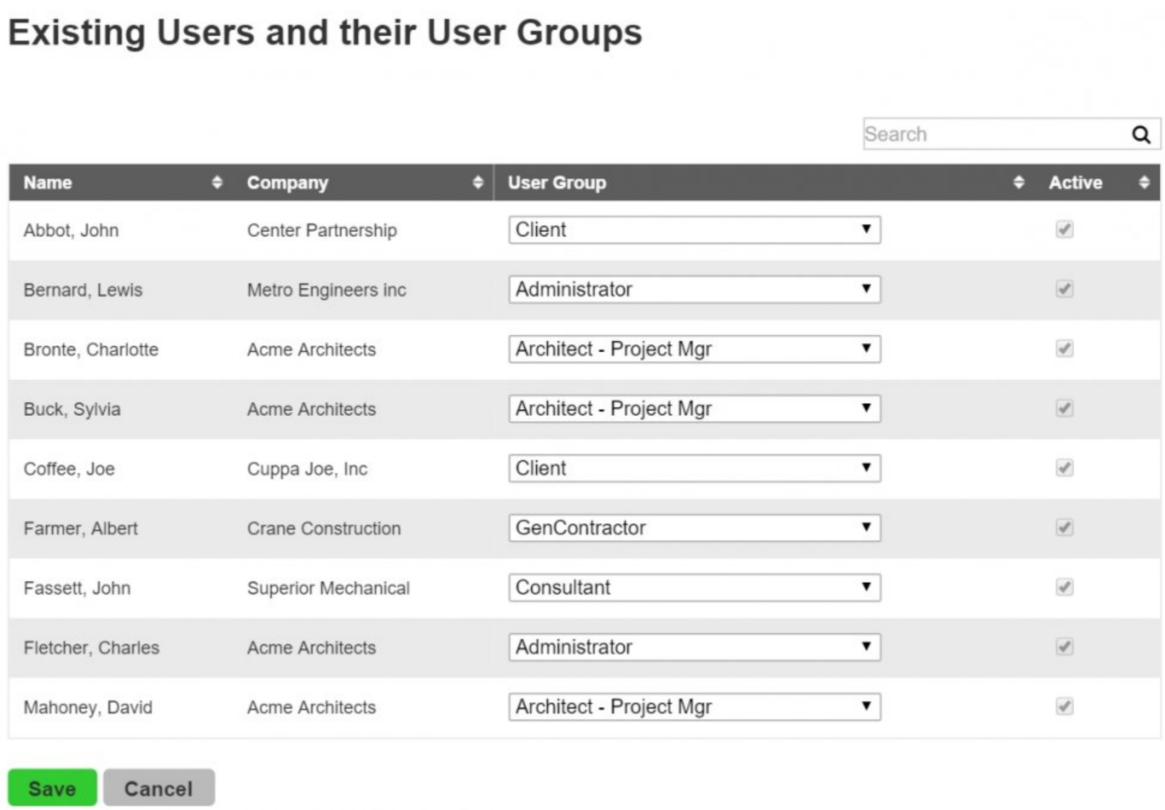
Download – When checked a user has the ability to download files from lists.

> 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

Search

Name	Company	User Group	Active
Abbot, John	Center Partnership	Client	✓
Bernard, Lewis	Metro Engineers inc	Administrator	✓
Bronte, Charlotte	Acme Architects	Architect - Project Mgr	✓
Buck, Sylvia	Acme Architects	Architect - Project Mgr	✓
Coffee, Joe	Cuppa Joe, Inc	Client	✓
Farmer, Albert	Crane Construction	GenContractor	✓
Fassett, John	Superior Mechanical	Consultant	✓
Fletcher, Charles	Acme Architects	Administrator	✓
Mahoney, David	Acme Architects	Architect - Project Mgr	✓

Save Cancel

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

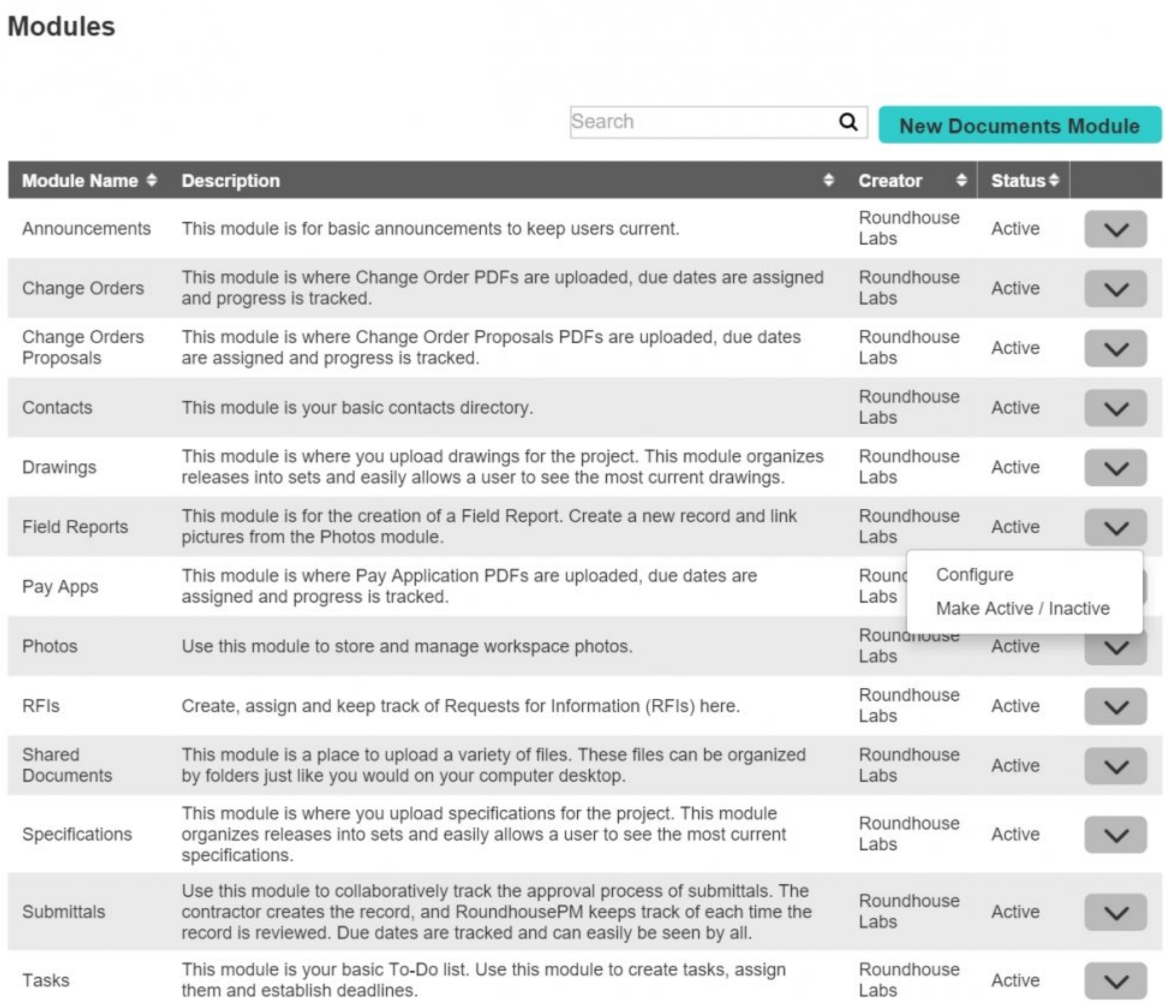
- Drawings
- Specifications
- Documents
- Duplicates of the Documents module that your administrator has created appear here.

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 Adminstration are. This screen shows all of the modules that make up your pyramid.



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.	Round Labs	
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 – 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)

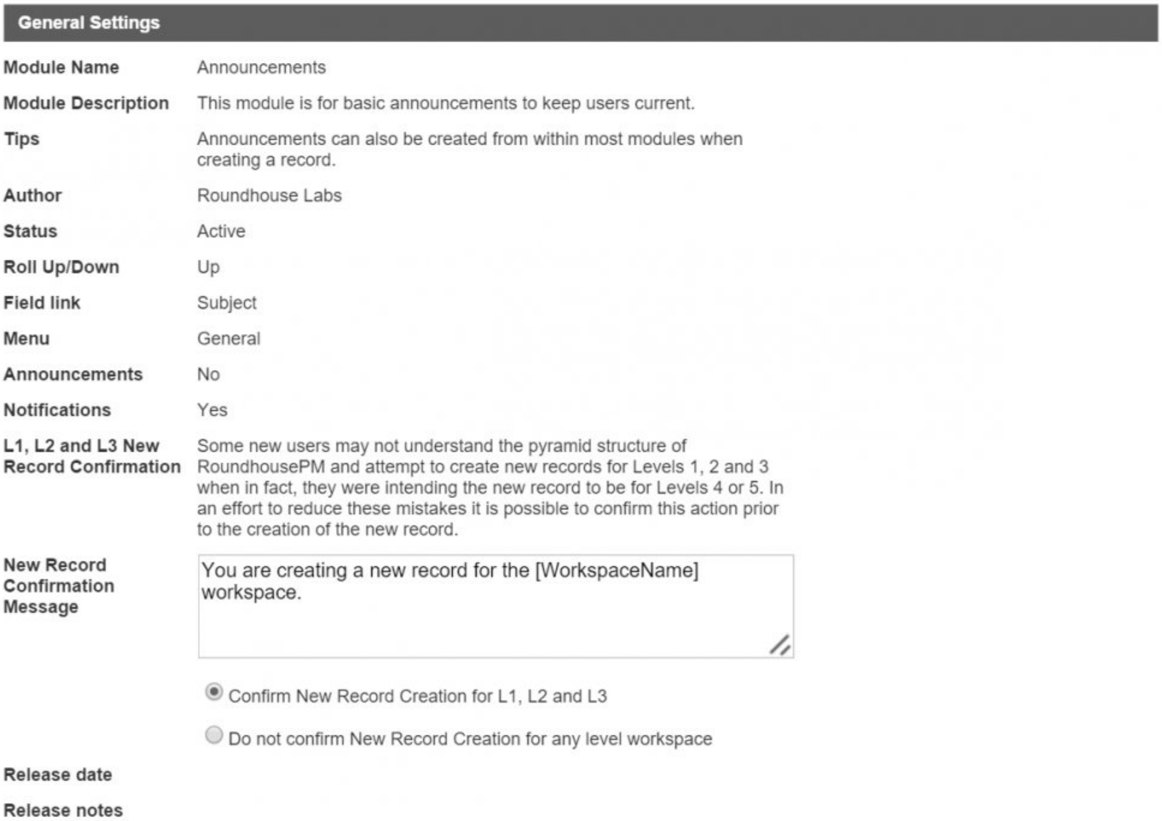
Control User Group Access – This allows you to define which user group can access, or can “see”, this module.

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.

