ePlans Comprehensive User Guide

Draft Version 1.3 February, 2013

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INTRODUCTION

How to Use This Document

ePlans is a powerful tool that streamlines the plan review process and improves accountability among all of the process's participants. The review process and the software have been set up to maximize flexibility, allowing the Project Manager the ability to utilize as many or as few of the available features as he or she is comfortable with. While each project begins with a standard template, that template can be modified to meet the specific needs of each individual project.

The intent of this document is to provide an overview of the core components of ePlans and to guide all ePlans users through a standard document review process, known as a Workflow. As you gain proficiency with ePlans, you will discover many advanced functions and features throughout the software that are not covered in this guide. While ePlans is the official name of this software, this manual refers to it as ProjectDox as well. The terms are used interchangeably throughout this manual and within the software.

This manual is organized into six main sections: an Introduction, Getting Started, the Workflows, Other Functions, the Appendix and the Glossary. The document starts with general information about ePlans, progressing to more specific descriptions of individual functions within the system. Read the Introduction and Getting Started sections before using ePlans to gain a general understanding of the purpose and function of the system. Once you begin to use ePlans, you can refer to the information in the Workflow and Other Functions sections as it pertains to your specific role in the Workflow.

Introduction: This section provides an overview of the purpose and function of ePlans within the Park Development Division's plan review process. It also defines the roles of the various user groups, introduces the Workflow and provides some quick reference tools.

Getting Started: Your computer must be properly configured to run ePlans. Before you begin, consult the Technical Requirements checklist. This section will also guide you through the process of creating a login and password for ePlans.

Workflows: The Workflow is the business process for plan review established by the Park Development Division, translated into the customized ePlans platform. This section is divided into four subsections that relate to the four user groups in the Workflow: Project Manager, Consultant, PDCO Team and QAP Officer. Refer to the subsection for your user group for step-by-step instructions to complete each of your tasks in the Workflow.

Other Functions: ePlans contains several reporting, publishing and document storage functions that can be used outside of the Workflow. This section provides a guide for using many of those functions.

Appendix: The Appendix contains additional technical information that provides some troubleshooting instructions to ensure ePlans functions properly on every user's machine. Network Administrators are the primary audience for the Additional Technical Information.

Glossary: As you read this manual, refer to the Glossary to understand the ePlans-specific terminology.

In addition to this Comprehensive Guide, there are several other reference documents that provide more in-depth information about ePlans and its various functions.

- While you are inside the ePlans platform, you can click on the "Help" button on the Main Tool Bar (see the "Getting Started" section of this guide). There is a lot of useful information in the ePlans help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The Brava Tool Tips user guide provides you with an in-depth description of all of the features that are available in the Brava Viewer. The user guide is available online, at the following address: ftp://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf
- ePlans' parent company, Avolve Software, has an Online Knowledge Base that contains information based on previous customer-support calls. Search their database at the following address: http://www.avolvesoftware.com/index.php/company/technical-support/online-knowledge-base/
- A training presentation has been created by Avolve Software and was given to Project Managers and PDCO Team members when ePlans was launched. Contact a Network Administrator for a copy of this presentation.

Purpose

ePlans is an online document review, storage and submittal platform created by Avolve Software and tailored for the Park Development Division (PDD) of the Montgomery County Parks Department. ePlans allows the PDD Project Manager the ability to organize and formulate comments for Consultants based on feedback from the Planning, Design, Construction and Operations (PDCO) Team.

By using ePlans to create online, virtual project workspaces, you enable people from across divisions at different locations, disciplines and schedules to share the same information at the same time, facilitating communication and higher productivity.

Here is what ePlans does to enable online project information management:

- All of the shared project information (documents, drawings, 3D models, annotations, project email, discussion threads, and faxes) is centralized in one location so it is visible, accessible and usable by everyone who needs it.
- The user-friendly interface makes it easy for users at all technical skill levels to leverage the "power tools" in ePlans.
- Permissions and roles-based security restrictions are configured and applied so that only appropriate personnel have access to project information, as well as subsets of that information.
- Using electronic Workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and enforce accountability.
- ePlans uses version control to track changes within a document.

- Automation features make sure that when activity takes place in the workspace, those who need the updated information are informed immediately.
- Plan, document and markup viewing tools, online discussions, and group email provide for timely information and a more productive review for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, email, annotations and markups, Workflows and forms, access and egress, plus much more.

In summary, ePlans allows the stakeholders in a project to manage information, communication, activity and resources better than manual or conventional means.

ePlans was brought to the Montgomery County Parks Department as part of a collaborative effort with the Montgomery County Planning Department. For the most part, the ePlans platform was tailored to meet the distinct needs of each department in the collaboration. Some shared elements could not be modified to individual department specifications, however, resulting in the occasional appearance of lines of text, instructions or nomenclature that is irrelevant to the Park Development process. Every effort has been made to minimize the occurrence of these elements, and none of them interfere with the Park Development Workflow or the Montgomery County Parks' ability to use ePlans.

Project Roles

This comprehensive guide is designed for anyone involved in the Park Development process that is responsible for reviewing design and construction documents using ePlans. ePlans users include Project Managers, Consultants, PDCO Team members, QAP Officers and External Stakeholders. Comments from External Stakeholders, such as state and county review agencies or members of the general public, will be coordinated by the Project Manager, generally outside of the ePlans Workflow.

Project Manager

The Project Manager is a member of the Montgomery County Parks Department's Park Development Division and is responsible for overseeing all aspects of park development projects. The Project Manager will initiate a Workflow and will hold accountable the entire project team for completing their tasks. The Project Manager will also serve as a PDCO Team member, reviewing and commenting on the Consultant's submissions. For design projects that are completed entirely by Park Development Division staff, the Project Manager will also handle the role of the Consultant, uploading drawings for review by the PDCO Team. ePlans often refers to "Project Managers" as "Project Administrators" in their help documentation.

Consultant

The Consultant is a person or group hired by the Park Development Division to complete a set of contract documents for a specific park development project. The Consultant is responsible for uploading his or her documents to ePlans for review by the Project Manager and the PDCO Team. The Consultant will also receive and respond to comments made by the Project Manager and PDCO Team. For design projects that are completed internal to the Park Development Division, the Project Manager will fill the role of the Consultant.

PDCO Team

The Planning, Design, Construction and Operations (PDCO) Team consists of Montgomery County Parks' employees from various divisions whose work programs are directly impacted by a park development project. PDCO Team members will use their individual expertise to review and comment on a Consultant's drawings for accuracy and completeness. The Project Manager is always a part of the PDCO Team.

QAP Officer

The Quality Assurance Program (QAP) Officer is the last person to review a set of contract documents before they go out to bid. Following a standard checklist of requirements, the QAP officer ensures that a set of contract documents meets the standards set forth by Montgomery County Parks.

Division Chief

Per Montgomery County Parks' contracting requirements, all contract documents must be approved by the Division Chief, who gives his or her approval by signing the cover sheet of the construction drawing set. He or she can use ePlans to apply a digital eSignature to the cover sheet, further streamlining the procurement process.

External

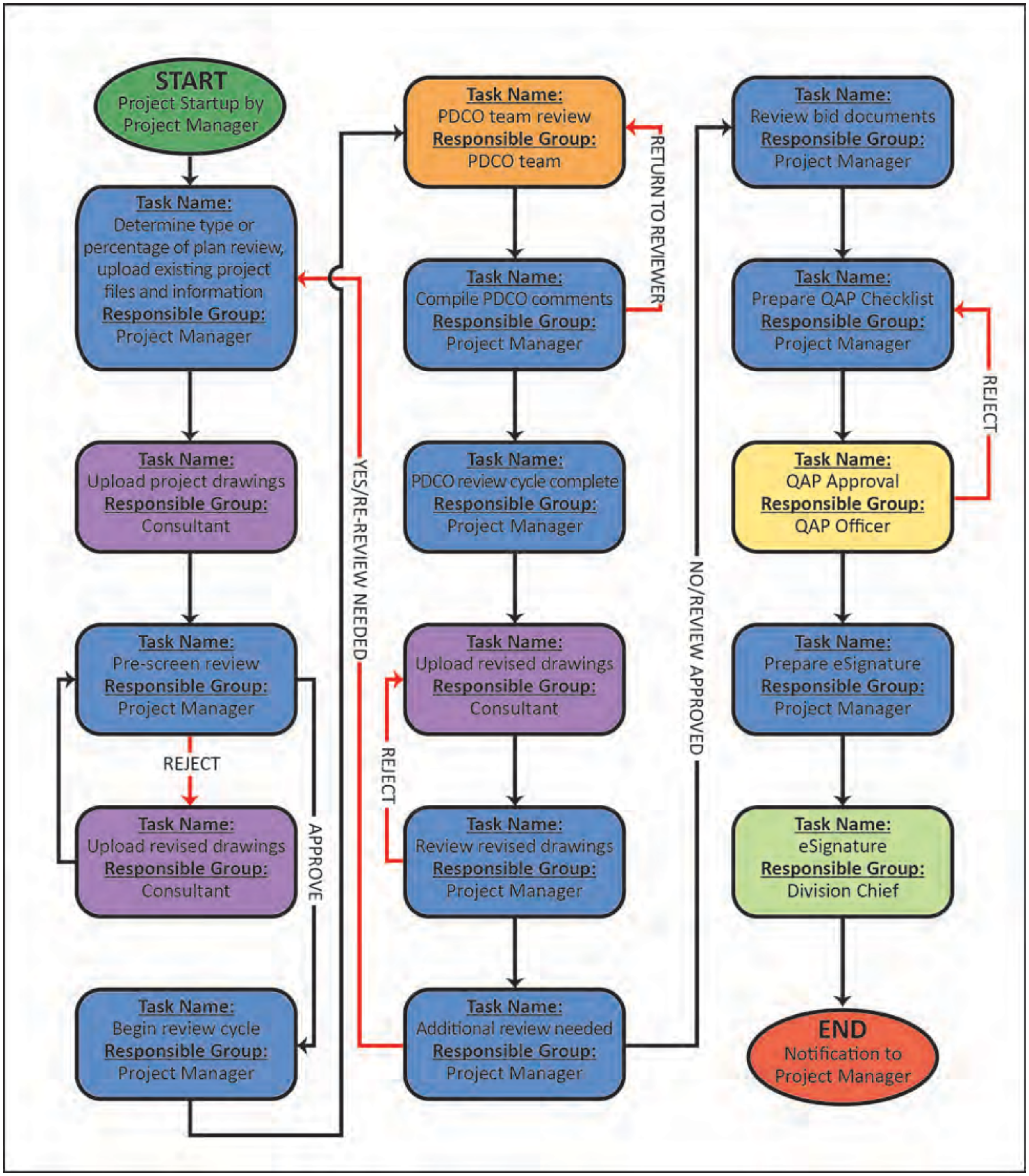
Any person or agency outside of Montgomery County Parks who has review authority over or is directly impacted by a project is considered part of the External User Group. Although a Project Manager can elect to provide external stakeholders with ePlans access, their review of a Consultant's drawings is usually conducted outside of the Park Development Workflow.

Other

The "Other" user group was created to provide a Project Manager with flexibility when creating his or her project team. This group can be used when assigning users to a project that may participate in a limited number of review cycles, or have special permissions, apart from those granted to other groups.

Workflow Overview

The flow chart below provides an overview of the steps involved in the ePlans review process. This chart is referred to as the Workflow.



Quick Reference

Below are some of the most common icons found throughout ePlans. You can also hold your cursor over an icon at any time to see a brief description.

Project icons		Folder Icons		File Icons		Reprographics Icons	
	Revoke permissions		Delete Folder		Delete File		Add item to Cart
	Project Topics/Notes Exist. Project Topics/Notes don't Exist.		Find Topic or Note in Folder		Topics/Notes Exist. Topics/Notes don't Exist.		View/Print Shipping label
	Edit Project		View File or Folder History		View File in Separate Window		Ordering not allowed
	View Project information		Add New Folder		View File in Pane		View Cart
	Send TeamMail to project or Single user		Rename Folder		Redline Exists for this File		Order Pending Ready to Ship
	Display calendar – Click to select date		View or Manage Folder Permissions		Download File	**Administration Icons**	
	ProjectDox Help		Subscribe to this Folder for email Notification		Move File(s) Copy File(s)		View or Edit User Permissions
	Refresh Page		Currently Subscribed to this Folder		Start Workflow against file		Edit Workflow Definitions
	Topic Open		Inherit parent permissions		Compare files		Setting not editable or closed
	Edit Topic		Arrange sort order		Check-In File Check-Out File		
	Edit Picklist Data		Subscribed to a folder/ subfolders		Copy internal/external markup link to Clipboard		
	User logged in Not logged in				Edit select file's metadata		
					Batch Stamp selected files		

GETTING STARTED

The Maryland-National Capital Park and Planning Commission
Montgomery Parks

Technical Requirements

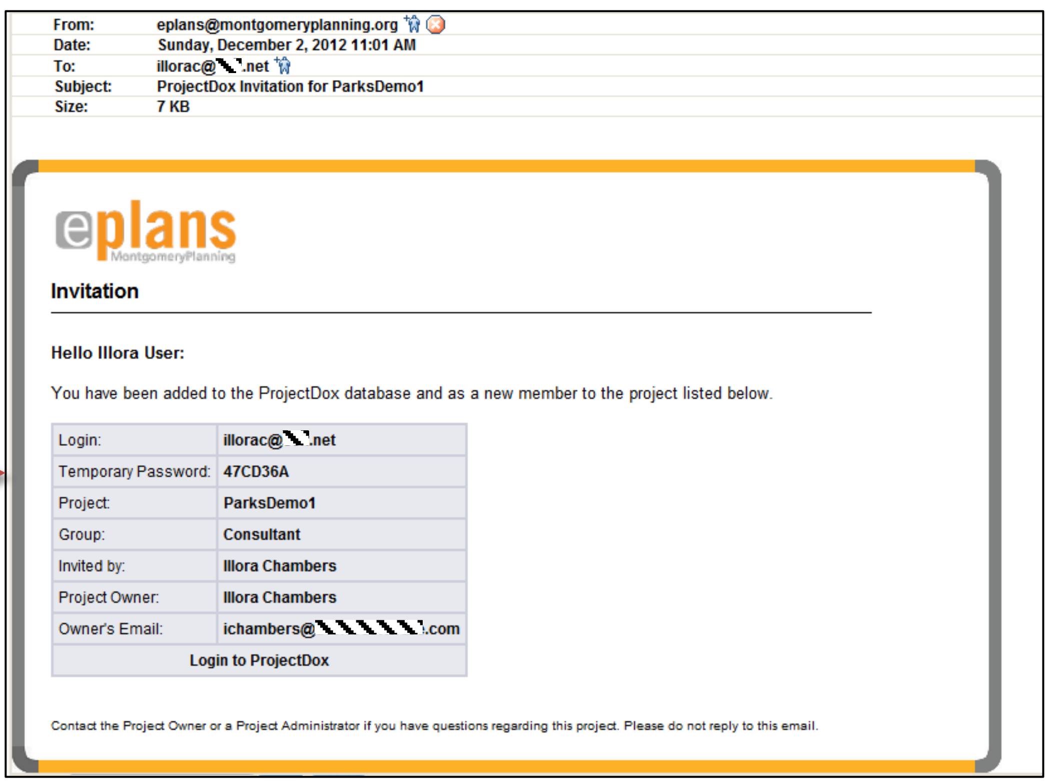
ePlans is designed to be a user-friendly program, understandable to anyone who possesses basic internet navigation skills and has a valid e-mail address. Before you begin, you will need to make sure you are using a computer that meets all of the minimum technical requirements necessary to run ePlans.

- A computer with a 32-bit processor and Windows XP, Windows Vista or Windows7 installed as the operating system.
- A high-speed internet connection, such as cable or DSL.
- Internet Explorer Version 8 or 9, with the pop-up blocker turned off (see the Appendix for instructions on disabling your pop-up blocker). *ePlans does not currently support other web browsers such as Safari, Firefox or Chrome.*
- Temporarily disabled User Account Controls (for Windows Vista and Windows 7 users only. See the Appendix for instructions on disabling User Account Controls.) UAC can be re-activated once ePlans components have been installed.
- ActiveX controls (see the Appendix for ActiveX download instructions).

Logging In For the First Time

The first time you are invited to join a project on ePlans, you will receive an e-mail notification, similar to the one below. This e-mail will contain a temporary password and a link to ePlans.

1. Copy the temporary password that was provided to you in the e-mail.



From: eplans@montgomeryplanning.org
Date: Sunday, December 2, 2012 11:01 AM
To: illorac@[redacted].net
Subject: ProjectDox Invitation for ParksDemo1
Size: 7 KB

eplans MontgomeryPlanning

Invitation

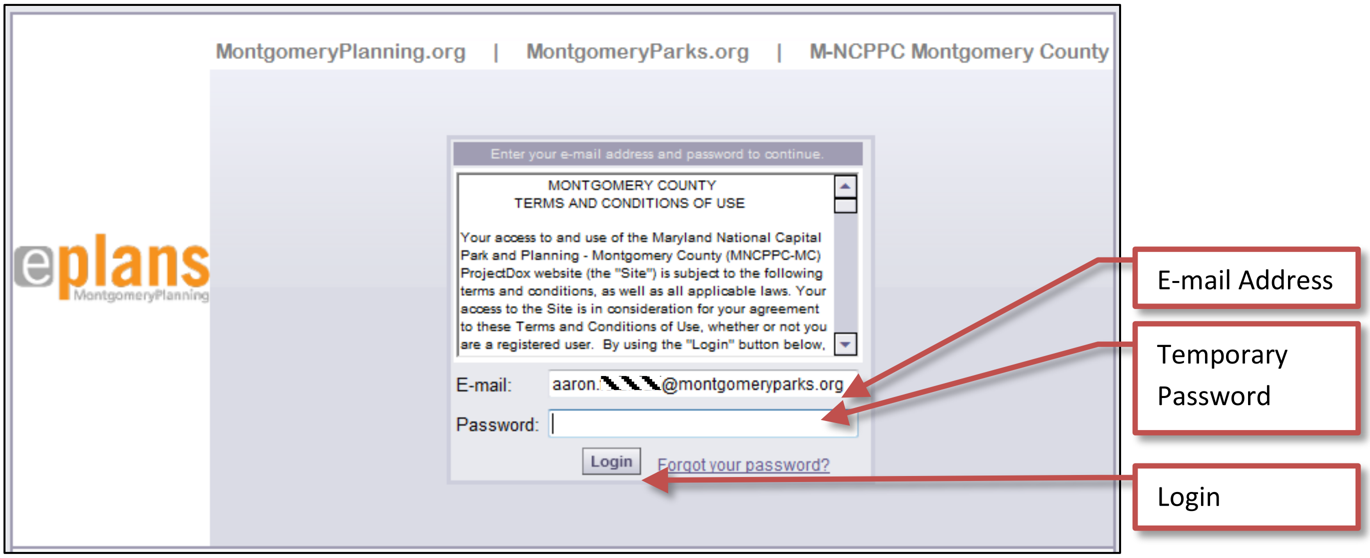
Hello Illora User:

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

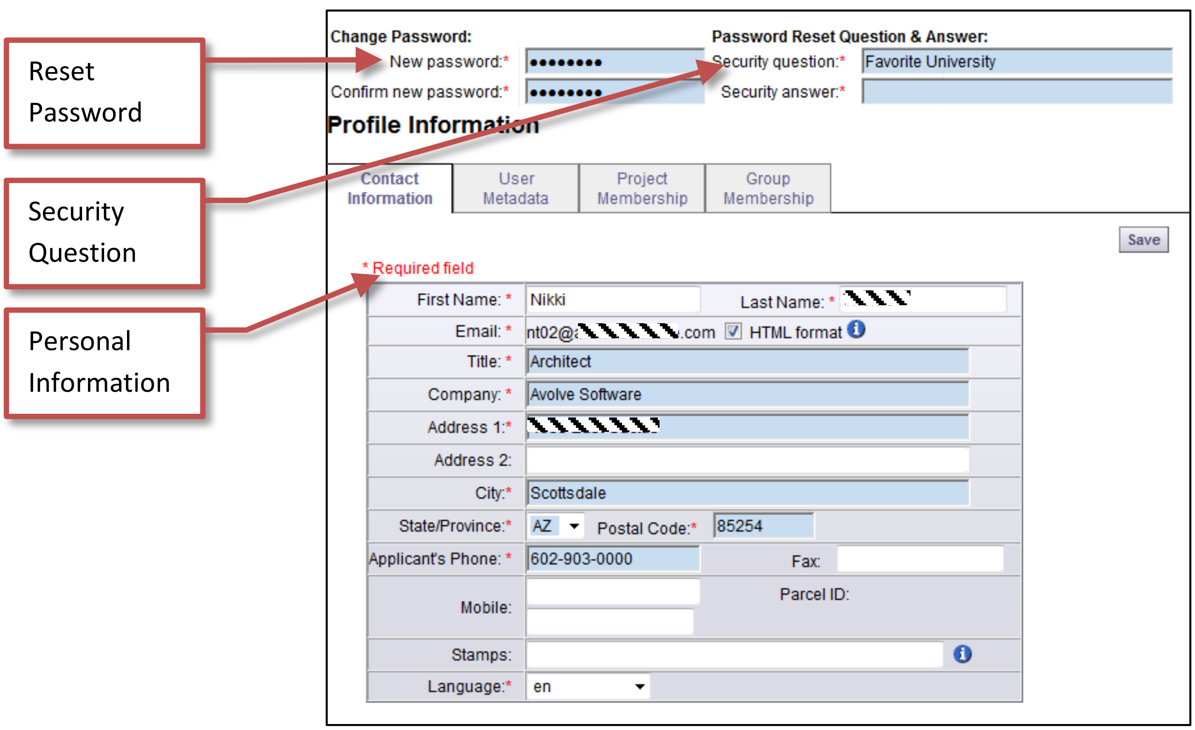
Login:	illorac@[redacted].net
Temporary Password:	47CD36A
Project:	ParksDemo1
Group:	Consultant
Invited by:	Illora Chambers
Project Owner:	Illora Chambers
Owner's Email:	ichambers@[redacted].com
Login to ProjectDox	

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

2. Click on the link that says “Login to ProjectDox.” This will automatically open Internet Explorer and take you directly to the login screen. *You can also open Internet Explorer and type in the address http://eplans.montgomeryplanning.org. At this point you can bookmark the page for future use. Alternatively, a link to this page will be provided to you every time you receive an e-mail notification from ePlans.*



3. Enter your e-mail address (the same address where you received the invitation to join the project) into the E-mail Field.
4. 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.

