JobSite OnLine – User's Guide
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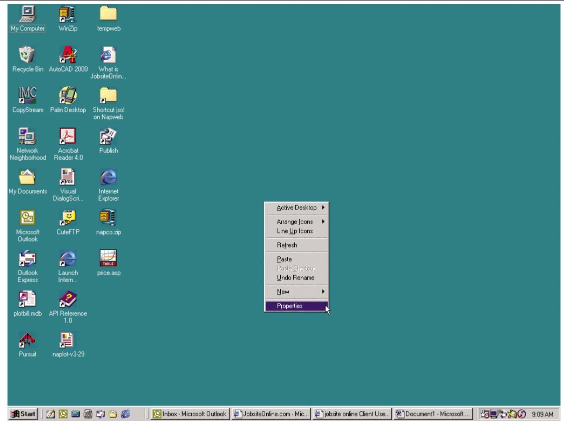
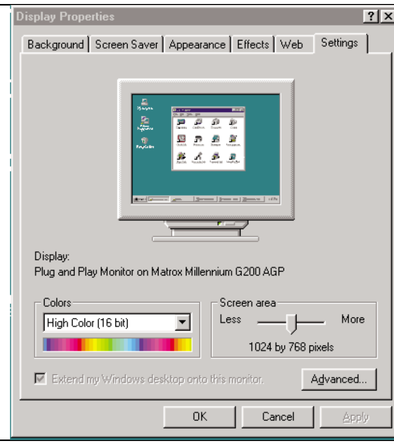
For the Beginner:

Preparing and Logging In to Run JobSite OnLine

1) Jobsite works best with a screen resolution of at least 800 x 600 preferably 1024 x 768. To set this, follow the instructions below.
   a) Click the right hand mouse button on your screen desktop
   b) From the pull down list select properties

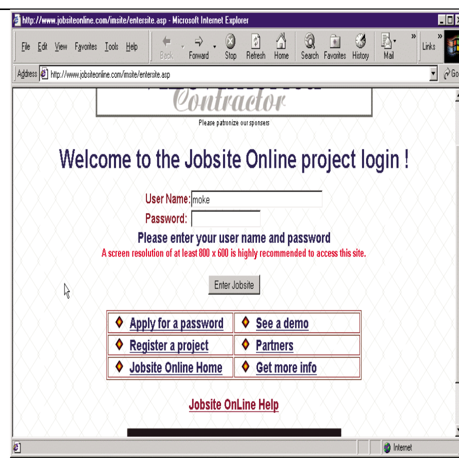


   c) Click the settings tab to set screen resolution
   d) Set resolution with slider bar.



2) Go to http://www.jobsiteonline.com
3) Click go to my project from the menu on the left. This will open a new browser window and display the log in page.

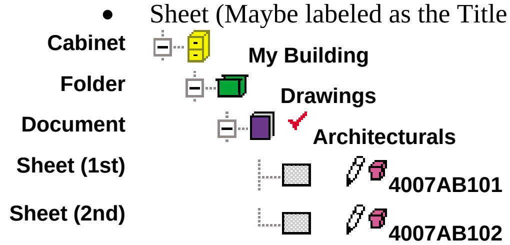
4) Maximize this window by clicking the center square in right hand side of the blue title bar.
5) Enter your name and password and check your preferences.
6) Click the Enter JobSite OnLine button.



How Drawings and Specs are Organized - Ease of Use

Documents are easy to find and work with due to JobSite OnLine's Organization by:

- Cabinet (Maybe labeled My Building)
- Folder (Maybe labeled Drawings)
- Document (Maybe labeled Architecturals)
- Sheet (Maybe labeled as the Title Block is)



Common confusion about "Documents" and "Sheets"

Regarding a set of drawings… A <u>sheet is to a document</u> – *AS* - a <u>drawing is to a set</u>. A set is one document… each individual drawing is a sheet

Regarding spec books… Because a Big spec book may contain hundreds even thousands of pages… Specs will not be broken down into sheets, however, Specs would require some kind of separation for easier search and retrieval … How could this be handled??? You might make a folder named "Specs" and then make each chapter or section of the spec book its own document

FYI
Empty Pencil Icon = No Notes – Filled in or Colored Pencil = Notes… we will cover notes in detail later
Clicking the Basket Icon, collects the Sheet in your basket… we will cover during encapsulation later

Searching for Files or Containers

You can search for both files and containers in the JobSite OnLine database, **to search for a file in JobSite OnLine...**

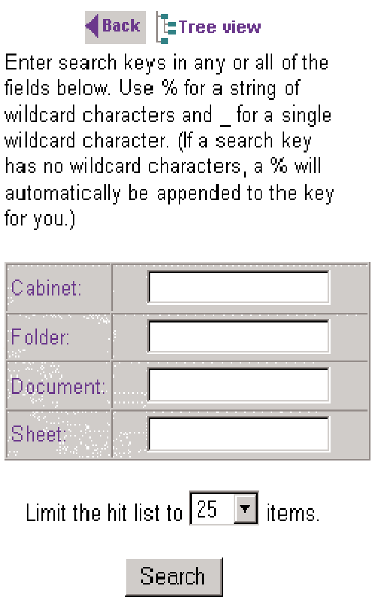
1. In the left side frame of your screen, click the button.

2. The search form is displayed. SEE BELOW

3. Enter search parameters in the fields, using wildcards if necessary (i.e. *).

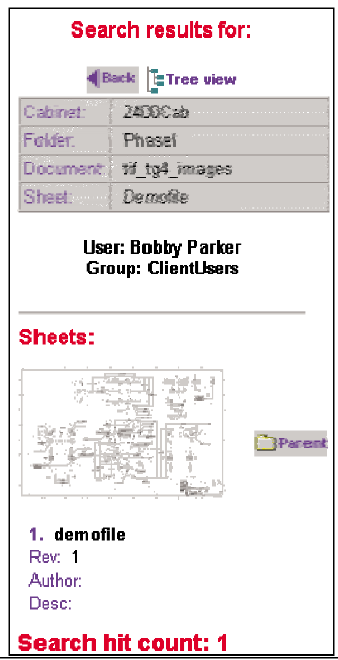
4. Select a limit for the number of search results to be displayed at one time. The default is 25. The maximum is 100.

