ePLAN Review
City of Austin

Welcome to

ePlan Review Applicant Handbook

City of Austin
Development Services Department

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Introduction

The City of Austin's goal is to be the Best Managed City in the US. To that end, the Development Services Department has partnered with several vendors to offer electronic plan application, submittal, credit card payments, and electronic plan review (ePlan Review).

WHAT IS ePLAN REVIEW?

ePlan Review is a web-based electronic plan and document workflow solution that allows citizens and City staff to initiate and complete the development plan submission, payment, review, and approval process online as opposed to a manual, paper-based process.

ePlan Review creates online, virtual project workspaces which enable people from many different locations and disciplines to share the same information at the same time, facilitating communication and increasing productivity.

Here's what ePlan Review does to enable online project information management:

- All the shared project information (documents, drawings, annotations, and project email) is centralized in one location so it becomes visible, accessible and usable by everyone who has been invited to the project.
- The user friendly interface makes it easy for users at all technical skill levels to leverage the "power tools" in ePlan Review.
- ePlan Review enables multiple-users access to the same information at the same time, enhancing team collaboration.
- Automation features make sure that when actions take place in the workspace, those who need the updated information can be informed immediately.
- Tools for interacting with information, such as view and markups, online discussions, and group email, make interacting with information timely, meaningful and productive for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, emails, forms, annotations and markups, plus much more.

ePlan Review's web-enabled collaboration empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, paper means.

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HOW DOES ePLAN REVIEW WORK?

When an applicant (architect, engineer, homeowner, business owner or agent) submits an application requiring drawings, ePlan will invite the applicant or agent by email to upload the electronic drawings and all relevant certificates and documents. City review staff will then have simultaneous access to review the plans and note any corrections directly on the plans to ensure absolute clarity. The applicant will be notified when corrections are needed and the updated plans can be electronically resubmitted to the City. When the plans are approved, and all fees are paid, the applicant can download the final approved stamped plans. For security, while a project is in development only those with an invitation to the project will be able to access information about it. Once a project is complete, relevant information will be available to the public through Austin Build + Connect. See below for the workflow process. (Figure 1)

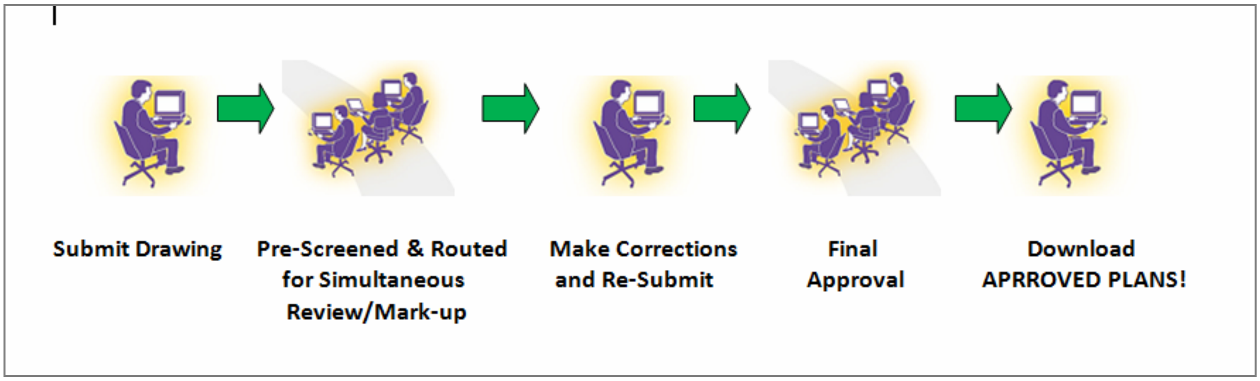

Figure 1 - Workflow

1. Customer submits paper application in person to intake staff member.
2. Applicant prepares PC to use the ePlan program (One time occurrence per PC for IE plug-ins).
3. The intake staff member generates a project in ePlan.
4. ePlan sends "Invitation" email to customer containing:
   - Project Name (70 character limit)
   - User Name/ID (One time occurrence. This is the applicant's email address)
   - Temporary Password (Applicant must reset password upon initial log in)
5. Applicant logs into ePlan, opens respective project, accepts task, uploads documents, and verifies task completion.
6. Applicant completes "Applicant Upload" task triggering Intake quality check.
7. Intake performs prescreen quality check and if it passes, forwards to Plan Reviewers.
8. Plans Reviewers perform plan review, and determine approval or rejection.

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9. Applicant receives email notice with project status and instructions:

    - If corrections are needed - Upload corrected documents to send the project back for re-review, or…

    - If fees are due, login to Austin Build + Connect to pay via credit card or echeck.

10. Case Manager electronically stamps final plan set and uploads plans into Approved folder in ePlan.

11. ePlan emails customer notice to download approved final plans.

12. Applicant places 1 set of documents and plans containing ePlan approval stamp on job site. (Inspectors will also have access to the approved ePlans on their tablets.)

WHAT TECHNOLOGY DO I NEED TO USE ePLAN REVIEW?

As a web-based system, ePlan requires Internet Explorer Version 10 or greater running on a Windows operating system. Active X and Silverlight will also be needed and can be downloaded from the ePlan Review login page. The Reviewer's change marks and thumbnails in the project can only be viewed when using IE. Other browsers can be used for ePlan, just not for viewing the change marks.

If you are installing Silverlight on a Macintosh system, the following requirements must be met:

- Silverlight versions after 1.0 run only on Intel processor based Macintosh (not PCC processor)
- Minimum Intel Core Due 1.83-gigahertz (GHz) or higher processor with 512-MB of RAM

Silverlight 5 requires Mac OS 10.5.7+ and Firefox 3.6+ or Safari 4+; Silverlight 4 requires Mac OS 10.4.11+ and Firefox3+ or Safari 3+

HOW DO I PAY FOR REVIEW FEES?

All fees for permits, reviews, and inspections will be paid through the Austin Build + Connect site. Currently, payments can be made by credit card or electronic check. Members should set up an account to keep track of permits, contractors, inspections, and fees.

See the Austin Build + Connect Web Help Manual for instructions.

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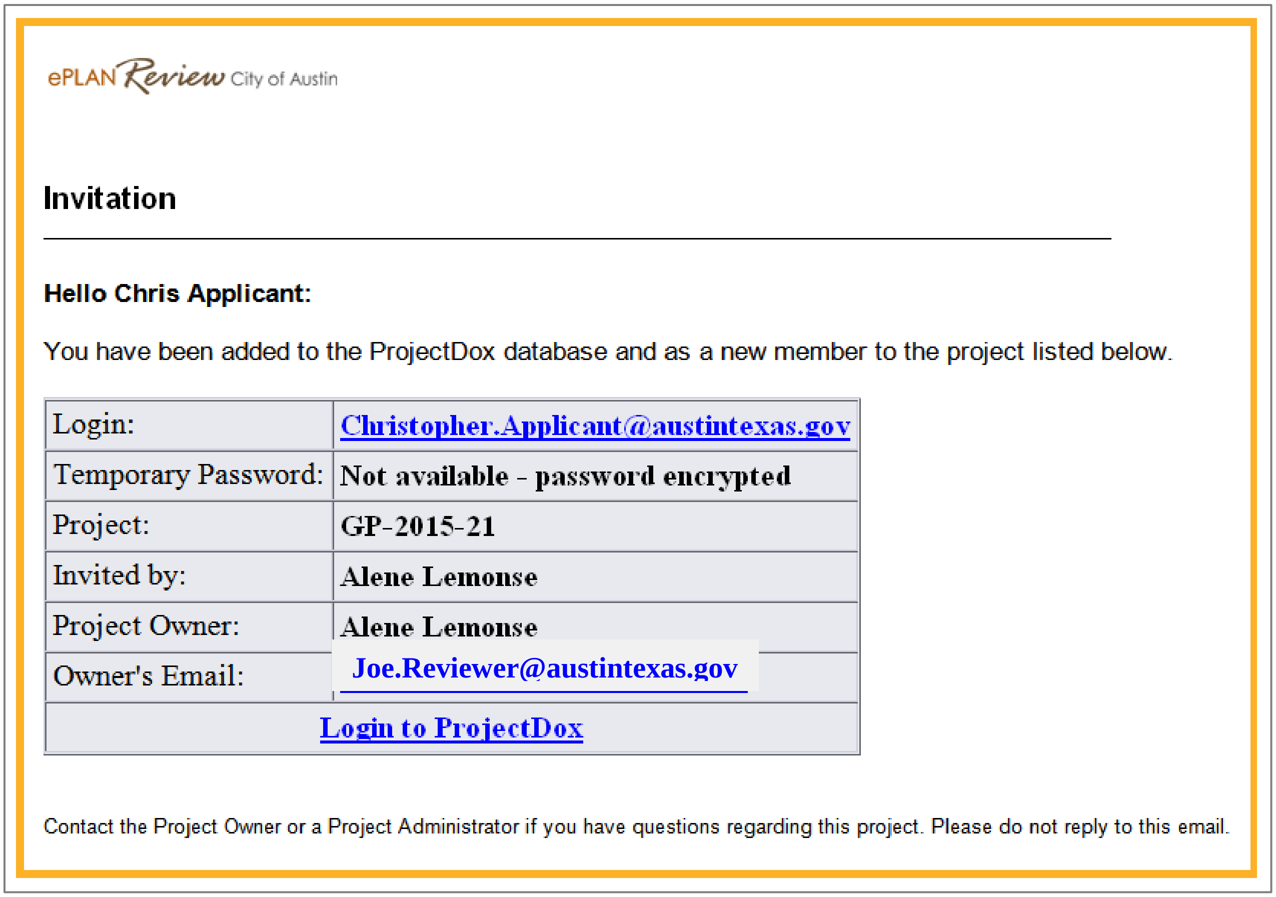
Logging In for the First Time

The first time you are invited to join a project in ePlan Review, you will receive an email notification, similar to the one below (Figure 2). This email will contain a temporary password and a link to ePlan Review.



ePLAN Review City of Austin

Invitation

Hello Chris Applicant:

You have been added to the ProjectDox database and as a new member to the project listed below.

Login:	Christopher.Applicant@austintexas.gov
Temporary Password:	**Not available - password encrypted**
Project:	**GP-2015-21**
Invited by:	**Alene Lemonse**
Project Owner:	**Alene Lemonse**
Owner's Email:	Joe.Reviewer@austintexas.gov
Login to ProjectDox	

Contact the Project Owner or a Project Administrator if you have questions regarding this project. Please do not reply to this email.

Figure 2 – Email Invitation

NOTES:

ePlan Review uses pop-up windows (browser windows with no toolbars). If you login but no ePlan Review window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to allow pop-ups for the ePlan Review site (blockers can be configured to allow pop-ups for specified sites).
The login page has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ePlan Review ActiveX controls. Click the Install ePlan Review Components link to run the installation. Alternatively, your network administrator or IT department may use other methods to install the components.
The login page also typically has a link for adding a desktop shortcut to the ePlan Review site, and a link for adding it to your favorites.

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1. Click on the link that says “**Login to ePlan Review.**” This will automatically open a web browser and take you directly to the login screen. *You can also open a web browser and type in your ePlan Review URL.*
   A login screen will appear, similar to the picture below. (Figure 3)

2. Type or paste the temporary password into the Password Field and click “**Login**.” The password is case sensitive and must be entered exactly as it was provided to you in the email.