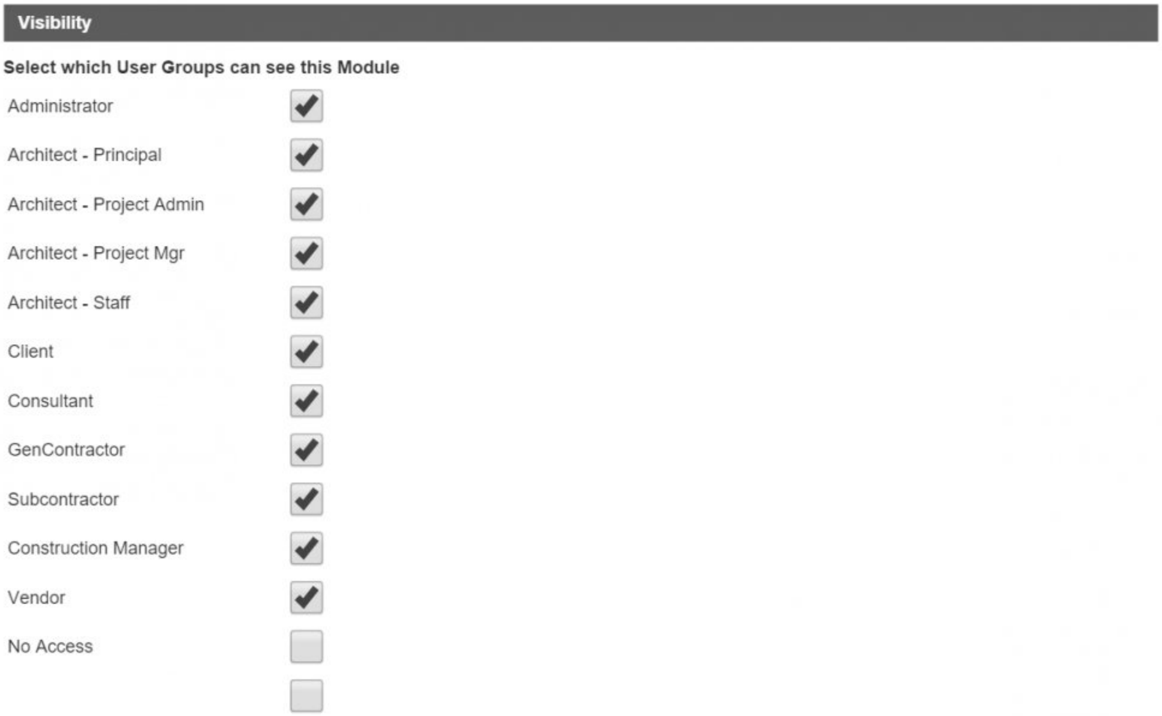


General Settings	
Module Name	Announcements
Module Description	This module is for basic announcements to keep users current.
Tips	Announcements can also be created from within most modules when creating a record.
Author	Roundhouse Labs
Status	Active
Roll Up/Down	Up
Field link	Subject
Menu	General
Announcements	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	You are creating a new record for the [WorkspaceName] workspace.
	Confirm New Record Creation for L1, L2 and L3
	Do not confirm New Record Creation for any level workspace
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.

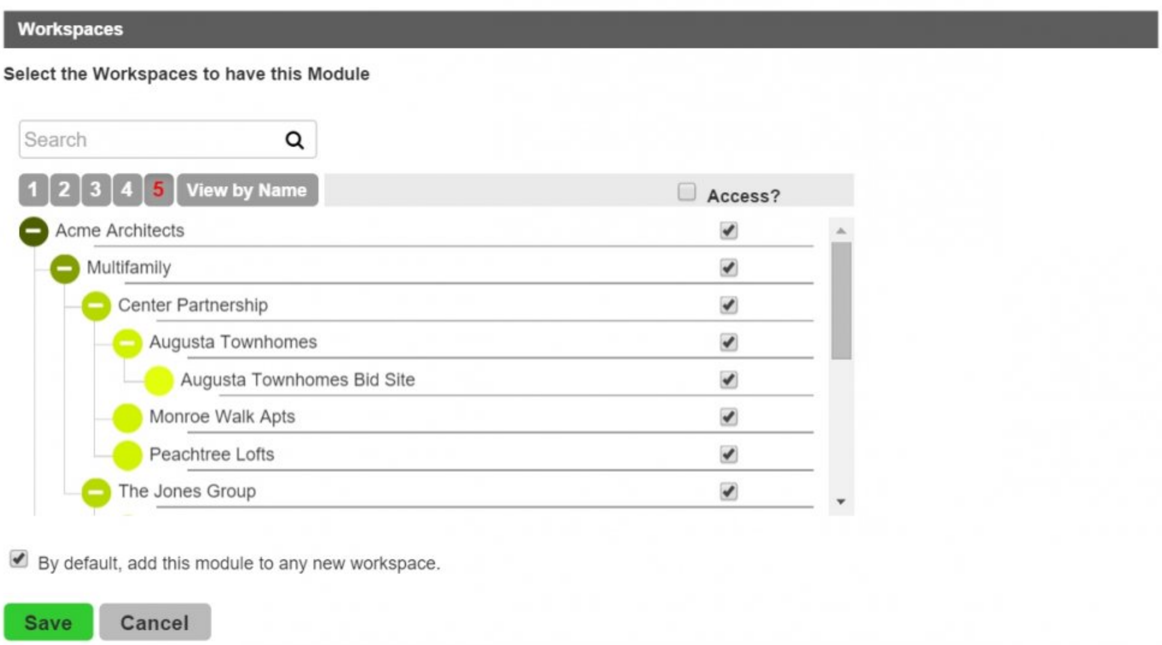
Admin – User Group Access

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



Admin – Workspaces

In this section you select which workspaces contain this module.



*

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 >>

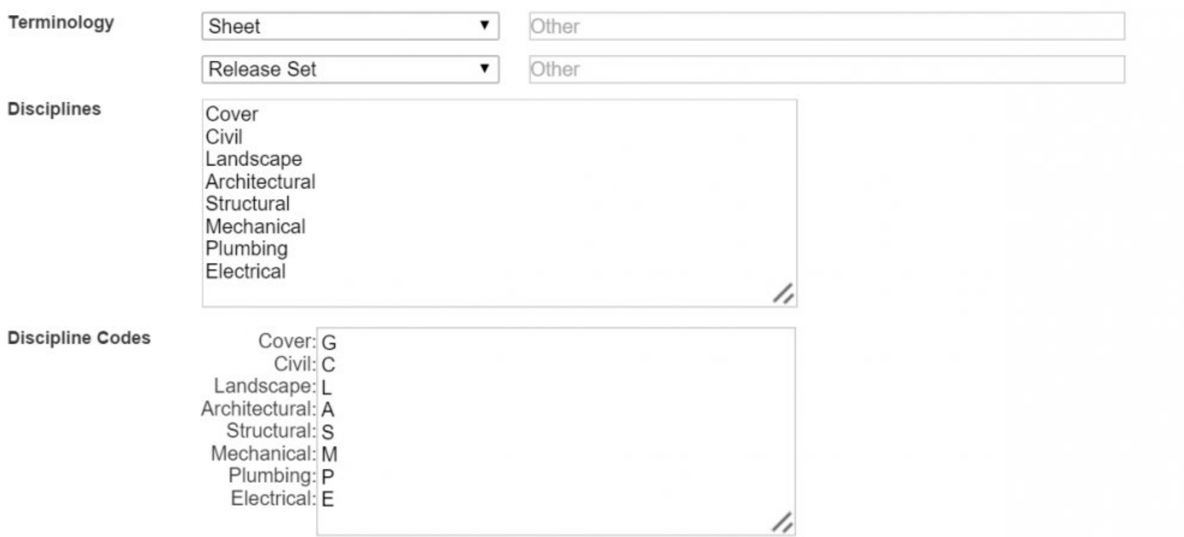
Non-Typical Module Admin Pages

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

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.



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	✓	✓
Architect - Principal	✓	✓
Architect - Project Admin	✓	✓
Architect - Project Mgr	✓	✓
Architect - Staff	✓	✓
Client	✓	
Consultant	✓	
GenContractor	✓	
Subcontractor	✓	
Construction Manager	✓	
Vendor	✓	
No Access		

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	✓	✓
Architect - Principal	✓	✓
Architect - Project Admin	✓	✓
Architect - Project Mgr	✓	✓
Architect - Staff	✓	✓
Client	✓	
Consultant	✓	
GenContractor	✓	
Subcontractor	✓	
Construction Manager	✓	
Vendor	✓	
No Access		

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

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 additoinal 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.

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

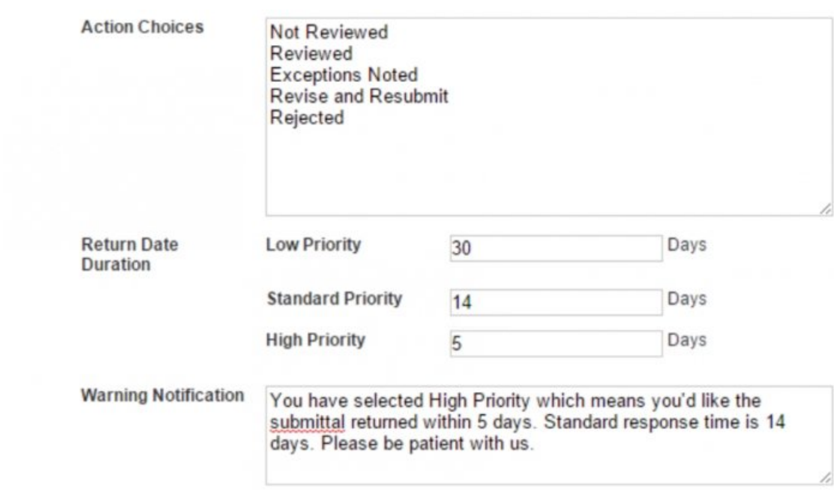
The RFI module allows you to define how many days you are given to respond. The default values are:

- 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



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

- Reviewed
- Excpeptions 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 >>]