5. Click the Search button.



6. JobSite OnLine searches the project's database for the indicated files or containers and displays the search results. SEE BELOW

For sheets search results are displayed as thumbnails (A-6). Click a thumbnail to open and view it. Select a thumbnail and click the button to view the thumbnails listing of all files in the document that contains the selected file.



Opening Sheets by Viewing Thumbnails

To view thumbnails for all sheets in a document...

1. Click the icon beside the cabinet that contains the image you want to open and view. A red check is displayed next to the cabinet name, to indicate that it is active

2. Click the icon beside the folder that contains the image you want to open and view. The red check is now next to the folder name.

3. All document names in the folder are listed.

4. Click the underlined name of the document that contains the sheet you want to open and view.

   Thumbnails of all sheets in the document are listed.

5. Click the thumbnail of the sheet you want to view. AND See the individual sheet in the Main Window.

Opening Sheets without Thumbnail View - ***Recommended***

This is recommended over thumbnail viewing, due to faster screen and image views. If Sheets were clearly indexed and organized from the beginning… Sheets will **still** be easy to find – even without a thumbnail view.

The preference for Thumbnails can be turned off (see Setting Preferences).

To view sheets of a document in a list …

1. Use the plus and minus signs (or icons) next to cabinets, folders and documents to view the list of what is enclosed. See red check mark indicating what is active.

2. Then actual underlined drawing name. See red check mark indicating that sheet is active. AND See the individual sheet in the Main Window.

Setting Preferences for Running JobSite OnLine

Once you have logged in, you can set preferences to individualize how JobSite OnLine runs the next time you start JobSite.

To set preferences for running JobSite OnLine...

1. Select Preferences from the field drop-down list in the database pane and click Go. The Preferences pane is displayed.
2. Check or clear the checkboxes according to the following:

Control	Description
Disable Sheet Thumbnails	When checked, downloading of thumbnails for sheets is disabled. Recommended
Start in view stream mode	Do NOT Recommend checking. When checked, you can open and work with an image even before all of its data has arrived. When cleared, the JobSite OnLine server handles all the tasks you accomplish in the database frame and also composes and sends all view changes, leaving your computer free for other work.
Initially show search interface	NOT usually necessary. When checked, the search tools are displayed at logon.
Alert if new notifications are present	Recommended. When checked, event notifications, if any, are displayed immediately after you log in. We will cover NOTIFICATIONS in more detail toward the end of this curriculum. SEE Understanding Events, Triggers and Notifications.

Preferences

Back

- [x] Disable sheet thumbnails
- [ ] Start in view stream mode
- [ ] Initially show search interface
- [x] Alert if new notifications present

Update

3. Click the Update button.

JobSite OnLine notifies you that your preferences have been updated.

4. Click OK. The next time you open JobSite OnLine, the preferences you checked will be enforced.

For the Average User:

Adding Notes and Note Streams to an Image

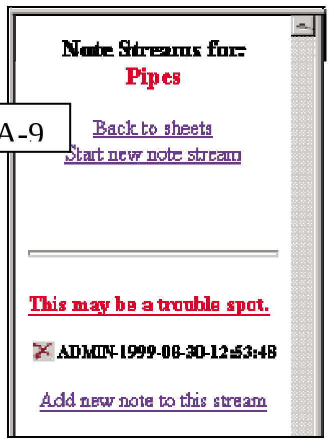
You can add a note stream for an image view or for a particular point of interest in an image. You can add as many note streams as necessary, and you can add new notes to existing note streams.

A-8

To add a new note stream...

1. Open and view the image to which you want to add a note stream.
2. Click the icon (no note streams exist) or the icon (note streams already exist) next to the image thumbnail. The Note Streams frame for the image is displayed. (A-8)
3. To start a new note stream, click the Start new note stream option. The New Note Stream frame is displayed. (A-9)

A-9



4. Enter a descriptive title for the note stream in the Note stream title field.
5. Move around in the image to display the view to associate with the note. If there is a particular point that should be marked in the view, press the keyboard Shift key and click the point in the image view. A red crosshair appears in the view, centered on the point.
6. Click the Submit button.
7. JobSite OnLine displays a message that the note stream was successfully started.
8. Click the OK button.
9. The Note Streams frame for the image is displayed with the new note title and the date and time it was added.
10. When a user clicks the note title, the image view for the note is displayed. A red crosshair is displayed in the view if a particular point was marked.

Note: If you are the user who added the note stream, you can delete the entire note stream by clicking next to the user name just below the note title.

To add a new note to an existing note stream...

1. Open and view the image to which you want to add a note stream.
2. Click the icon (no note streams exist) or the icon (note streams already exist) next to the image thumbnail.
3. The Note Streams frame for the image is displayed. In the bottom portion of the frame:

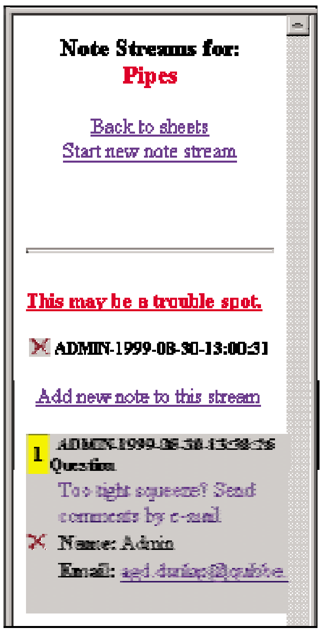
   a. Locate the note you want to add to.
   b. Click the Add new note to this stream option.

4. The Add New Note form is displayed.
5. Enter or select values in the fields.

Field	Description
Type	Select a valid value (Question, Answer, Comment) from the drop-down list. Optional.
Text	Enter the text for the note. Required.
E-mail	Enter an e-mail address for sending comments regarding the note. Optional.

Click the Submit button.

