

Issue Type: Usability US, Process PRS, Continuity CON, Training TRN, Technology TECH, Hardware HW, Communication COMM

Activity- 'Post it' note data gathering activity which emphasizes learning and improving using category of 'Start , Stop and Continue'

Priority: Determined by voting activity- the most vote will determine the highest priority

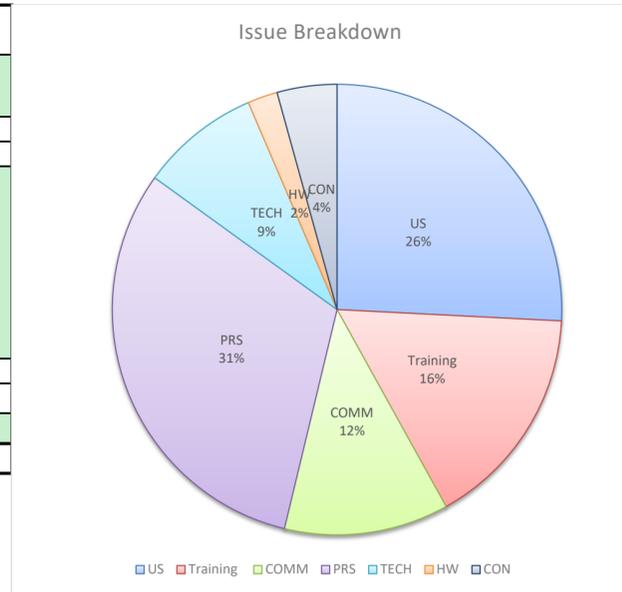
Action items based on priority:

- 1. Process** -work on SOPs, process for changemarks, Checklists, review process, and overall for what/ how users work in TRACs and PDOX. Ensure there is efficiency and not duplication of documentation, steps and work processes.
- 2. Usability**- work with vendor Avolve to prioritize list of user needs, features and improvements for future releases.
- 3. Continuity**-Continue with the pilot, and continue to evaluate the process for bringing on additional projects for Process Managed, and Commercial permits. Users felt strongly about not stopping the pilot or the eplans program.

Usability
Training
Communication
Process

Technology
Hardware
Continuity

Type	Issues	% Type	Number of votes	Priority based on votes
US	24	26%	18	2
Training	15	16%	8	6
COMM	11	12%	3	7
PRs	29	31%	25	1
TECH	8	9%	9	5
HW	2	2%	10	4
CON	4	4%	14	3
Total	93	100%	87	



Issue Type	START	Issue Type	STOP	Issue Type 2	CONTINUE	Remarks
US	Have a 'trash' draft' layer for internal comments -that is not visible to the applicant and only visible to internal users	Communication	Trying to please everyone, every work stream; changes have to be made, and we can not make everyone happy all the time.	Continuity	The pilot & the process for taking in Projects within ProjectDox	This was brought up in all 3 retrospect's
US	Have the ability to modify changemarks from the Changemarks grid	US	Email notifications for every step; confusing some emails are for actual actions, some are info only.	Continuity	The process to take in all Process Managed Projects	US
US	Combine Life Safety & Energy into one review line; if the user is in both review groups, they have to log out/ log back in as the different reviewer role for the changemarks to show in the correct dept.	PRS	Making changemarks and checklists visible to the applicant during review process (prior to review process complete).	Training	The tips, and tricks, and training info - repeating helped the users to learn the application	If the user: accepts the task, makes a changemark, runs the report, it will not appear. If the user: accepts task, makes changemark, exits eForm, runs report, then it WILL appear.
PRS	Create SOP when to use Changemarks, Checksheet, and Checklist items- when appropriate to use which one	US	Too many steps, and clicking within the application- seems over complicated	Training	The guides and the training sessions were helpful with learning	PRS
Training	Create a central repository for FAQs, tips and tricks; create a site for users to go to for self serve help and guidance	US	Too many pop up windows, user has to close, and keep track of what is opened.	Continuity	No 'gaps' in the pilot and the business process to complete reviews in ProjectDox	CON
Training	More detailed training specific to Review or the role the user is doing	Technology	Crashing issue, and instability within the BRAVA viewer; crashing when users have more than 10+ drawings open.	Continuity	Repetition, and bring on more projects in ProjectDox- practice will help us to improve and learn	Training
US	How to for Searching within the tool; how to search specific drawings when in a folder	Technology	Workarounds to complete work, need the application to be stable ; having to open documents in PDFs, or download other tools to make the application work.	PRS	Prescreen process in ProjectDox, for acceptance	Technology
US	Allow users to access the changemarks, checksheets grids outside of the review process, and outside of the task. Right now, you can only access these through the Eform within the Task, or view in a report.	Technology	Instability with the crashing did not occur in the first pilot- the version may not be stable.	Training	Drop in training and working session for reviewers	Hardware
US	Better usability for users to scroll through the plan sets/ drawings	Technology	Issue with the Active X and IE	Training	Working Sessions for Reviewers - nice job!	Communication
PRS	Organization of plans and drawing sets within sub directories; right now all drawings for all review types are just in one big drawing folder, making is difficult for users to find their specific drawing.	US	Too many alerts and notifications.	PRS	Great support and help from the PDOX team !	COM