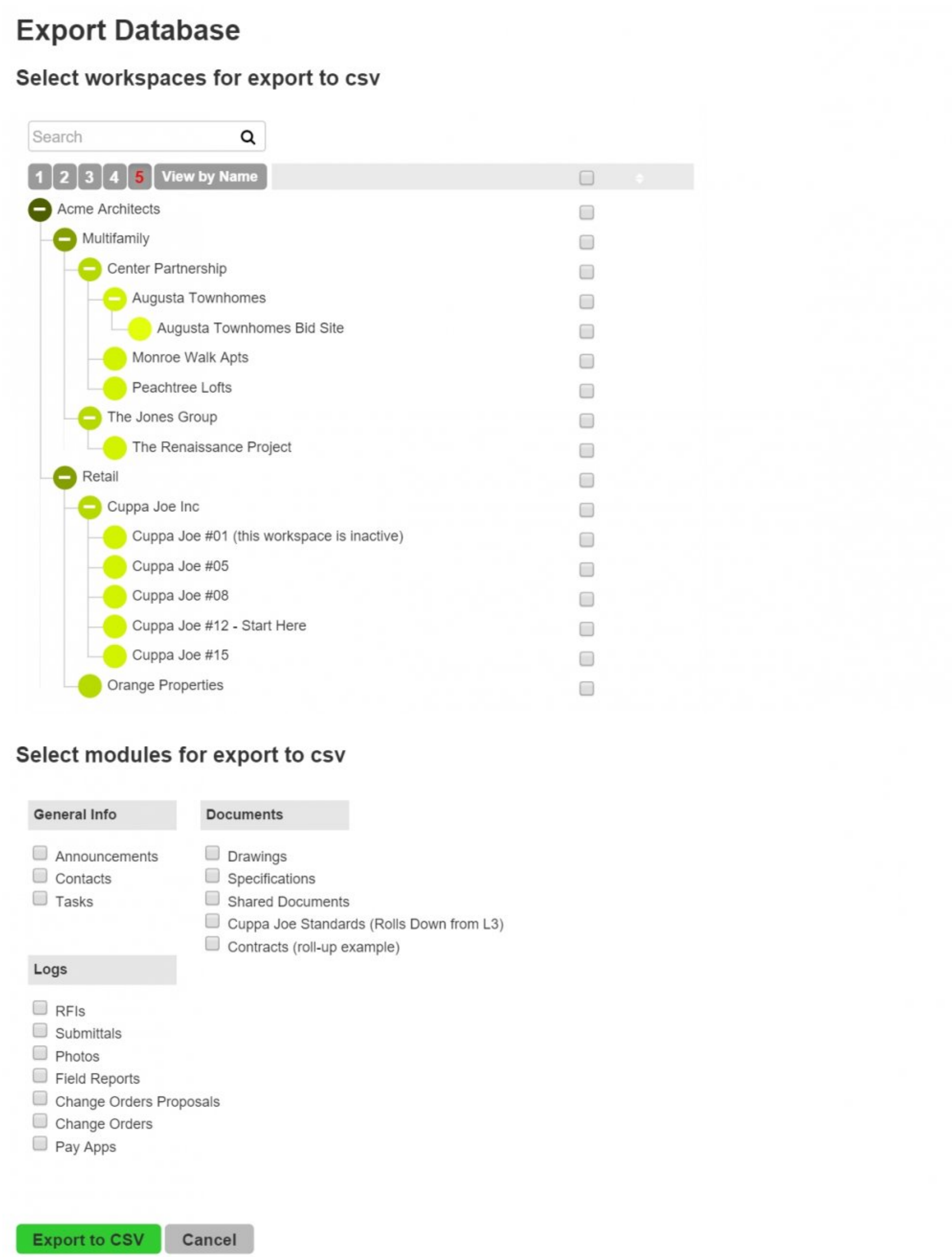
Export Modules

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



To export records:

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 Subn	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 Faste	Can we us	Farmer, A	N/A			Bronte, Ch	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, Ch	Yes	########	
5	Cuppa Joe	RFI-0003	9/2/2015	Low	9/7/2015	Fletcher, Charles - A		Toilet Acc	Do you mi	Fletcher, (	N/A			Bronte, Ch	No	########	
6	Cuppa Joe	RFI-0004	########	High	########	Fletcher, (	ScreenShc	Fire Marsh	The fire m	Farmer, A	N/A			Bronte, Ch	No	########	
7	Cuppa Joe	RFI-0005	########	Standard	########			Mounting	What are t	Farmer, A	########	They're or	Electrical (	Bronte, Ch	Yes	########	
8	Cuppa Joe	RFI-0006	########	Low	########	Fletcher, (	554e61c03	Concrete I	Is this wha	Farmer, A	N/A			Bronte, Ch	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 >>]

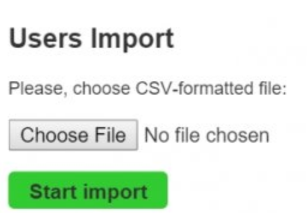
Import Users

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.

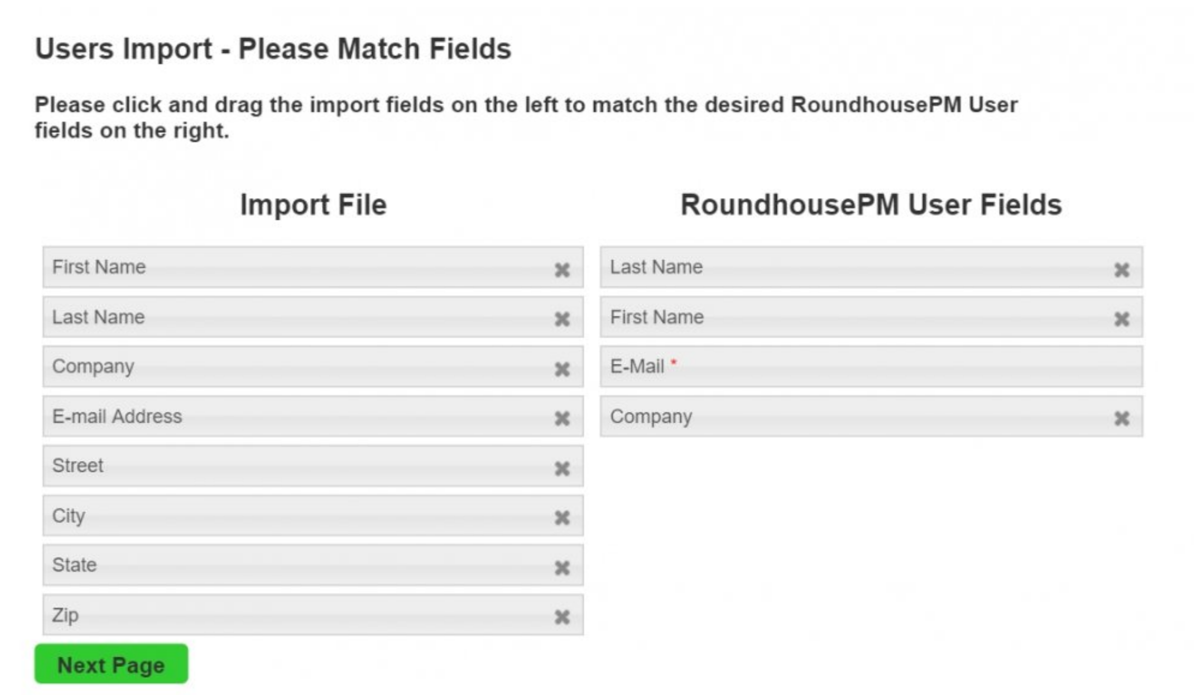
The sample file that we have exported looks like this when viewed in a spreadsheet.

	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

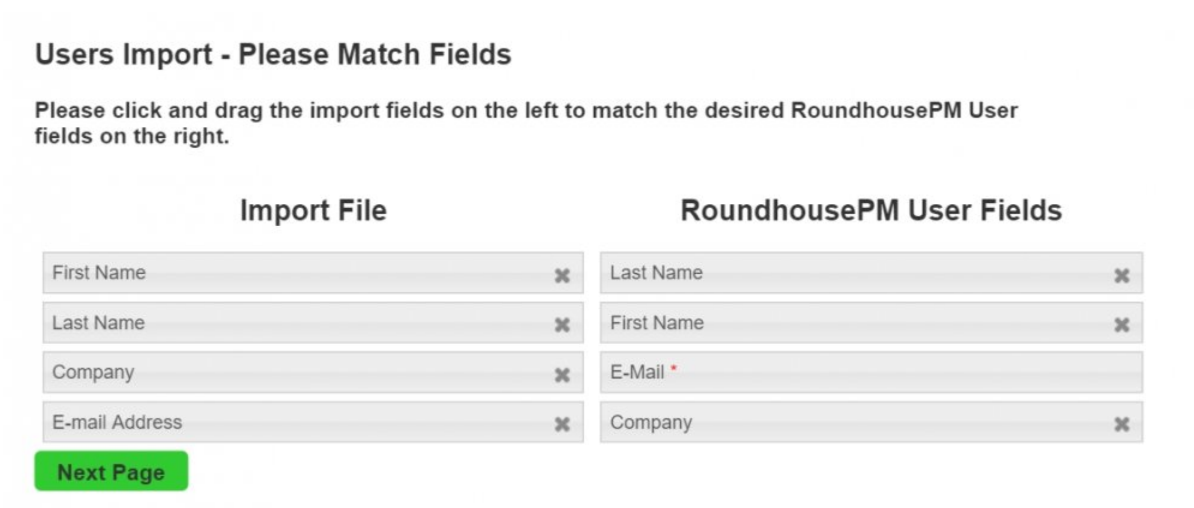
When selecting **Import Users** you will first see this screen:



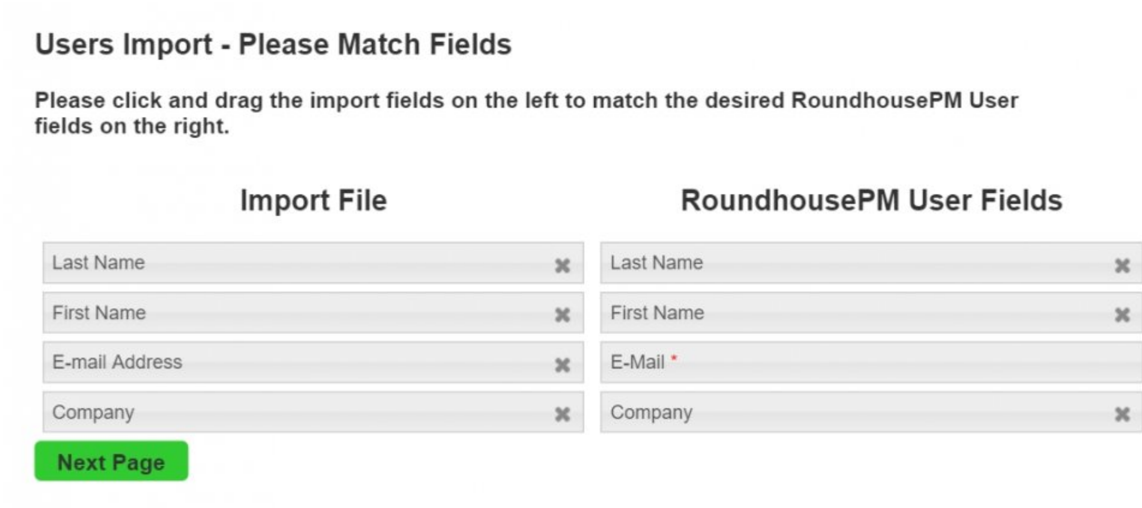
After you import the file you will see the fields from your imported file on the left and the fields that RoundhousePM needs on the right. As you can see in the image below there were additional fields for the address of the person in the exported file.



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



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.



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.