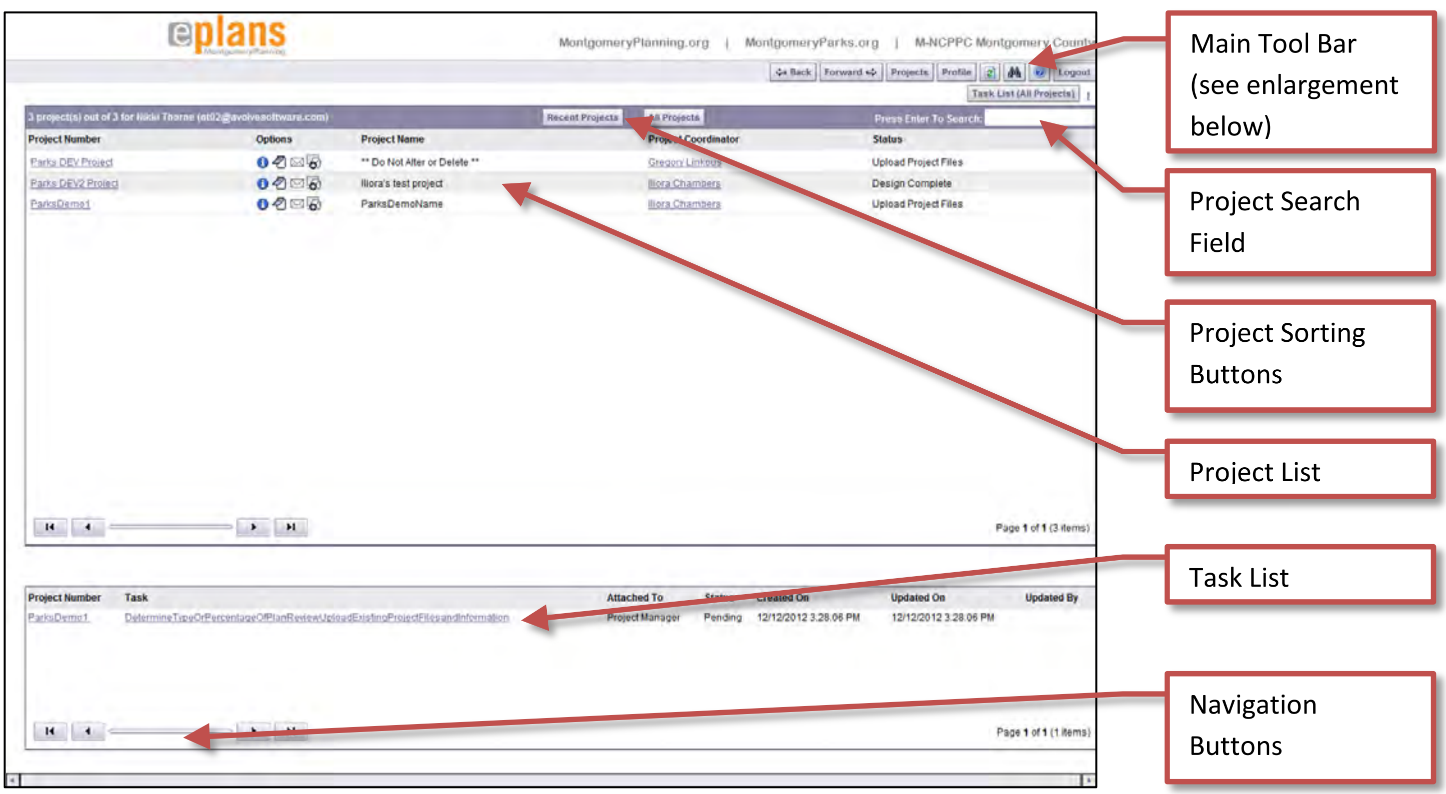


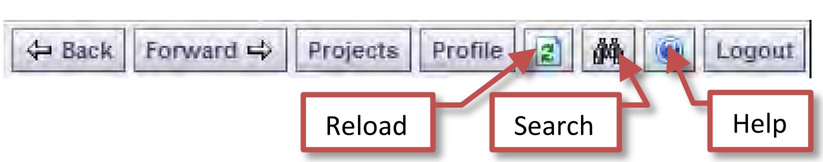
5. Once you successfully log in, you will be taken to your User Profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself. Keep your new password and security answer in a safe place. You will use this password the next time you log in. If you ever forget your password, you will need to answer the security question you created to reset your password.
6. Fill in all of the required fields (those marked with a red asterisk*), and click "Save." *You can return to this screen at any time by clicking on the "Profile" button on the Main Tool Bar.*
7. After saving your profile information, you will be taken to the Projects Screen.

Logging In After the First Time

The second time you log in to ePlans (and every time after that); you will use the password that you entered in your User Profile page. If you ever forget your password, click on the "Forgot Your Password?" link next to the "Login" button.

After logging in, you will be taken to the Active Projects Screen. From this screen, you can view all of the projects you have been invited to and all pending tasks for you to complete.





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

- The "Back" and "Forward" buttons function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed.
- The "Projects" button will take you back to the Active Projects Screen.
- The "Profile" button will take you to your User Profile, where you can edit your personal information or change your password.
- The "Reload" button will refresh the current page you are on.
- The "Search" button allows you to search for a project based on the information entered into the Project Info Page, or it allows you to search for keywords within a project.
- The "Help" button takes you to the ProjectDox Help site. There is a lot of useful information in the help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The "Logout" button logs you off of ePlans and takes you back to the Login Screen.

Project Search Field – The search feature is a partial word search and will provide results that contain the words entered into the Search Field for any of the highlighted columns above. For example, a search for "DE" for the above projects would result in all three projects displaying because each project has "DE" contained under the Project Number 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.

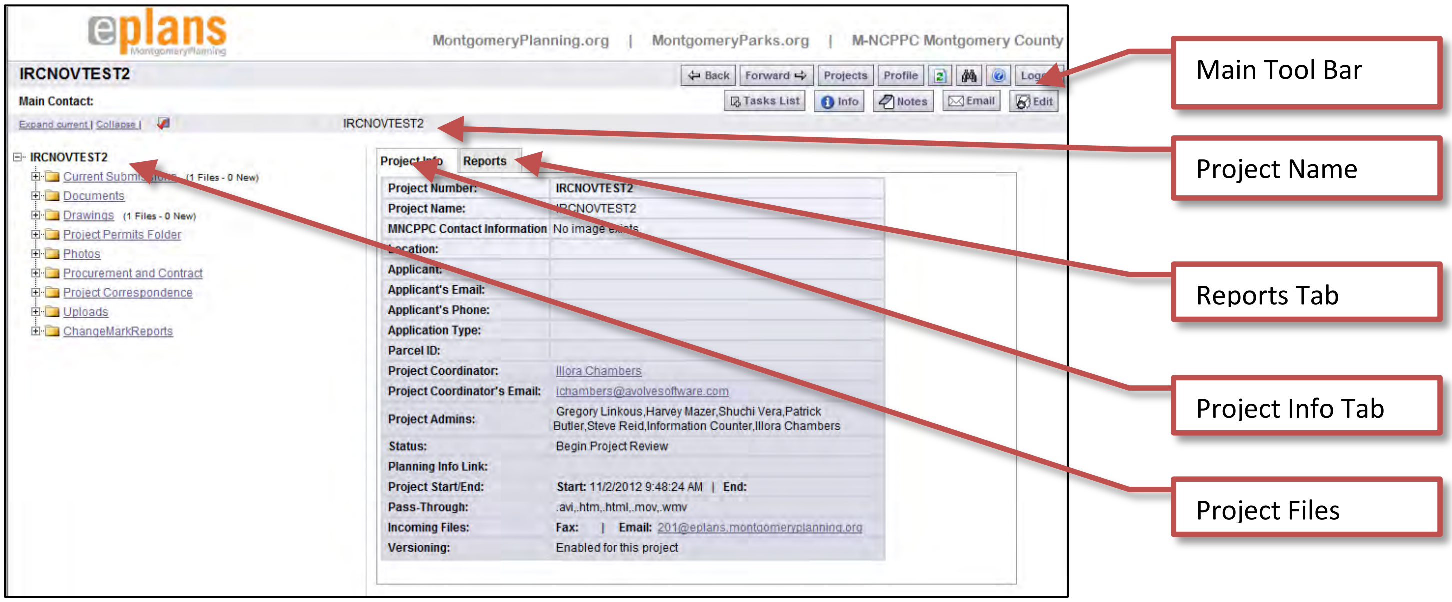
Project List – The Project List provides you with basic information about every project to which you are assigned. You can sort your projects by number, name, coordinator or status. Clicking on the project number will take you to that project's main page.

Task List – The Task List shows any tasks requiring action from you for all of your projects. Clicking on the task will take you to the eForm for that task; there you can get further instructions for completing that task.

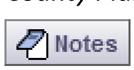
Navigation Buttons – The Project List and the Task List are set to display a limited number of entries at a time. You can use the navigation buttons at the bottom of each list to scroll through all of your projects or tasks.

Accessing Projects

When you click on a project number in your Project List, you will be taken to that project's Main Page. Here you can access all of the files that have been uploaded to that particular project, view project information and communicate with other members of the Project Team.



Main Tool Bar – The top row of the Main Tool Bar is identical to the Main Tool Bar in the Active Projects Screen. The bottom row provides a number of additional features.

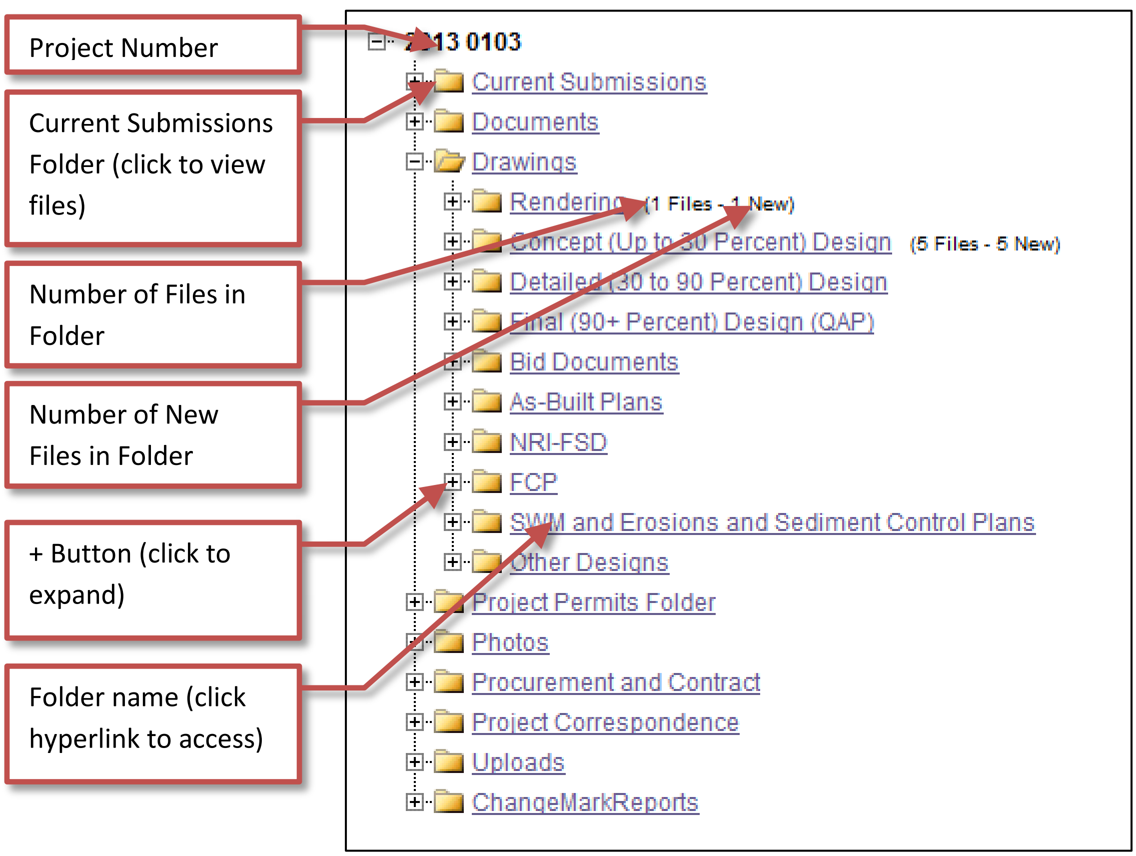
- The "Tasks List" button  will take you to a list of all of the tasks pending for this project. Project Managers and System Administrators have the ability to view all tasks for all members of the project team from this link by clicking the "Show All Tasks For All Users" checkbox above the Tasks List window.
- The "Info"  button will display all of the project's information, including a roster of all of the project team members, the groups they are assigned to and the levels of permission they have. *Many of these fields will be left blank, as this is a screen that is also used by the Montgomery County Planning Department for their project review process.*
- The "Notes"  button allows you to add and share notes with other project team members. These notes are not distributed beyond the notes page.
- The "Email"  button allows you to send e-mails to individual members of the project team, several people within the team, or the entire project team.
- The "Edit"  button allows Project Managers to add or remove people from groups and to change users' permissions within a project.

Project Name – The name of the project is always provided at the top of the screen, making sure you are always aware which project you are working in.

Reports Tab – The reports list allows you to generate several types of reports for a project. See the Reporting section for more information about reports.

Project Info Tab – Basic project information, entered by the Project Manager, is provided here. For most projects, many of these fields will be blank, as the information does not apply to Parks. Details about this tab are provided in the Project Startup task.

Project Files – The project files section of ePlans functions much like the folders in Windows Explorer. Click on the "+" button at the left to see a list of the subfolders contained in each folder. Click on a folder's name to view the files inside. The text (in parentheses) to the right of each folder name indicates how many files are inside each folder and how many of those files were recently added (folders without any text are empty). If you click on an empty folder, a screen will appear telling you that no files currently exist in that folder. You can return to the previous folder structure by clicking the "View Folders" button or you can upload files by following the instructions on the screen. *All files to be reviewed should be uploaded into the "Current Submissions" folder at the top of the file structure.*

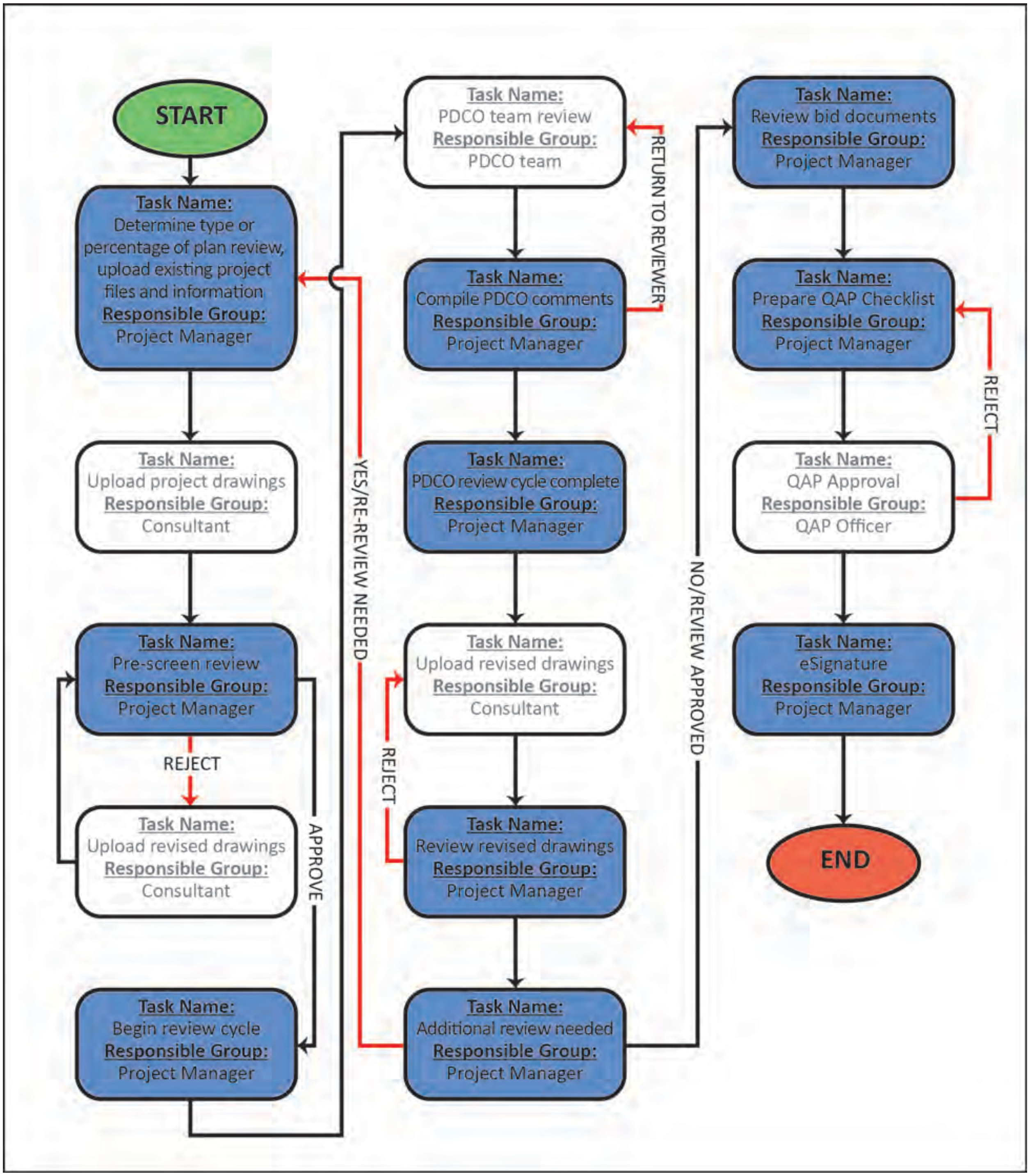


WORKFLOWS

WORKFLOWS:
Project Manager

Project Manager

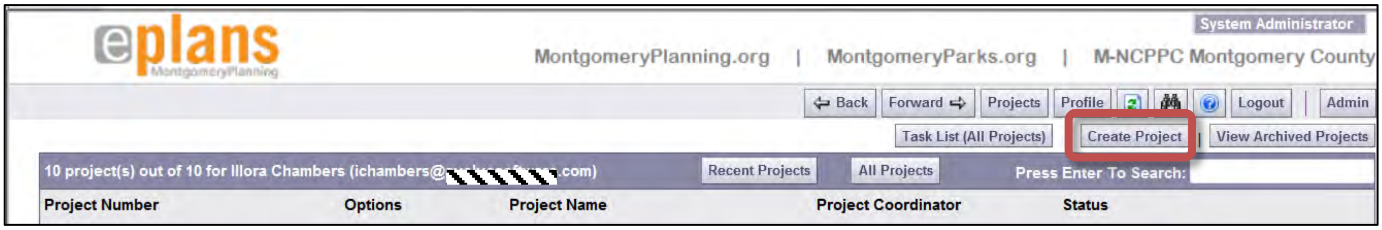
This section describes all of the Project Manager's tasks within The Workflow.



Project Startup

Before documents can be reviewed in ePlans, the Project Manager or System Administrator must first create a project, which stores all of the documents and comments, tracks the Workflow and distributes notifications to the project team members. All projects will start with the same basic Parks template, which you can modify to meet the specific needs of your project. You can add or remove folders, change group permissions, add project team members, assign roles and even skip tasks within the Workflow if needed. This section will walk you through the steps to create a project.

1. After logging in, the Active Projects Screen will appear. Click the "Create Project" button. *If you do not see this button, contact the System Administrator to change your privileges.*



2. Fill in the top four lines of the Create Project form:

   Project Number: Enter a unique project identification code, using the following naming system: **AAA-BB-CCCCCC-DDDD-EEEEEE,** where:

      AAA – Three-character Park Facility Code. *See the appendix for a list of park facility codes.*

      BB – The last two digits of the fiscal year in which the project is scheduled to begin. *For example, enter "15" if a project is scheduled to begin in FY 2015.*

      CCCCCC – Project Description Form (PDF) or other identifying number. If the project originated from another agency (such as a Technical Review or a Mandatory Referral) use the number assigned by the sponsoring agency. *This number does not necessarily represent the funding source (OCA) for the project.*

      DDDD – Three or four digit Project Tracking Database (PTDB) number. This is number assigned to the project in the Project Tracking Database.