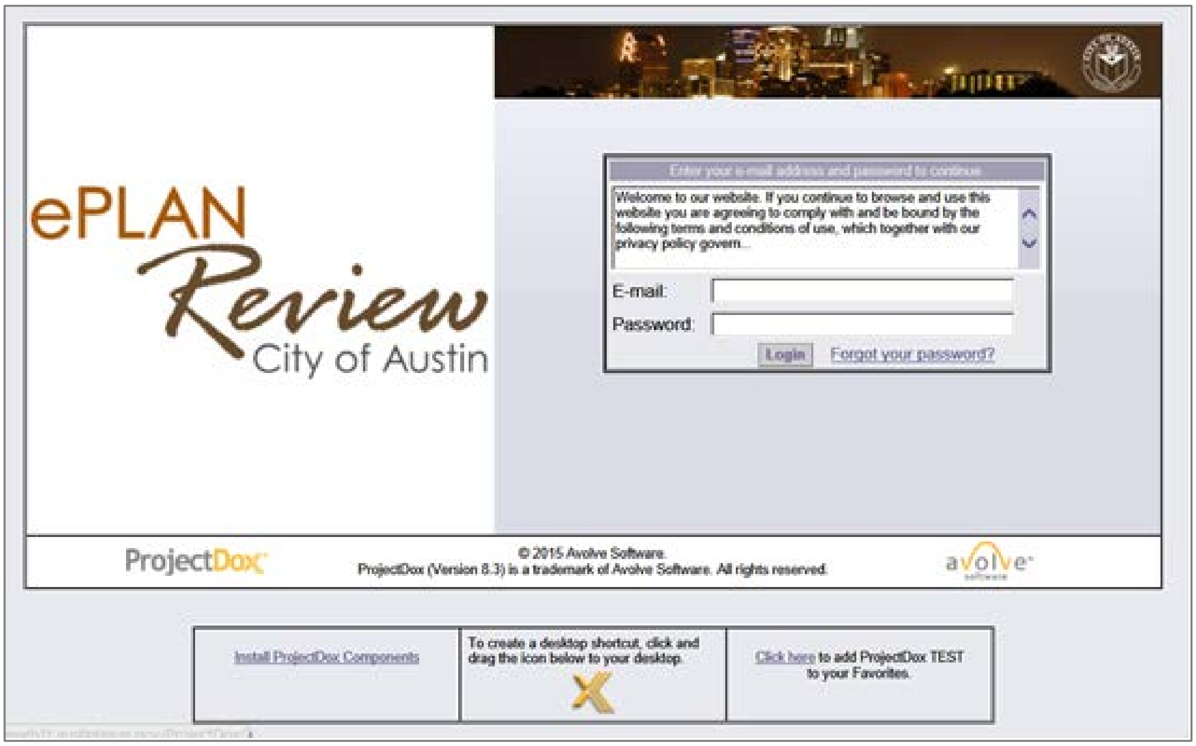

Figure 3 - Login Screen

3. Once you successfully log in, you will be taken to your User Profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself.

4. Fill in all of the required fields (those marked with a red asterisk * and highlighted in yellow - Figure 4), and click “**Save.**” You can return to this screen at any time by clicking the “**Profile**” button on the Main Tool Bar.

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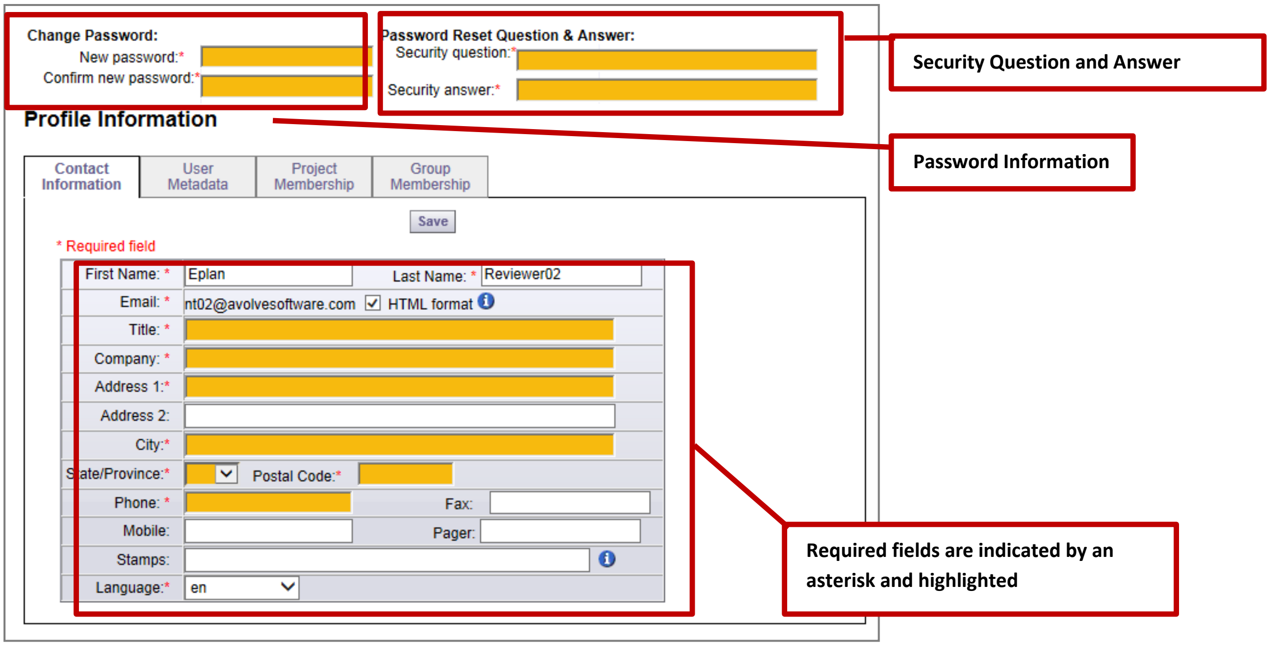

Figure 4 - Completing User Profile

5. After saving your profile information, you will be taken to the Home Page (Figure 5), where your list of Active Projects will display. When tasks have been assigned they will also display on home page in the Active Task List. Once logged in, applicants will have the ability to invite others to their project and reassign tasks to others in their work group.

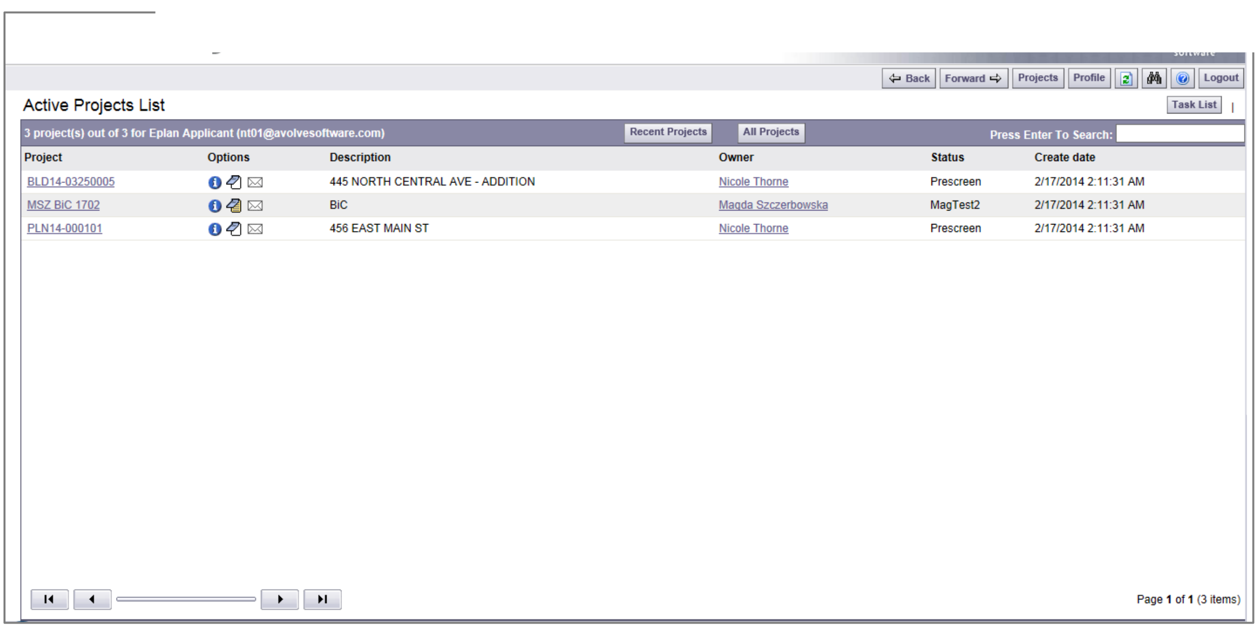

Figure 5 - Home Page

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ACCEPT TASKS

After you log in you will see your home page with your active projects listed at the top (Figure 6). The bottom part of the screen will be your Active Task List. Click on the task name to accept the task. Click on the Project Name to enter the project and upload your updates.

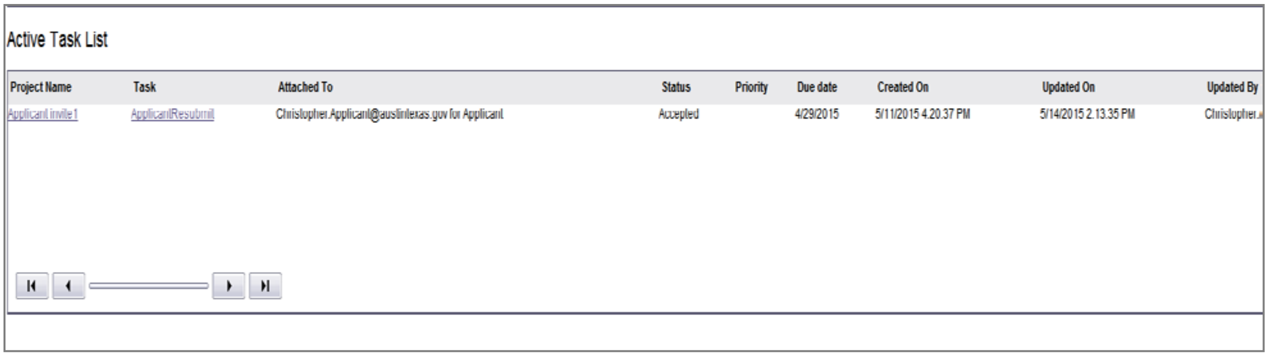

Figure 6 - Active Task List

TASK e-FORM

Once you accept your task the following e-form will open (Figure 7 & Figure 8). On this e-form will be instructions to assist you in completing the task. You can invite others to your project and reassign this task to someone else in your group. Lastly, you can see what the reviewers have commented on each file in your project.

Figure 7 - Task e-Form

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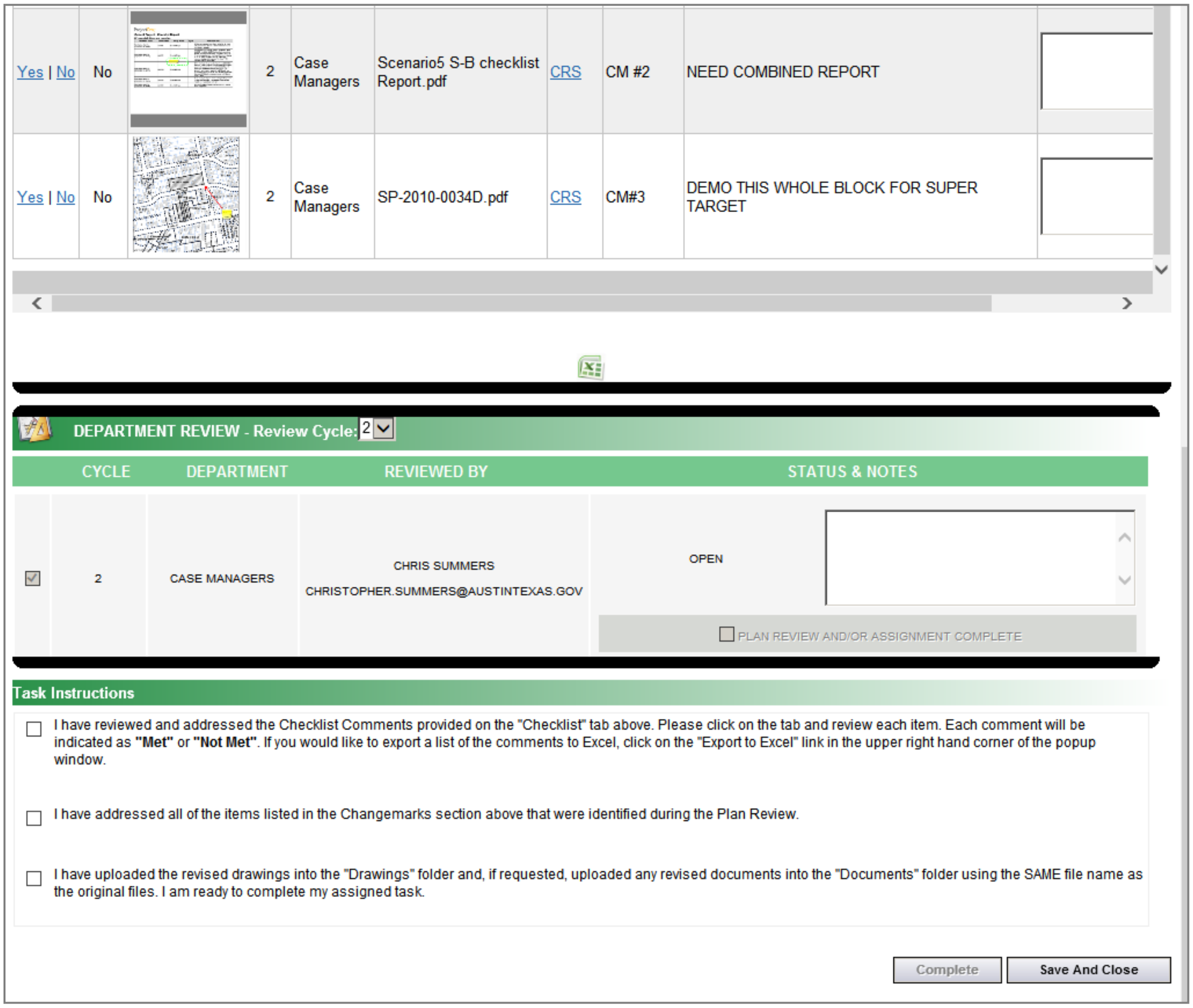

Figure 8 - Task e-form

You can filter comments by review cycle and see a thumbnail of the file and the change marks along with comments the reviewer made. This thumbnail is a hyperlink which will take you directly to the file and zoom into the area of the change mark. At the bottom are three checkboxes you must select in order to complete the task.