A-11



The Note Streams frame for the image is displayed with the note you just added. (A-11)

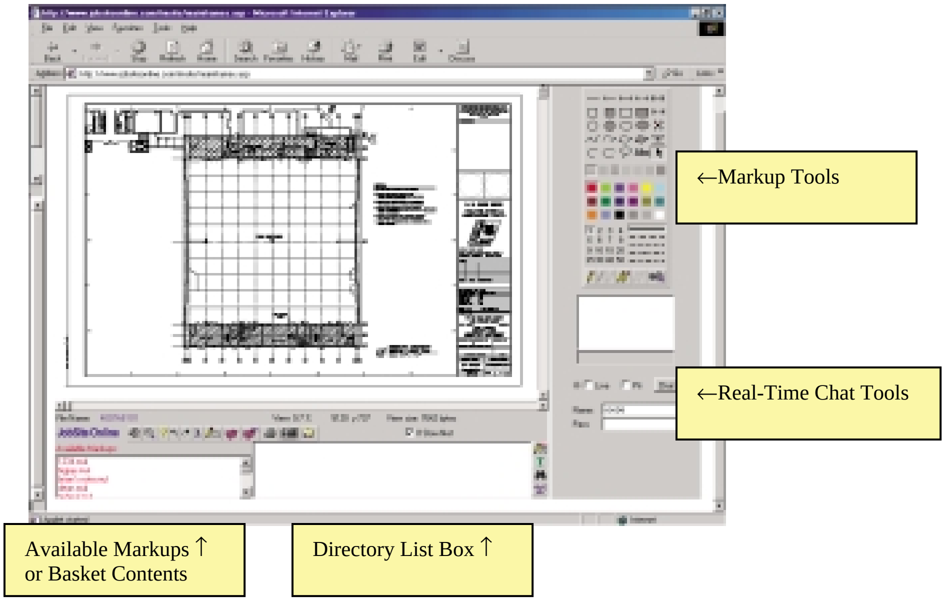
Note: If you are the user who added the note stream, you can delete the entire note stream by clicking next to the user name just below the note title. If you are the author of a specific note in the note stream, you can delete that note by clicking next to the name field in the note.

The Main Window includes Tools and Listboxes:

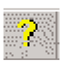
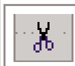
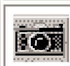
To get a better view of the Main Window, we will Narrow our left side frame.

Do this with your mouse. Place your mouse so you see a two-sided arrow – click your mouse button and drag your mouse until the left side frame has almost disappeared.

- Directory Listbox and Tools for working with files and displaying extended controls.
- Markup Tools with drawing tools and toolbar buttons for displaying extended controls.
- Real-Time Collaboration Tools for pointing in the image view and marking up images.
- A Listbox that can be switched between “Available Markups” (for working on a specific sheet) AND “Basket Contents” (for encapsulation… which we will cover later).



Tools Above the Listbox's

	These are image viewer tools. (Use your mouse to zoom in – use negative magnifying glass to zoom out incrementally – use the Bird's eye for a full view of image)
	Click to display the JobSite OnLine Help File
	Click one of these buttons to rotate the current image and all open markups in the indicated clockwise or counterclockwise direction (Only raster images can be rotated, dwg files are vector images-not raster, and therefore cannot be rotated)
	Click to collect files in the shopping basket that are selected in the directory listbox. All open markups are collected, in addition to specific files selected for collection. DON"T think shopping, think collecting. This is usually used when collecting items encapsulate or download.
	Click to clip a JPEG version of the current image view into a separate browser window (jpeg is just a common type of image file which most standard computers can view without additional software). You can print the current image view using the browser's standard File > Print dialog box. DUE to the small, easy, robust features of encapsulation and it's viewer this option probably won't see much action.
	Click to display the available markups list for the current open image, if it is not already displayed.
	Click to display the shopping basket listbox, if it is not already displayed.
	*Click to submit files for printing to a JobSite OnLine server print queue. NOT currently enabled.*
	Click to encapsulate and download files from the basket.
	*Click to post files to JobSite OnLine that are in the shopping basket. NOT currently enabled.*

Tools to the Right of the Directory Listbox

	Click to refresh the available markups list from the server for the current open image.
	Click to view an image or container support file in a separate browser window.
	Click to search for files in JobSite OnLine (directory mode).

	Click to view .dwg layers.

Tools to the Left of the Directory Listbox

	Click any of these three buttons on the directory list box to collect files in the shopping basket. The top arrow adds a single selected file. The middle arrow adds several selected files. The bottom arrow adds all files.
	Click to remove collected files from the shopping basket. The top X deletes a single selected file. The bottom X deletes all files.

Creating & Working with Markups

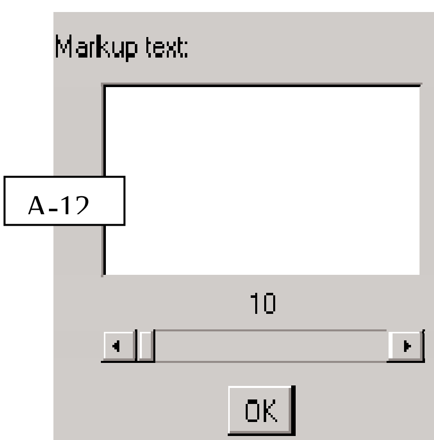
To create a new markup…

1. On the markup tools, click the button.
   and The extended markup tools are displayed.
2. Click NEW and type a name for your markup (you can make a markup more private by using passwords so people can only view it if they know the password "READ"– or can only change it with a password "WRITE").
3. Now you can markup you sheet and save it!

To add lines and shapes in a markup…

4. On the markup tools, select the markup and markup layer you want to work with.
5. Click the line or shape you want to add to the markup:
6. **Note:** If you selected a polyline or polygon in Step 2, press the keyboard Esc or Enter key to end it. Otherwise, JobSite OnLine will continue to add edges when you hold down the left mouse button and drag.
7. Click the markup tools button to restore the left mouse button to its zoom and pan functions for changing the image file view.
   or
   Use the right mouse button to move around in the image view while you also have markups open.

To add text in markups...