      EEEEEE – Type of project, up to 50 characters. *Type in a very short (2-3 word) description of the work to be done.*

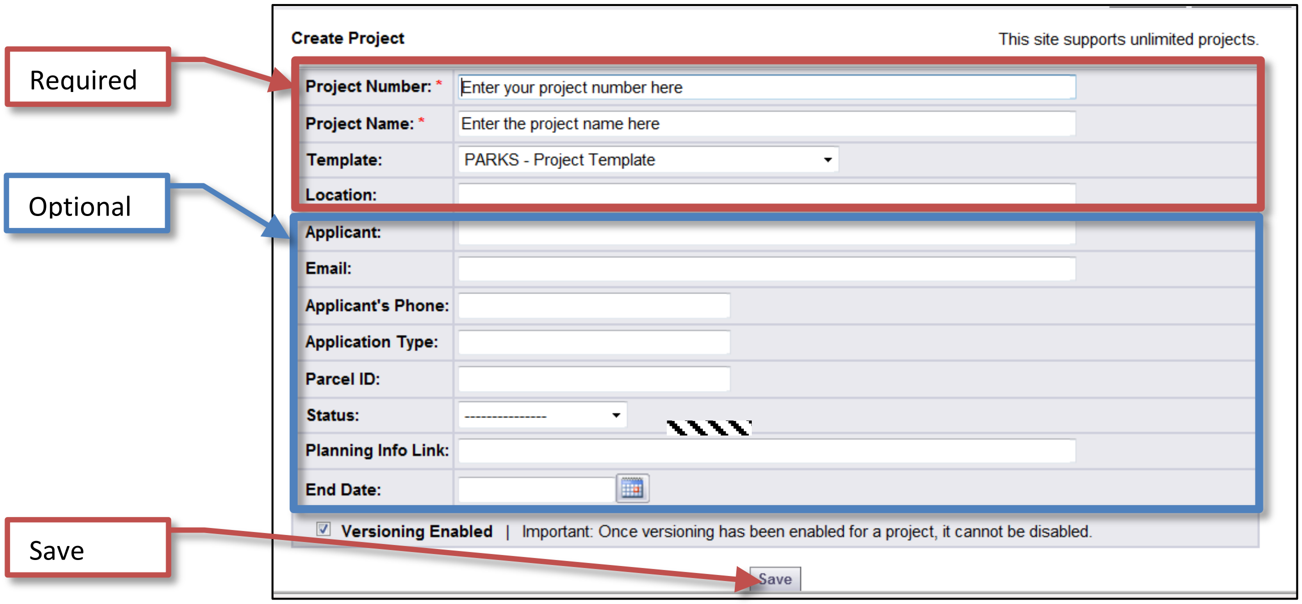
   Project Name: Enter the name of the project site. *This could be the name of an entire park or just one amenity within a park, depending on the scope of the project.*

   Template: Choose "PARKS – Project Template" from the dropdown list.

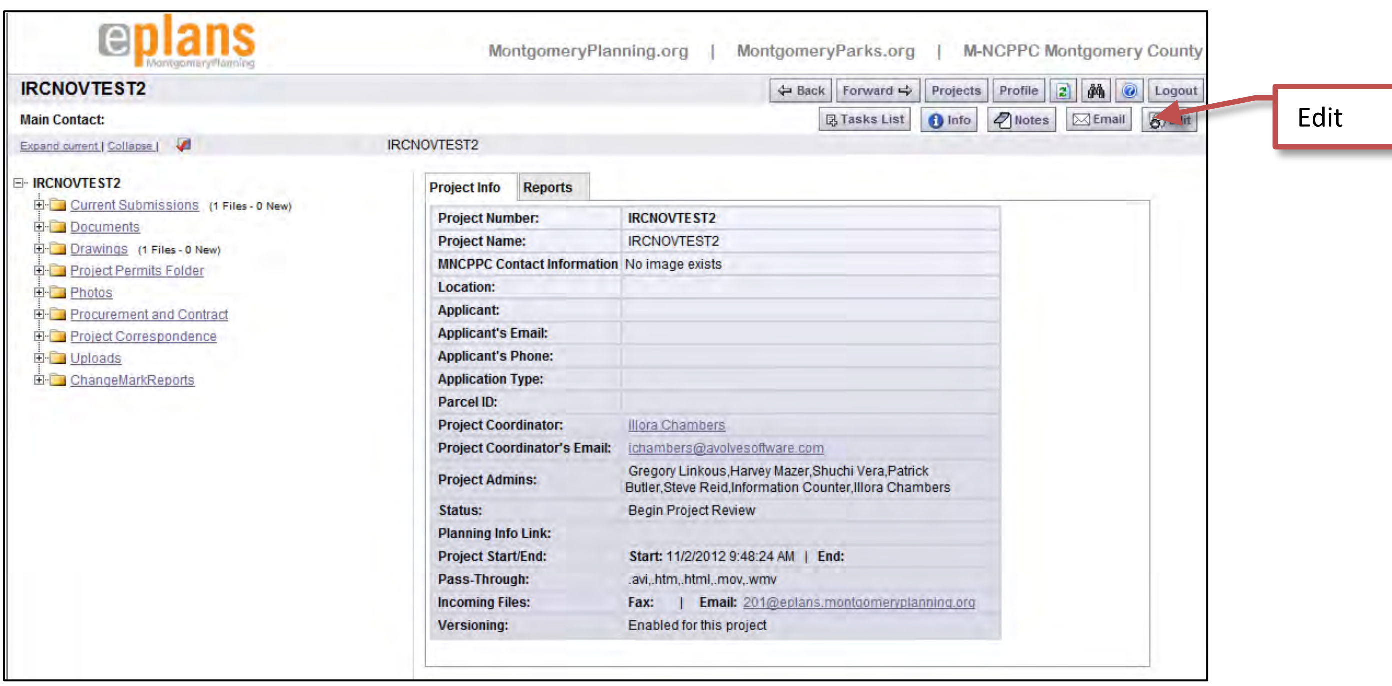
   Location: Enter the name of the park.

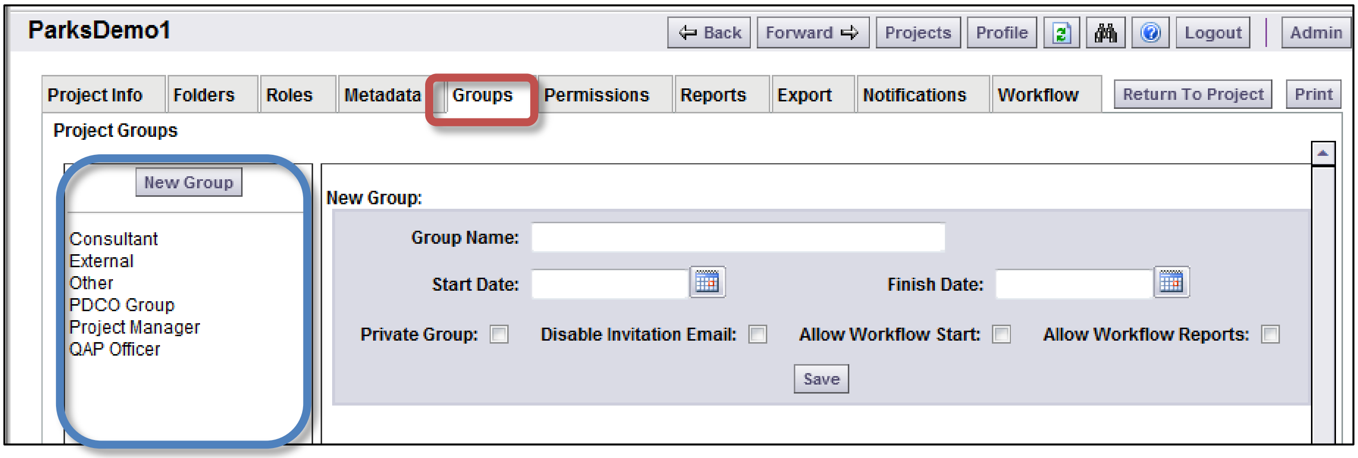
   The remaining fields of the Create Project form are optional.

3. Click the "Save" button. This will take you to the newly created project's Main Page. *Once you click the "Save" button, ePlans will load all of the Parks template information into the project you just created. This may take a few moments.*

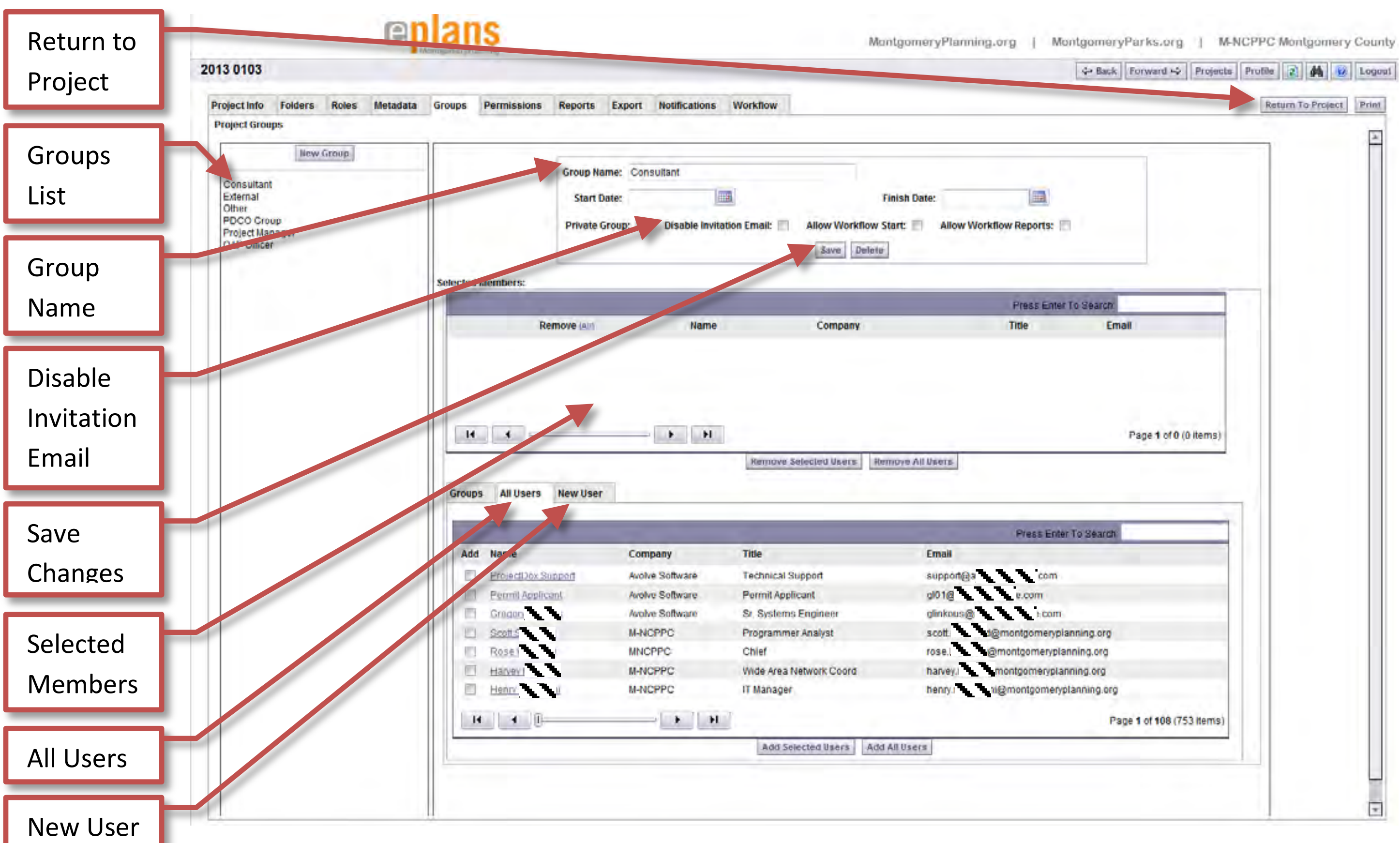


4. Click on the "Edit" button to modify the project template and to add users to the project. You can add users to the project at any time during the workflow by going back to this button. *Adding users to the project allows others to view and comment on the documents loaded into ePlans. The rest of the project template can be used as-is or customized to meet the needs of your specific project. Most projects will not require any changes to the template.*



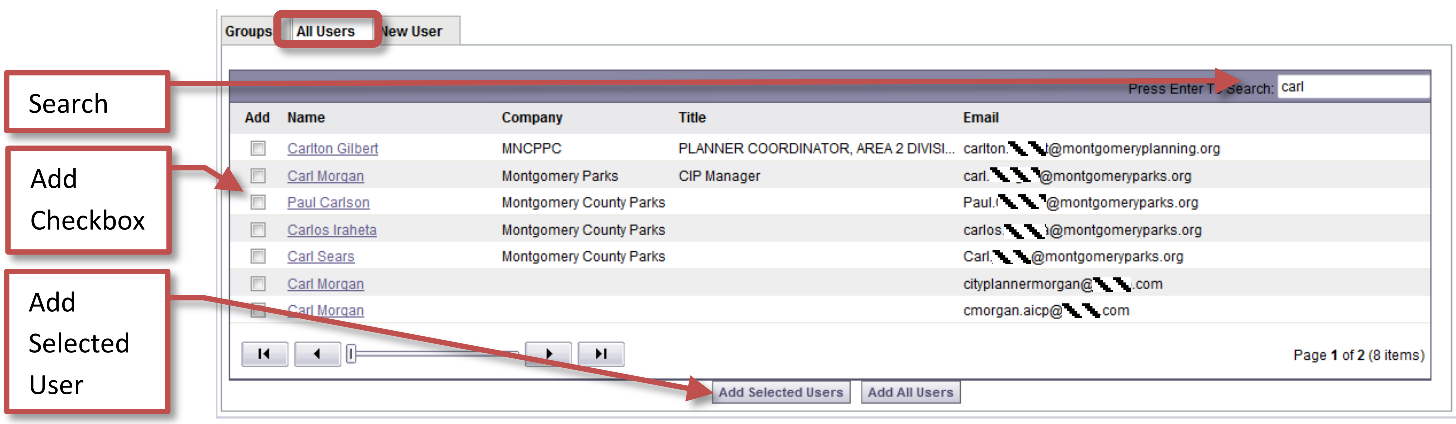


5. Select the "Groups" tab at the top of the screen. The left window displays a list of pre-set groups that are most common to the plan review process. Select the group you wish to add users to by clicking on the group's name in the left window. The Group Name field at the top of the screen will then show the name of the group you just selected. ***Do not change or delete the group names as they are tied directly to the Workflow.*** *Default roles and permissions have been assigned to each group, based on the Park Development Division's common business practices. You can modify any of these default settings by clicking on the tabs at the top of the screen.*



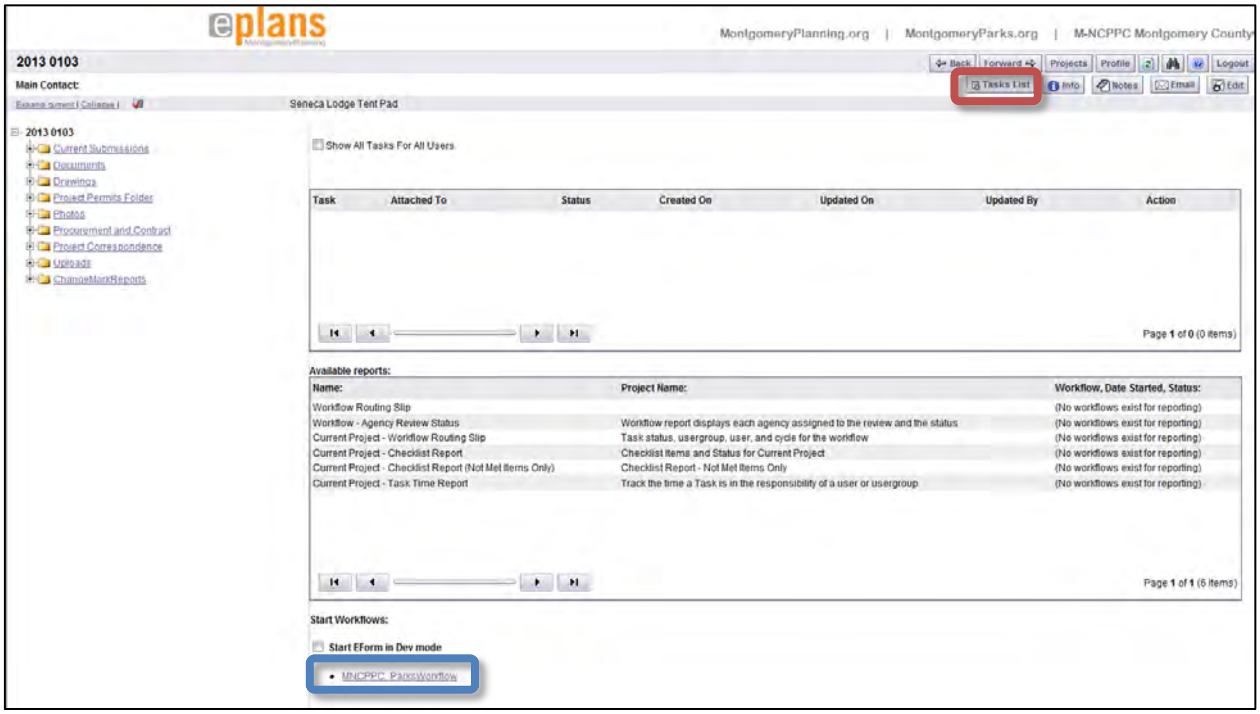
6. Add users to a group by using the “All Users” or “New User” tab at the bottom of the screen.

   All Users (existing users): The e-mail addresses for all Montgomery County Parks Department employees are pre-loaded into the ePlans database. Similarly, any consultant who has previously been invited to a project will appear in the “All Users” tab. To add an existing user to a group, enter all or part of a person’s name or e-mail address into the search field. Click on the checkbox next to that user’s name and click on the “Add Selected Users” button at the bottom of the screen. That user’s name will now appear in the “Selected Members” box at the top of the screen.
   New Users: Make sure the person you are trying to add does not appear in the “All Users” window before creating a new user. To create a new user who has not yet been added to the ePlans database, select the “New User” tab. Enter the name and e-mail address of that user and click the “Invite” button. The user will receive an e-mail invitation to ePlans with a temporary password, and be added to the “All Users” list.
7. Repeat steps 5 and 6 for each relevant group in the project. *Be sure to add yourself as a PDCO team member in case you need to reassign a review task to yourself. See the Reassign and Skip Pending Tasks description for more information.*



8. Once you have added all of the necessary users, click the “Return to Project” button in the Main Tool Bar.
9. Click the “Tasks List” button in the Main Tool Bar.

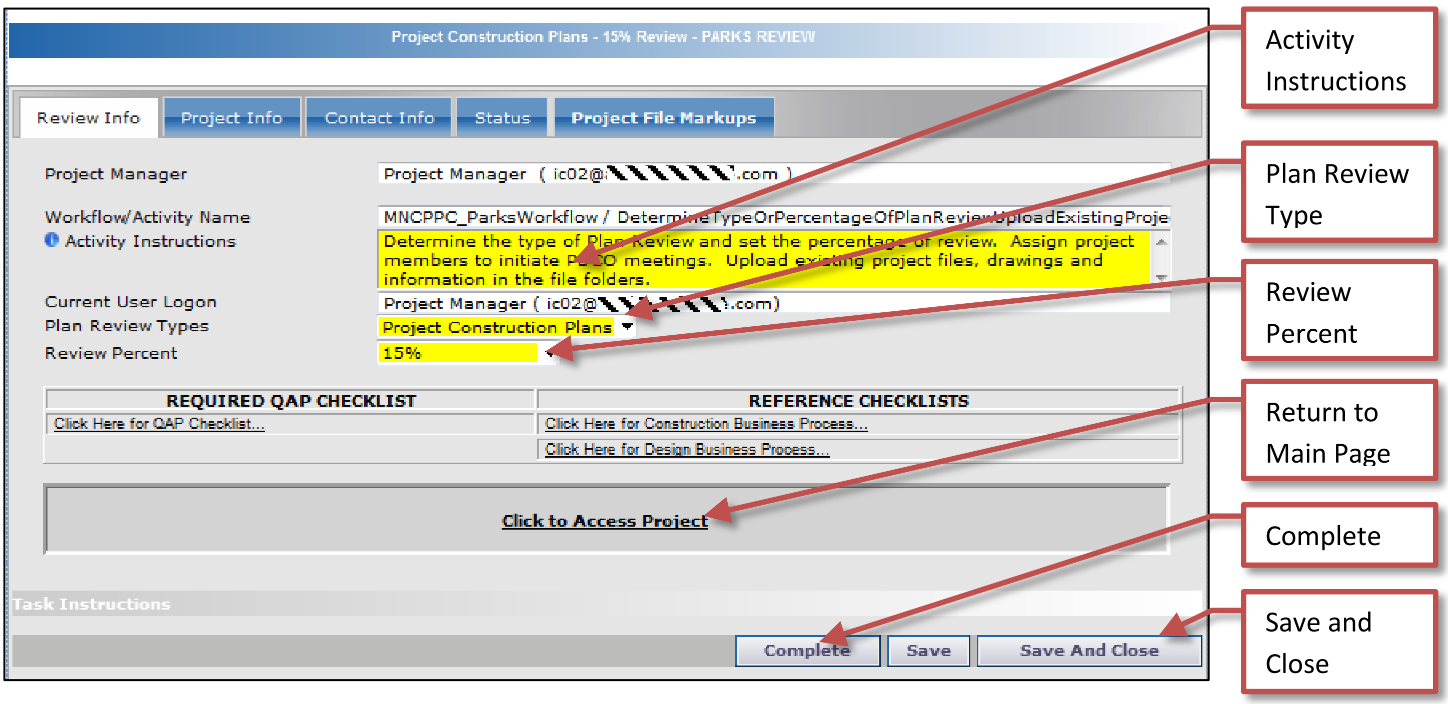
10. At the bottom of the page, click the “MNCPPC ParksWorkflow” link to start the Workflow. This is arguably the most important step in the process, as it initiates the project and sends out the first task.



Task Name: Determine Type or Percentage of Plan Review, Upload Existing Project Files and Information

Now that you have set up your project template and added users, you are ready to begin the Workflow. The first task is to identify what type of project you are working on and to upload background documentation to the project folders.