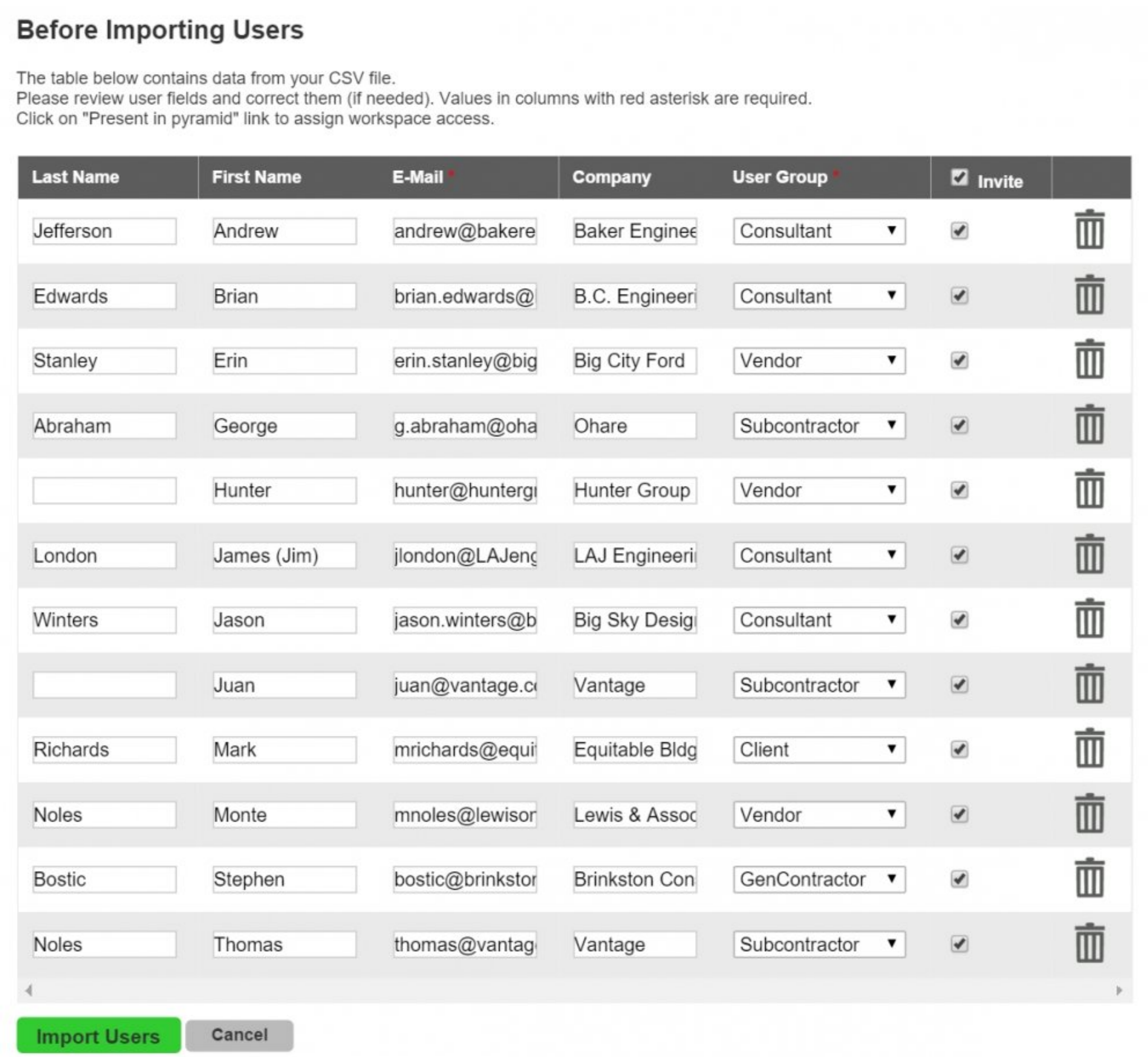
Before Importing Users

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 *	Invite	
Jefferson	Andrew	andrew@bakere	Baker Enginee	Select one	✔	
Edwards	Brian	brian.edwards@	B.C. Engineeri	Select one	✔	
Stanley	Erin	erin.stanley@big	Big City Ford	Select one	✔	
Abraham	George	g.abraham@oha	Ohare	Select one	✔	
	Hunter	hunter@huntergı	Hunter Group	Select one	✔	
London	James (Jim)	jlondon@LAJenç	LAJ Engineeri	Select one	✔	
Winters	Jason	jason.winters@b	Big Sky Desig	Select one	✔	
	Juan	juan@vantage.cı	Vantage	Select one	✔	
Richards	Mark	mrichards@equi	Equitable Bldg	Select one	✔	
Noles	Monte	mnoles@lewisor	LEWISON AN	Select one	✔	
Hightower	Rebecca	rebecca.hightow	The PEAK Co	Select one	✔	
Kaplan	Sarah	skaplan@united:	United Sun Cc	Select one	✔	
Pinckney	Stan	stan@integritygr	Integrity Grour	Select one	✔	
Bostic	Stephen	bostic@brinkstor	Brinkston Con	Select one	✔	
Noles	Thomas	thomas@vantag	Vantage	Select one	✔	
Marine	Ulysses	usmarine@yaho		Select one	✔	

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 *	Invite	
Jefferson	Andrew	andrew@bakere	Baker Enginee	Consultant	✔	
Edwards	Brian	brian.edwards@	B.C. Engineeri	Consultant	✔	
Stanley	Erin	erin.stanley@big	Big City Ford	Vendor	✔	
Abraham	George	g.abraham@oha	Ohare	Subcontractor	✔	
	Hunter	hunter@huntergi	Hunter Group	Vendor	✔	
London	James (Jim)	jlondon@LAJenç	LAJ Engineeri	Consultant	✔	
Winters	Jason	jason.winters@b	Big Sky Desigi	Consultant	✔	
	Juan	juan@vantage.c	Vantage	Subcontractor	✔	
Richards	Mark	mrichards@equi	Equitable Bldg	Client	✔	
Noles	Monte	mnoles@lewisor	Lewis & Assoc	Vendor	✔	
Bostic	Stephen	bostic@brinkstor	Brinkston Con	GenContractor	✔	
Noles	Thomas	thomas@vantag	Vantage	Subcontractor	✔	

Import Users Cancel

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

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		
Architect	**Admin**	**Acctg**	**Add**	**Edit**	**Delete**	**D'load**	**Read**	**Add / Edit**	**Unlock / Delete**	**D'load / Read**
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	**Admin**	**Acctg**	**Add**	**Edit**	**Delete**	**D'load**	**Read**	**Add / Edit**	**Unlock / Delete**	**D'load / Read**
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	**Admin**	**Acctg**	**Add**	**Edit**	**Delete**	**D'load**	**Read**	**Add / Edit**	**Unlock / Delete**	**D'load / Read**
Administrator	x	x	x	x	x	x	x	x	x	x
GenContrctor - 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	**Admin**	**Acctg**	**Add**	**Edit**	**Delete**	**D'load**	**Read**	**Add / Edit**	**Unlock / Delete**	**Download / Read**
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	Workspace only / This WS and WS below	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:

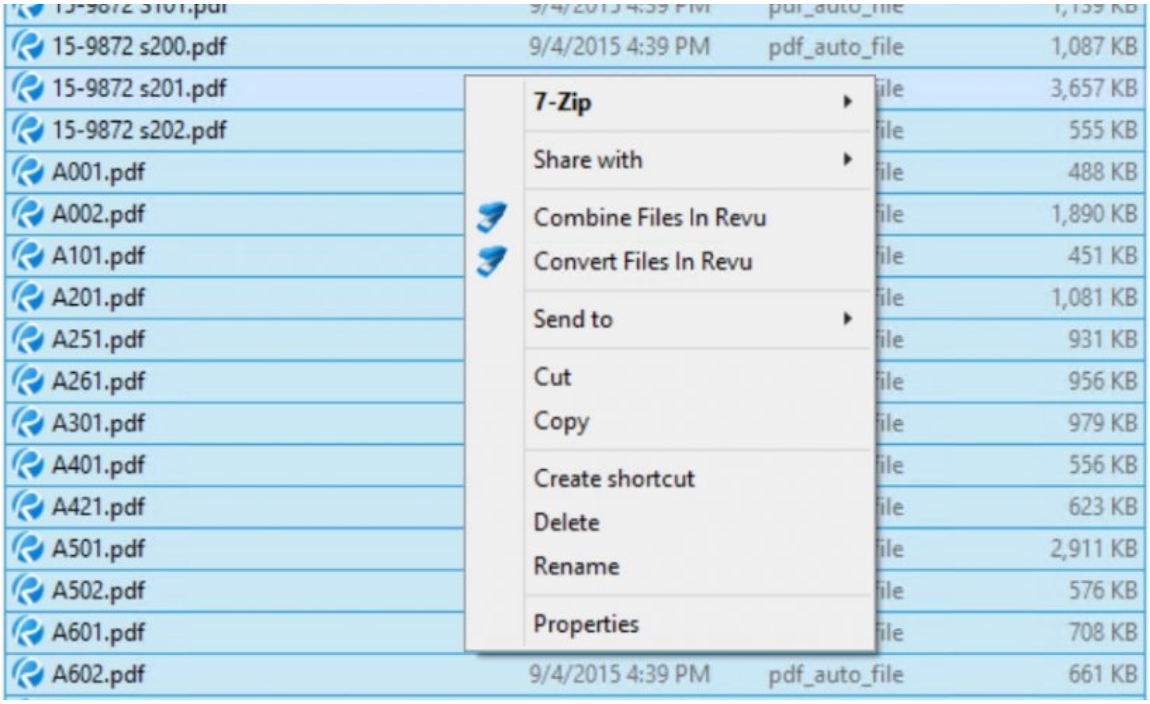
1. Combine multiple PDFs into a single PDF file.
2. Rename the pages by using Bluebeams OCR tools.
3. Extract each page into individual files ready to upload to RoundhousePM.