PRS	Require Applicant to provide a table of contents for all projects.	US	Auto Zoom in the viewer- issue with the drawing and changemarks	Training	Accessing the needs to reviewers and users for hardware and equipment	
PRS	Process for what we are doing in TRACS, and what we are doing in PDOX; right now some of the work is being duplicated , i.e. reviews, to do list, documentation, checklists	US	Zoom in on comments is vague- hard to tell which comments go with what changemarks	PRS	Using TRACs for to do list and other functionality	
PRS	Process for how to communicate between reviews, items that are outside of the review, i.e. info only items, for reviewers to other reviewers	Technology	Inability to see the thumbnail drawing in the reports and the grid	Communication	User group training and feedback for review groups	
PRS	Need a process for items that are marked for condition of approval (COA) - not redlines need to be outside of ProjectDox (example dedication right of way)			Training	Frequent trainings	
PRS	Make provisions within the software for ' cite- it- write it'...			Communication	Open Houses!	
PRS	Showing how the applicant sees the changemarks, and checklists; reviewers are looking at the plans, changemarks, applicants looking at a list or report			Communication	Working with and listening to us!	
US	Ability to easily change the text, font, color, highlight, etc., in changemarks and checklists			Communication	Informing the staff of decisions points and ask for input	
Communication	Engaging Permitting service team, early and often, as they will be heavily impacted.			Training	Training docs, tips and tricks	
PRS	Preparing for the next phase and the next upgrade for the application.			PRS	Being the best POPS team to work with !	:)
Communication	Use Director and leadership level pressure to move other Bureaus into working with this process.			Hardware	Accessing the needs to reviewers and users for hardware and equipment	:)
PRS	Have a way for applicants to assign ancillary, or contractors (sub reviews) within the process; right now, the Process manager or the lead within the Dept must reassign or assign the additional reviewer			Communication	Working with other stakeholders and user groups (CAC and DRAC)	
Hardware	Collection of specific hardware and computer specifications for system to run properly			Communication	Working with other jurisdictions for best practices	
PRS	Create an SOP for Special Inspection form			US	Excel option for reports	Are we uploading form in both TRACS and PDOX?
Technology	Screen settings so the drawings and viewer do not need readjusting			US	Ability to filter by Dept.	
PRS	Clarification on what is communicated through PDOX versus TRACs					
PRS	Screening process before intake of project to make sure LUS reviewed and approved					
PRS	Require Applicant to provide graphic scale for all projects.					This is REQUIRED- we need to reject at Prescreen if these are not included
Training	Training specifically for the BRAVA viewer and measurement tools					

Training	Create a How To checklist document with steps					
Communication	Provide feedback to reviewers for the pilot - what they did right/ wrong					
US	SPELLCHECK!					Spellcheck is available with Chrome, but not IE
PRS	Ability to assign or allow engineer or user other than the applicant to respond directly to the comments					Example: structural engineer to respond and work directly with other engineer
Technology	Ability for users to create their own checklist items					Sys admins had to create additional items
US	Need Search within drawings					You can search but it does not work well
PRS	Ability to access project and drawings if not assigned to project					You can do this, we would just create a 'View' only group
PRS	Ability for user to delete and remove documents if needed					This is for SYS ADMIN or process mars.
PRS	Testing PDOX with other permit types					
PRS	Define what needs to be in TRACs, online portal, Portland Maps, and PDOX					
PRS	SOP for Def Submittal and Revisions					We have integration ready and tested for TRACS REV and DEF folder types with PDOX
PRS	Process for Addressing approval for Review process begins					
US	Better way to facilitate independent reviews					
US	Ability to add text without adding to a changemarks or a checklist					Addressing was the example
PRS	Allow end users and permitting staff to communicate via PDOX during review process					
PRS	Versioning naming convention to be consistent					
Training	Keep training sessions closer to the review times for users					
Communication	Prepare and plan for future roll out of eplans and communicate to staff					
Training	Remote training, online training					
Training	Expand training to public					
US	Need larger thumbnails					
US	Custom filter for the folders needs to work!					Currently this crashes the system
US	Comment numbers in the grid and reports (REF#)					
PRS	Expand access to Sub Contractors					We can do this, allowing the view access or create new group
Technology	Need a way to 'batch' print with the drawings and the comments					This may be an option, but need to check with Avolve on how to set this up in the system
US	Hover feature over the comments in the changemarks does not work well					
Training	Easy access to Contact info					This is available in a report - showed the users how to access
US	Better way allow applicants and reviewer to comment and respond to the corrections and changemarks					The grid is not user friendly, and is difficult to navigate in and to know which comments or how to respond to comments