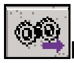


1. On the markup tools, select the markup and markup layer you want to work with.
2. Click the Abc button. JobSite OnLine displays the text tools: (A-12)
3. Enter text for the new text object in the Markup Text area.
4. Use the slider to set the text size in points (72 points = 1 inch). The value you select is shown above the slider.
5. In the markup view, place the text in one of two ways:
   - Point and click to place normal left-to-right reading text at angle 0.

     or
   - Drag out a line at an angle. The text will follow the angle of the line.
6. In the text tools, click OK. The text is entered in the markup.

7. Click the  button to restore the left mouse button to its zoom and pan functions for changing the image file view

To save your new markup or markup changes...

1. In the open markups list at the bottom of the markup tools, select the markup you want to save.
2. Click the  button.
   The extended markup tools are displayed.
3. In the Markups area, click Save.
   The markup is saved to JobSite OnLine with any changes you have made.

   Note: When a markup is saved, all rotation is automatically removed so that the markup rotation matches the native orientation of the image.

To move, resize, or delete a markup object...

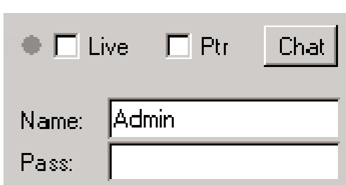
1. Select the current markup and layer.
2. Select the markup object - Hold down the keyboard Ctrl key and click the markup object with the left mouse button. Click repeatedly to “drill down” to an object in a stack of objects. The object is selected.
3. Do any of the following, as needed:
   - To move the selected markup object, hold down the left mouse button and drag the selection box interior.
   - To resize the markup object, drag the selection box handles with the left mouse button.
   - To delete the markup object, press the keyboard Del key.
   - To clear the selected object and return to zoom and pan mode, click the  button on the markup tools or press the keyboard Esc key.

Go Live! Real-time Online Meetings

You can collaborate in real-time on images.
You typically start a real-time collaboration session by connecting all participants via a telephone conference call and directing everyone’s attention to a particular image and relevant markups in JobSite OnLine. If you do not have a phone conference in progress, you can still collaborate using online chat text.
When the arranged time arrives, each participant should take the following steps.

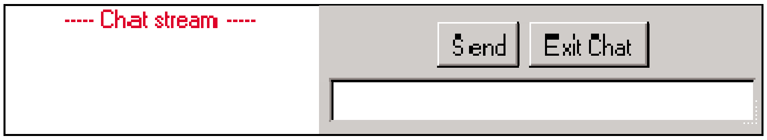
To collaborate in real-time on an image...

1. Open and view an image. Participants should agree on the image to work on before the session begins.



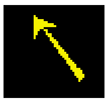
2. Open and view the markups.
3. Check the Live checkbox in the real-time collaboration tools.
   You are live when the indicator beside the checkbox is green. You remain live until you clear the checkbox (the indicator becomes gray) or until you open a different image in the image viewer.
4. Enter a user name and group password, if a password is required (that is, if everyone has agreed beforehand on a password for this collaboration session).
5. If you want to send or receive chat text during your real-time session, click the Chat button.

   The chat box is displayed.



All text sent by participants is displayed in the chat stream area. To send chat text yourself, enter text in the field and click the Send button. To close the chat box, click the Exit Chat button. (This does not end the chat. You can re-enter the chat at any time.)

6. Use the markup tools as necessary, and indicate points of interest using the real-time pointer in the image view.

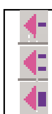
Real-Time Pointer	**Description**
	Click the Ptr button to turn the pointer on or off. Hold down the left mouse button and drag to move the pointer.

7. Each person collaborating on a markup can see all view changes and all real-time pointer movements made by every other person who is working live on the markup. All view changes and pointer movements are replayed within several seconds. The user name of the person moving the pointer is displayed at the top of the markup. To eliminate timing conflicts, all view changes are processed on a first-in, first-out basis.

8. Save markup changes. JobSite OnLine disconnects you from the collaboration session. The indicator becomes gray instead of green. Clear the Live checkbox to exit your real-time collaboration session.

Collecting and Encapsulating a group of items for field use (or bid sets)

There are various ways to get sheets into your basket:

 Click any of these three buttons on the directory list box to collect files in the shopping basket. The top arrow adds a single selected file. The middle arrow adds several selected files. The bottom arrow adds all files.
Clicking the Basket Icon next to the sheet on your left side frame.
 Click to collect files in the shopping basket that are selected in the directory listbox. All open markups are collected, in addition to specific files selected for collection. DON"T think shopping, think collecting. This is usually used when collecting items encapsulate or download.

IMPORTANT NOTE ABOUT ENCAPSULATING DRAWINGS THAT HAVE BEEN MARKED UP: If you want to encapsulate a drawing with its markup, you must open the drawing AND the markup… if you can see the markup when you add the drawing in your basket… the markup will be included in the encapsulation & should be indicated in your basket contents list.

1. Once you have collected everything you need, click  to encapsulate your basket
2. Type things that you may want to appear on the title page
3. If you choose, you can require a password AND you can disable features for added security
4. Click okay & save your encapsulation (choose where to save it and what to name it)

Working with Encap Viewer

1. Remember where you saved your encapsulation when you downloaded it (if you forget to save a specific name, it defaulted to the file name ENCAP32.

2. Find the encapsulation and click to open it.

3. Your title/splash screen is shown – Click okay to Open Viewer.
4. The viewer opens in a thumbnail list view, click on individual sheets to open them.
5. You can use your mouse to zoom in & the space bar to zoom out.
6. To view associated markups within an individual drawing: Go to the MARKUPS menu and choose Markup control, then select the markup and click display to view.
7. To add field markups: In the individual sheet, FROM the MARKUPS menu, you can open <u>markup tools</u> to make & save markups without an internet connection.
8. Encap Markups can be uploaded to the project site.