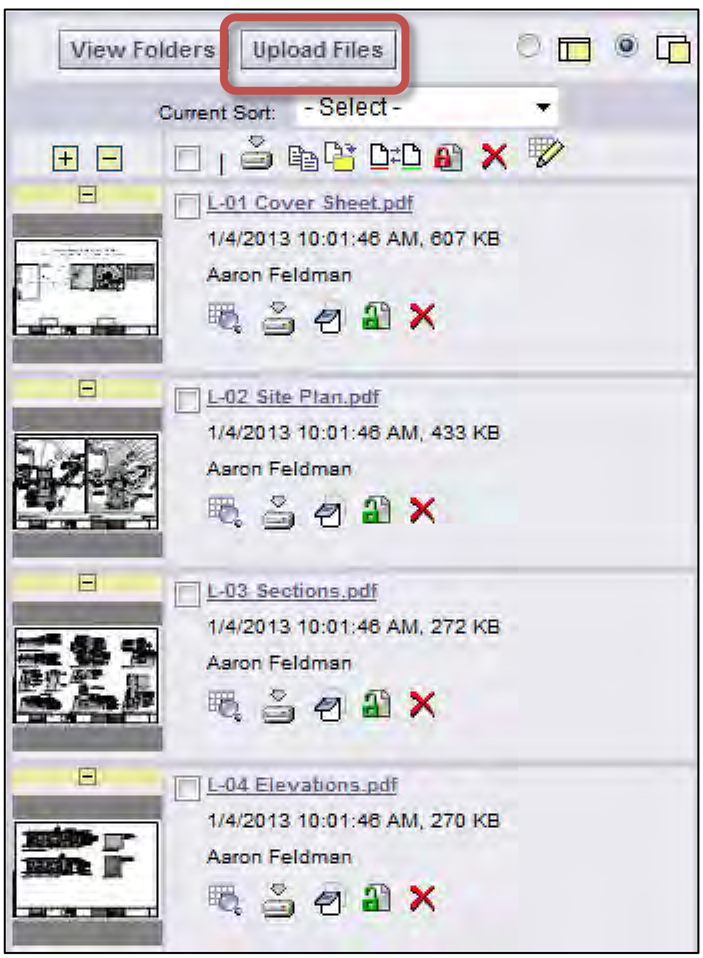
1. Once you start the Workflow, a task will appear in your Task List. Click on the link entitled “DetermineTypeOrPercentageOfPlanReviewUploadExistingProjectFilesandInformation.”
2. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm. *This step will take a few moments while ePlans generates the eForm for the first time for this project.*
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.

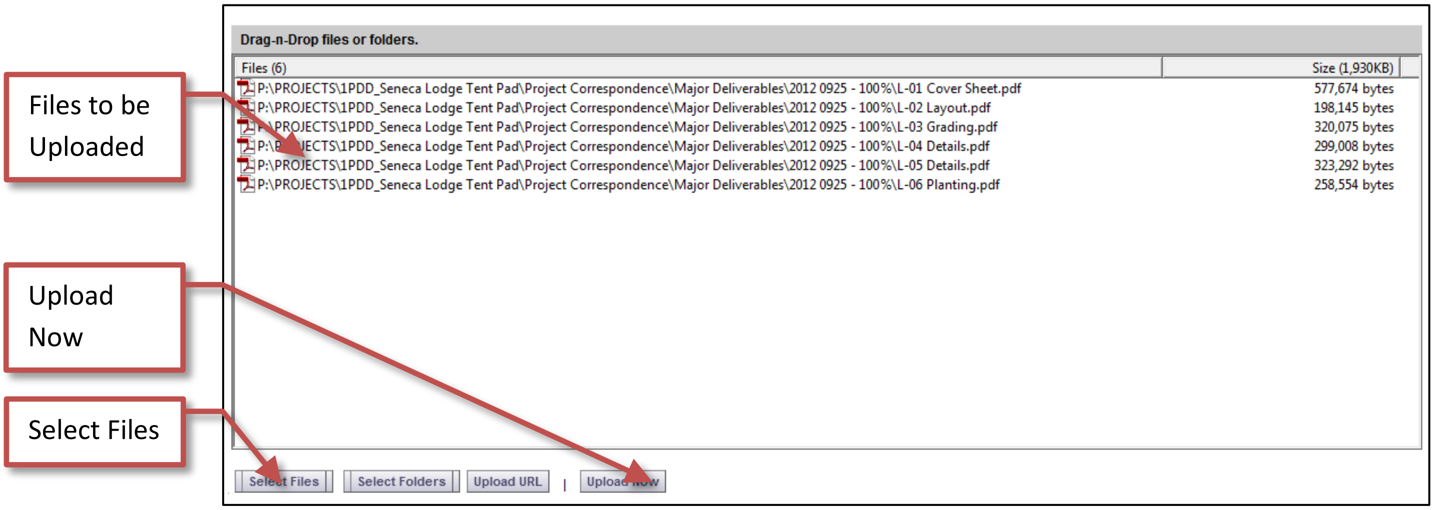


4. Select the Plan Review Type from the dropdown menu. A list of standard plan review types have been provided in the dropdown menu. Select one of those or add your own by selecting “Other” and typing in another plan review type.
5. A list of standard milestone review percentages have been provided in the Review Percent dropdown menu. Select one of those or add your own by selecting “Other” and typing in another number.
6. To upload project files, click on the link entitled “Click to Access Project.” This will take you to the Project’s file structure. *The file structure list also appears at the left side of the screen in the*

project's Main Page. See the [File Management](#) section of this guide for more detail about file organization.

7. Click on the destination folder to which you would like to upload files.
8. Click on the "Upload Files" button, and a new window will open allowing you to select files to upload. *If the folder you selected is empty, a set of instructions for uploading files will appear on your screen. If there are already files in the folder you selected, click the "Upload Files" button at the top of the screen.*



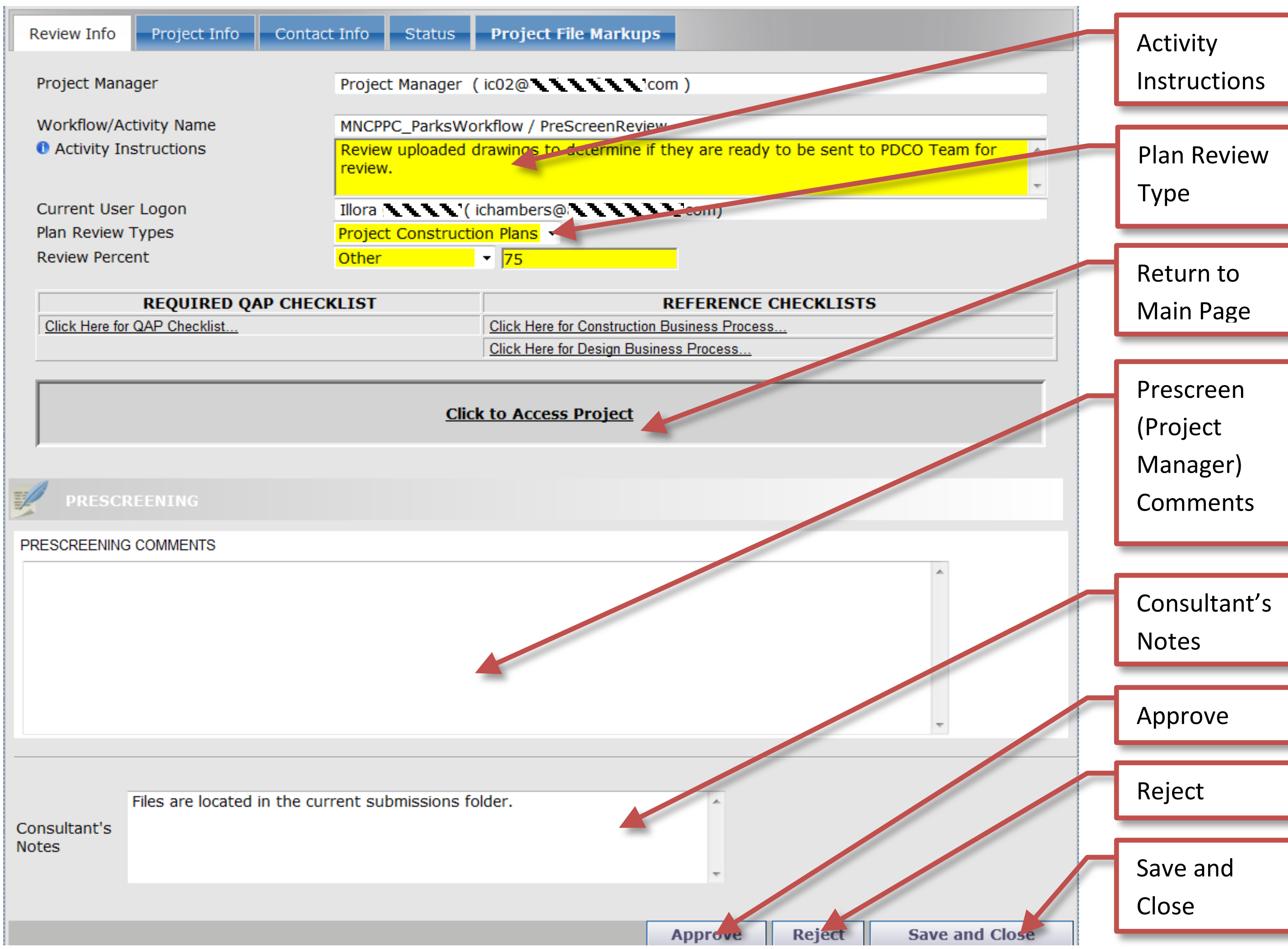


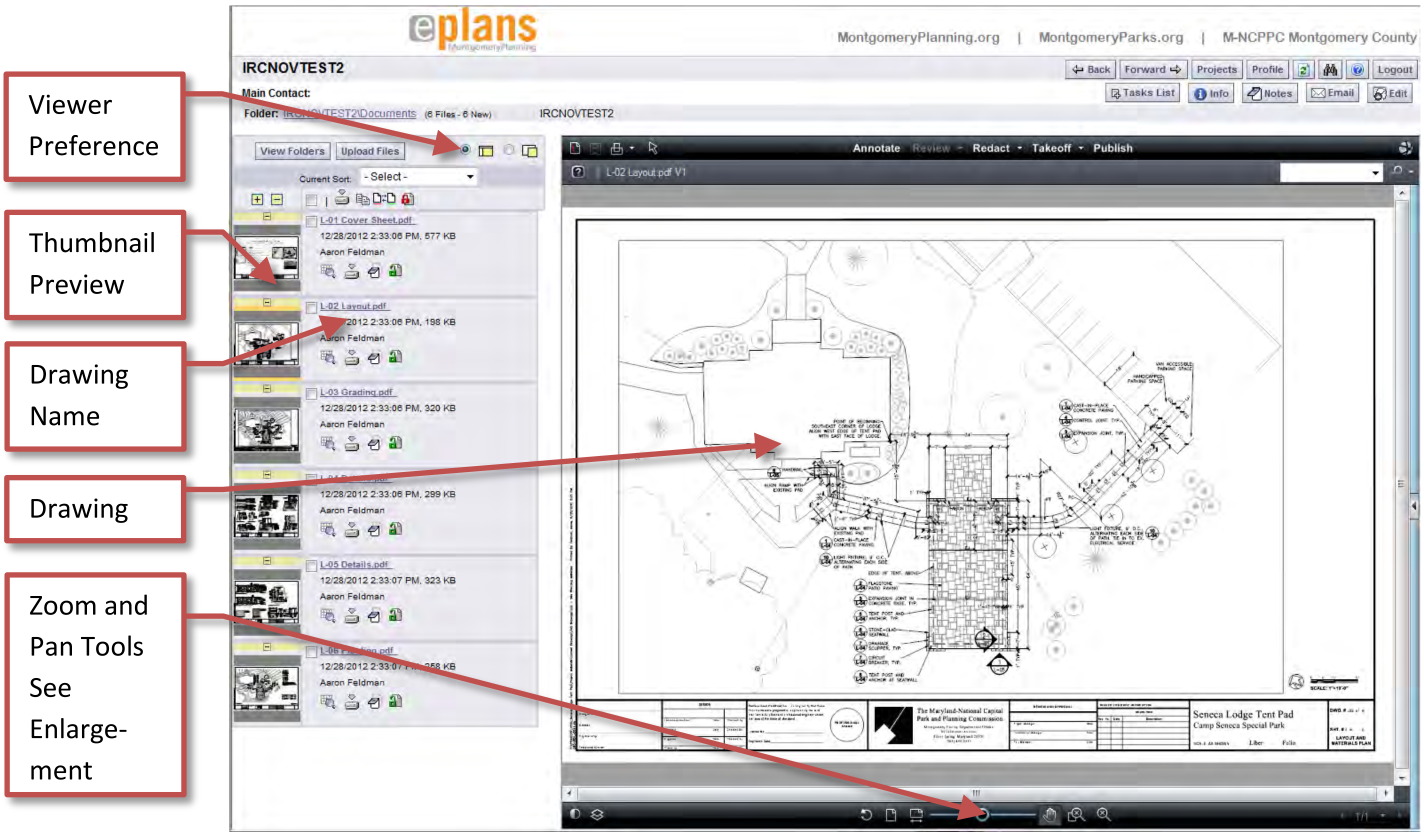
9. Click the "Select Files" button. A Windows Explorer window will open. *You can also drag files directly from Windows Explorer into the Files to be Uploaded Box.*
10. Find the files that you want to upload from your computer or local server drive onto ePlans. Highlight the desired files and click "Open." *Hold down the "Control" key to select multiple files.*
11. Click the "Upload Now" button to upload the files.
12. Once you are finished uploading project files, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Task List (see step 1).*
13. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
14. You are now finished with this task, and it will disappear from your Task List.
15. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 7 through 11 above.

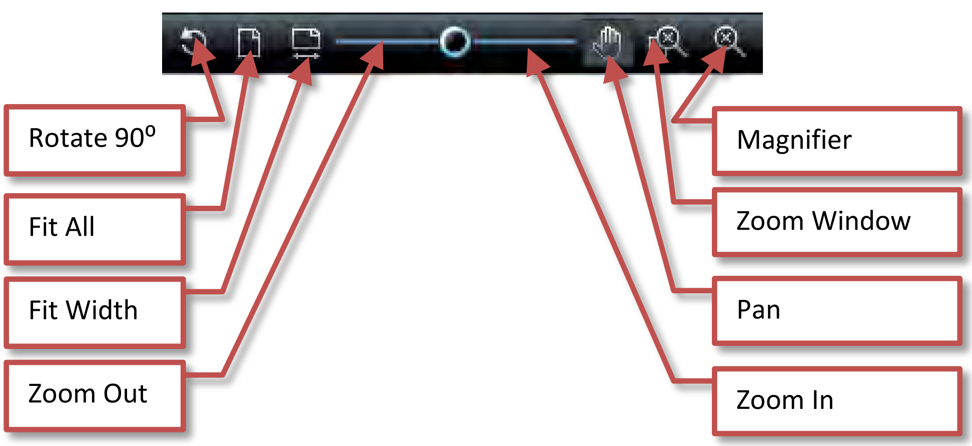
Task Name: Pre-Screen Review

Once you determine the type or percentage of plan review and upload project drawings, the Consultant(s) will receive an e-mail instructing them to upload their project drawings for review. Once that is complete, you will need to conduct a Pre-Screen Review to ensure the Consultant's drawings are acceptable to send to the PDCO team for their review.

1. Once the consultant completes the task entitled Upload Project Drawings, a new task will appear in your Task List. Click on the link entitled "PreScreenReview."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. Near the bottom of the page is a field labeled "Consultant's Notes." This is where you will find any special instructions left by the Consultant when they uploaded their drawings.
4. To view the uploaded drawings, click on the link entitled "Click to Access Project." This will take you back to the project's Main Page.







5. The project's File List will appear on the left side of the screen. Unless otherwise noted in the Consultant's Notes, the files should be found in the "Current Submissions" folder. Click on the folder to see a preview of all of the drawings. The [File Management](#)section of this manual contains additional details about the different functions available in the File List.

6. Before viewing the Consultant's drawings, set your ProjectDox viewer preference by clicking on the radio button for the view you would like to use.
    - Right Side Panel: The drawings will appear in the same window as the File List, on the right side of the screen. This setting reduces the number of windows you have open, making desktop navigation simpler.
    - Separate Window: The drawings will appear in a separate window. This setting allows you to expand the viewing area to incorporate more of your screen.

7. To view a drawing, click on the drawing's name or the thumbnail image of that drawing. The drawing will appear in the Brava Viewer. Use the tool bar at the bottom of the screen to zoom and pan to close-up views of the drawing. To view another drawing, click on another thumbnail image or another drawing name.
8. At this point, you can use the changemarks tool to make individual comments on each drawing. Refer to the PDCO Team Review task for detailed instructions on making changemarks.
9. Once you have completed your review of all of the drawings, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Task List (see step 1).*
10. Complete this task by selecting one of the three buttons at the bottom of the screen.

    Approve: The drawings are acceptable to send to the PDOC Team for their review without any changes from the Consultant. This will move the Workflow to the Begin Review Cycle Task, skipping the Upload Revised Drawings Task.

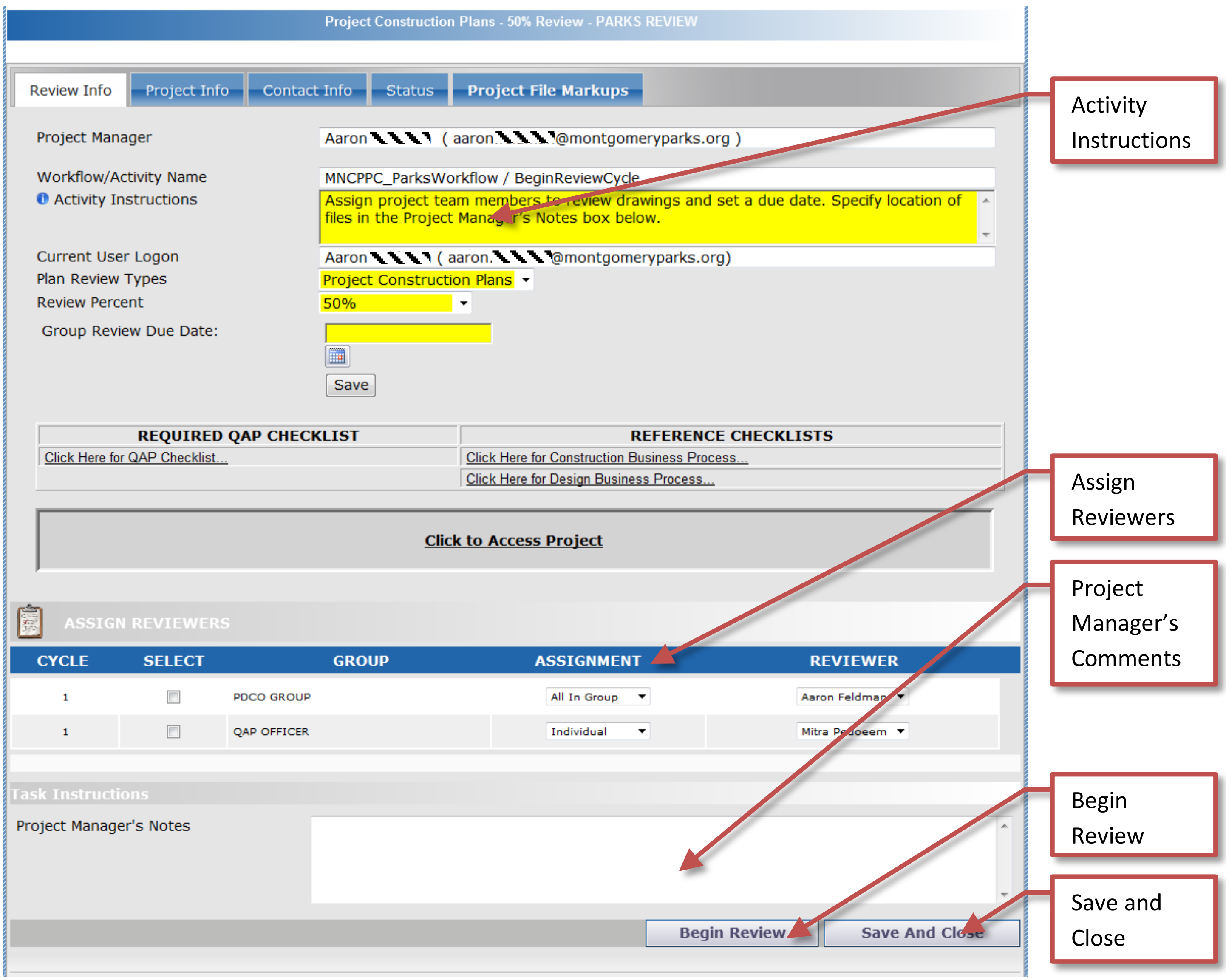
    Reject: The Consultant needs to make changes to the drawings before they can be sent to the PDCO Team for their review. Before clicking the "Reject" button, enter your instructions to the Consultant in the Prescreening Comments Field on the eForm. This will move the Workflow to the Upload Revised Drawings Task. After the Consultant uploads the revised drawings based on your comments, you will need to complete another Pre-Screen Review.

    Save and Close: Select this button if you want to leave ePlans and finish this task later.
11. Once you approve the Consultant's drawings, you will be finished with this task.

Task Name: Begin Review Cycle

Once you determine the Consultant's drawings are acceptable to send to the PDCO Team, you will need to assign project team members to the PDCO Team review and set a due date for them to complete their review.

1. A new task will appear in your Task List. Click on the link entitled "BeginReviewCycle."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Enter the Group Review Due Date and click the "Save" button. This is the deadline for all PDCO Team members to complete their review of the submitted drawings.

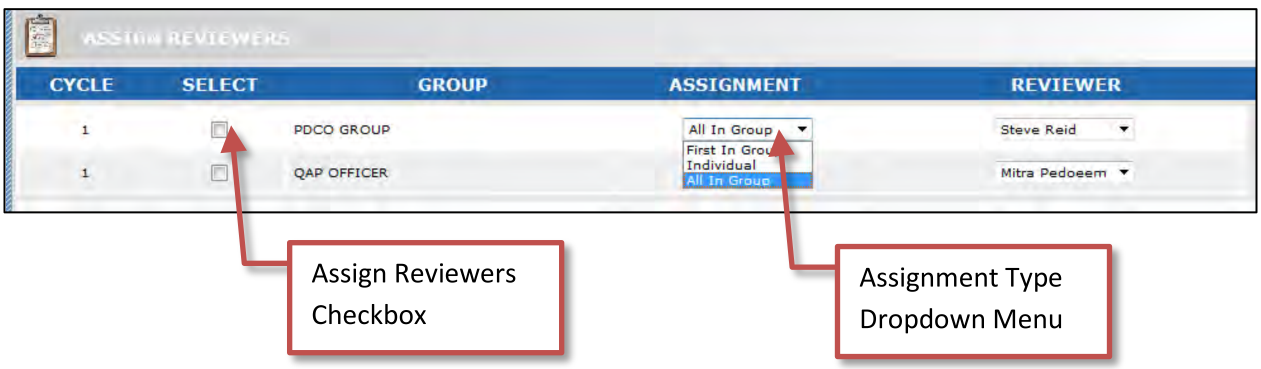


5. Assign reviewers by clicking the checkbox next to each group you would like to include in the PDCO Team Review. You will also need to set the Assignment Type for each review group. *As Project Manager, you are, by default, included in the PDCO Team Review, so don't worry about adding yourself to the Assign Reviewers list.*

   <u>All in Group</u>: All users in the group will receive this task and all users will need to accept the task. This is the default setting, and the most common setting to use in the review process.