LOGGING IN AFTER THE FIRST TIME

When logging into ePlan Review after your first time, you will use the password that you entered in your User Profile page. After logging in, you will be taken to your home page. From this page, you can view all of the projects you have been invited to and all tasks for you to complete.

FORGOT YOUR PASSWORD?

If you ever forget your password, click on the “**Forgot Your Password?**” link next to the “**Login**” button. The use of the “**Forgot Your Password?**” link requires that you have logged in at least once and no longer have a temporary password associated to your account.

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Navigation Basics

HOME PAGE NAVIGATION

Main Tool Bar – This group of buttons provides your primary navigation functions

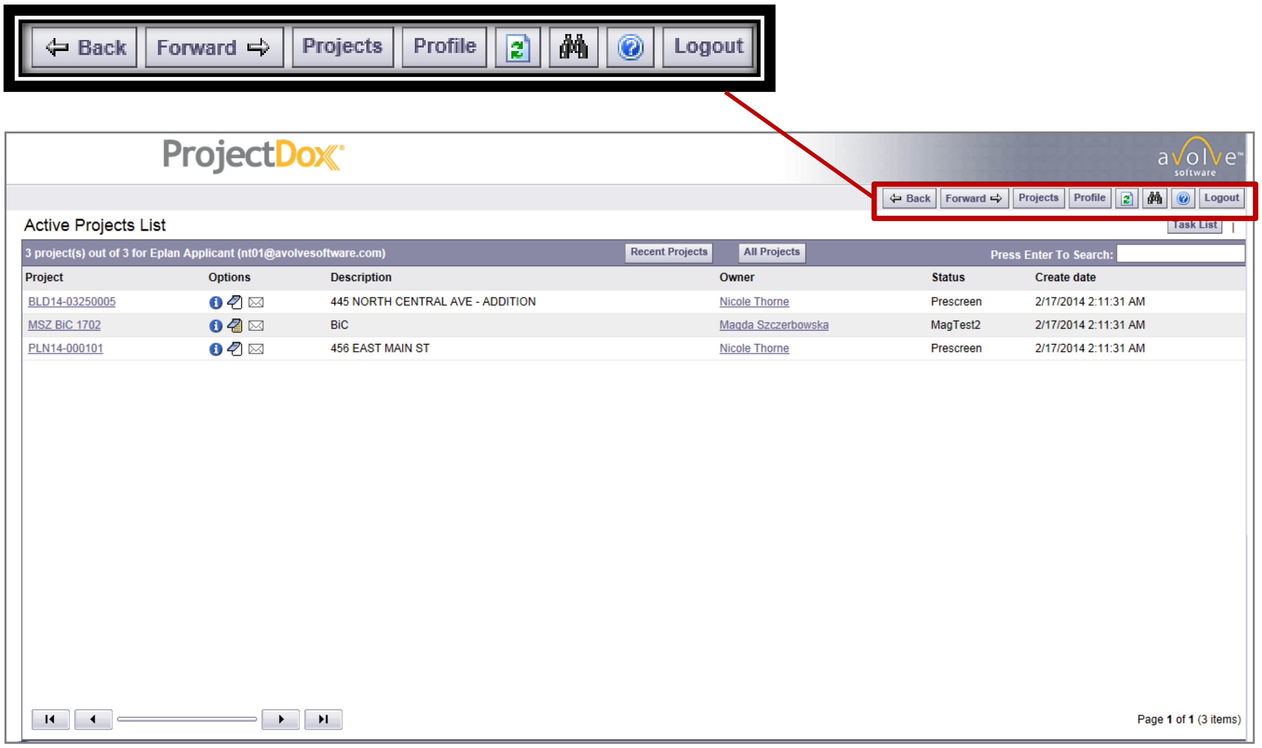


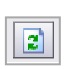
Figure 9 - Navigation Buttons

- "**Back**" and "**Forward**"  – function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed.

- "**Projects**"  – will take you back to the home page where your list of active projects and tasks are displayed.

- "**Site Wide Reports Tab**" – allows you to generate several types of reports for a project. See the "Run Reports" section for more information about reports.

- "**Profile**"  – will take you to your User Profile, where you can edit your personal information or change your password.

- "**Reload**"  – will refresh the current page you are on.

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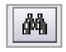
- “**Search**”  – allows you to search for a project based on the key information entered into the Project Info Page. It also allows you to search for keywords within a project.
- “**Help**”  – takes you to the ePlan Review Help site. Use the index or search functions to find instructions on specific aspects of ePlan Review.
- “**Logout**” 

– logs you out of ePlan Review.

PROJECT NAVIGATION

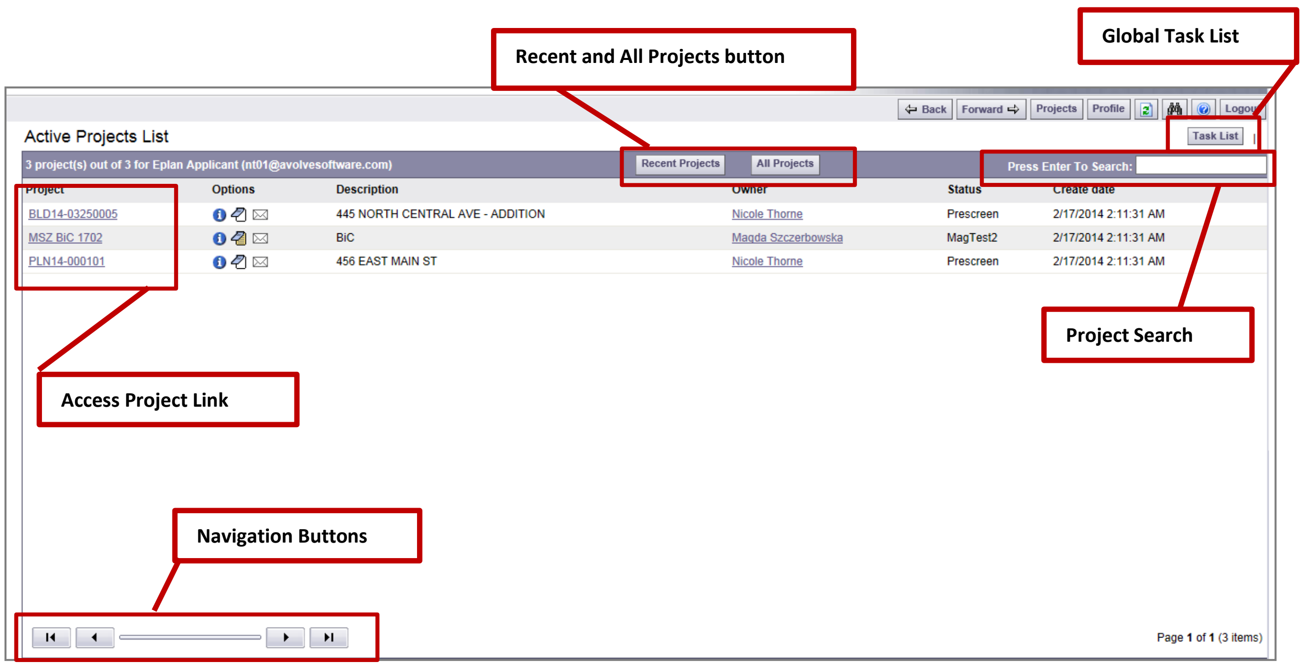


Figure 10 - Project Navigation

- “**Project Search Field**” 

– is a partial word search that will provide results that contain the words entered into the Search Field for any of the columns listed: Project, Description, Owner, and Status. For example, a search for “14” with the above projects would result in two of three projects displaying because these projects have a “14” contained in the Project field.
- “**Project Sorting Buttons**” 

– After conducting a project search, you can view all of your projects again by clicking on the “**All Projects**” button. The “**Recent Projects**” button will show the 15 most recently accessed projects with the most recently accessed always displaying at the top.

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- "**Active Projects List**" – The Active Project List provides you with basic information about every project to which you are assigned. You can sort your projects by name (or number), description, owner, or status by clicking the header of each of the columns. You can access a project by clicking on the project link which will direct you to the project's main page. The below table (Figure 11) displays the sort capabilities:

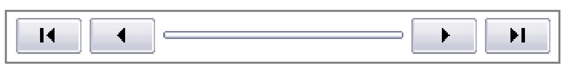
Column	Sort by?	Function	Description
Project	Yes	Link	Project name (or number)
Options	No	Button Group	Button Group
Description	Yes	Information	Project Description
Owner	Yes	Link	Project Owner
Status	Yes	Information	Project Status
Create Date	Yes	Information	Project Created Date

Figure 11 - Sort Capabilities

Note: Hovering over a Project Name displays the date when the project was created.

- "**Task List**" 

– shows any tasks requiring action from you for all projects in a separate page.

- "**Navigation Buttons**"  – The Project List and the Task List are set to display a limited number of entries at a time. You can use these buttons to move to the first, previous, next, or last page.

PROJECT OPTIONS TOOLBAR

Each project has the Project Options Toolbar displaying the project related features. (Figure 12)

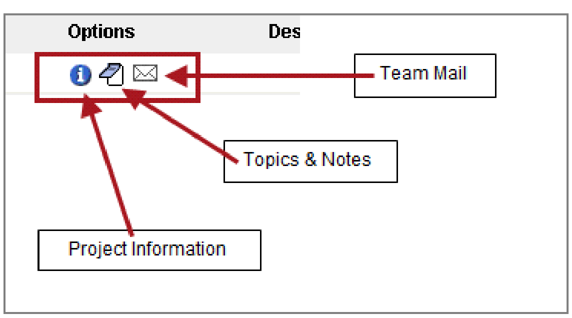


Figure 12 - Option Buttons

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- "**Project Info Tab**" – displays basic project information.
- "**Topic and Notes**" - allows for electronic conversations to be recorded between members of the project. Any member of the project has access to this feature at the project level.
- "**Team Mail**" - allows for an email to be composed and sent from the project to project members. This is saved as part of the project.