Project Posting and Maintenance:

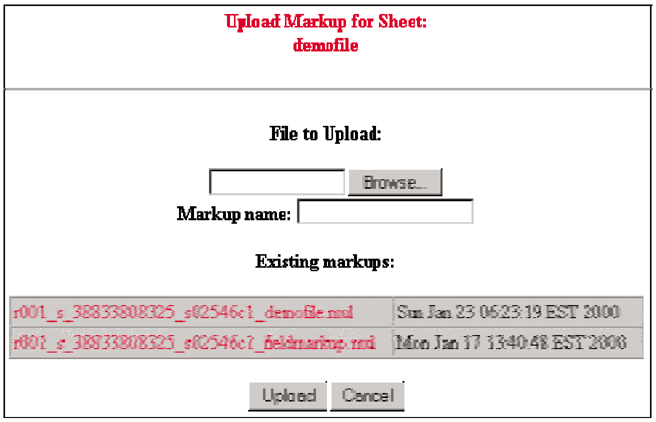
Uploading Field Markups

A field markup is any markup that is created outside of JobSite OnLine. If you are working in JobSite OnLine in database mode, you can upload as many field markups as you want.

To upload a field markup...

1. In the database tree view, click the sheet icon for a raster or .dwg image. A red check mark is placed next to the icon to indicate that it is the active sheet.
2. Select Upload Markups in the field above the tree view and click Go.

   The form for uploading a markup for a sheet is displayed.



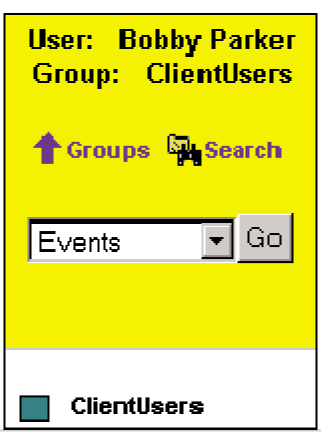
3. In the File to Upload field, enter the complete path and filename for the field markup you want to upload, or click the Browse button to select the file.
4. In the Markup Name field, enter the name you want to use for the markup in JobSite OnLine.
5. Click Upload.

   The field markup is added to JobSite OnLine and is associated with the active sheet.

Adding a Cabinet

With the correct security permissions, you can add new cabinets (the top level of database container) to JobSite OnLine.

To add a cabinet to JobSite OnLine...



1. **Log in to run JobSite OnLine.**
   The group you are assigned to is displayed in the database frame.
   This frame shows the portion of the JobSite OnLine database structure that is accessible to you from the top level down. All cabinets in the group are listed. The Client Users group shown here does not yet have any cabinets.
2. Select New cabinet from the field drop-down list and click Go.
   The New Cabinet form is displayed.
3. Enter values in the fields:

Field or Control	**Description**

Name	Enter a name for the cabinet you are adding.
Owner	Enter the name of the person who is to be responsible for the cabinet and its contents. Optional.
Description	Enter a description of the cabinet. Optional.
e-Mail	Enter an e-mail address for sending comments or instructions regarding the cabinet. Optional.

4. Click Submit.
JobSite OnLine sends a message that your request for a new cabinet is successfully queued.

5. Click OK to confirm the message.

6. Click the 

button.
JobSite OnLine displays the group to which you just added a cabinet.

7. Click the group icon to refresh the display and open the group.
JobSite OnLine displays the (empty) cabinet you just added to the group level of the JobSite OnLine database.

Note: If JobSite OnLine is busy processing prior requests, the cabinet may not be displayed immediately. Click the group icon at intervals to refresh the display.

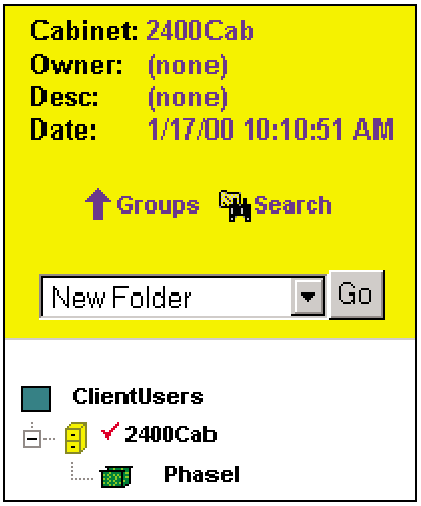
Adding a Folder to a Cabinet

With the correct security permissions, you can add folders (the middle level of database container) to JobSite OnLine cabinets.

To add a folder to a cabinet...

1. In the group display of the database frame, click the cabinet to which you want to add a folder. The cabinet tools are displayed at the top of the frame. The cabinet contents are displayed below the tools, if the cabinet has any contents. A red check mark beside the cabinet indicates that it is the active cabinet. The cabinet "shown here is empty:
2. Select New Folder from the field drop-down list and click Go.
   The New Folder form is displayed.
3. Enter values in the fields:

Field or Control	**Description**
Name	Enter a name for the folder you are adding.
Owner	Enter the name of the person who is to be responsible for the folder and its contents. Optional.
Description	Enter a description of the folder. Optional.
e-Mail	Enter an e-mail address for sending comments or instructions regarding the folder. Optional.



4. Click Submit.
   JobSite OnLine server sends a message that your request for a new folder is successfully queued.
5. Click OK to confirm the message.
6. Click the 

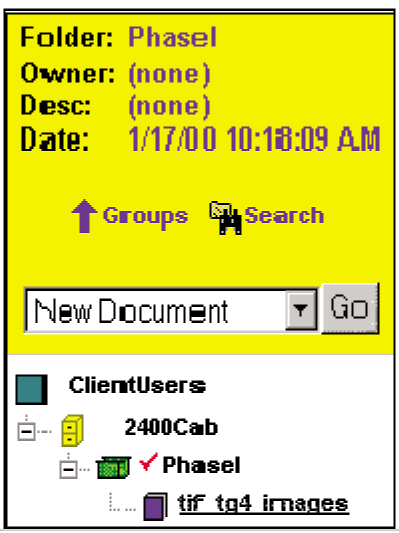
   button.
   The frame displays the cabinet to which you just added a folder.
7. Click the cabinet icon to refresh the display and open the cabinet.
   The frame displays the (empty) folder in the cabinet.

   Note: If JobSite OnLine is busy processing prior requests, the new folder may not be displayed immediately. Click the cabinet icon at intervals to refresh the display.