Step 1 – Combining Files

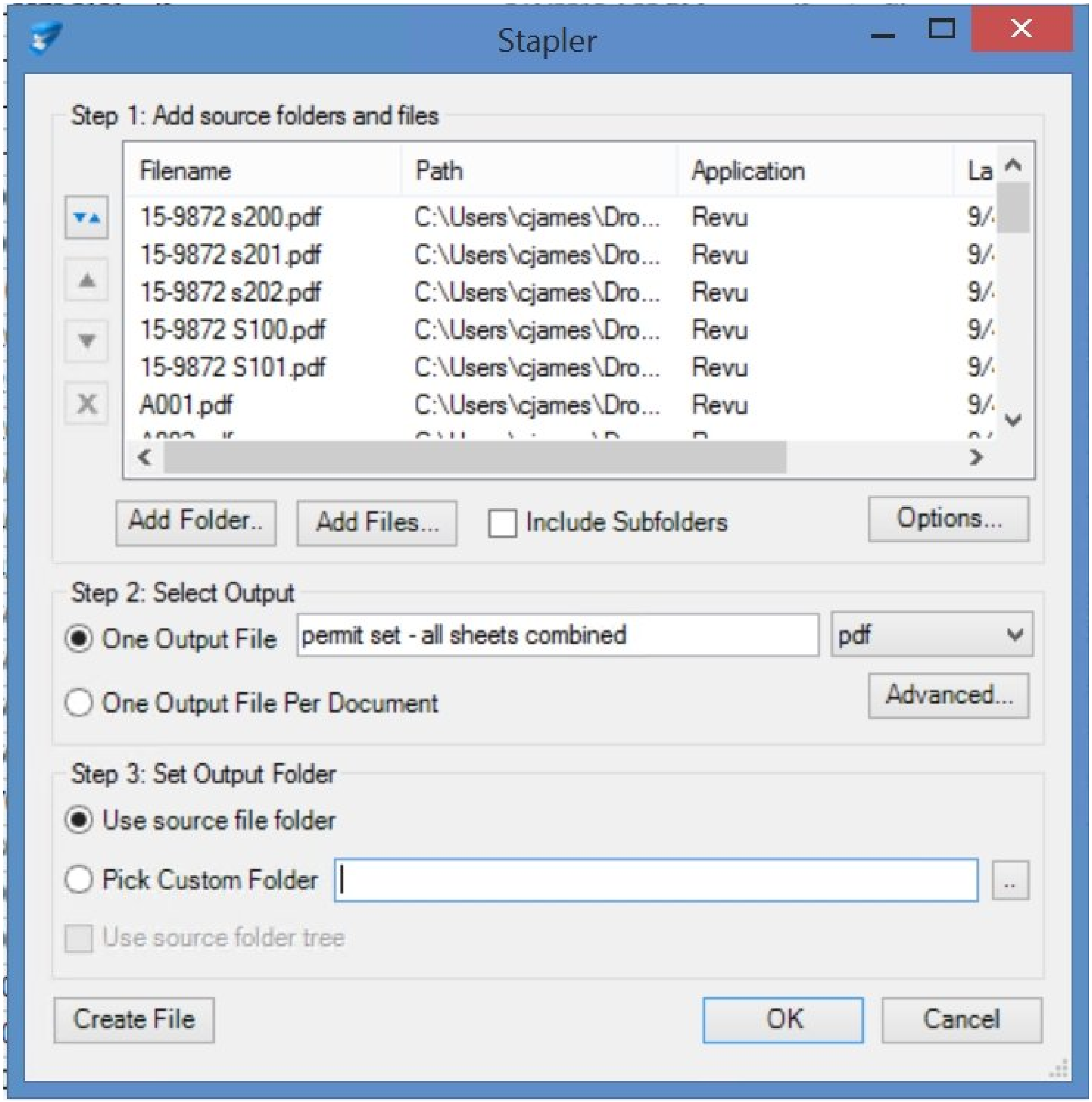
Before you release a set of files to the world you create PDF files from the CAD / BIM software that you use and you receive files from consultants. These files are probably named using different naming conventions as shown below.

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

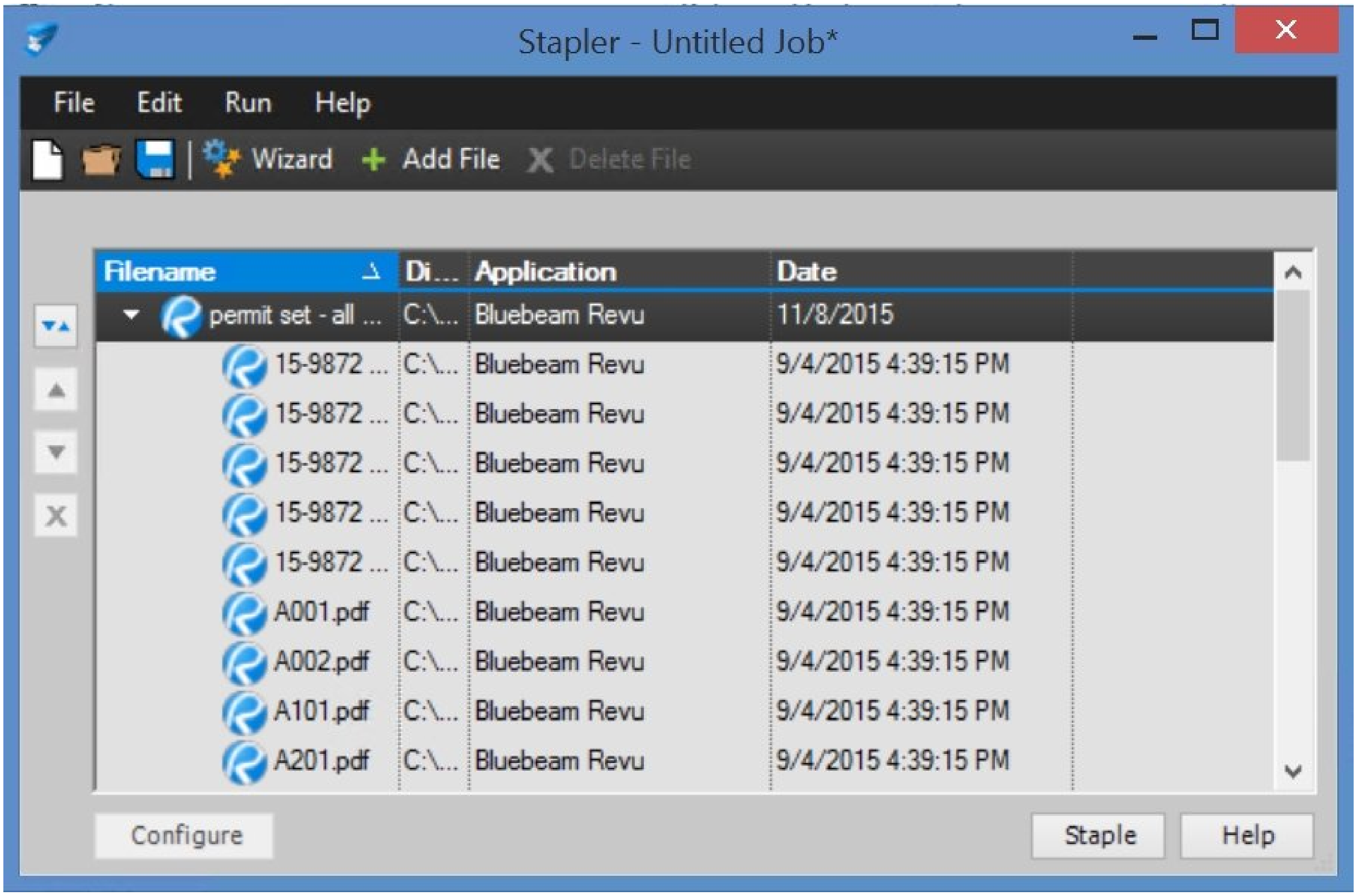
Select all files, right mouse and select **Combine Files in Revu**.



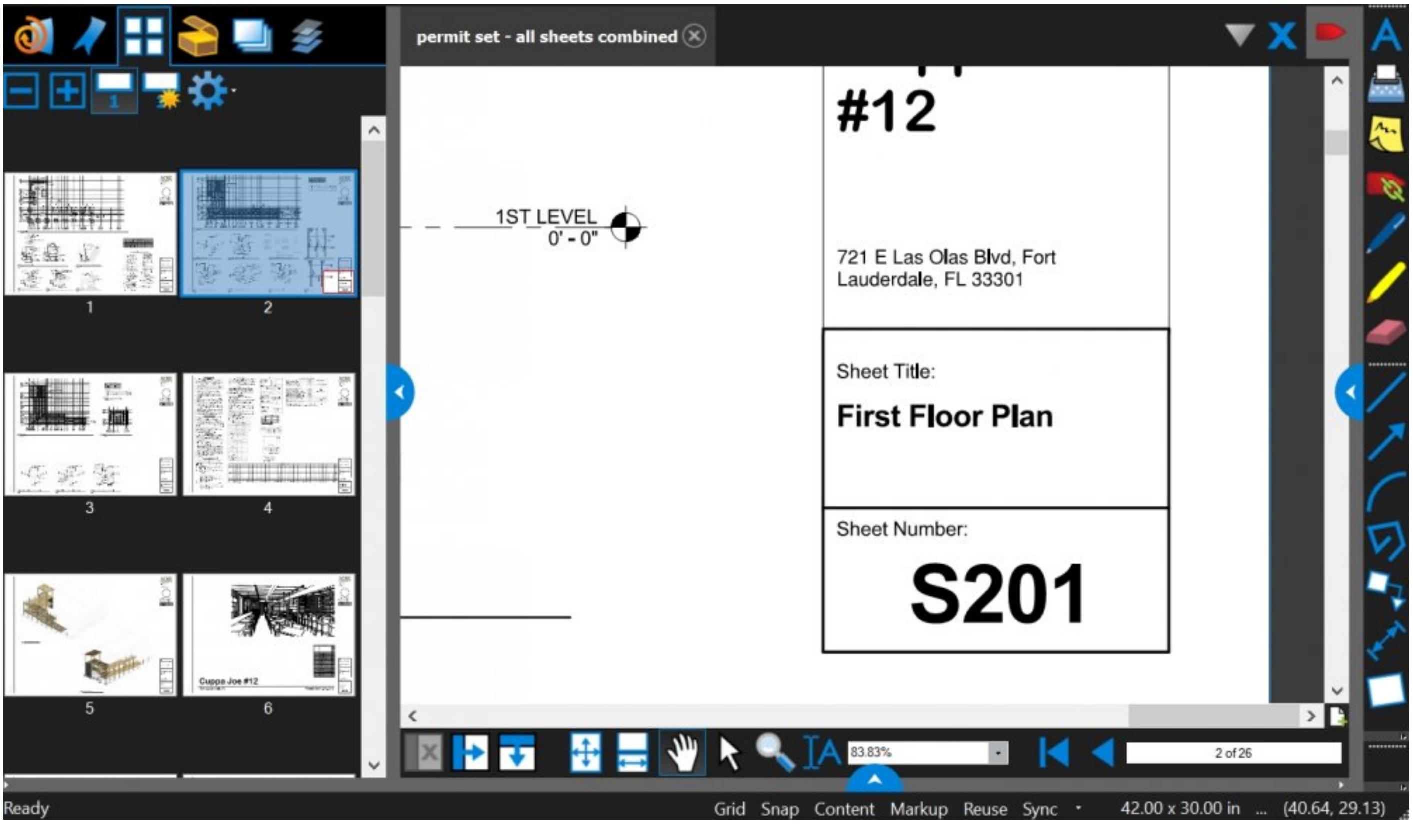
Name the file and select the location for saving and press **OK**.



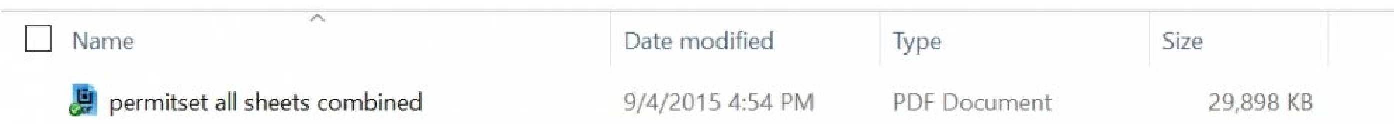
On the following dialog press **Staple**.