Project Information Page

The Project Information Page (Figure 13) lists items relative to the project in a read-only format for non-administrator use:

- Project Name and Description
- Map Config Name: Displays GIS Map associated to the project (The GIS module will be implemented soon)
- Location and Contact Information
- Project Status: Status of the overall project as determined by the administrator or workflow
- Status Info: Additional field available for entry by an administrator
- Archive: Selection of this checkbox by an administrator will remove the project from the user's active projects list
- Alert: Will display project alerts and messages
- Project Start/End: Project Start is the date the project was created (this is not editable)
- Pass-through Extensions: List of file types that can be uploaded into the project without being published by ePlan Review. These files will display in the projects with the icon and require you to have the software on their computer to be able to view the file. Some common entries are: .bmp, .png, .tiff, .jpg
- Versioning Enabled: Whether versioning has been enabled for this project (See section Versioning and File History, for more information)
- Email Template Path: Identifies the location of project specific email templates in the server configuration to be used by the project
- GIStream Incoming Folder [Not yet implemented]: Upload Ariel maps from the GIS module to this folder
- Project Member List: Displays the list of project members, their contact information, and login status
- Show Thumbnails: Whether file thumbnails display in the project

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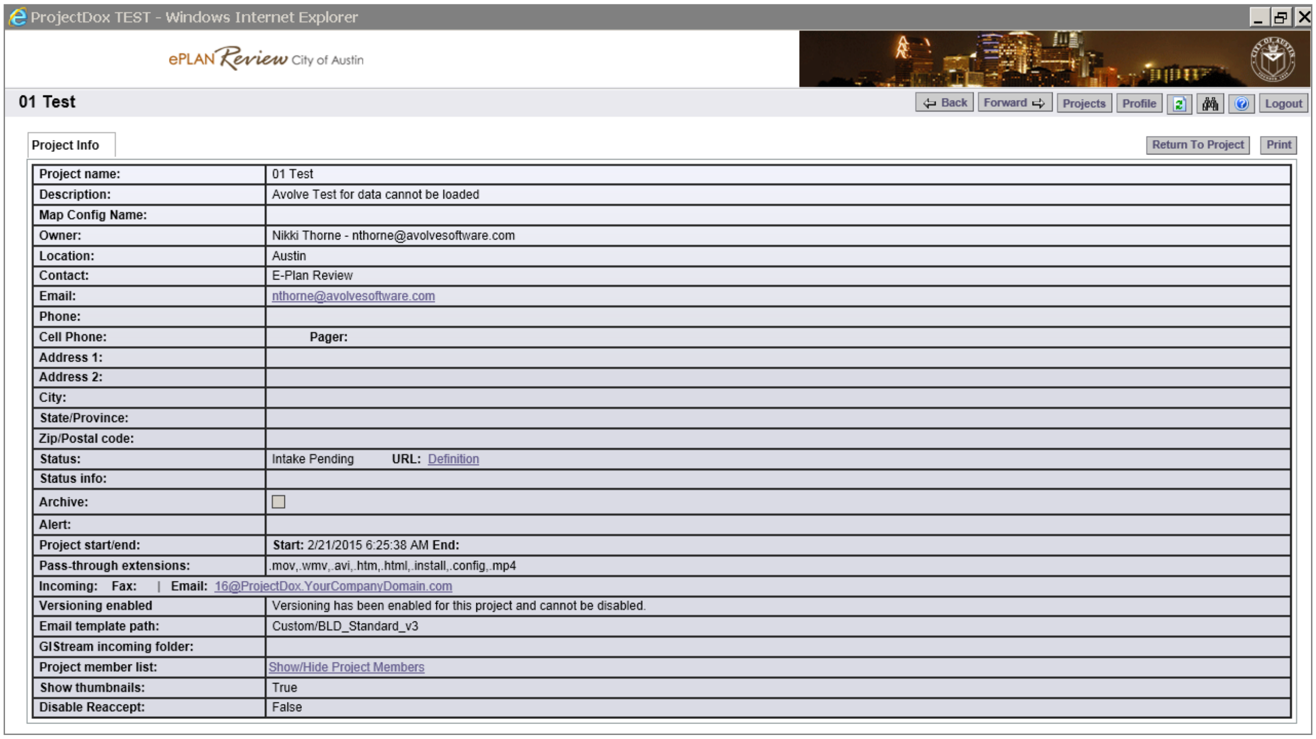

Figure 13 - Project Information Page

SHOW-HIDE MEMBER LIST

Select the link once to display a hierarchical list of group and non-group members for the project, click again to hide it. (Figure 14)

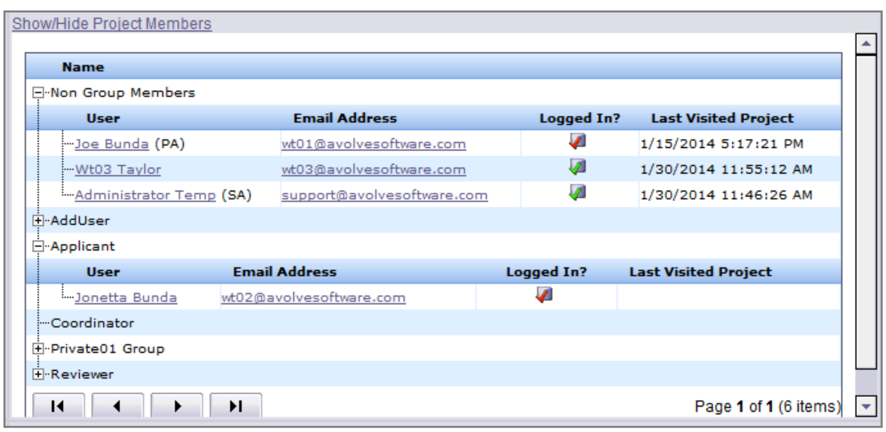

Figure 14 - Project Members Listing

The interface behaves in standard Windows fashion: clicking on a **+** sign will expand an item to view its contents, clicking a **–** sign will collapse it.

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You can navigate in the display to see users (as provided by your permissions) and information about them:

- User's name
- Email address
- Group membership
- Indication of SA (System Administrator) or PA (Project Administrator)
- Indication if a user is logged in to ePlan Review

   Green checkmark = logged in

   Red Checkmark = not logged in

- Date and time of a project member's last visit to the project

Project View

ENTERING A PROJECT

On the Active Projects List on the home page, click the link under the "**Project**" column to access the project view.

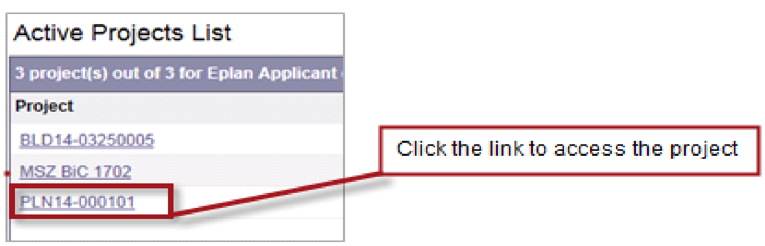

Figure 15 - Selecting a Project

The left side of the screen displays the folder structure of the project. The right side of the page contains an abbreviated version of project information and the **Project Feature Tool** bar in the upper right. (Figure 16)

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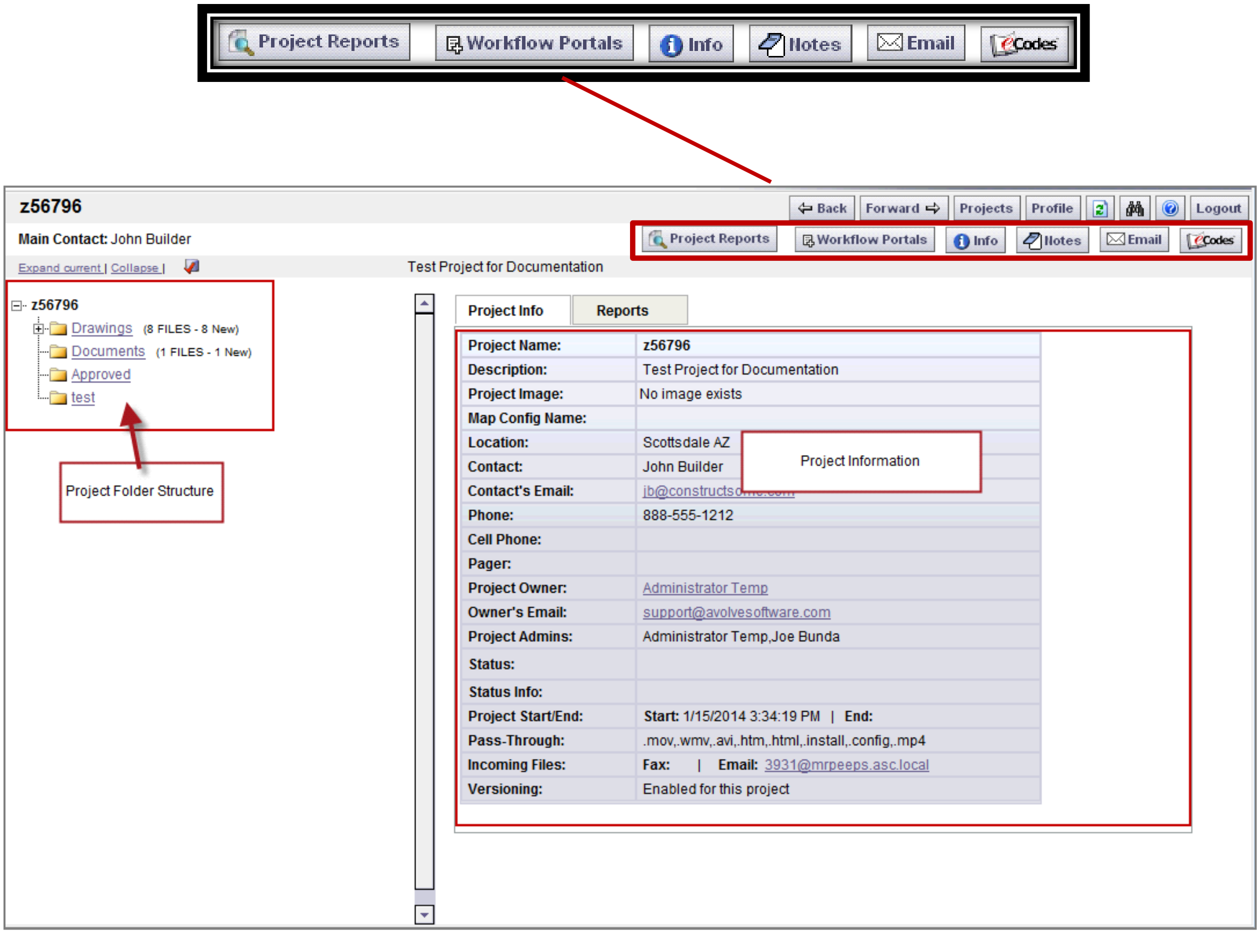

Figure 16 - Project Page

PROJECT FOLDERS

Navigation in the folder structure follows conventions typical in Windows: click a "**+**" sign to view a folder's subfolder; click a "**–**" sign to collapse the view back to a single folder. Note that the folder names are actually links: click on a folder name to view its contents. You can also expand or collapse the view by clicking on the links above the folder structure.

NOTES:
About "Page Loading." Page loading means that not all the contents of a list may load at first opening – this results in faster loading of a screen. An example of this behavior can be seen when viewing the list of files in a folder. With page loading, there may appear to be 20 files in the folder. However, when you scroll to the bottom and keep the mouse button depressed, another batch of 20 files will appear. If you continue this process, eventually all the files will be loaded. If your site is set for page loading, and you wish to select all the files in a folder, you will need to follow the above process until no more files load. Then you can click the checkbox to select all files in the folder.

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If a folder contains files, next to the folder name will be displayed a count of the files and a count of new files. (Figure 17)

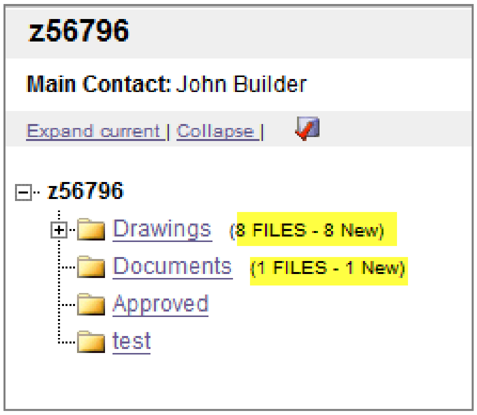

Figure 17 - File Counts

For example, the Drawings folder in the figure above contains 8 files, and all 8 of them are "New." A file is considered "New" for three days after it arrives in the folder. Once a file's age in the folder passes three days, it will be part of the "FILES" count, and drops out of the "New" count.