Adding a Document to a Folder

With the correct security permissions, you can add documents (the lowest level of database container) to JobSite OnLine folders.

To add a document to a folder...



1. In the cabinet that contains the folder you want to add a document to, select the folder.
The folder name is displayed at the top of the frame, above the folder tools. In the tree view below the tools, a red check mark beside the folder indicates that it is the active folder. The folder contents are displayed, if the folder has any contents. The folder shown here is empty:

2. Select New Document from the field drop-down list and click Go.
The New Document form is displayed.

3. Enter values in the fields:

Field or Control	Description
Name	Enter a name for the document you are adding.
Owner	Enter the name of the person who is to be responsible for the document and its contents. Optional.
Description	Enter a description of the document. Optional.
e-Mail	Enter an e-mail address for sending comments or instructions regarding the document. Optional.

4. Click Submit.
JobSite OnLine server sends a message that your request for a new document is successfully queued.

5. Click OK to confirm the message.

6. Click the 

button.
The frame displays the folder to which you just added a document.

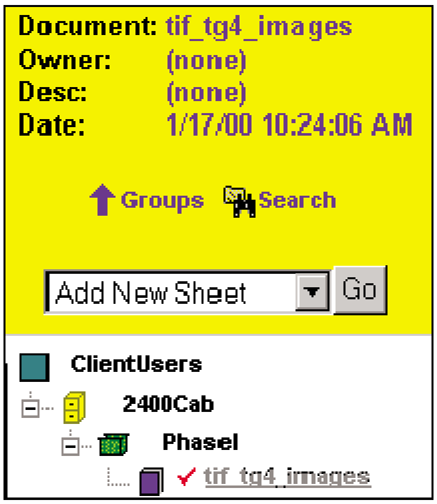
7. Click the folder icon to refresh the display and to open the folder.
The frame displays the (empty) document in the folder.

Note: If JobSite OnLine is busy processing prior requests, the document may not be displayed immediately. Click the folder icon at intervals to refresh the display.

Adding a Sheet to a Document

With the correct security permissions, if you are running in database mode, you can add sheets (either supported image file types or supported document file types) to JobSite OnLine document containers.

To add a sheet to a document...



1. In the cabinet and folder that contain the document you want to add a sheet to, select the document.
The document name is displayed at the top of the frame, above the document tools. In the tree view below the tools, a red check mark beside the document indicates that it is the active document. The document contents are displayed, if the document has any contents. The document shown here is empty:

2. Select Add New Sheet from the field drop-down list and click Go.
The Add Sheet form is displayed.

3. Enter or select values in the fields:

Field or Control	Description
File Browse	Enter the full path and name of the file you want to add, or click the Browse button to select a file path and name.
Name	Enter the name of the person adding the file. Optional.
Author	Enter the name of the person who authored the file. Optional.
Description	Enter descriptive text. Optional.

4. Click Submit.
JobSite OnLine displays a message that the sheet has been queued for adding.

5. Click the OK button.

6. Click the 

button.

The frame displays a thumbnails listing of the document contents, including the sheet you just added.

7. Click the 

button to display the tree view.

8. Click the document icon twice to close and re-open the document. The tree view shows the date and time of the addition plus any optional information you entered in Step 3.

Note: If JobSite OnLine is busy processing prior requests, or if the sheet file size is very large, the sheet may not be displayed immediately. Click the container icon at intervals to refresh the display.

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Adding and Viewing Image Revisions

With the correct security permissions, you can add revisions to images.

To add image revisions...

1. In the cabinet, folder and document that contains the sheet (image) you want to revise, click on the icon next to the sheet name.
2. A red check mark is placed next to the sheet to indicate that it is the active sheet.
3. In the field above the tree view, select New Sheet Revision and click Go.
   The New Sheet Revisions form is displayed.
4. Enter or select values in the fields:

Field or Control	**Description**
File Browse	Enter the full path and name of the file you want to add as the next revision, or click the Browse button to select a file path and name.
Name	Enter the name of the person adding the revision. Optional.
Author	Enter the name of the person who authored the revision. Optional.
Description	Enter descriptive information regarding the revision. Optional.

5. Click Submit. JobSite OnLine displays a message that the revision has been queued.
6. Click the OK button.
7. Click the 

button.

   The frame displays a thumbnail of the sheet in the document you selected in Step 1. In the display of information below the thumbnail, the number in the Rev: field is incremented by 1.

To view back revisions...

1. In the tree view, double-click the name of the document that contains the sheet (image) with the revisions you want to view.

   Thumbnail views are displayed for all sheets in the document.
2. Click the 

button next to the thumbnail of the image you want to view back revisions for. The Back Revisions frame is displayed. Click the 

button.

   JobSite OnLine displays thumbnail views of all back revisions for the image. The revision number is displayed in the Rev: field below each thumbnail. Click a thumbnail to view that revision.

For the Advanced User:

Creating a Hotspot

You can create a hotspot in a markup. You create a hotspot in a markup in order to link the markup to to a web page or to another markup. Hotspots are perfect for using in conjuction with AEC America free web page service.

To create a hotspot...

1. Select the markup and markup layer you want to work with.
2. Click the  button on the markup tools.
   JobSite OnLine displays the Hotspot Info tools.
3. Enter or select values:

Field or Control	Description
HotSpot Title	Enter the text you want displayed in the hotspot.
URL	Specifies the URL for the target web page or target image. You can manually enter a URL, such as a web page created with AEC America, or a target image, or you can click Bookmark. **Note:** If you manually enter a URL for a target image, you must enter the full path and name of the image as it is known within the JobSite OnLine directory or database structure. Prefix the path with %R% if the target is a raster image, or with %D% if the target is a DWG image. **Example:** %R%My Dir:\f15.tg4. (Try a few bookmarks first and observe the results to see how the naming convention works.)
Format	Select a visual display style (round, rectangle, underlined text, or jagged border) for the hotspot.
Bookmark	Click to automatically enter the URL of an open image in the URL field. JobSite OnLine enters the JobSite OnLine-relative URL for you.
Mark	Click to display the image view. Then click and drag in the view to enter the hotspot.
Save	Click to save the hotspot information temporarily, until you save the markup.