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.



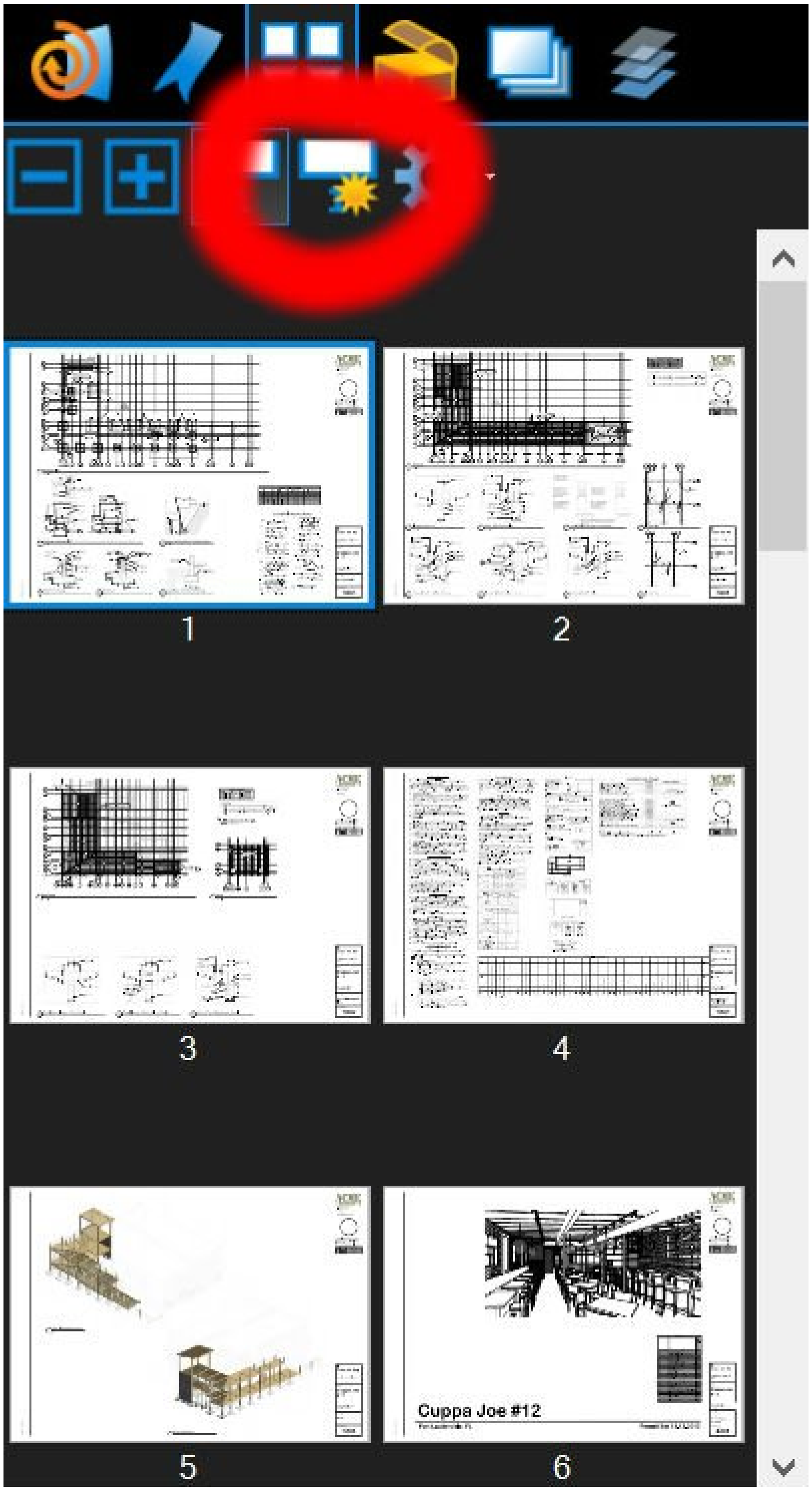
Save this combined file to your computer.



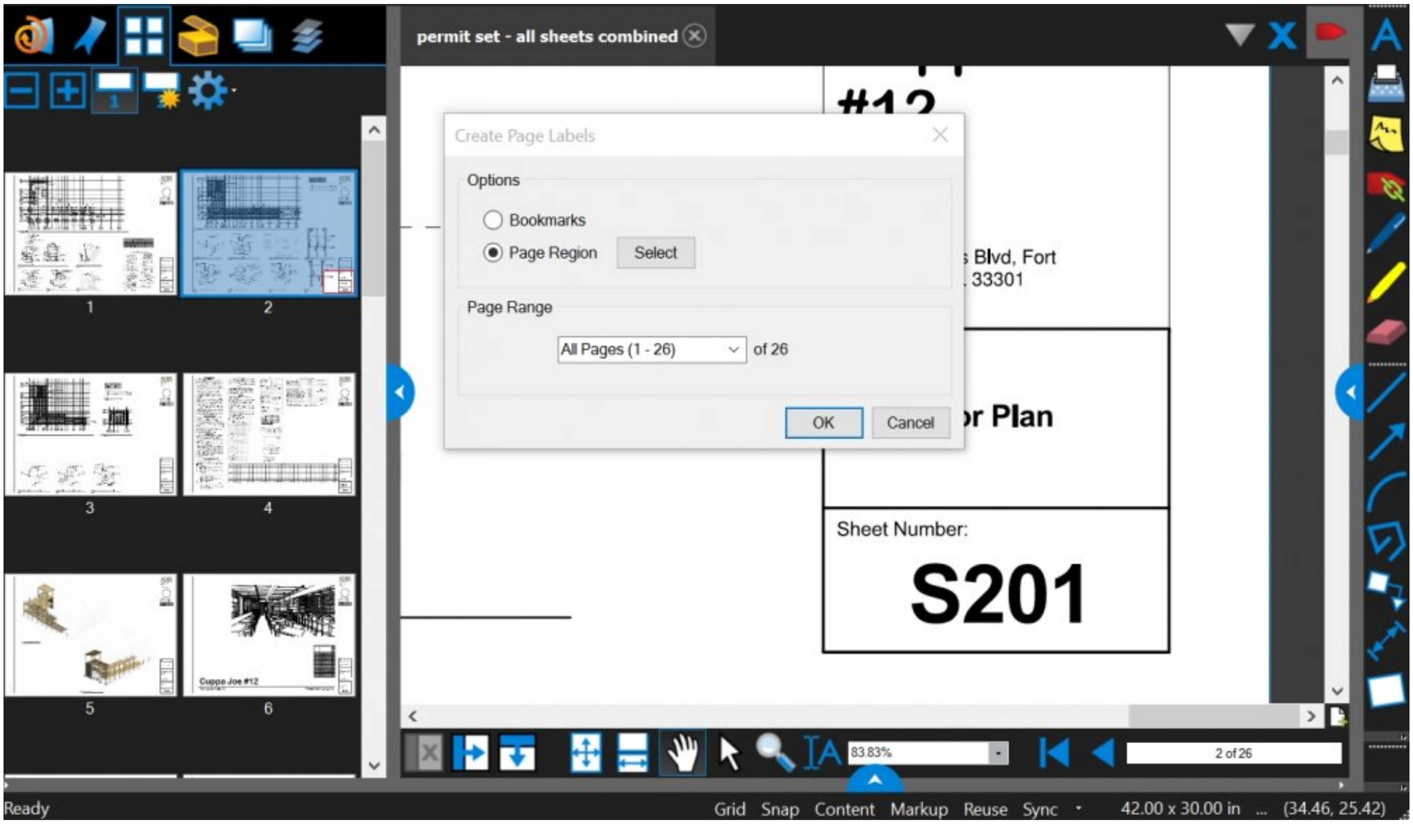
Step 2 – Renaming the Pages to match the Sheet Number and Title

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.

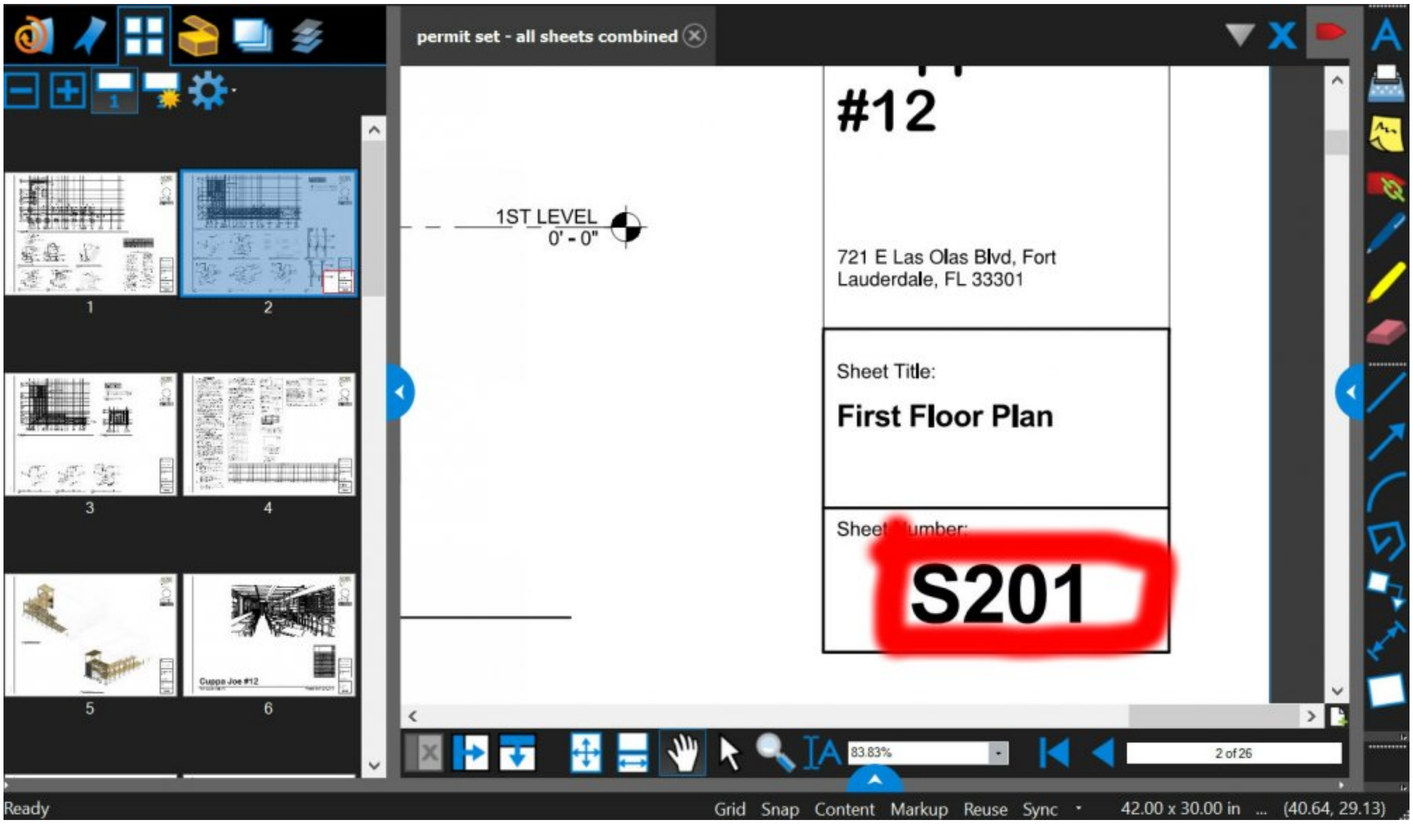
Select the **Create Page Labels** tool circled below.