   <u>Individual</u>: The task is assigned to the individual user whose name is selected in the dropdown list to the right of the Assignment Type.

   <u>First In Group</u>: All users in the group will receive the task, but only one person needs to accept it.

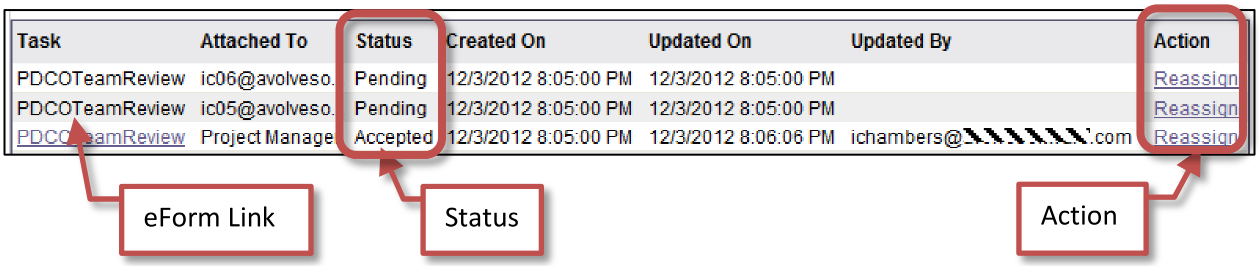


6. The Project Manager's Notes Field allows you to communicate general instructions, such as the location of the files to review, to the PDCO Team.
7. Click the "Begin Review" button at the bottom of the eForm to finish this task and move on. *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
8. You are now finished with this task, and it will disappear from your Task List.

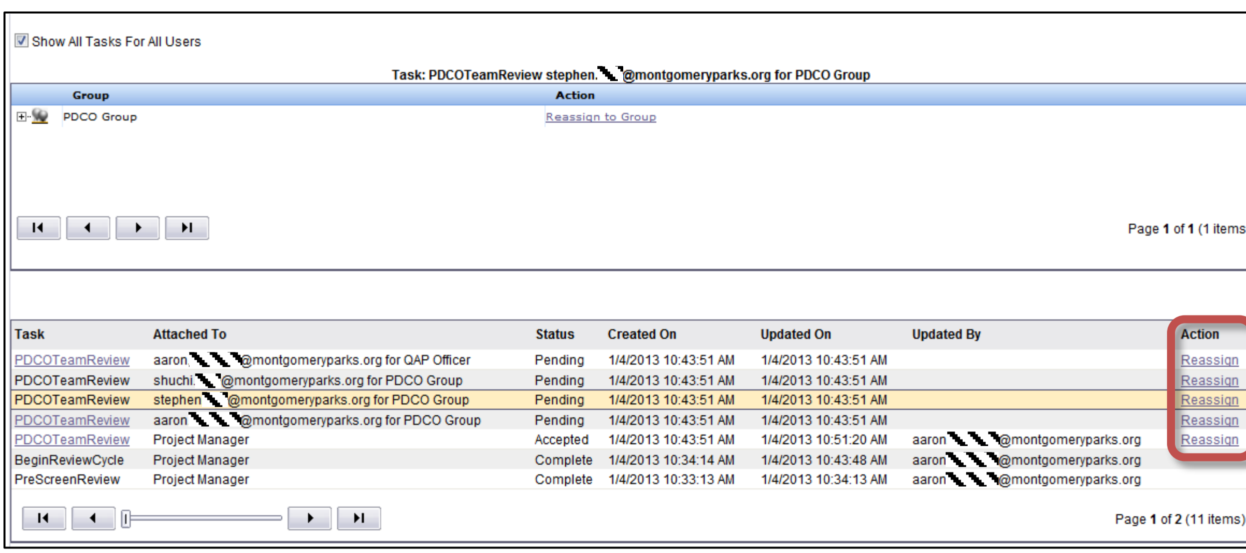
Task Name: PDCO Team Review (Reassign and Skip Pending Tasks)

As the Project Manager, you are responsible for completing a review of the Consultant's documents just like every other member of the PDCO Team. See the PDCO Team Workflow chapter for detailed instructions on how to make and submit comments. In addition to conducting a PDCO Team review of your own, you are responsible for monitoring the progress of the PDCO Team and ensuring everyone submits their comments by the Due Date. In order to keep a project moving, you can bypass a reviewer's task or reassign a reviewer's responsibilities to another user.

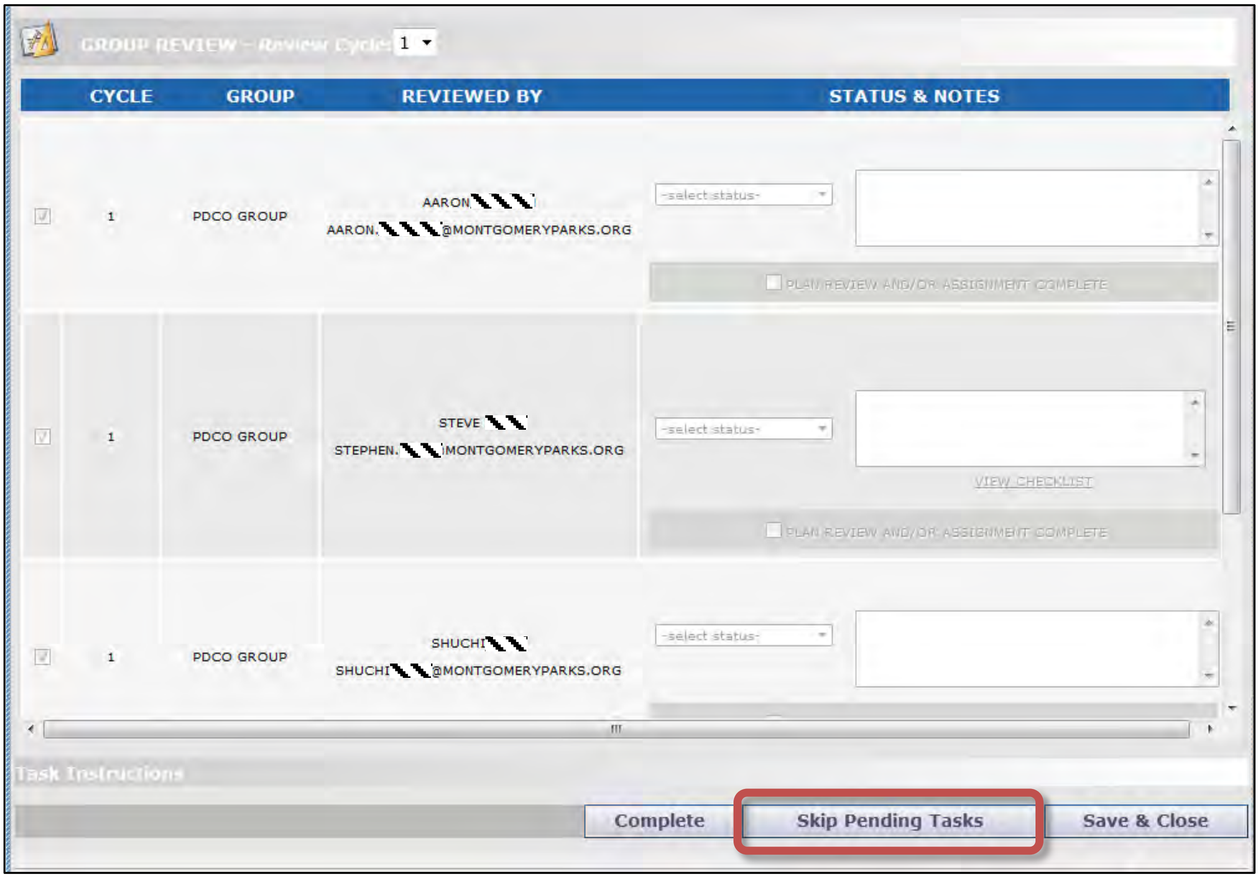
1. You can use the Status Column in your Task List to monitor the progress of each member of the PDCO Team as they complete their review of the Consultant's documents.
   Pending: The task has not yet been accepted by the assigned user.
   Accepted: The assigned user has accepted the task but has not yet completed it.
   Complete: The user has completed the assigned task.



2. To reassign a review task to another user, click on the "Reassign" link in the Action Column. A pop-up window will appear asking if you want to reassign this task to another user. Click the "OK" button. This will take you to the Reassign Window.
3. The user that you want to reassign from will be highlighted in yellow. Select a user within the PDCO Team and click the "Reassign" link at the right side of the screen. *If you want to reassign to someone not in the PDCO Team, add a user to the PDCO Team group using the "Edit" button in the Main Tool Bar. You can also reassign a task to yourself to complete the task without additional comments.*



4. In order to end the PDCO Team Review early and skip all outstanding reviews, you will need to change all reviewers' status from "Pending" to "Complete." To do this, click on the task attached to your e-mail address in the Task List. This will take you to the eForm.
5. Click on the "Skip Pending Tasks" button at the bottom of the eForm. You will be asked to make sure that you want to skip all pending tasks. If so, click "OK."

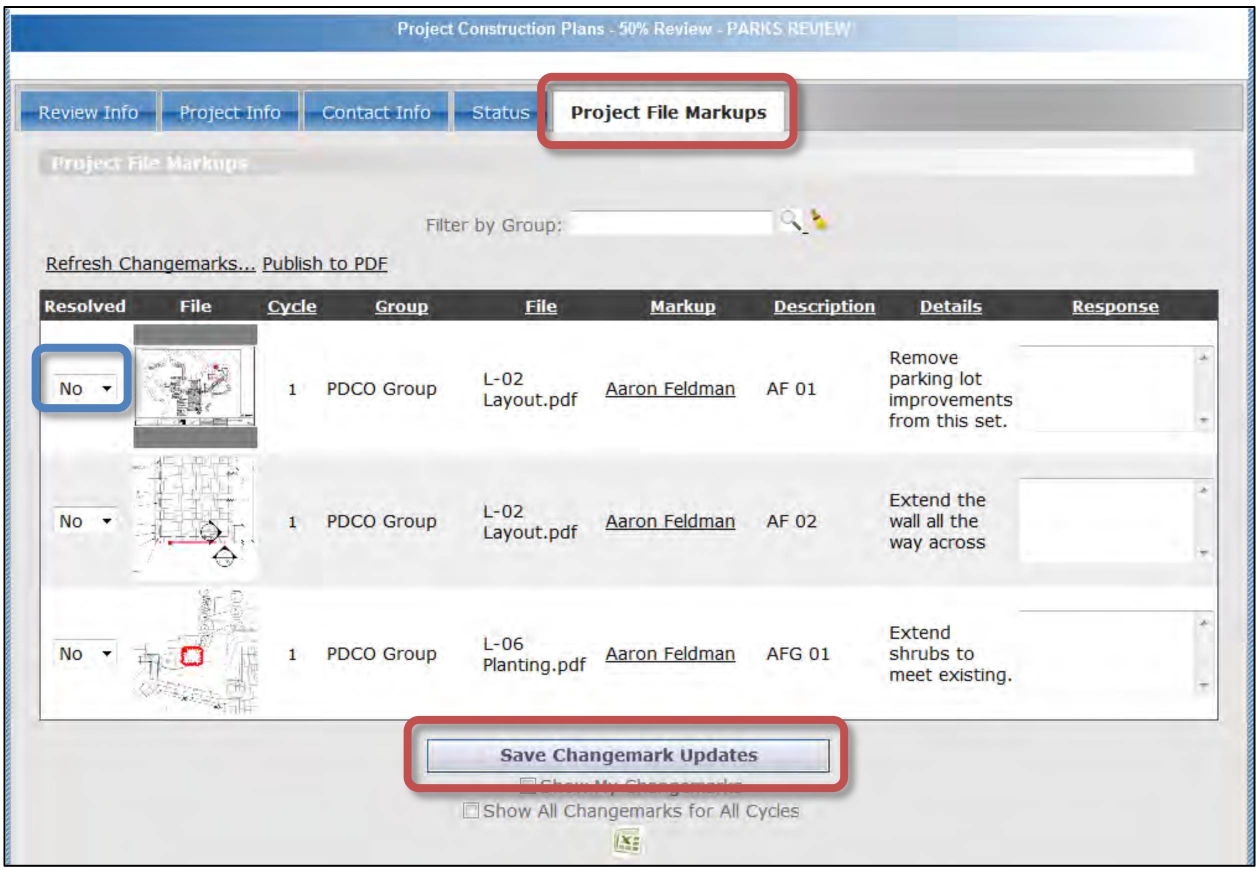


6. Click the "Complete" button at the bottom of the eForm to finish the task. You will be asked to make sure that you want to complete the PDCO Team Review. If so, click "OK." The status of all PDCO Team members will change to "Complete" and the task will be removed from everyone's Task List. *Once you click the "Complete" button, you cannot reopen the PDCO Team Review task. PDCO Team members may still make changemarks on drawings, but you will need to communicate with them outside of the Workflow.*

Task Name: Compile PDCO Team Comments

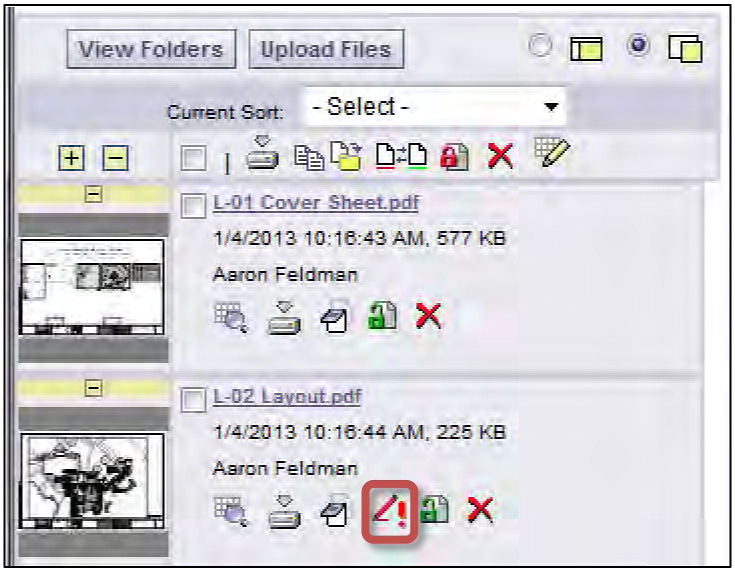
Once every member of the PDCO Team has had the opportunity to comment on the Consultant's documents, you will need to compile and review the comments before sending them to the Consultant. This task allows you to rectify any conflicting comments, remove any redundancies and clarify discrepancies with individual reviewers.

1. A new task will appear in your Task List. Click on the link entitled "CompilePDCOTeamComments."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. Click on the "Project File Markups" tab at the top of the screen.



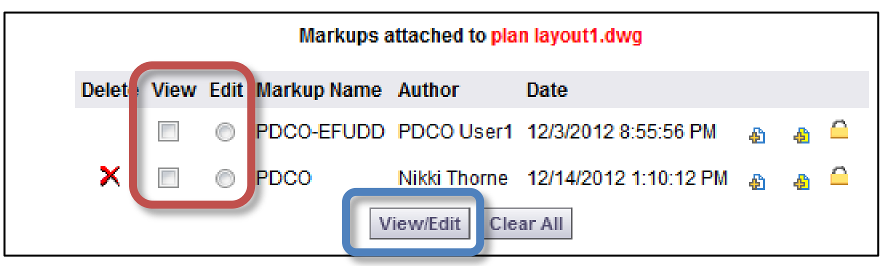
4. The top portion of the Project File Markups Screen shows a list of every changemark made on the drawing. Review each of the changemarks. For each changemark that you feel is appropriate to forward on to the Consultant, select "Yes" in the Resolved Column for that changemark. If you are not satisfied with a changemark or you feel it needs further clarification from the reviewer, select "No" in the Resolved Column.

5. You can view and edit changemarks within the context of an entire drawing by navigating back to the project's Main Page and selecting the folder to which the Consultant's drawings are saved (this is usually the Current Submissions Folder). *Do not close the eForm while you are viewing changemarks; it may be helpful to toggle back and forth between the two screens.*



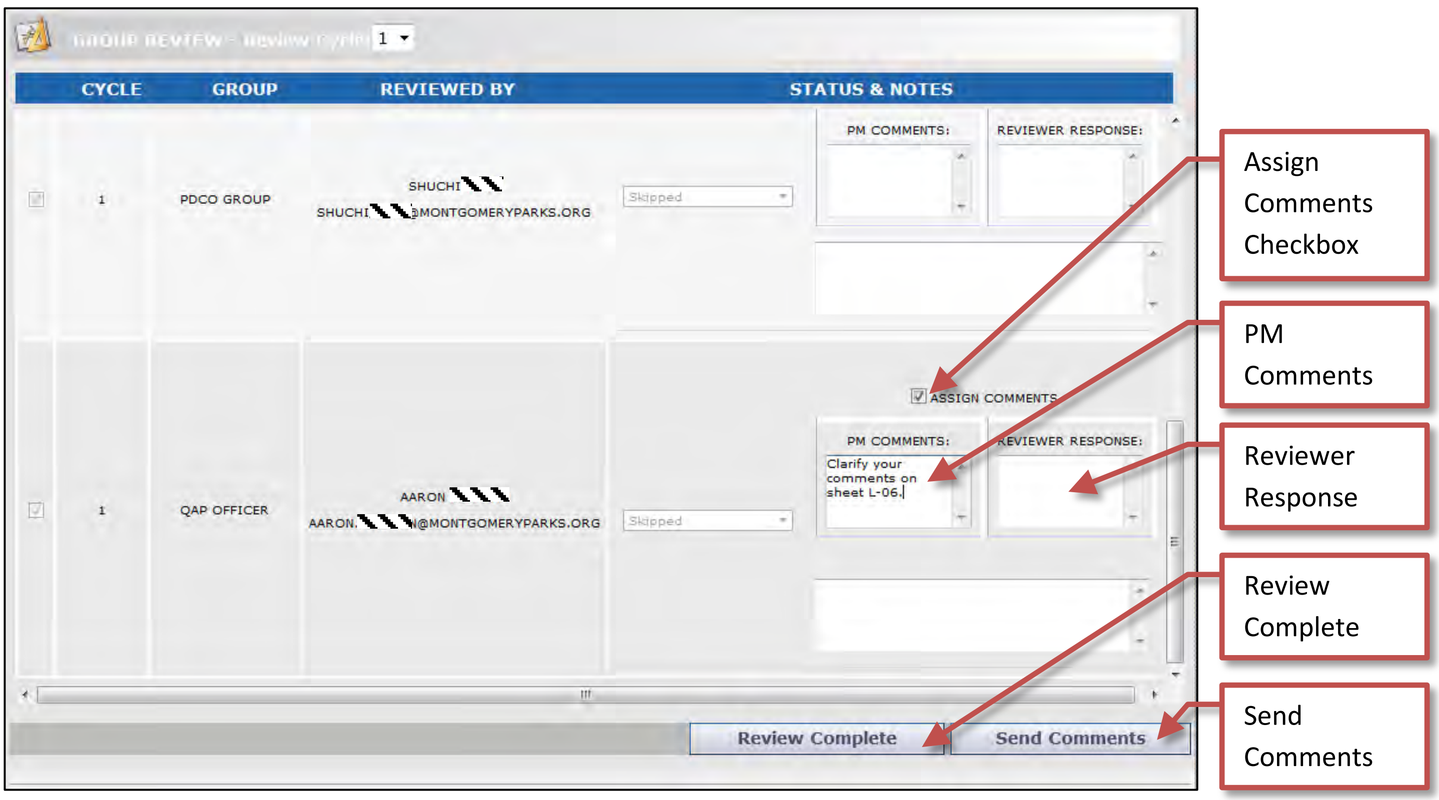
6. If changemarks exist within a drawing, the "Markups" icon will appear below the file name. Click the "Markups" icon, and the View Markup Screen will appear.
7. Decide which changemarks you want to view or edit.

   View: To view changemarks, click on the "View" box for each markup name you would like to see. You can view as many or as few changemarks at the same time as you would like.
   Edit: To edit changemarks, click on the "Edit" button for the changemark you want to edit. You can only edit one set of changemarks at a time.



8. Once you have selected the changemarks you want to view or edit, click the "View/Edit" button. The drawing and all of the selected changemarks will appear in the Brava Viewer. *Here, you can use the tool bar at the bottom of the screen to pan and zoom to areas of the drawing. You can also click on individual changemarks to see the text of each.*
9. After reviewing all of the changemarks, click the "Save Changemark Updates" button in the Project File Markups Screen of the eForm and scroll to the bottom of that screen. Select the "Assign Comments" checkbox for each reviewer who has unresolved changemarks (changemarks marked "No" in the top portion of this screen).