VIEW PROJECT FILES

To view project files, enter the project folder by clicking the folder name. The left side of the window will display the files within the folder. Use the expand and collapse icons **+/-** to display just the filename or the thumbnail for the folder or choose the **+/-** icons at the top of each file to collapse each file individually.

By default, each file will be listed with a thumbnail, file name, upload date and time, file size, author (who uploaded the file), and relevant file action icons based on your permissions. To return to the folder view, click the "**View Folders**" button.

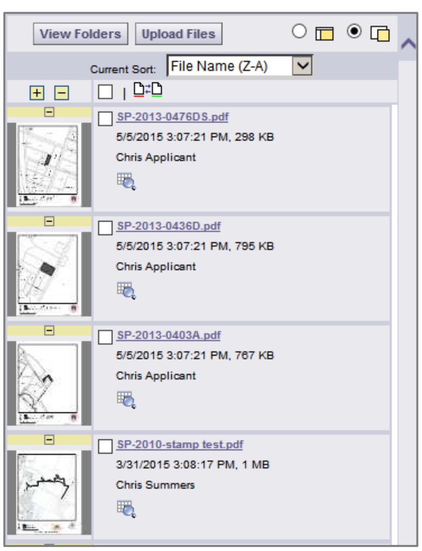

Figure 18 - Folder Contents

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> Windows provides several methods for navigating between open windows. Depending on the version of the operating system you are using, these include: hovering over icons in the taskbar, or using keyboard shortcuts such as Alt-tab or Windows-tab.

To see a larger version of the thumbnail without opening the file, hover the cursor over the file, as shown below. (Figure 19)

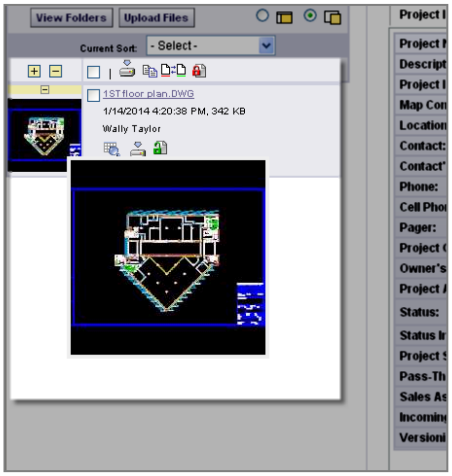

Figure 19 - Large Thumbnail Displayed

To view a large rendition of the file, left click on the file name or thumbnail image. The Viewer will launch and display the selected file. There are two modes for displaying the ePlan Review Viewer window:

- Set ePlan Review Viewer in right-side panel 
- Set ePlan Review Viewer in separate window 

By default, the Viewer displays in the right panel of the ePlan Review window. (Figure 20)

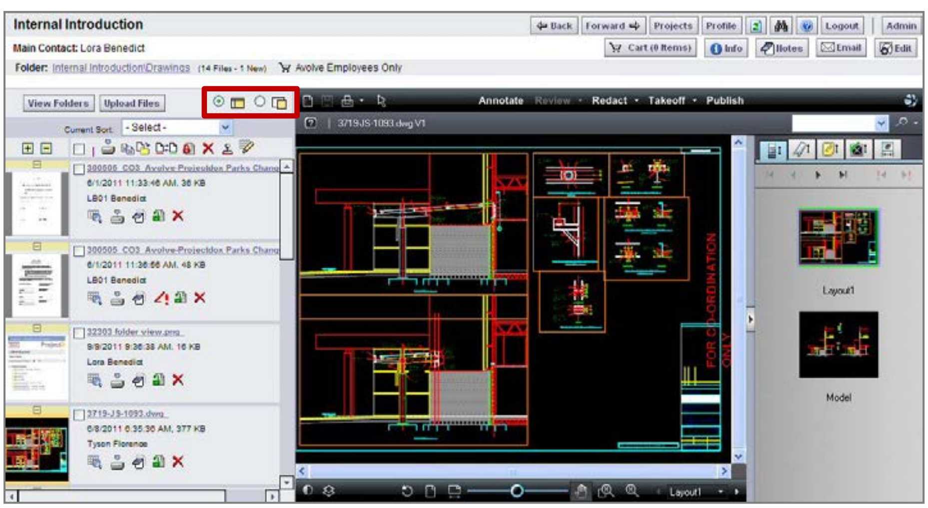

Figure 20 - Viewer Display in Right Panel

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To launch the Viewer in a separate browser window, click the radio button above the file list. You can switch it back at any time by clicking the radio button.

- Using the Viewer in separate window mode allows you to have multiple Viewer windows open simultaneously.
- Separate window mode can take advantage of multiple monitors: Viewer and ePlan Review windows can be viewed and moved independently between monitors.

Uploading Files

You can upload files to any project for which you have Upload privileges by clicking Upload Files:

Figure 21 - Upload Files Button

The types of files that are allowed to be uploaded to the project are determined by a System Administrator. If a file type is selected that is not allowed for the site you will either receive a message indicating the file type is not allowed, or when browsing to select the file will not find it in the display of file types to be added to ePlan Review. There are two types of controls that allow files to be uploaded:

- ePlan Review Standard Upload Control – single file upload
- ePlan Review Silverlight Upload – allows for batch file upload (highly recommended)

The appearance of the resulting screen will show whether Silverlight is installed and active. Figure 22 shows the *Upload* dialogs presented by the ePlan Review and Silverlight uploaders.

> TIP Files can be consolidated into .Zip files to save on upload time to the ProjectDox application. When the ZIP file is uploaded the ProjectDox application will unzip the file and process the files into the folder as individual single page or multi-page files. Zip files cannot be retained in folders within the ProjectDox application.

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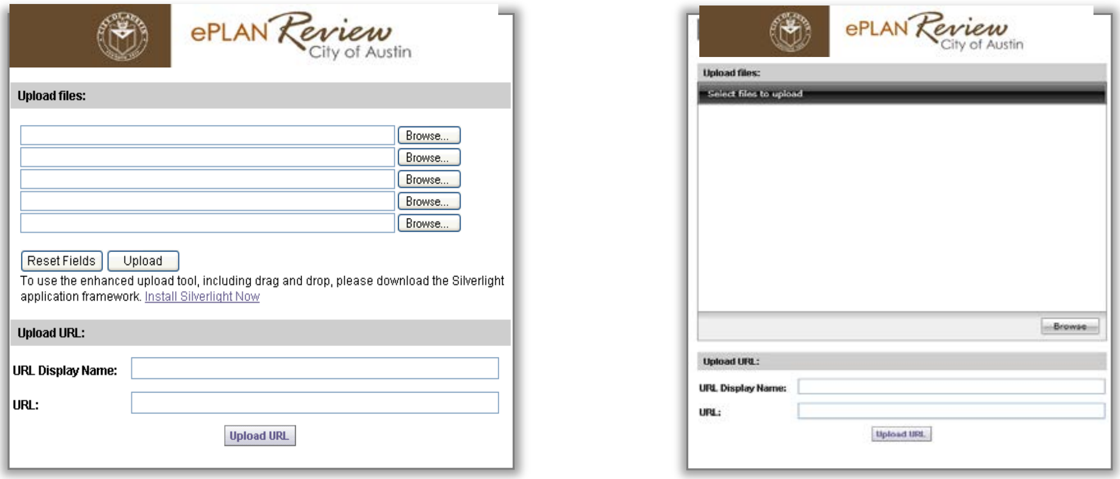

ePlan Review Uploader Silverlight Uploader

Figure 22 - Uploader Screens Comparison

UPLOADING FILES USING SILVERLIGHT

Silverlight provides for enhanced file uploading including batch upload, and drag and drop file selection from a windows explorer into the Upload window list. Silverlight can be installed from the ePlan Review application by clicking the "**Install Silverlight Now**" link, and requires administration rights on the computer for installation. The version of Silverlight may need to be altered depending upon your system's operating system version. Check the system requirements document or speak with your System Administrator if you have questions.

To install Silverlight:

1. Click "**Install Silverlight Now**" in the *Upload Files* screen.

   Click "**Run**" in the Silverlight file installation dialog and then click "**Install Now**" on the Install Silverlight screen (Figure 23). Silverlight will install and the uploader will launch.

Figure 23 - Install Silverlight Screen

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To upload files:

1. Use one of the two following methods:
    - Click “**Browse**” to locate and select the files you would like to upload to the current folder. Click “**Open**” to select the file(s).
    - Open a Windows Explorer window and use drag and drop to place the selected files into the control window. (When using drag and drop to move files, the Add dialog box should be closed.) When you have completed your selection, click “**Upload,**” or to begin again, click “**Cancel**.”

2. Figure 24 shows the Uploader dialog with files selected. You can delete selected files from the list by clicking the “**x**” to the right of the file size. You can also click “**Cancel,**” “**Upload,**” or “**Add more files**.”

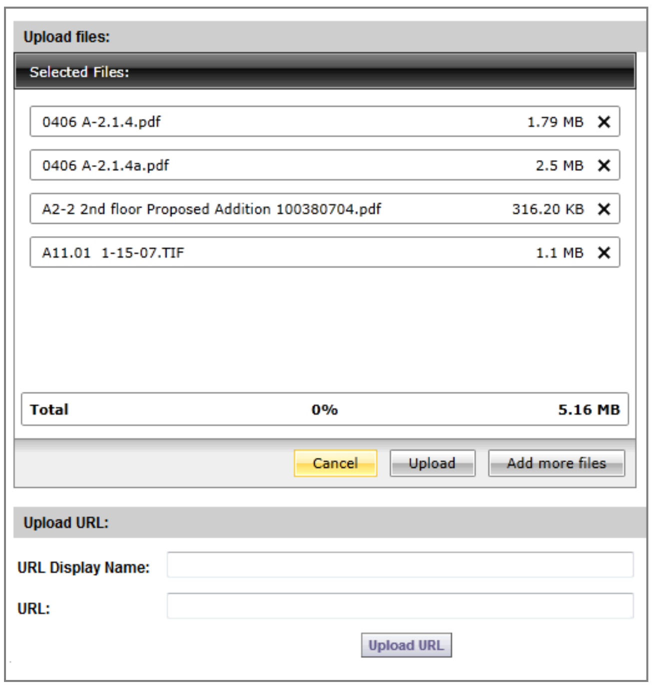

Figure 24 - Files Selected for Upload

3. When the file *uploading* has completed, a dialog box appears (

   Figure 25). The publishing process will continue in the background until completed.

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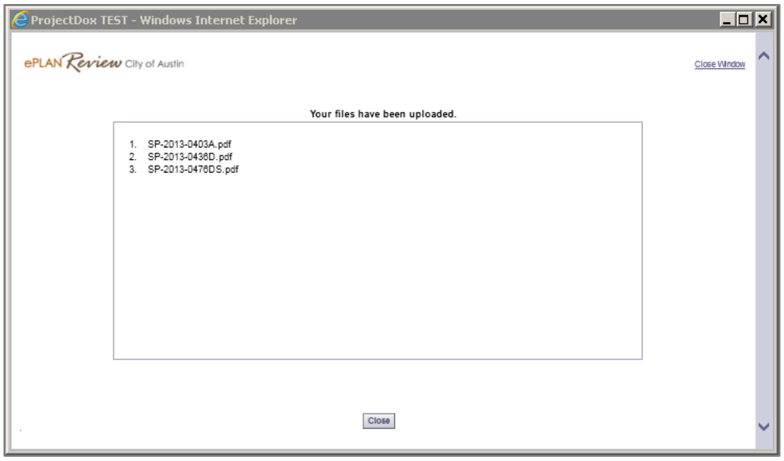

Figure 25 - Upload Complete

UPLOADING FILES WITH ePLAN REVIEW UPLOADER

If Silverlight is not installed, you will be presented with the standard ePlan Review Upload control. This feature is restricted to the number of the files that can be uploaded and requires you to browse and select each file for placement in the upload dialog window. We highly recommend using the Silverlight upload control to allow for more efficient uploads to the ePlan Review site.

1. From the Project page, select the folder where you want to upload your file.
2. Click the "**Upload Files**" button (next to View Folders).
3. The Upload dialog appears. (Figure 26)
4. In the Upload Files area, click "Browse…" to locate and select the files you want to upload to the current folder. The maximum size file name is limited to 70 characters.