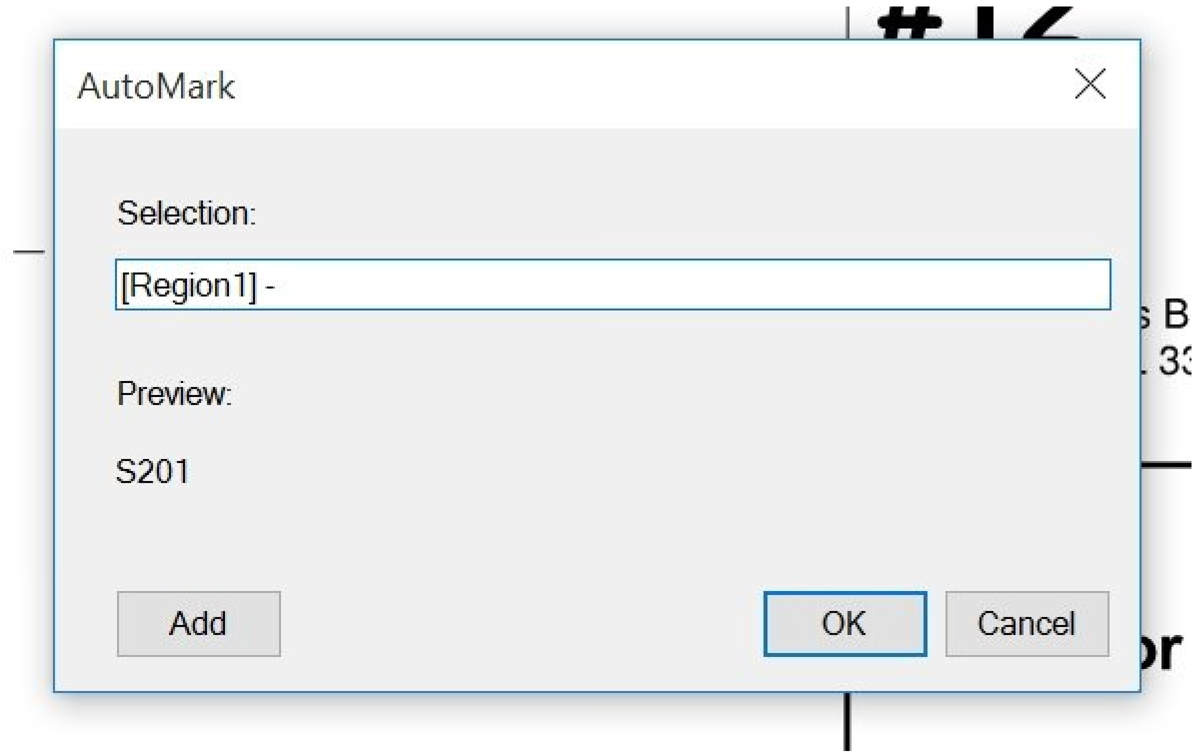
The following dialog will open. Make sure that All Pages are selected and then click on the *Add *button.



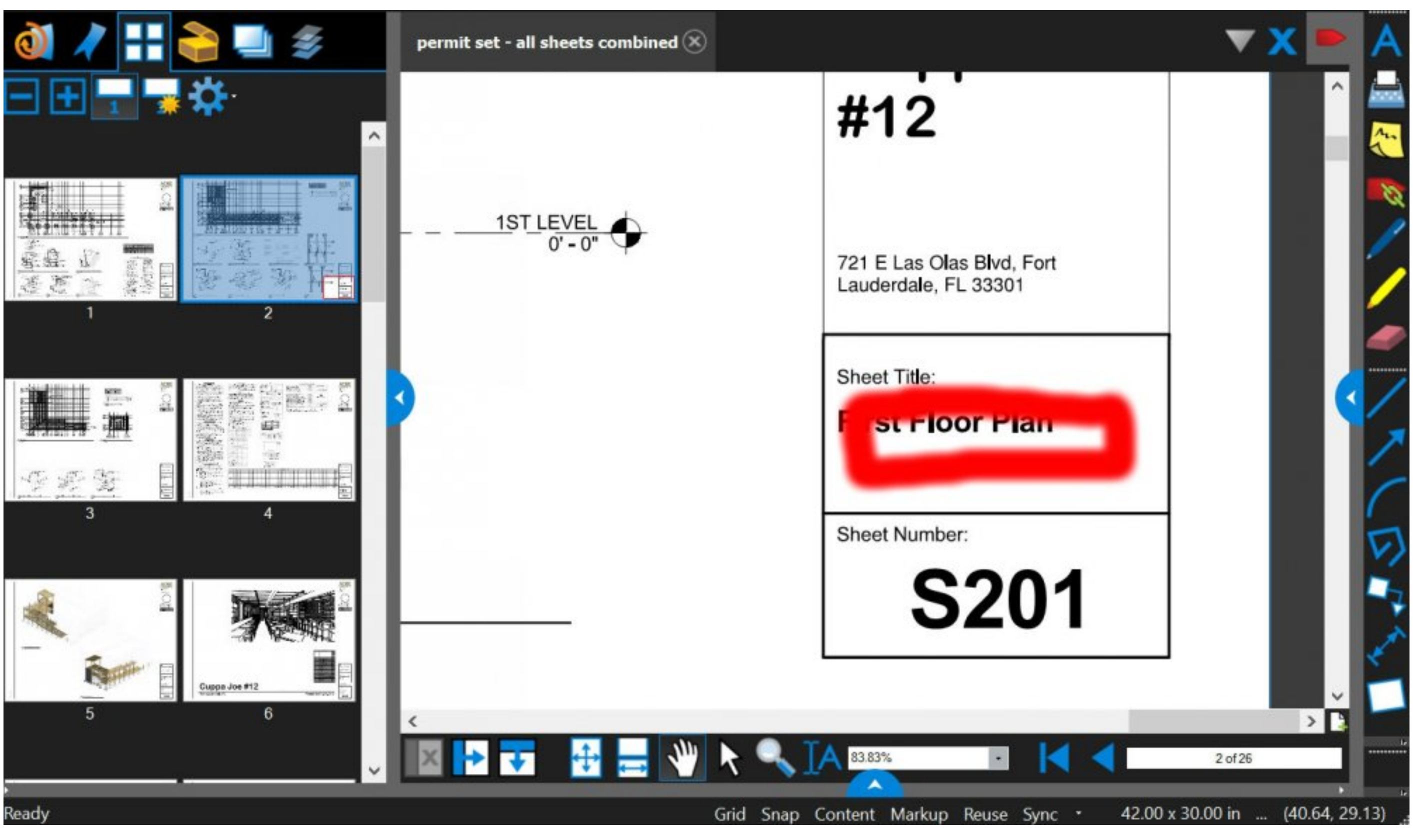
The dialog will disappear and draw a rectangle around the sheet number.



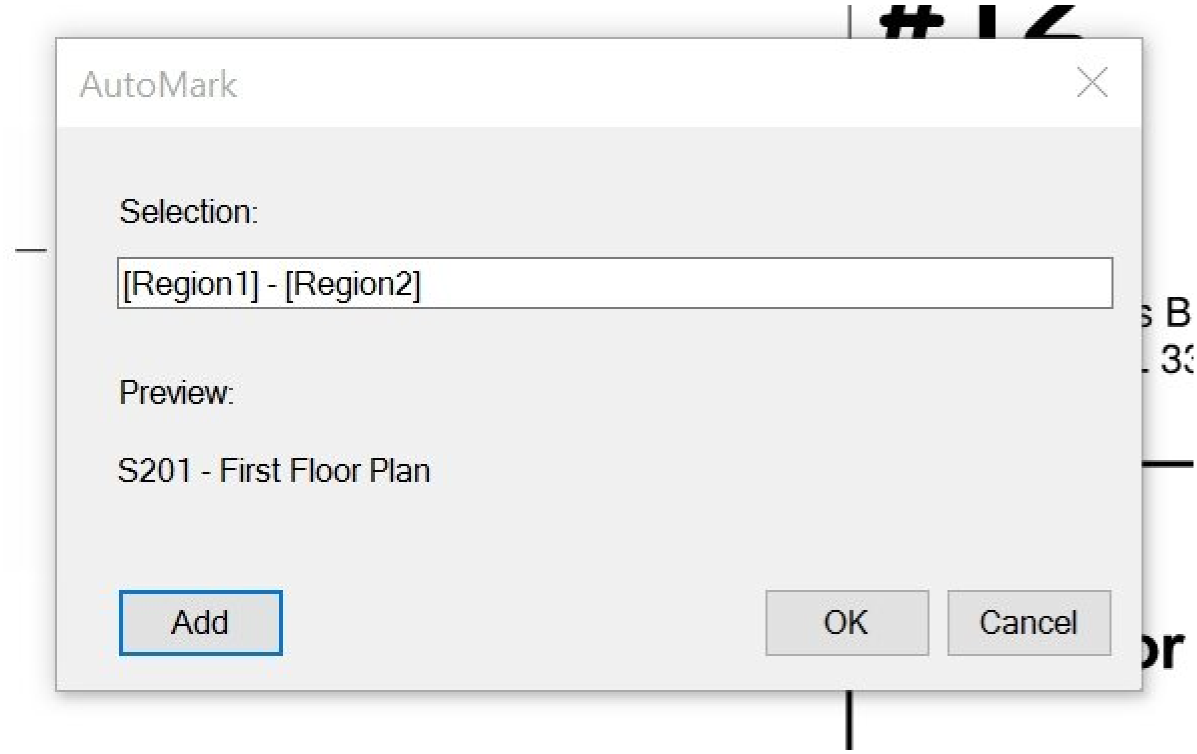
The AutoMark dialog now appears. You can see that **[Region1]** is entered and a preview of what it has scanned is shown below. At this time you need to manually enter a "- " (space hyphen space" and then click the **Add** button again to select the text of the sheet title. **Do NOT click OK**.