4. When you have entered the hotspot information, click OK. JobSite OnLine closes the Hotspot Info tools.
5. In the image view, press the left mouse button and drag to position the hotspot in the markup.
6. Click the right mouse button. JobSite OnLine displays the hotspot in the markup.
7. Save your markup changes.

   When someone clicks this hotspot in zoom or pan mode:

   - A separate browser window opens, if the hotspot link is a URL for a web page.
   - Another JobSite OnLine image opens in the image viewer, if the hotspot link is a URL for an JobSite OnLine image.

Understanding Events, Triggers and Notifications – Start with Events

Everything done on the project is an EVENT… and A TRIGGER is set to NOTIFY you every time an EVENT takes place

Example: You want to receive a notification every time a revision is posted to your project.

In this case a revision is the EVENT. You would set a TRIGGER in order to receive a NOTIFICATION when revisions are posted

Let's start with Events. You can view all events that have occurred in your group in a specified time period, or you can view object events that relate only to a specific container or sheet.

To view all events...

1. Select All Events in the field at the top of the database frame and click Go.

   The events form is displayed.

2. Set limits for the search by selecting or entering values in the fields.

3. Click the Find button.
   All events matching the search limits are listed in a found events log below the events form.

   Note: Users with administrator privileges can export the events log to a comma-delimited file for archiving. For more information, see the *JobSite OnLine Administrator Manual*.

4. To view event details for a particular event in the log, click the event link in the Type column.

To view object events for a specific container or sheet...

1. In the database frame tree view, click the icon next to the container or sheet for which you want to view events. A red check mark beside the container or sheet indicates that it is the active container or sheet.

2. Select Object Events in the field at the top of the database frame and click Go.

   The events form is displayed with the name of the selected object in red.

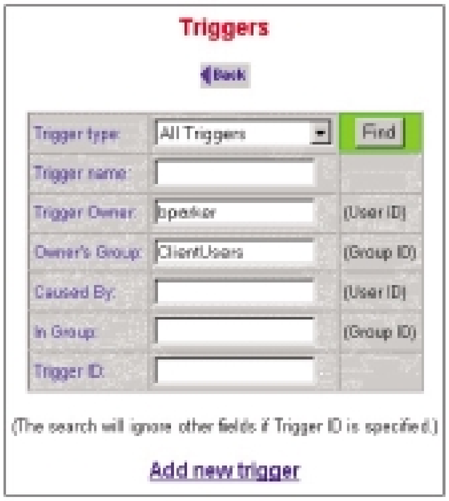
3. Set limits for the search by selecting or entering values in the fields.

4. Click the Find button. Object events matching the search limits are listed in a found events log below the events form.

5. To display event details for a particular event, click the event link in the Type column.

Viewing and Adding Triggers

You can view all existing triggers for which you are the trigger owner, and you can set new triggers for any event type. You can also set object triggers for any event type that relates only to a specific container or sheet. Once a trigger is set, you can view notifications for each occurrence of the event.

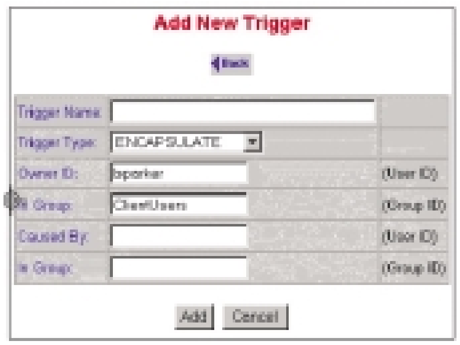


To view existing triggers...

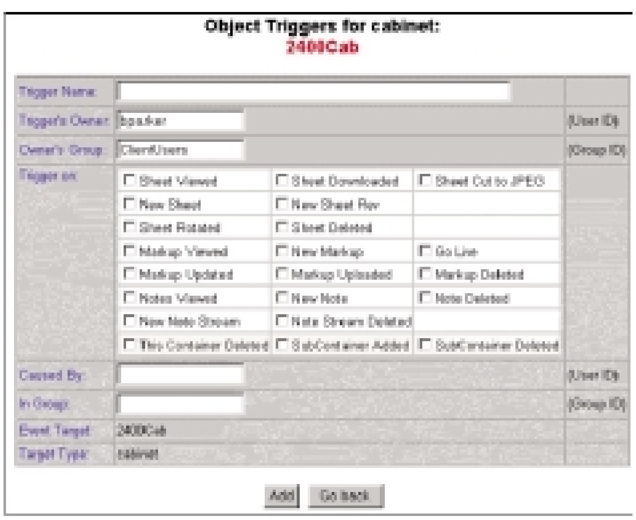
1. Select Triggers in the field at the top of the database frame and click Go.
   The form for viewing triggers is displayed.
2. Select All Triggers to search through all existing triggers, or select Object Triggers to search triggers for object events only.
3. Set additional search limits for triggers by entering or selecting values in the fields.
4. Click the Find button.
   Triggers matching the search limits are listed in a found triggers log below the events form.

To add a trigger for any event type...

1. Select Triggers in the field at the top of the database frame and click Go.
   The triggers form for viewing triggers is displayed.
2. Click the Add New Trigger link.
   The triggers form for adding non-object triggers is displayed.
3. Set trigger information by entering or selecting values in the fields.
4. Click the Add button.
   JobSite OnLine sends a message that the new trigger has been successfully added.
5. Click OK to confirm the message.



To add an object trigger for object event types...



1. In the database frame tree view, click the icon next to the container or sheet for which you want to view events.
   A red check mark beside the container or sheet indicates that it is the active container or sheet.
2. Select Object Triggers in the field at the top of the database frame and click Go.
   The triggers form for viewing triggers is displayed.
3. Click the Add New Trigger link below the form.
   The form for adding object triggers is displayed.
4. Set trigger information by entering or selecting values in the fields.
5. Click the Add button.
   JobSite OnLine sends a message that the new object trigger has been successfully added.
6. Click OK to confirm the message.

Viewing Notifications

Once a general trigger or an object trigger is set for an event type, you can view notifications sent by JobSite OnLine for each occurrence of that event type. You can view only those notifications for which you are the owner.