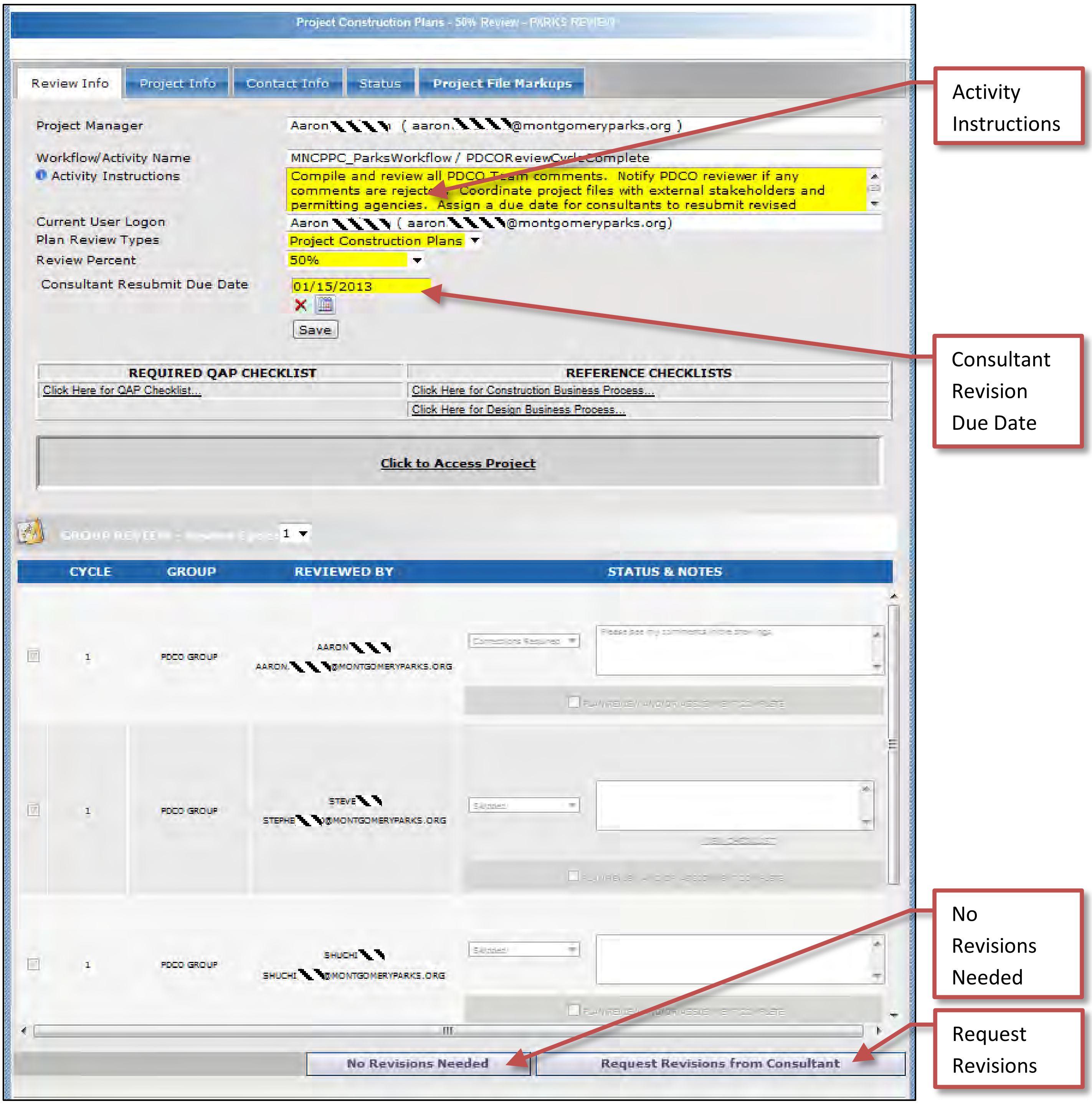
10. Type any general comments, questions or instructions in the PM Comments Field for each reviewer. *The PM Comments Field and Reviewer Response Field show a record of all of the text entered into these boxes. Be sure to enter your most recent comments at the top of the box; adding a date at the beginning of each new comment may help to better organize your comments and responses.*
11. Click the “Send Comments” button to notify the PDCO Team reviewers of unresolved comments.
12. Repeat steps 1 through 11 until all changemarks are resolved. *As changemarks are resolved, change their status from “No” to “Yes” in the Resolved Column at the top of the Project File Markups Screen of the eForm. Once all of a reviewer’s changemarks are resolved, uncheck the “Assign Comments” checkbox for that reviewer.*
13. Once you are satisfied with all of the changemarks, make sure all of the “Assign Comments” checkboxes are unchecked and click the “Review Complete” button to end the PDCO review.



Task Name: PDCO Review Cycle Complete

Once you have reviewed and resolved all of the PDCO Team's comments, you will need to coordinate a review of the Consultant's documents with any external stakeholders and permitting agencies. You can do this by adding external reviewers to the "External" user group (see the instructions for adding users to a project in the Project Startup section) and including them in the PDCO Team Review, or by requesting their comments separately, outside of the ePlans Workflow. Because external reviews often take longer than PDCO Team reviews, allowing their reviews to take place outside of the ePlans Workflow will allow you to return the PDCO Team comments to the Consultant in a more timely fashion.

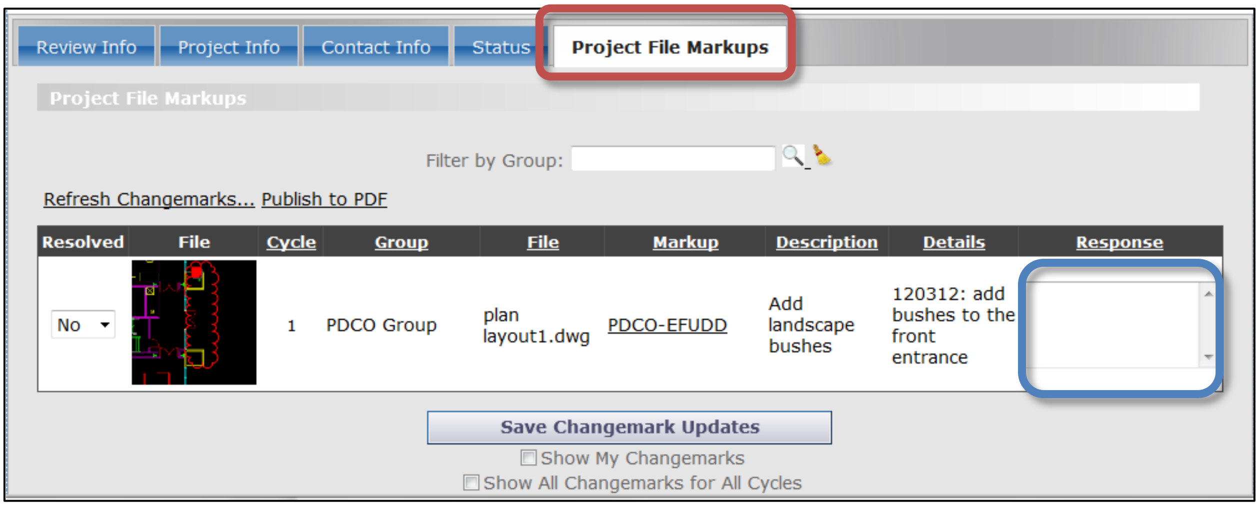
1. A new task will appear in your Task List. Click on the link entitled "PDCOReviewCycleComplete."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. If the Consultant is required to make revisions based on PDCO Team comments, enter the Consultant Resubmit Due Date and click the "Save" button. This is the deadline for the Consultant to submit their revised drawings.
5. Click the "Request Revisions from Consultant" button to notify the Consultant that there are comments waiting for them.
6. If the Consultant is not required to make any revisions, click the "No Revisions Needed" button to move on to the next task (see screenshot on the next page).


Project Construction Plans - 50% Review - PARKS REVIEW
Review Info
Project Info
Contact Info
Status
Project File Markups
Project Manager
Aaron [redacted] (aaron.[redacted]@montgomeryparks.org)
Workflow/Activity Name
MNCPPC_ParksWorkflow / PDCOReviewCycleComplete
Activity Instructions
Compile and review all PDCO Team comments. Notify PDCO reviewer if any comments are rejected. Coordinate project files with external stakeholders and permitting agencies. Assign a due date for consultants to resubmit revised
Current User Logon
Aaron [redacted] (aaron.[redacted]@montgomeryparks.org)
Plan Review Types
Project Construction Plans
Review Percent
50%
Consultant Resubmit Due Date
01/15/2013
Save
REQUIRED QAP CHECKLIST
Click Here for QAP Checklist...
REFERENCE CHECKLISTS
Click Here for Construction Business Process...
Click Here for Design Business Process...
Click to Access Project
CYCLE
GROUP
REVIEWED BY
STATUS & NOTES
1
PDCO GROUP
AARON [redacted]
AARON.[redacted]@MONTGOMERYPARKS.ORG
1
PDCO GROUP
STEVE [redacted]
STEPHE[redacted]@MONTGOMERYPARKS.ORG
1
PDCO GROUP
SHUCHI [redacted]
SHUCHI [redacted]@MONTGOMERYPARKS.ORG
No Revisions Needed
Request Revisions from Consultant
Activity Instructions
Consultant Revision Due Date
No Revisions Needed
Request Revisions

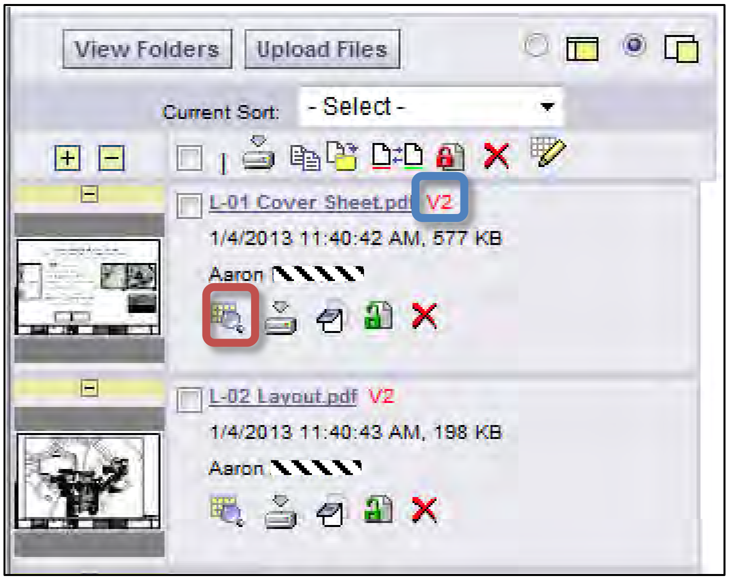
Task Name: Review Revised Drawings

After the Consultant revises their drawings, you will need to conduct another review to make sure all of the PDCO Team and external reviewer's comments have been addressed. This task is similar to the Pre-Screen Review and can be repeated until the Consultant has satisfactorily addressed all of the comments provided to them.

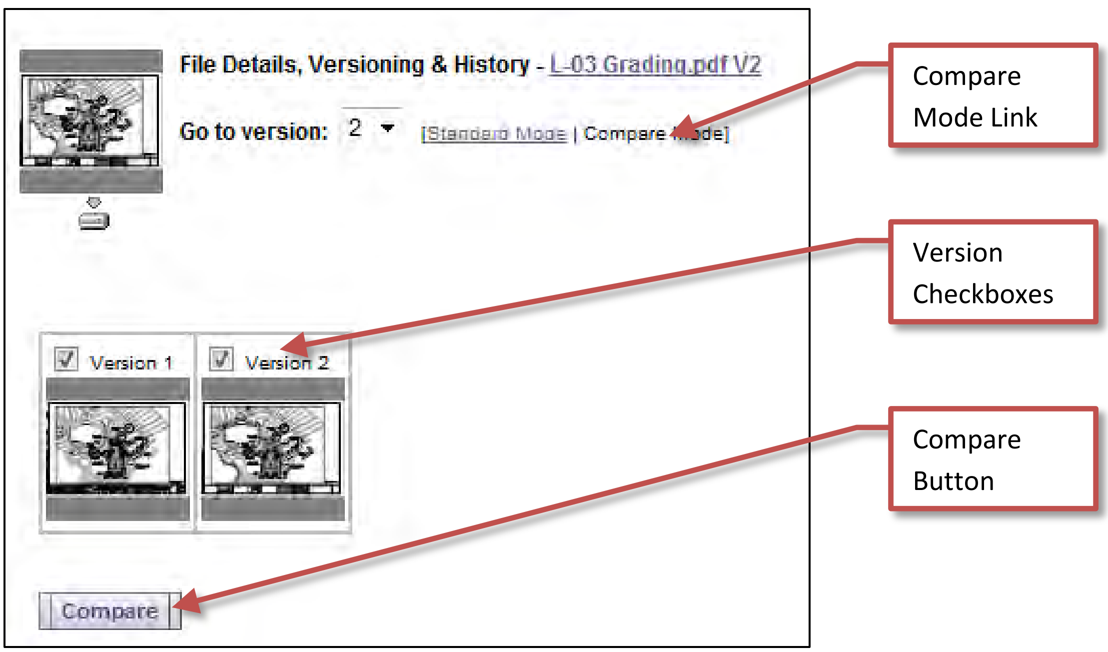
1. A new task will appear in your Task List. Click on the link entitled "ReviewRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. Near the bottom of the page is a field labeled "Consultant's Notes." This is where you will find any special instructions left by the Consultant when they uploaded their drawings.
4. Click on the "Project File Markups" tab at the top of the screen. The top portion of the Project File Markups Screen shows a list of every changemark made on the drawing. View the Consultant's response to each changemark in the "Response" field at the right of the screen.



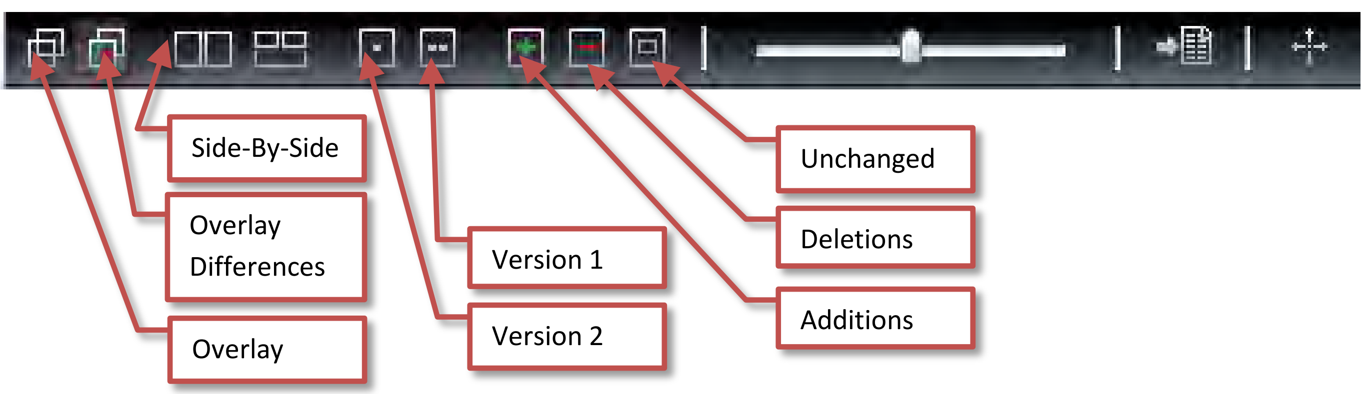
5. You can view the revised drawings by navigating back to the project's Main Page and selecting the folder to which the Consultant's drawings are saved (this is usually the Current Submissions Folder). *Do not close the eForm while you are viewing changemarks; it may be helpful to toggle back and forth between the two screens.*
6. You can also compare the revised drawings with the original drawings by using the Versioning tool, available on any drawing that has a red "V2" (or V3, V4, etc.) next to its name. Click on the "View History" icon beneath the file name you want to view and the File Details, Versioning & History Page will appear in a new window. *Versioning only works for files within a single folder. In other words, you cannot overlay two files located within two different folders; you must first copy them into the same folder.*



7. Click the "Compare Mode" link at the top of the screen.
8. Select the versions you want to compare by checking the checkboxes for those versions.

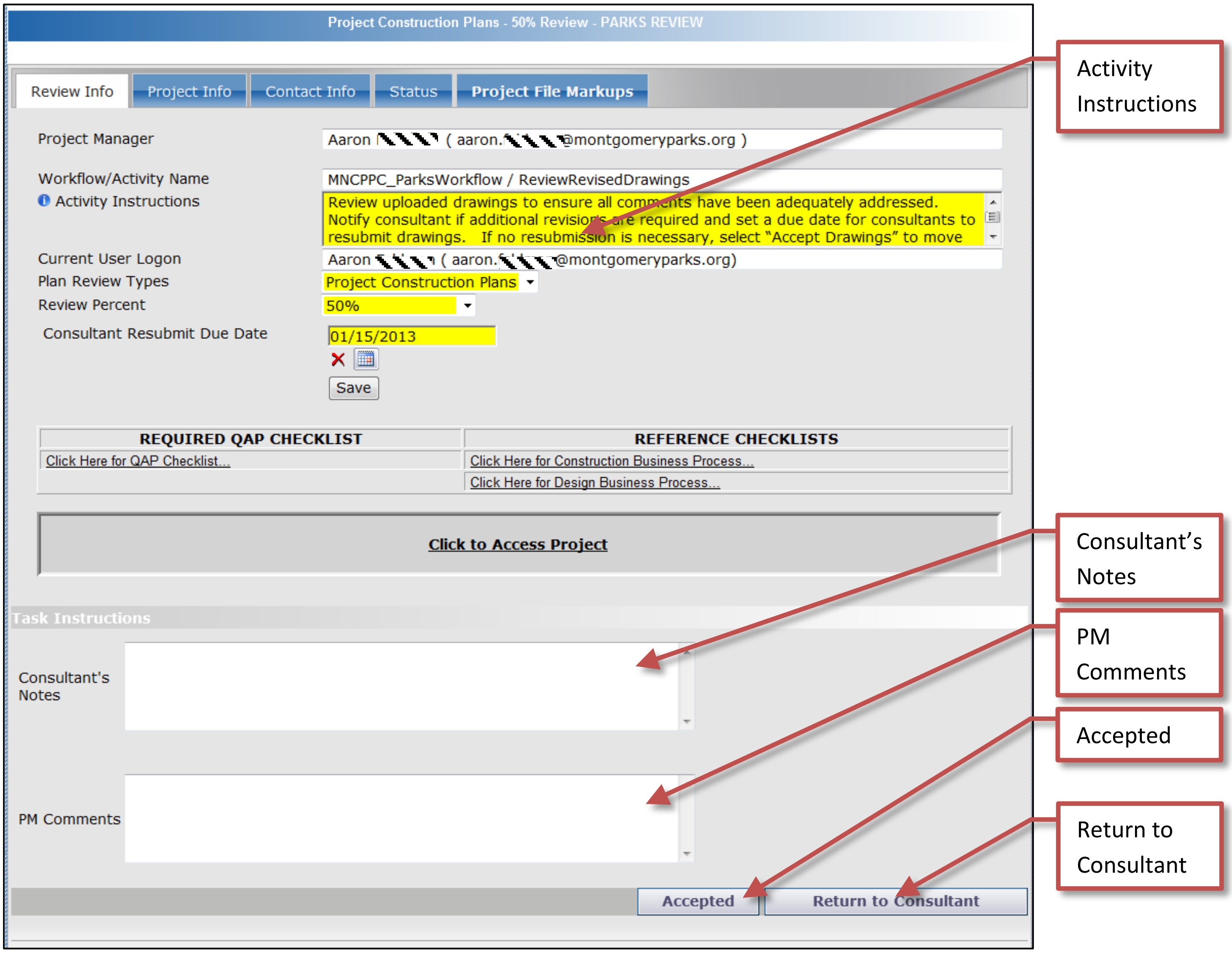


9. Click the "Compare" button to open the Brava Viewer. The viewer is configured to load two versions side-by-side as the default view. The files will always display with the oldest version on the left. You can also overlay the two files, viewing only elements that have been added (green), elements that have been deleted (red), unchanged elements (grey) or a combination of the three. Use the toolbar at the bottom of the screen to toggle views.



<u>Overlay</u>: Places the two versions on top of one another.
<u>Overlay Differences</u>: Shows elements that have been added to Version 2 (in green), deleted from Version 1 (in red) and remained unchanged (in grey).
<u>Side By Side</u>: Shows the two versions next to each other.
<u>Version 1</u>: Shows the older version only.
<u>Version 2</u>: Shows the newer version only.
<u>Additions</u>: Shows only elements that have been added to Version 2 (in green).
<u>Deletions</u>: Shows only elements that have been deleted from Version 1 (in red).
<u>Unchanged</u>: Shows only elements that have not changed between Version 1 and 2 (in grey).