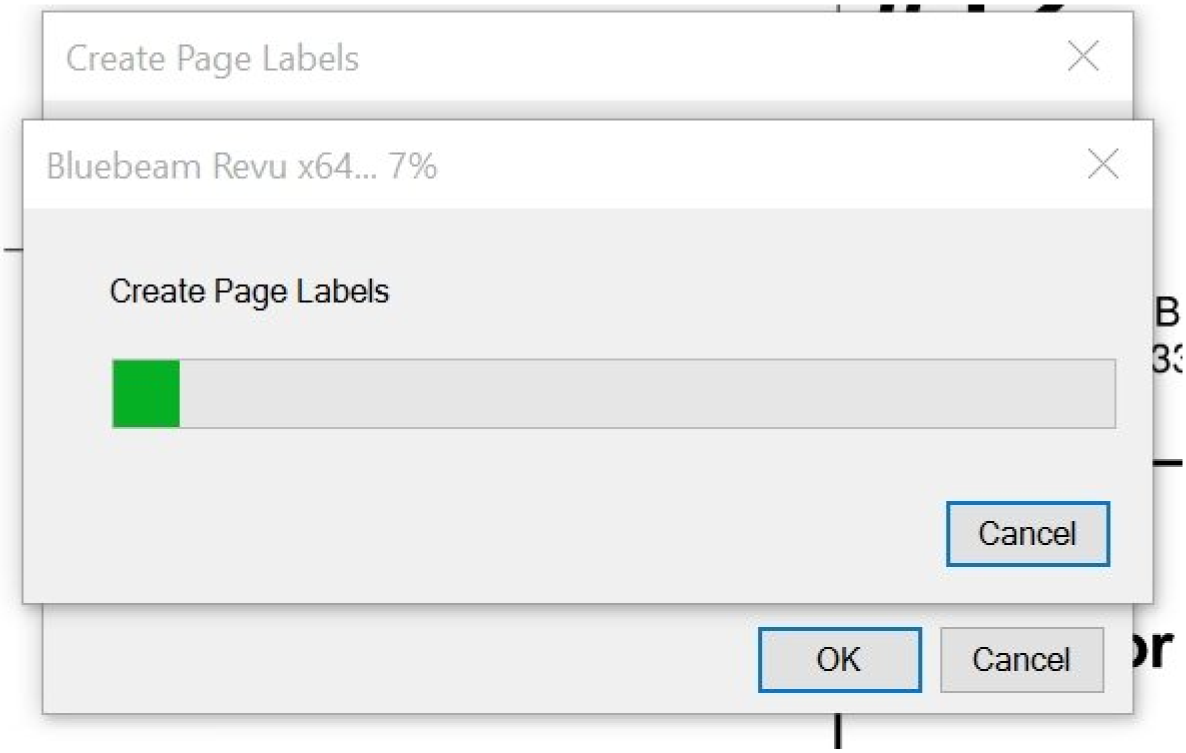
The AutoMark dialog disappears. Draw a rectangle around the sheet title text.



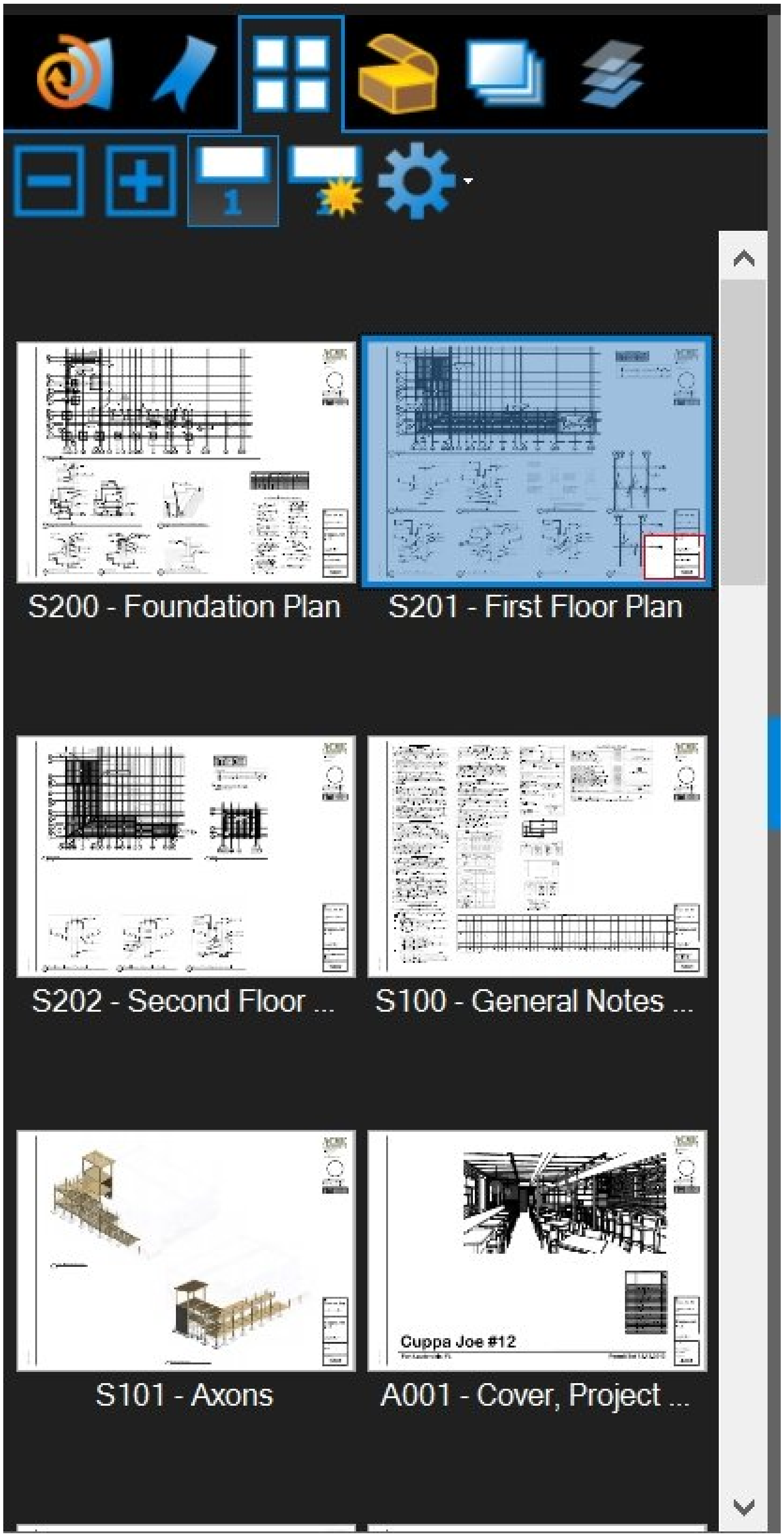
The AutoMark dialog reappears and you can see that **[Region2]** has been added to the field and the preview shows you the text that has been scanned.



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

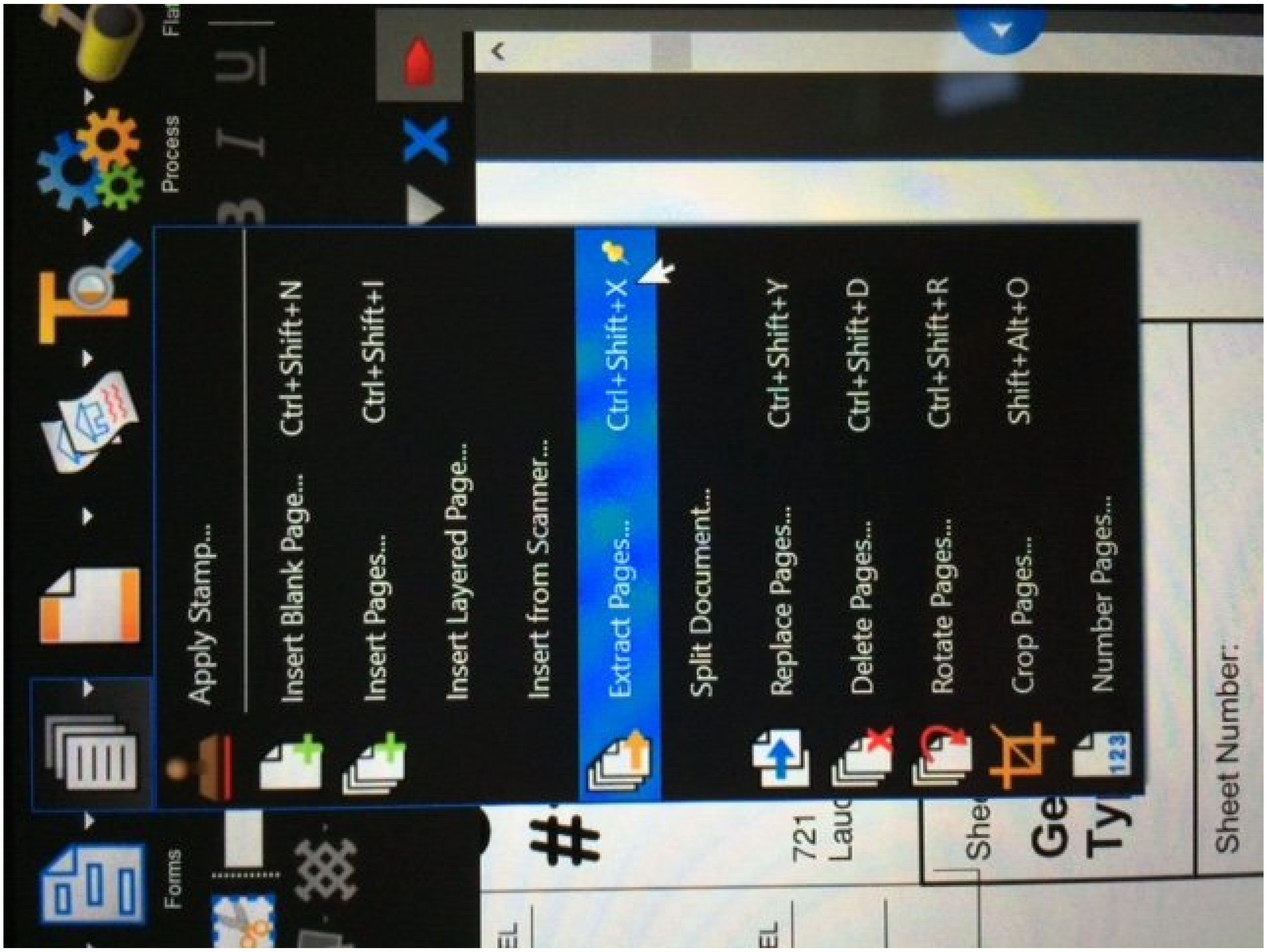


When the process is finished you will see that all of the page names have been changed to the new formatting. You should take a few minutes at this time and review the text that was created. While Revu does a great job it's not 100% perfect and you may need to manually edit a few of the page names.


S200 - Foundation Plan
S201 - First Floor Plan
S202 - Second Floor ...
S100 - General Notes ...
S101 - Axons
A001 - Cover, Project ...
Cuppa Joe #12

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.

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