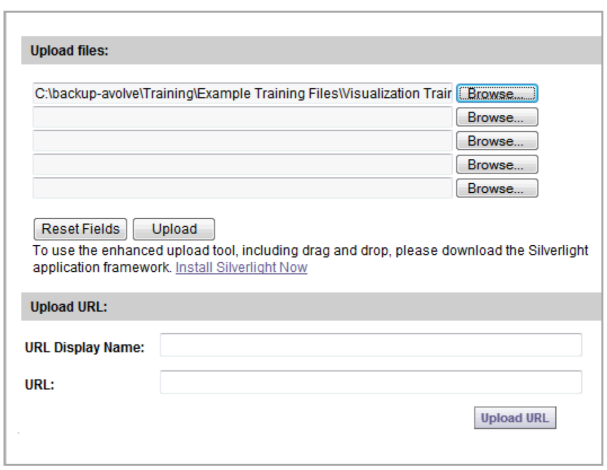

Figure 26 - ePlan Review Uploader Dialog

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5. In the resulting dialog box, navigate to, and click to select the file to upload (Figure 27):

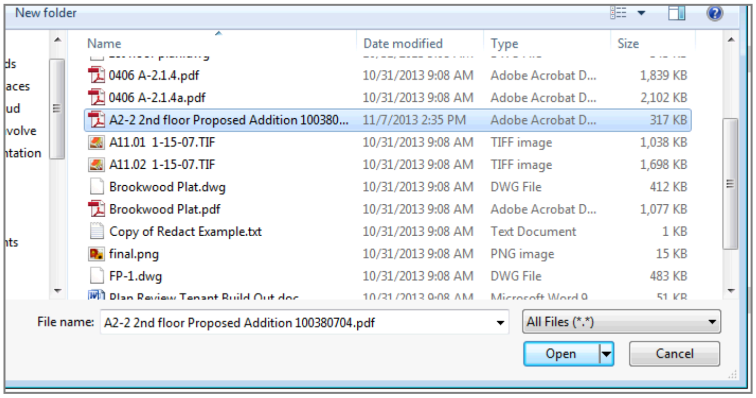

Figure 27 - Upload File Selection

6. Click "**Open**" to add the file to the list of files to upload.
7. You'll be taken back to the Uploader dialog box. Click "**Reset Fields**" to clear all file selections, or **"Upload**" to upload the files to the project folder.
8. When the file uploading has completed, the publishing process will continue in the background.

VERSIONING AND FILE HISTORY

FILE NAME AND SUBMITTAL STANDARDS

All drawing files must follow the U.S. National CAD Standard naming conventions and include the following three data fields: **Discipline Designator** (either Level 1 or 2, with Level 2 being optional), **Sheet Type Designator** and **Sheet Sequence Number**.

The **Discipline Designator** denotes the category of subject matter contained in the file and includes two options:

- Level 1- a more general, one character and hyphen designator description
- Level 2- a more defined, two-character designator description

The **Sheet Type Designator** is a single numerical character that identifies the sheet type, and the **Sheet Sequence Number** is a two-digit number that identifies the file in a series of the same discipline and sheet type (ranges from 01-99). Some examples include:

- A-102 = Architectural Plans Sheet 02
- AS001 = Architectural Site General Sheet 01

All drawing files must meet the following submittal standards:

- Vector-based PDF files only
- Single plan sheet per file (exception is cover page and notes)

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- File must be monochrome .pdf with white background
- File names must not exceed 70 characters in length
- Units and scale must be properly set (and included on every drawing sheet)
- Professional of record electronic stamp must be on every drawing (if not for reference)

Supporting documentation or non-drawing files are not required to adhere to the above naming and submission standards and can include .bmp, .jpg, .png, and .docx (in addition to PDF's).

BORDER STANDARDS

A 3" X 3" area must be reserved at the **lower right** corner of **ALL** drawings for the **APPROVAL STAMP**. Please leave the lower right corner completely blank on all drawings (with exception of the border). This applies to all sheet sizes.

SAMPLE COVER PAGE TOC INDEX

SHEET INDEX	Plan set page number
Cover Sheet	1
Legend	2
Notes	3
ARCHITECTURAL	
A-HVAC-RDFF-1 (HVAC systems: return air diffusers)	4
A-HVAC-SDFF-1 (HVAC systems: supply diffusers)	5
CIVIL	
C-COMM-OVHD-1 (Telephone communications: overhead)	6
C-COMM-UGND-1(Telephone communications: underground)	7
C-COMM-UGND -2 (Telephone communications: pole)	8
ELECTRICAL	
E-CABL-COAX-1 (Cable systems: coax cable)	9
E-CABL-COAX-2 (Cable systems: coax cable)	10
E-CABL-COAX-3 (Cable systems: coax cable)	11
E-CABL-FIBR-1 (Cable systems: fiber optics cable)	12

VIEW FILE HISTORY

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The File History icon links to a window that displays a file's details, versioning, and other history through three tabs (Main, History, and Workflow).

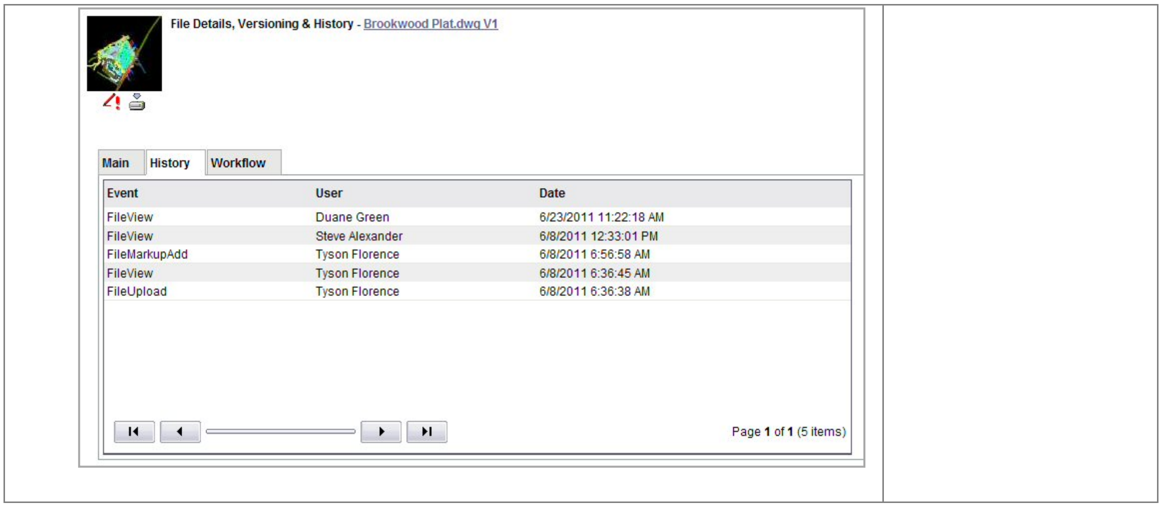

Figure 28 - File History

To view a file's history:

1. Click the history icon.
2. The Main, History, and Workflow tabs show information about the selected file.
3. To view the file history of a specific version, if more than one version is available, click on the version number from the Go to Version selections.
4. The Main tab lists the file's details, which are editable by administrators only.
5. The History tab lists activity history for the file. Information for each event (such as viewed, downloaded, markup up, etc.), includes the name of the user who performed the action, and the date and time it occurred.
6. To open the file in the Viewer, click the thumbnail image contained in the upper left corner of the view history screen (or click the file name link in the Main or History tab). If markups are associated with the file, the markups present icon will display above the thumbnail image. You can also download the file to your system if the download icon is present.

NOTES:
Events such as copying, moving, versioning, and batch stamping can result in a file's history being split between the earlier and later copies or versions of the file.

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Versioning for project files that are uploaded to the project using the same file name are identified by ePlan Review. These files will show highlighted in blue and identified as a candidate.

Figure 29 - Successful Version Upload

Project Dox will do a checksum of the file to see if anything within the file has changed. If changes in the file are identified, the file is incremented to its next version showing a V2 after the file name in the file view of the folder.

If multiple versions exist for the file, the File History window will turn yellow and will include additional features (Figure 30):

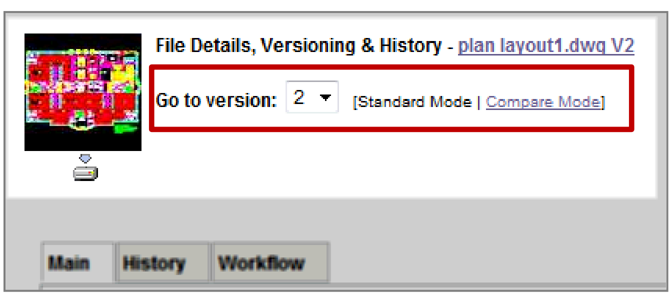

Figure 30 - File History– Versioned File

The **Go to version** dropdown allows you to select a version of the file (by default, the most recent version is selected). The tabbed areas will display only the information for the selected version.

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COMPARE FILE VERSIONS

File History is also used to access the file comparison feature for versioned files:

1. In the File History dialog, click **Compare Mode** to view thumbnails for all versions of the file.

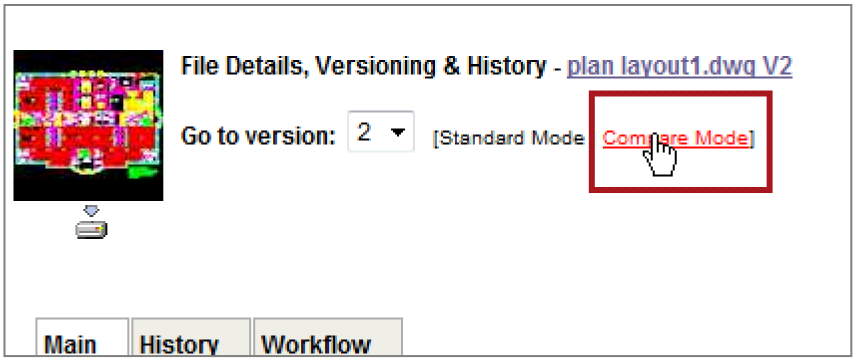

Figure 31 - File History– Compare Files

2. Click to select the check boxes for the two versions you would like to compare; then click **Compare** to view the two files in Compare mode in the Viewer:

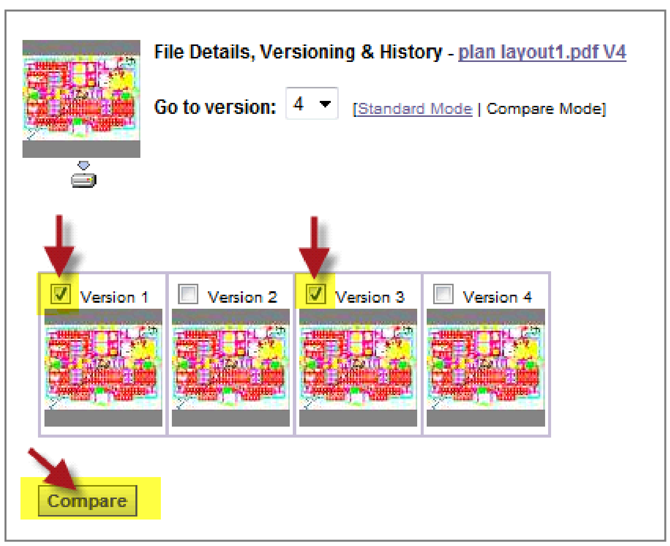

Figure 32 - Compare File versions

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File Viewing Features

SORT FILES

When viewing the file list (thumbnails) for a folder, you can quickly sort the order of files by criteria offered in the **Current Sort** drop down list.

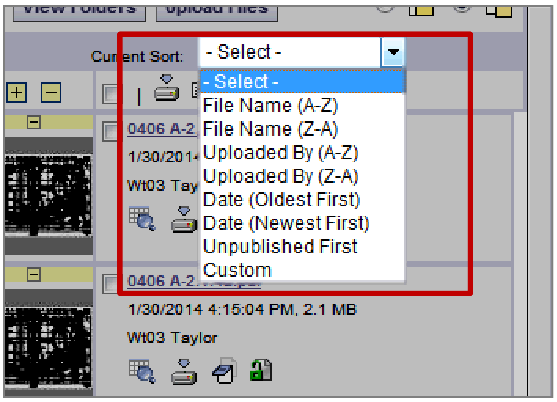

Figure 33 - File Sort Drop Down

From the dropdown, you can select to sort the list by: File name – ascending (default) or descending; Uploaded by – ascending or descending; Date uploaded – Oldest First or Newest First; Unpublished First; and Custom. The Custom sort setup is beyond the scope of this course, but information is available in the online help.