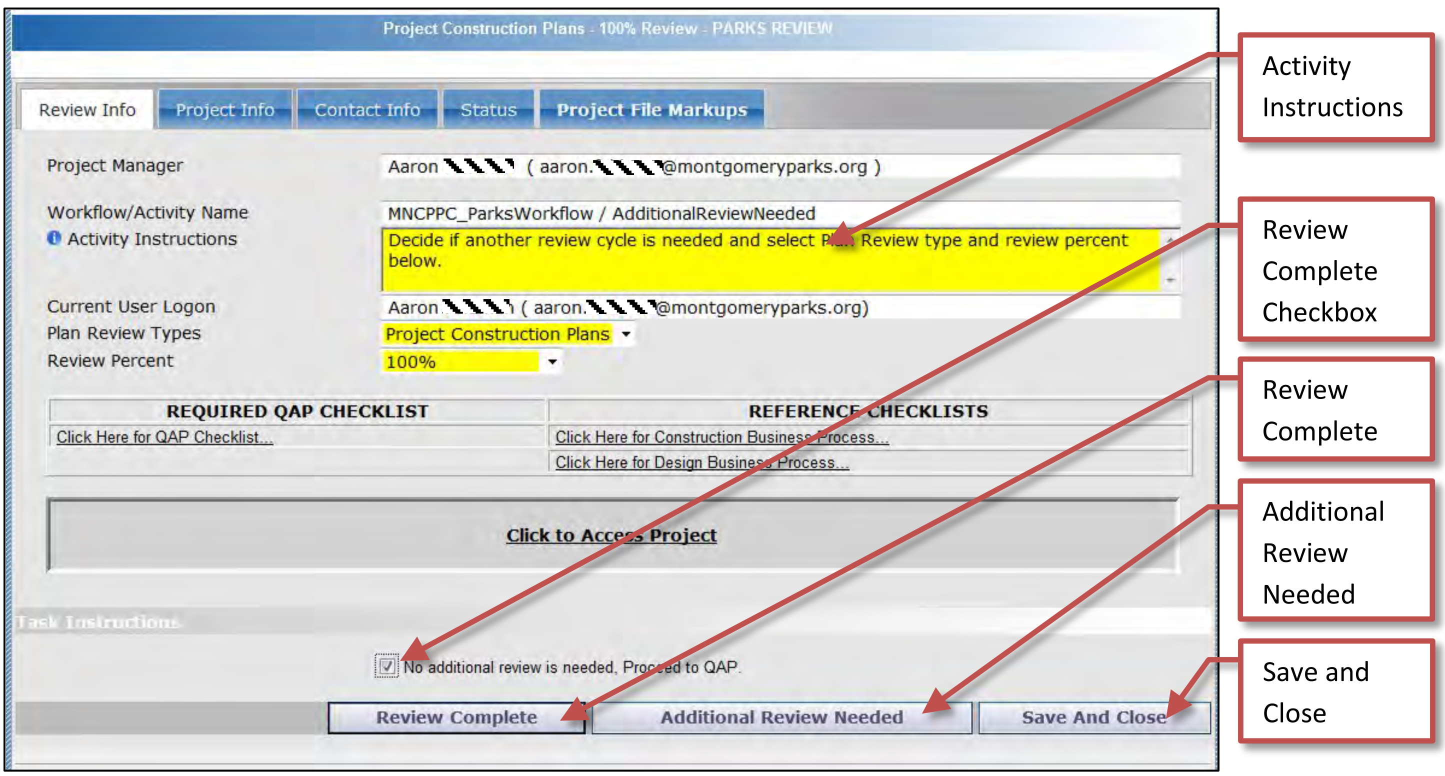
10. Once you have determined whether or not the Consultant has addressed all of the comments from the PDCO Team and the external consultants, return to the Review Info Screen of the eForm. If the Consultant has not addressed all of the comments, enter any additional comments in the PM Comments Field in the eForm and click the "Return to Consultant" button. Once the consultant uploads their revised drawings, you willl need to review the drawings again.
11. If all comments have been addressed, click the "Accepted" button to move on to the next task.



Task Name: Additional Review Needed

Once you have received a set of approved drawings from the Consultant, you are effectively finished with the current milestone and you should save a record set of the drawings as they stand. If your project is still in development, you can begin another review cycle for the next milestone. If you just completed the 100% review, you are ready to move on to the Quality Assurance Program (QAP) process.

1. A new task will appear in your Task List. Click on the link entitled "AdditionalReviewNeeded."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.

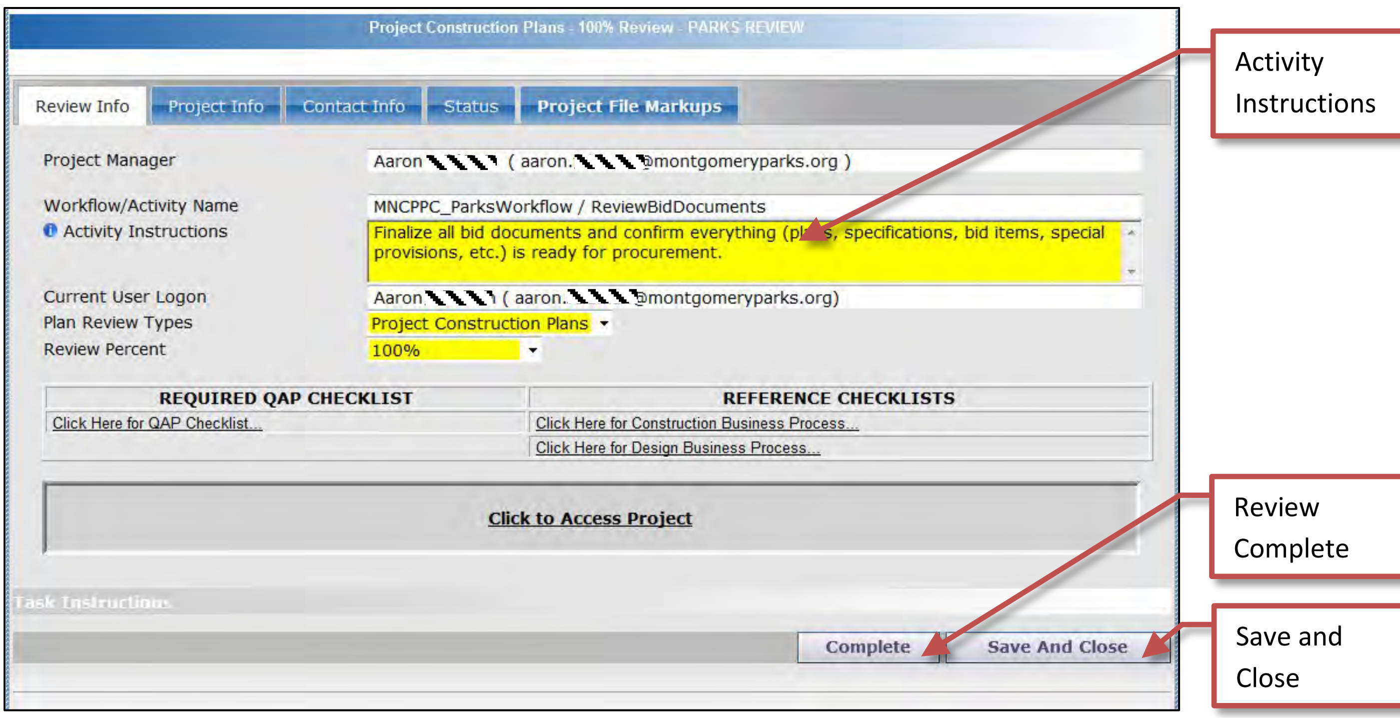


4. If your project is still in development and you need to go through another review cycle, select the "Plan Review Type" and the "Review Percent" from the dropdown menus, and then click "Additional Review Needed" at the bottom of the page. This will restart the Workflow from the Determine Type or Percentage of Plan Review task. *All of the changemarks, plans, comments and reports from the previous review cycle will be saved, and a new record will be created for the new review percentage.*
5. If you just completed the 100% review of your project, click on the checkbox next to "No additional review is needed. Proceed to QAP," and click the "Review Complete" button. This will take you to the final tasks in the Workflow.

Task Name: Review Bid Documents

Although the ePlans Workflow provides the tools necessary to review a set of construction drawings, there are several other components to a complete set of bid documents. This task ensures that you review the specifications, bid form and routing sheet necessary to send a project out to bid.

1. A new task will appear in your Task List. Click on the link entitled "ReviewBidDocuments."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.

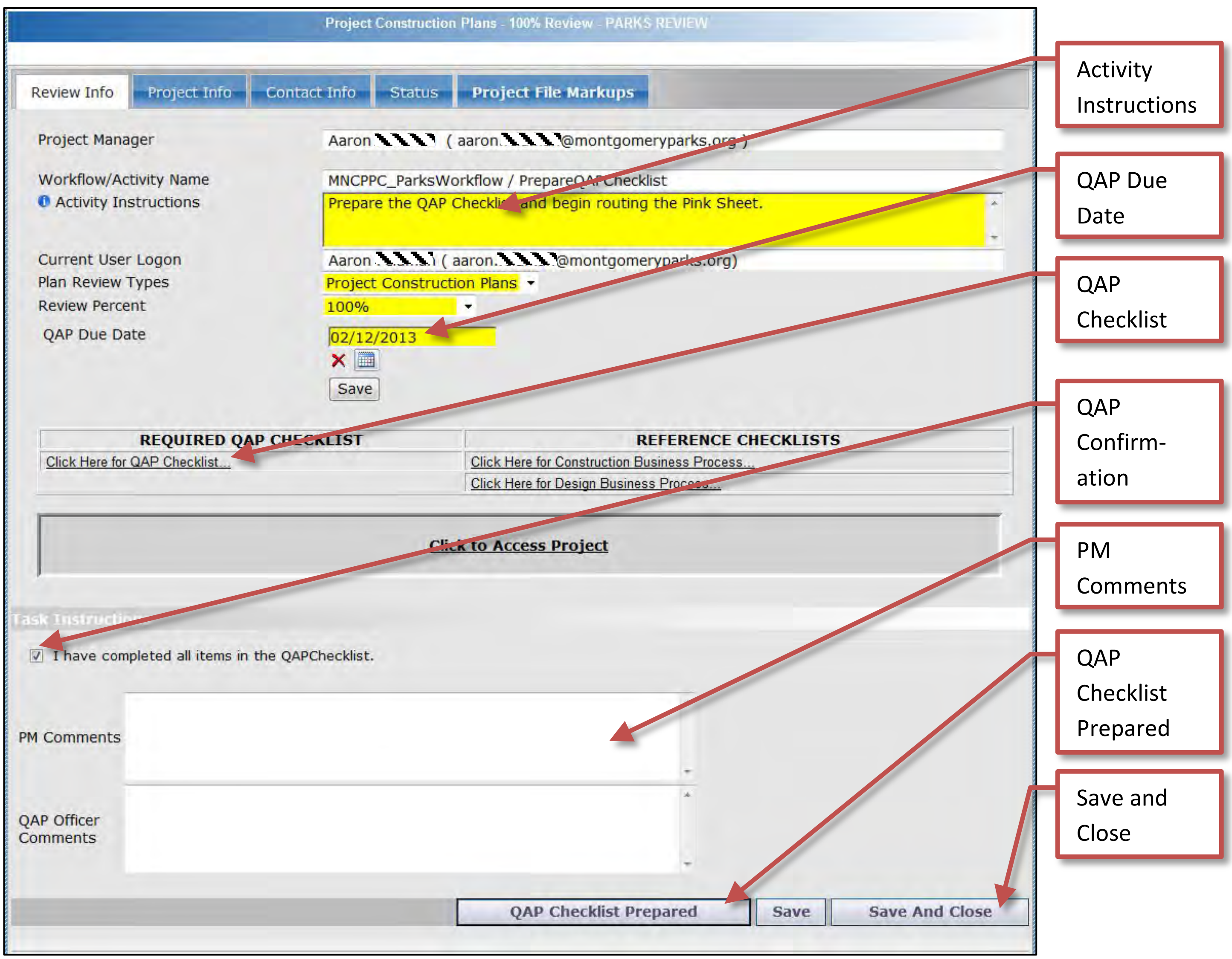


4. Review and revise all of the bid documents as necessary to prepare them for the QAP Manager's review.
5. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*

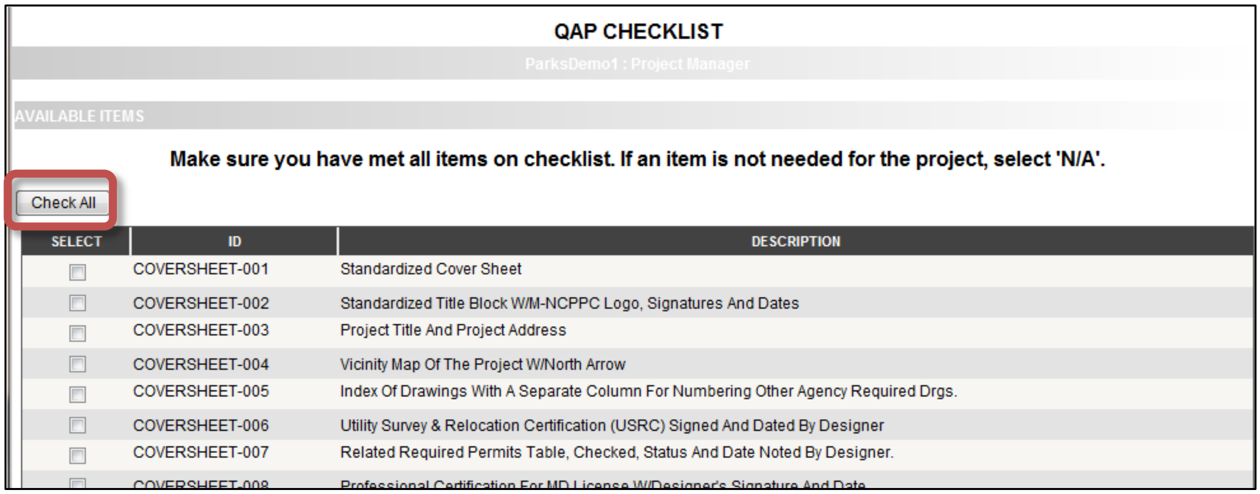
Task Name: Prepare QAP Checklist

Before going out to bid, all construction projects must go through the Quality Assurance Program (QAP). This process ensures that a set of bid documents meets the standards adopted by the Park Development Division. The QAP review is the one step of the Workflow that cannot be bypassed.

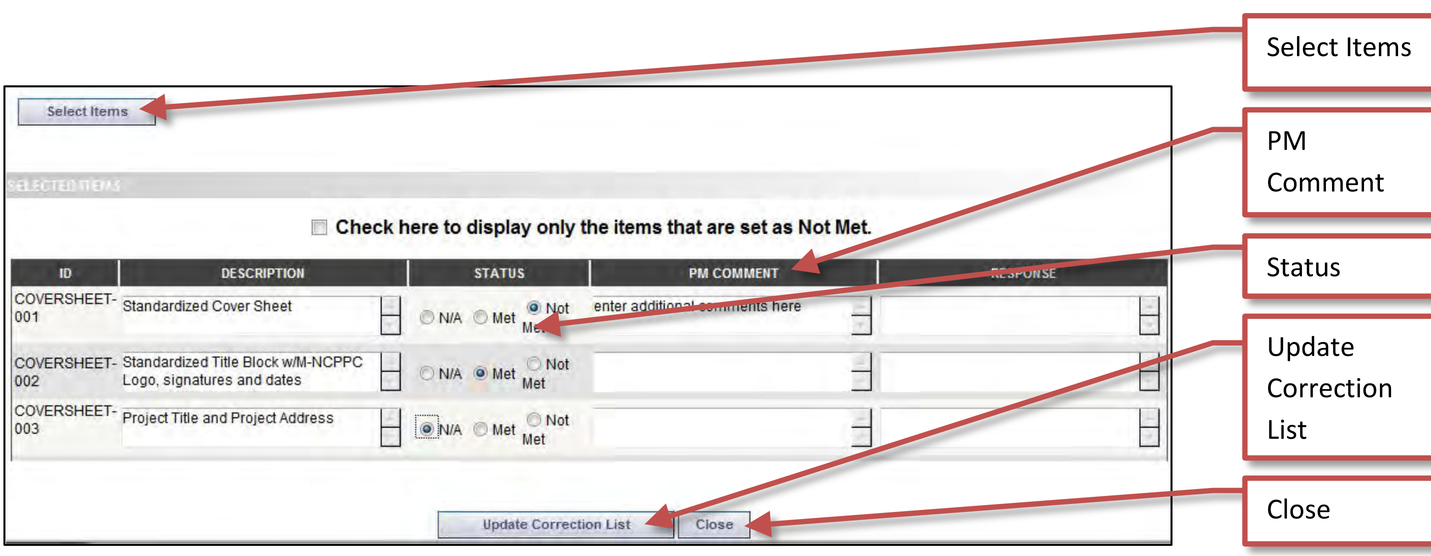
1. A new task will appear in your Task List. Click on the link entitled “PrepareQAPChecklist.”
2. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Enter the QAP Due Date and click the “Save” button. This is the deadline for the QAP Officer to complete his or her review of the drawings.



5. Click the link entitled "Click Here for QAP Checklist." The QAP Checklist Page will appear in a new window.
6. At the top of the page, click the "Check All" button to select all of the items in the QAP Checklist. *Alternately, you can conduct a self-check of the bid documents by checking each once you have determined your documents meet the requirement.*



7. Click the "Select Items" button at the bottom of the QAP List. This will move all of the checklist items into the form at the bottom of the page.
8. Select the status for each QAP Checklist item, either "N/A." "Met" or "Not Met." The default status is "Met." For any items marked "N/A," be sure to include an explanation in the PM Comment Field for each item. *Make sure all items are marked "N/A" or "Met." You will not be able to send your project to the QAP Manager if any items are marked "Not Met."*
9. When you have finished your review of the checklist, click the "Update Correction List" button to save the checklist, and then click the "Close" button to return to the eForm. *If you need to stop work in the middle of this step and return to it later, click "Update Correction List" and then "Close" to save your progress. Click the QAP Checklist link on the eForm to return to this point.*

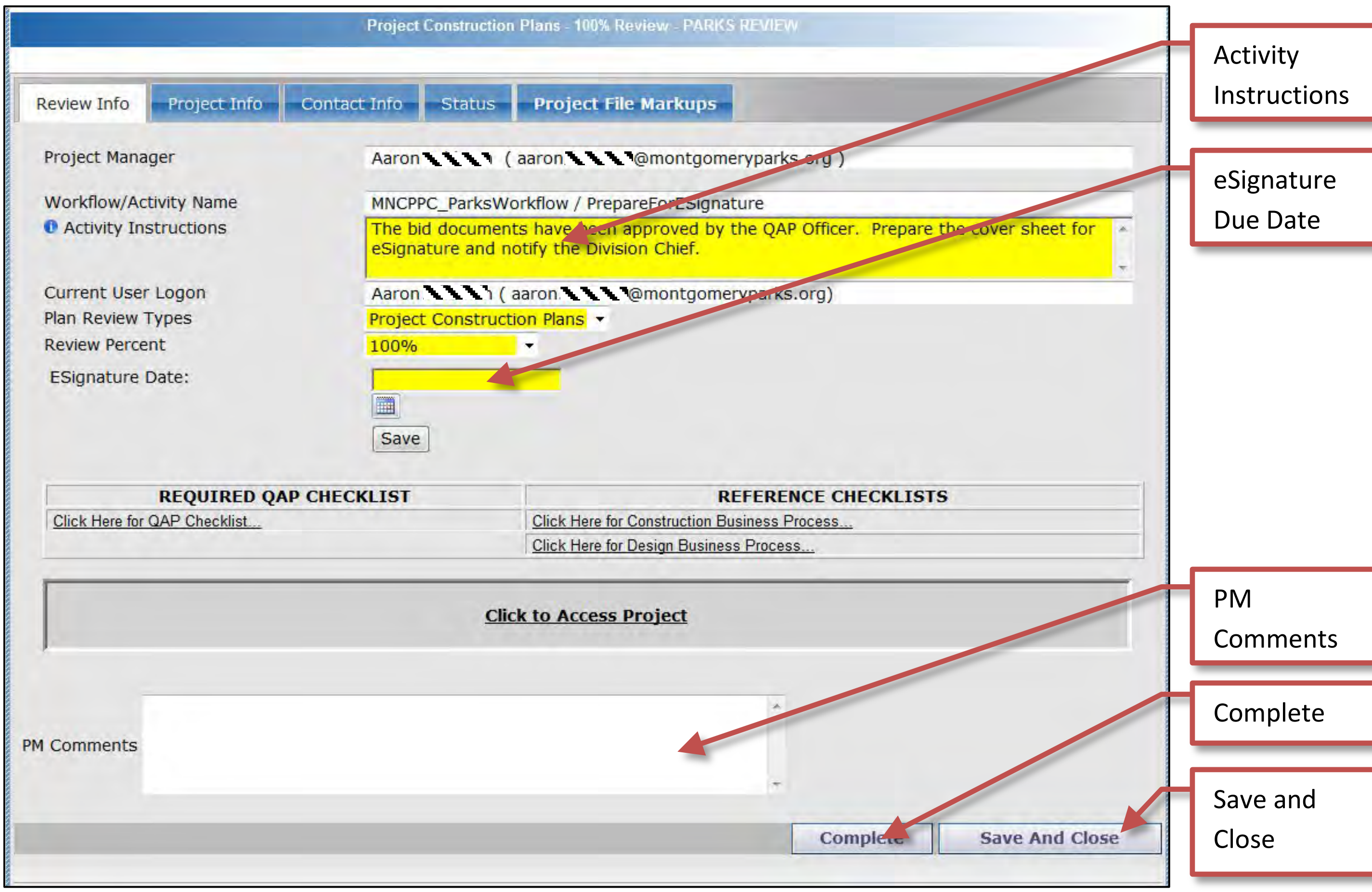


10. Once you are ready to send your project to the QAP Officer, check the checkbox entitled “I have completed all items in the QAP Checklist.”
11. Enter any general comments to the QAP Officer in the PM Comments Field and then click the “QAP Checklist Prepared” button at the bottom of the screen. You will be asked if you are sure that you want to complete this task. If so, click “OK.” *If you want to leave ePlans and finish this task later, click the “Save and Close” button.*
12. If you have completed all the steps above and the “QAP Checklist Prepared” button is not active (the text inside the button is grey), go back to the QAP Checklist and check to see if any items are marked “Not Met” in the status column. Make sure the “I have completed all items in the QAP Checklist” checkbox is checked.
13. The QAP Officer will now conduct his or her review of the Bid Documents. If he or she rejects the set for any reason, you will need to repeat this task until the QAP Officer approves the documents.
14. Once the QAP Officer approves the Bid Documents, you are ready to move on to the next task.