Note: You can take the following steps for viewing notifications at any time during a JobSite OnLine session. To view notifications automatically at logon time, see Setting Preferences for Running JobSite OnLine.

To view notifications for all triggers...

1. Select Notifications in the field at the top of the database frame and click Go.
   The form for viewing the notifications log is displayed.
2. Enter or select values in the fields to limit the search for notifications.
3. Click the Find button.
   All notifications matching the search limits are listed in a found notifications log below the events form. Notifications that have not been acknowledged are displayed in red.

To view object notifications for object triggers...

1. In the database frame tree view, click the icon next to the container or sheet for which you want to view object notifications.
   A red check mark beside the container or sheet indicates that it is the active container or sheet.
2. Select Object Notifications in the field at the top of the database frame and click Go.
   The form for viewing the notifications log is displayed.
3. Enter or select values in the fields to limit the search for object notifications.
4. Click the Find button.
   All object notifications matching the search limits are listed in a found notifications log below the events form. Notifications that have not been acknowledged are displayed in red.

Acknowledging, Downloading, and Deleting Notifications

Once a notification is sent, you can acknowledge, download, and delete some or all of the notifications for which you are the owner.

To acknowledge notifications...

1. View the notifications for all triggers or for object triggers.
   All notifications matching the search limits are listed in a found notifications log below the events form. Notifications that have not been acknowledged are displayed in red.
2. Check the Notify Date/Time column for notifications you want to acknowledge, or use the Select All button to check all items at one time.
3. Click the Acknowledge Selected button.
   JobSite OnLine sends a message that the selected notifications have been acknowledged. Acknowledged notifications are no longer displayed in red.
4. Click OK.

To download notifications...

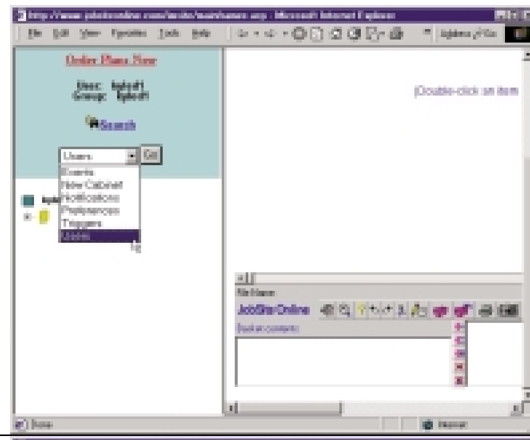
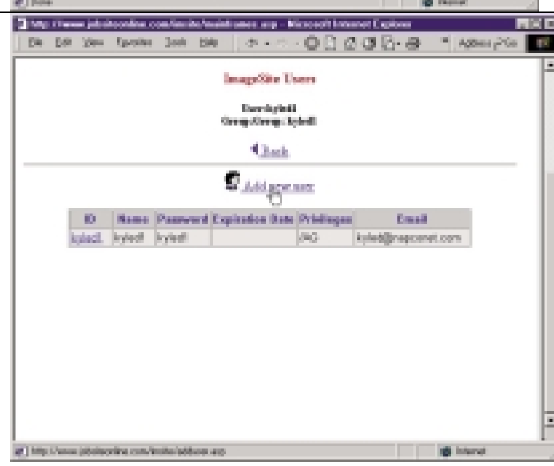
1. View the notifications for all triggers or for object triggers.
   All notifications matching the search limits are listed in a found notifications log below the events form. Notifications that have not been acknowledged are displayed in red.
2. Check the Notify Date/Time column for notifications you want to download, or use the Select All button to check all items at one time.
3. Click the Download button.
   JobSite OnLine displays a standard dialog box for downloading. When the download is complete, JobSite OnLine displays a message that the download is complete.
4. Click OK.

To delete notifications...

1. View the notifications for all triggers or for object triggers.
   All notifications matching the search limits are listed in a found notifications log below the events form. Notifications that have not been acknowledged are displayed in red.
2. Check the Notify Date/Time column for notifications you want to delete, or use the Select All button to check all items at one time.
3. Click the Delete button.
   JobSite OnLine displays a message that the selected notifications have been deleted.
4. Click OK.

Administrating JobSite OnLine:

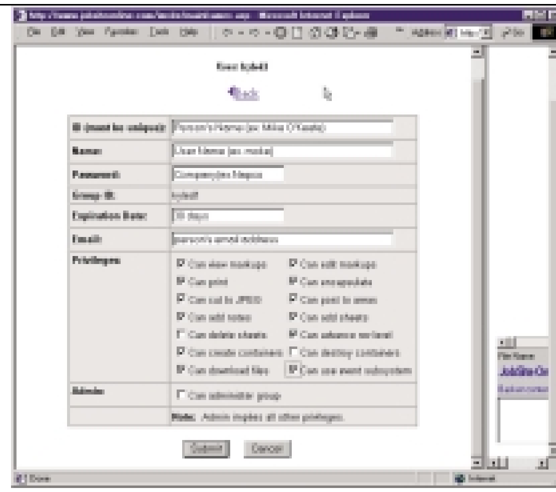
Adding new users to JobSite OnLine

1) Log onto JOBSITE ONLINE using your user name and password.	
2) From the pull down menu select users. If your not taken automatically to the user screen click the “GO” button.	
3) At the resulting page select “Add New User”.	

4) The Add user window appears.

5) Fill in the ID with the name of the person who will use JOBSITE ONLINE. Enter the user name for this person. (can be anything)

6) Fill in the password of the new user.



7) If you have reason to, you may enter an expiration date for the user. Enter the expiration date in the following format: <u>07/15/00</u>

8) Check the permission boxes as you see fit.

9) Click the submit button.

10) JOBSITE ONLINE should display "The user table has been successfully updated". Click Back and you will be returned to the users screen. If you get an error you may have to change the ID or User Name and try again.

1) To delete this user follow steps 1&2. At the user screen click on the ID of the user to delete. Below the user info box click the delete button.

2) JOBSITE ONLINE should display "The user table has been successfully updated". Click Back and you will be returned to the users screen.