This sort order is a temporary view, and affects only the currently viewed folder. Once you leave a folder, the order will revert back to the default file order.

COMPARE TWO FILES IN SAME FOLDER

You can select two files listed in a folder and open them for comparison.

1. Select the two files and click the **Compare** button .
2. The Viewer launches in Compare mode, with side-by-side as the default view.

- The sort order in effect for the folder when you selected the two files will determine their position in the Viewer – the higher file in the list will display to the left.
- The files can be compared in the following modes: overlay, overlay differences, side-by-side, added or deleted information only, and others.
- In overlay view, elements unique to the left file display in red, those unique to the right file display in green. Unchanged areas display in gray (Figure 34).
- See the Viewer online help file for additional information about the compare file and the compare alignment tools.

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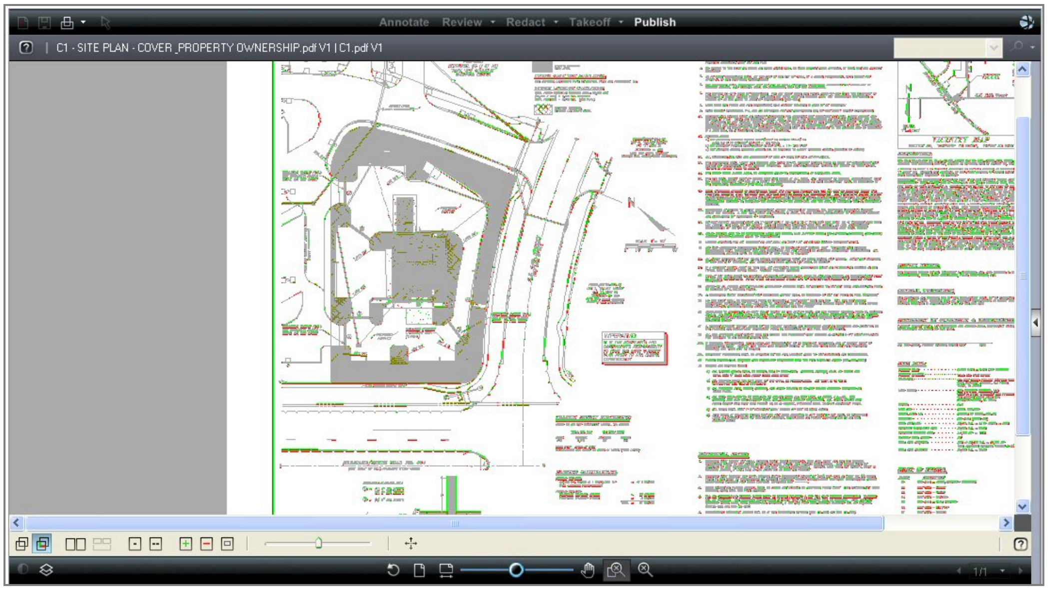

Figure 34 - File Compare - Overlay Mode

FILE MARKUPS ICON

The highlighted area in Figure 35 is a Markups icon.

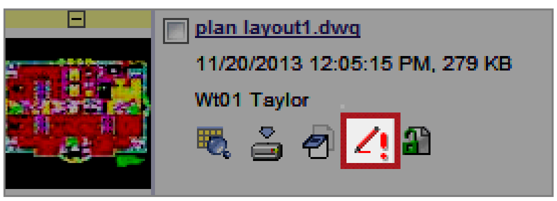

Figure 35 - Markups Icon

The presence of this icon means that there **are** change marks (annotations) associated with the file. For more information about change marks, see the Viewer help.

Team Mail

Team Mail is a convenient way to send email to project members.

1. You can access Team Mail from several places in ePlan Review:
   - On the Active Projects List, in the Option button group, click the Team Mail icon for the desired project.
   - On the Project page, click the Mail button in upper right hand corner.

2. The Team Mail screen appears. (Figure 36)

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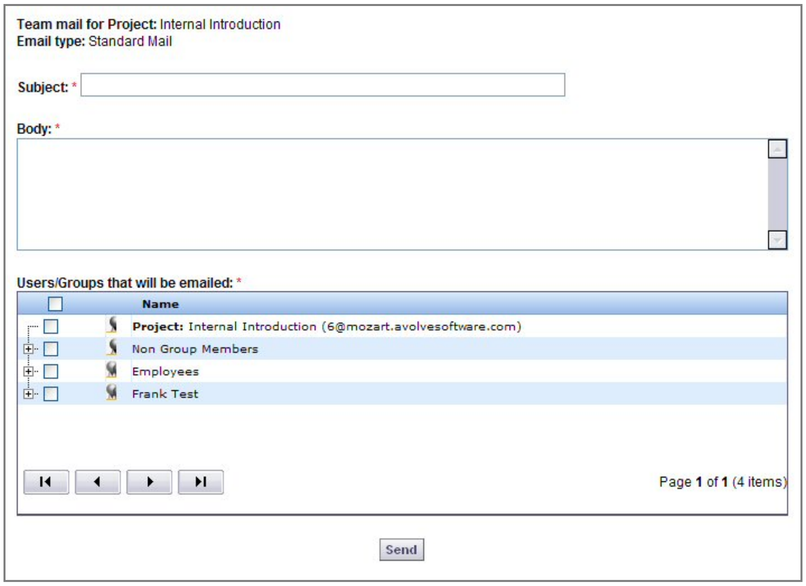

Figure 36 - Team Mail Screen

3. The interface for selecting recipients is the same as the one for Show-Hide Member List in a project. You can select the recipients in several ways:
    - Figure 37 shows how to to select (or clear selection of) all members.
    - You can expand and click to select or clear individual check boxes for Team Members or Project Groups as recipients.

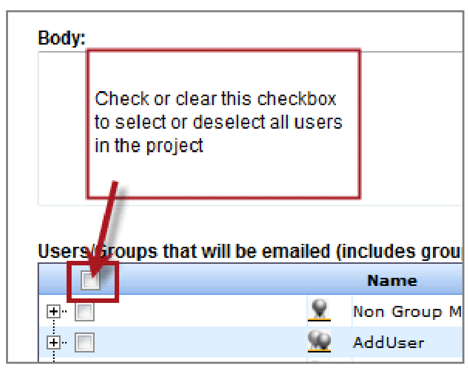

Figure 37 - Select All Project Members Box

4. Enter a message: subject and body.
5. Click **Send** to send your message.

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Topics and Notes

Topics are high level subjects for discussion. **Notes** are messages related to their parent topic. Topics and Notes can be assigned at a project, or to a file - and while they are accessed differently, they are otherwise very similar. File-level Topics and Notes will be discussed below, addressing the differences for project-level Topics and Notes where applicable.

TOPICS

You can create or view existing topics and notes for any file in the project, or for the project itself.

1. To find a file with notes, the white page in the icon will be yellow.
2. Click the Topics + Notes icon to view the topics. The View Topics screen appears.

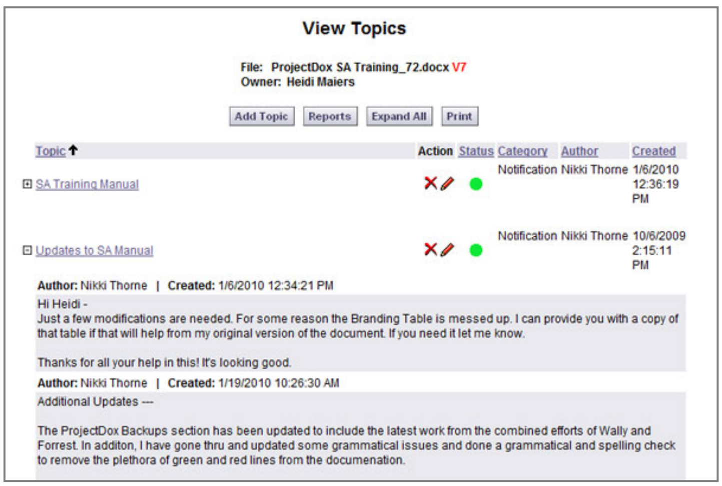

Figure 38 - View Topics Dialog

- You can edit or delete any topic you created using the Edit icon and Delete icon, respectively.
- Project and System Administrators can edit or delete any topic.
- The Status column indicates whether or not a topic has been closed. The green circle in the Status category indicates that the topic is open and notes can be added or edited. A red circle indicates that the topic is closed, meaning no notes can be added or edited.
- Topics can be sorted by any column (Topic, Action, Status, Category, and Created date) by clicking on the desired column heading. Clicking on a column header toggles the topics from ascending to descending based on the contents of the column selected.
- Use the **+/-** buttons to expand or collapse the additional notes associated with each topic. You can use the **Expand All** button to view all topic notes at once.

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ADD A TOPIC

1. In the View Topics screen, click **Add Topic**. The Add Topic screen displays. (Figure 39)

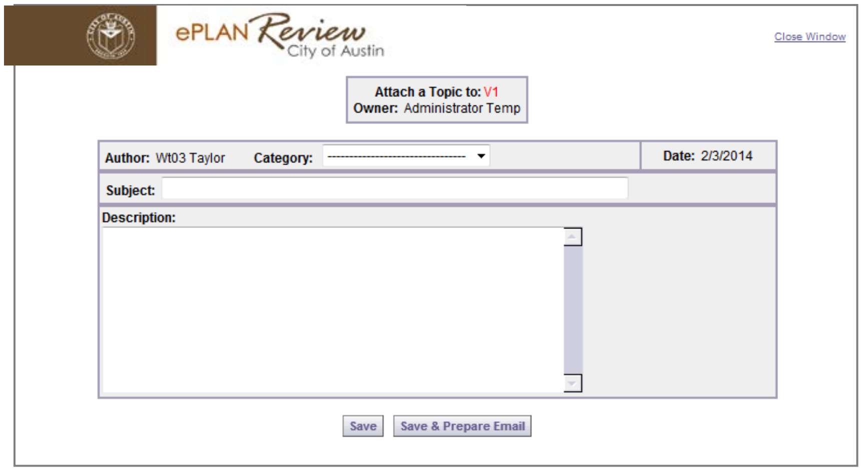

Figure 39 - Add Topic Dialog

2. Choose a Category from the dropdown list.
3. Enter a subject and a description for the topic.
4. Click the **Save** to save the topic and close the window. Use **Save & Prepare Email** to save and close the topic and open a new Team Mail (the system will automatically populate the subject and body of the message from the subject and body of the topic).

NOTES:

You can exit the process of creating a topic by clicking **Close Window** in the upper right hand corner of the dialog box. This will discard any information entered in the dialog.

If you click **Save & Prepare Email** when creating a topic or note, and then decide not to send the email, you can simply close the window. ePlan Review has already saved the topic or note.

CLOSE A TOPIC

1. In the View Chosen Topic and Notes screen, select an **Action Code** from the drop-down.

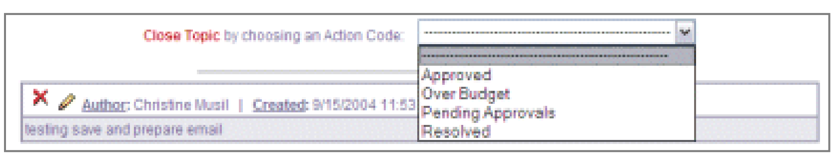

Figure 40 - Close Topic Dialog

2. A confirmation dialog will appear warning that the topic will be permanently closed.
3. Click **OK**.

NOTES:

Once a topic is closed, it cannot be reopened. Instead of closing a topic, you might consider sending a note to the effect that no more input is requested for the topic at present. That would allow you to continue the thread in the future if needed.

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TOPIC REPORTS

From the View Topics screen, you can view and generate reports for project and file level topics and notes.

1. Click the **Reports** button and select an available report from the drop-down list.
2. Select a report:
    - a single file contained in a project
    - all files contained in a project (exclude project level topics and notes)
    - project level only (exclude file level topics and notes)
    - both project level and file level topics and notes (all)
3. Click **Go** to view the report on screen.
4. Click the **Print Report** button to print the report, if desired.

NOTES

In the View Topics screen, click a topic name to view more information on that topic and any associated notes. The View Chosen Topic & Notes screen appears. (Figure 41)

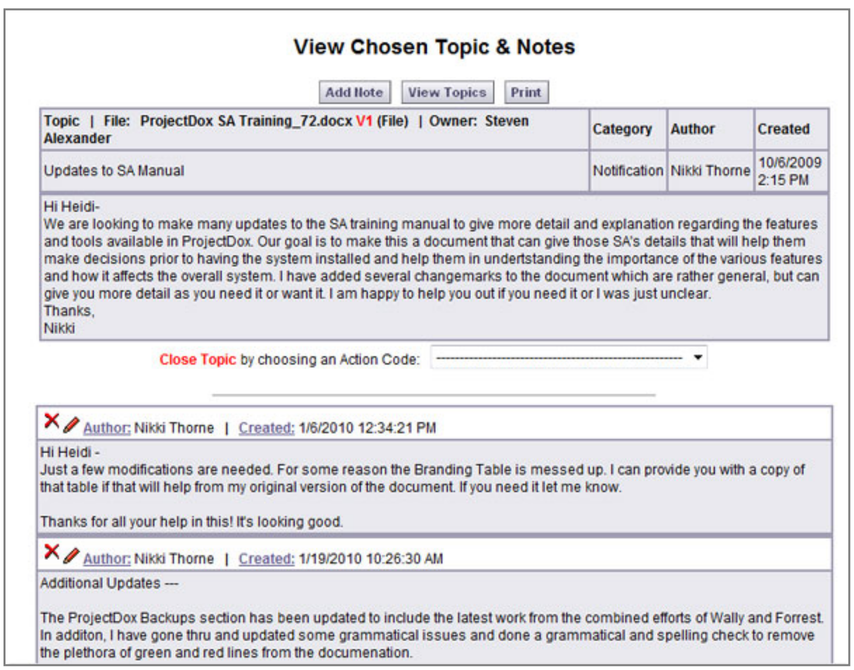

Figure 41 - View Chosen Topic & Notes

Click the **View Topics** button to return to the View Topics screen.

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ADD NOTE

1. In the View Topics & Notes screen, click **Add Note**. The Add Note to Topic screen displays:

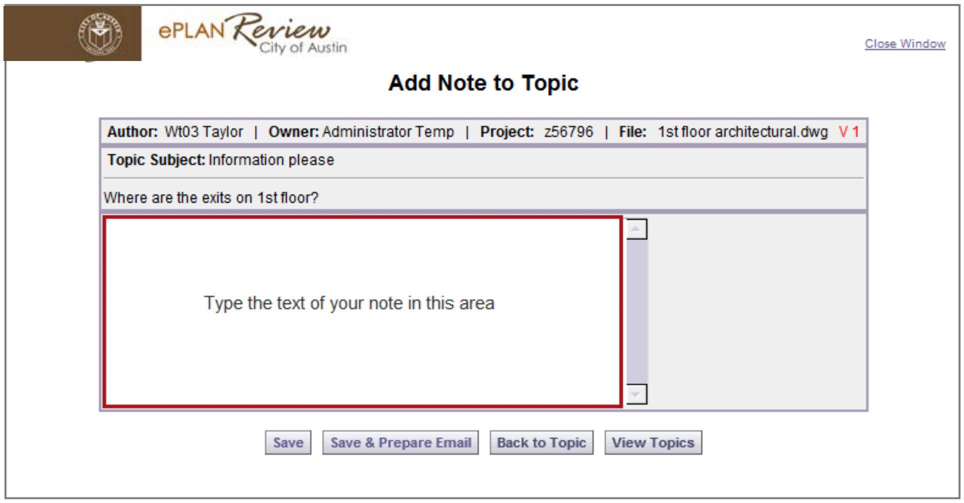

Figure 42 - Add Note to Topic Dialog

2. Type the note message as shown.
3. You have several choices to conclude this step:
   - Click **Save** to save the note and close the window
   - Click **Save and Prepare Email** to save and close the note and open a new Team Mail message
   - Click **Back to Topic** to discard the note and return to the topic
   - Click **View Topics** to discard the note and return to the list of topics for the current project or file

Run Reports

PROJECT REPORTS

Each report has a report viewing tool bar that allows additional feature such as page navigation, keyword search, parameter entry, such as date range to narrow the results of the report and the ability to export data into an alternate format.

To export report data into another format for viewing outside of the ePlan Review application in the viewing tool bar select the format from the “Select a format” dropdown. There are several options available including XML, CSV, TIFF, PDF Web Archive and Excel, but Avolve recommends exporting the data to Excel for better quality and capability to sort and manipulate the data. (Figure 43)

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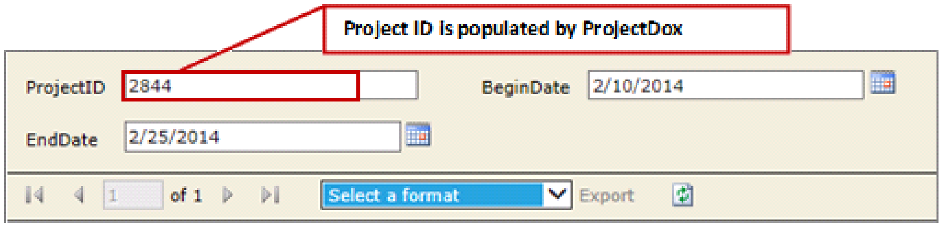

Figure 43 - Select a Format

1. From the Available Reports list, click the report icon  to view the information in Report Viewer. The sample below is the first link, *Current Project – All Files Report*.
2. From the Export Options dropdown of the report viewer, you can choose to export the data to XML, CSV, PDF, HTML, XLS, TIFF, Word format. (Figure 44)

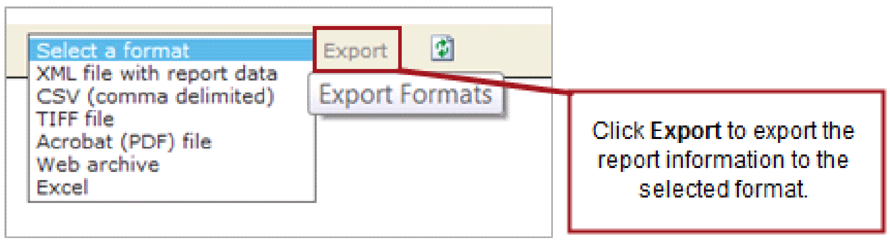

Figure 44 – Export Data

3. Click the **Export** link to export the report into the selected format and click the **Save** button to save it to a location of your choice.

Searching in ePlan Review

NOTES: Searches will only be performed in the projects, folders, markups, and topics and notes for which you have access permission.

The Home page has a simple search text box as shown in Figure 45.

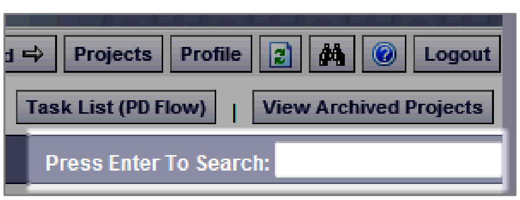

Figure 45 - Simple Search

To use the simple search, type the word or phrase you want to match and press Enter. This will search the Project Names and Project Descriptions and return the list of matches.

ePlan Review also has a more comprehensive and powerful Search tool. The Search tool makes it easier to find information, especially in large sites with many users, projects, and topics. The search engine has the ability to search for objects in the database and return all matches in

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various fields and properties, markup text, topics and notes, file, folder, project names, addresses, and more. All versions of a file can be searched.

The Search tool is available in the upper right hand corner. (Figure 46)

Figure 46 - Advanced Search Tool Button

To use the Search tool:

1. Click the Search Tool button.
   - If selected from the home page the Scope to Search area will only display the radio button to search All Projects. This allows a search of all projects you have access to.
   - If selected from within a project the Scope of Search will display the ability to search This Project and All Projects.
2. The Search dialog appears (Figure 47):

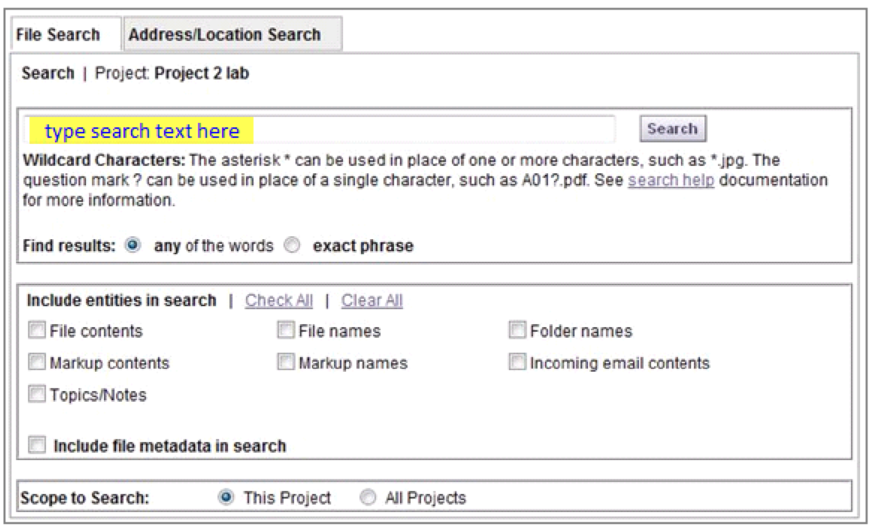

Figure 47 - Search Dialog

3. Type the string you want to search for:
   - Search allows full, exact, and partial word searches. To search a full word, select '**any of the words**' and type the word and the search engine will return all results where that word is found in its entirety. To search exact terms, select the "**exact phrase**" check box and type in the exact term you want matched. To search for partial words and phrases, use wildcard characters.
   - If you are searching with '**any of the words**', and enter "wind road," you will only get results with the whole word "wind" or the whole word "road." The search will not find "winding roads" because the whole words "wind" or "road" do not exist in either of those terms in their entirety. If you wanted to return the result "windy roadside,"

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you would use wildcards such as “wind* road*”. The words DO NOT need to be next to or near each other, just contained in their entirety somewhere in the item being searched. If you don’t want to search for the entire word, use a partial search with a wildcard ***** or **?**

- If you search with ‘exact phrase’ selected, the words must be in the exact order and be an exact match. For example, if you search for “Admin User,” the results will contain "admin user," but not "admin users." There is no need to add double quotes to each end of the search terms.
- Search is NOT case sensitive.
- Wildcards characters do not work when using “**exact phrase**”; they should only be used with the “**any of the words**” option.

4. Select the desired items from the **Include entities in search** area. ePlan Review will search all the selected entities. You must select at least one entity for results.
5. In the **Scope to Search** area, select your desired scope. When searching at the File level, your scope can be as narrow as searching a single folder or as wide as searching all projects contained in an ePlan Review site.
6. Click Search (or press Enter). The results will display in the View Search Results window with the keyword or phrase highlighted. Term hit highlighting is supported in ePlan Review so that when you perform a search, all files where this word or phrase exists will display. When you click on a file, you are quickly taken to the page where the first occurrence of the item exists (zoomed and highlighted).

You can use the **Address/Location Search** tab to quickly locate address information from the Project Information screens. The results appear on the bottom portion of the tab once you enter the criteria and click **Search**:

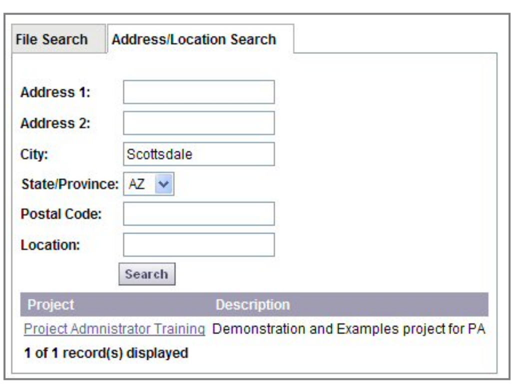

Figure 48 - Address/Location Search

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