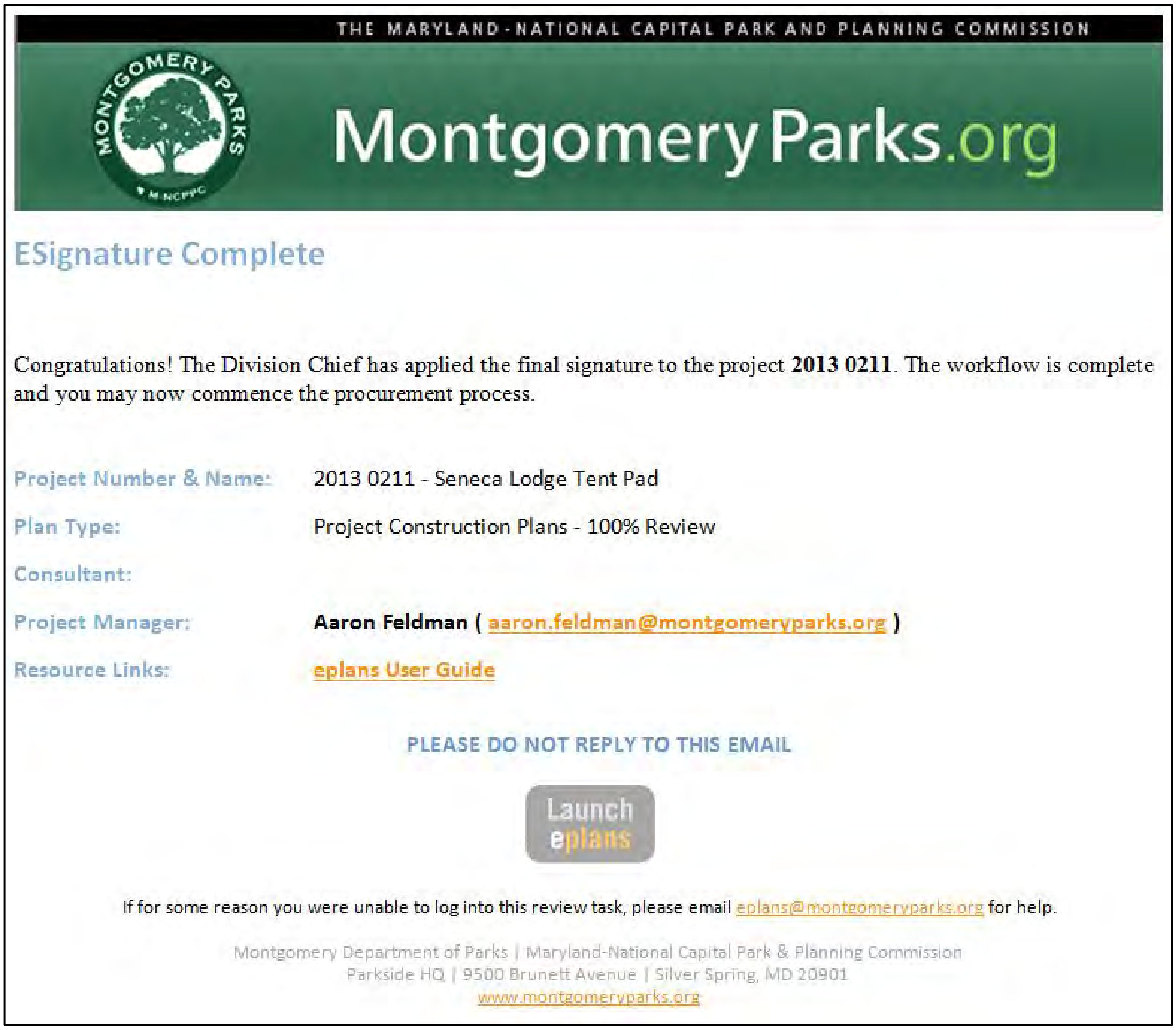
Task Name: Prepare eSignature

After the QAP Officer approves the bid set, you are ready to initiate the Procurement Process. This task verifies that you have completed all of the necessary steps and quality control checks in the Workflow.

1. A new task will appear in your Task List. Click on the link entitled “Prepare ForESignature.”
2. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.



4. Enter any general comments to the Division Chief in the PM Comments Field and then click the “Complete” button at the bottom of the screen. You will be asked if you are sure that you want to complete this task. If so, click “OK.” *If you want to leave ePlans and finish this task later, click the “Close” button.*
5. Once the Division Chief Applies his or her eSignature to the cover sheet of the construction drawings, you will receive an email instructing you to proceed with the procurement process.



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

Montgomery Parks.org

ESignature Complete

Congratulations! The Division Chief has applied the final signature to the project **2013 0211**. The workflow is complete and you may now commence the procurement process.

Project Number & Name:	2013 0211 - Seneca Lodge Tent Pad
Plan Type:	Project Construction Plans - 100% Review
Consultant:	
Project Manager:	**Aaron Feldman (aaron.feldman@montgomeryparks.org)**
Resource Links:	eplans User Guide

PLEASE DO NOT REPLY TO THIS EMAIL

Launch eplans

If for some reason you were unable to log into this review task, please email eplans@montgomeryparks.org for help.

Montgomery Department of Parks | Maryland-National Capital Park & Planning Commission
Parkside HQ | 9500 Brunett Avenue | Silver Spring, MD 20901
www.montgomeryparks.org

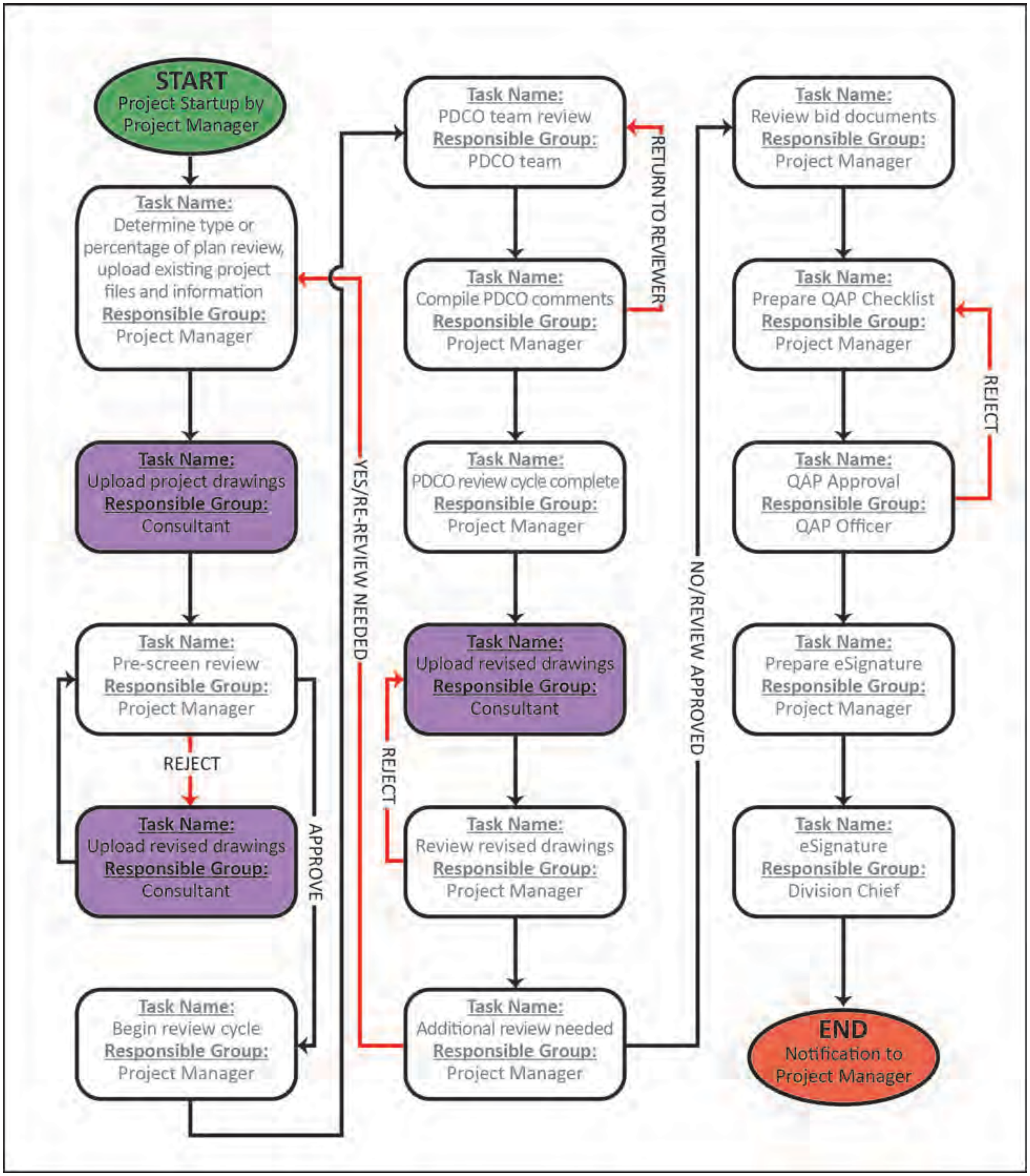
6. You can view the Division Chief's eSignature by opening the project's cover sheet in the Brava Viewer (click the thumbnail of the cover sheet in the File List on the project's Main Page).
7. Click the "Review" button at the top of the Brava Viewer. A window entitled "Markup Open for Review" will appear.
8. Select the Division Chief's name from the list and click "OK." The eSignature and date will appear in the "Approved for Procurement" box on the cover sheet.
9. Refer to the Other Functions section for instructions on publishing a copy of the cover sheet with the eSignature (this process is identical to Publishing Changemarks).

WORKFLOWS: Consultant

WORKFLOWS

Consultant

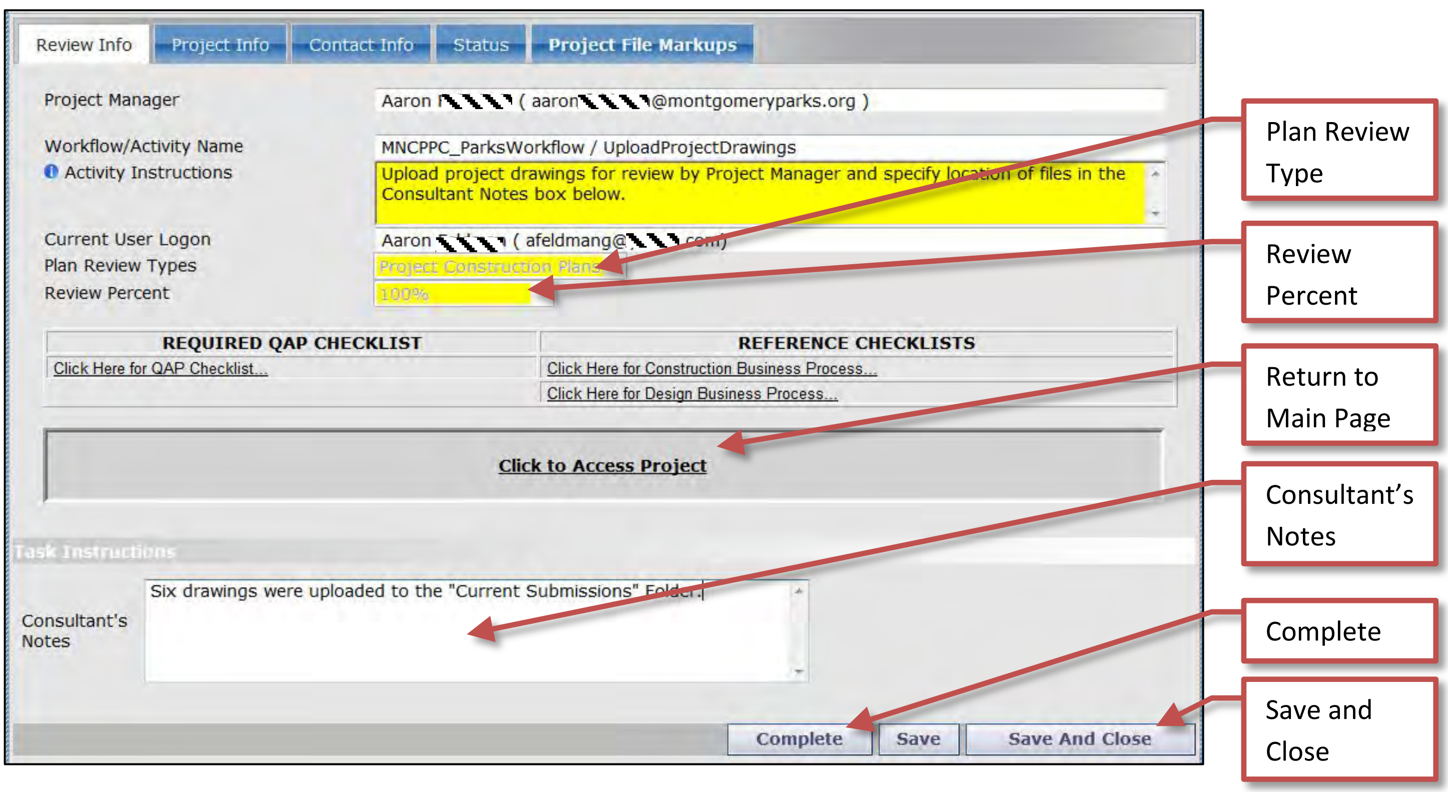
This section describes all of the Consultant's tasks within the Workflow.



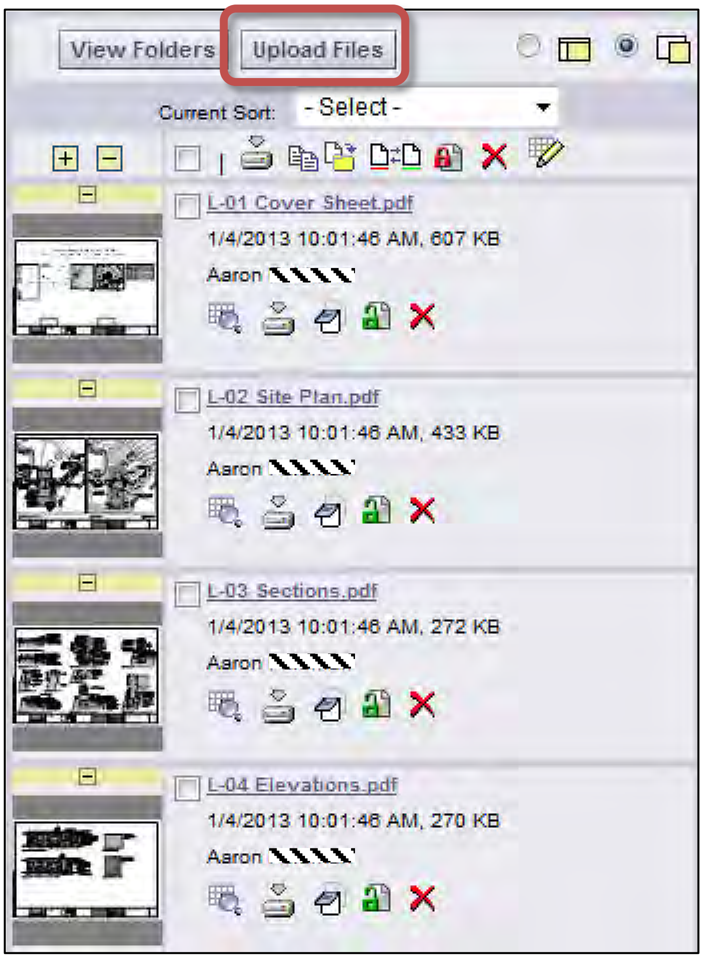
Task Name: Upload Project Drawings

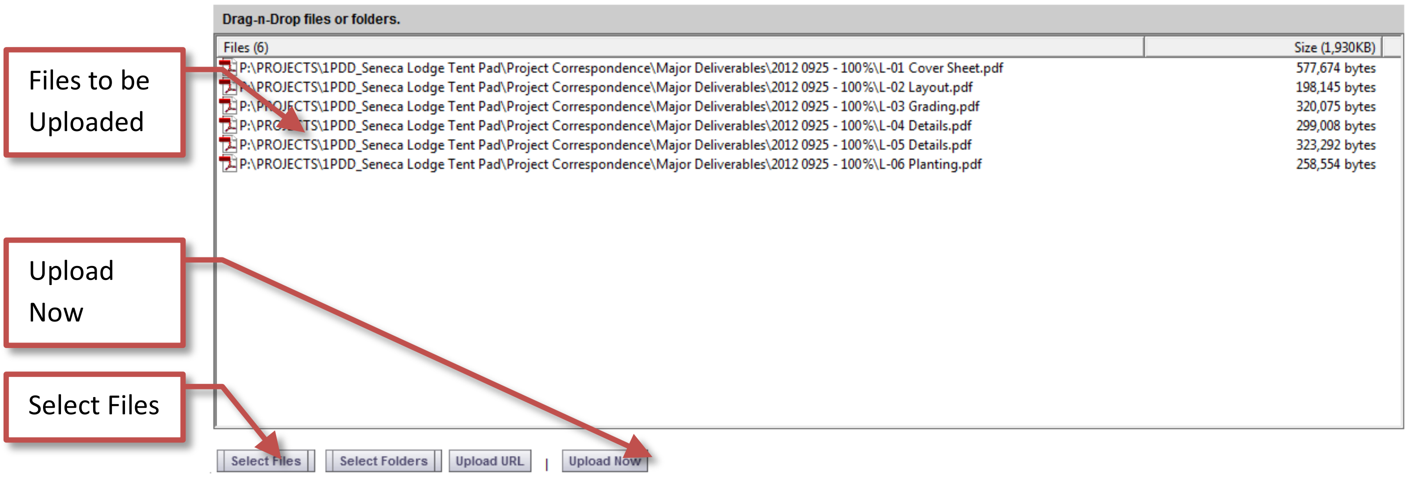
The Project Manager from the Park Development Division will create a file for your project in ePlans and send you an e-mail inviting you to join the project. If this is your first time logging on to ePlans, you will need to follow the steps in the [Getting Started] section before continuing. As the consultant, your first task is to upload your drawings on to ePlans for review.

1. A new task will appear in your Task List. Click on the link entitled "Upload Project Drawings."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. To upload project files, click on the link entitled "Click to Access Project." This will take you to the Project's file structure. *The file structure list also appears at the left side of the screen in the project's Main Page. See the [File Management] section of this guide for more detail about file organization.*



5. Click on the destination folder to which you would like to upload files. *Unless the Project Manager directs you to do otherwise, submission drawings should always be uploaded to the Current Submissions Folder.*
6. Click on the "Upload Files" button, and a new window will open allowing you to select files to upload. *If the folder you selected is empty, a set of instructions for uploading files will appear on your screen. If there are already files in the folder you selected, click the "Upload Files" button at the top of the screen.*



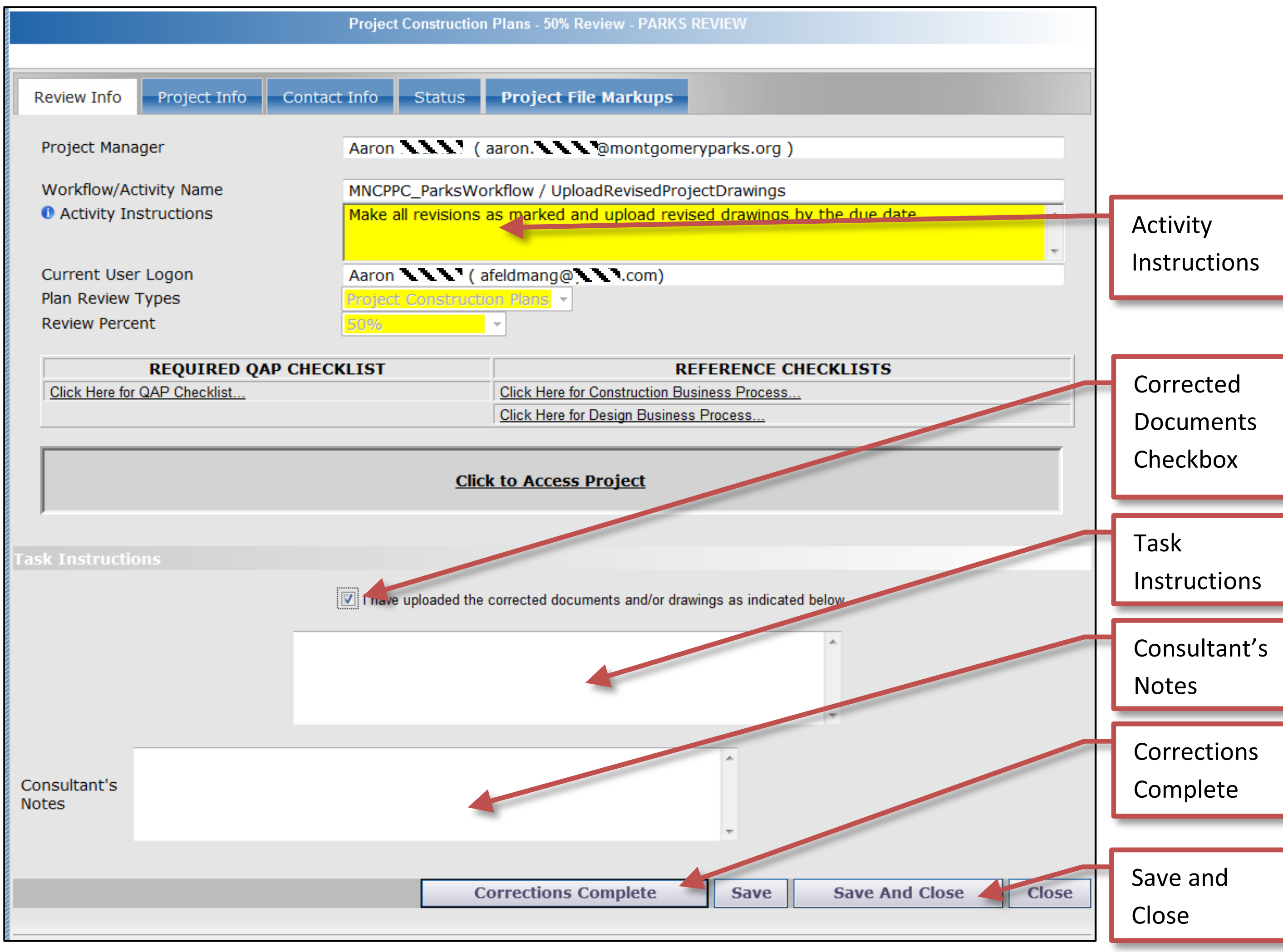


7. Click the "Select Files" button. A Windows Explorer window will open. *You can also drag files directly from Windows Explorer into the Files to be Uploaded Box.*
8. Find the files that you want to upload from your computer or local server drive onto ePlans. Highlight the desired files and click "Open." *Hold down the "Control" key to select multiple files.*
9. Click the "Upload Now" button to upload the files.
10. Once you are finished uploading project files, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Task List (see step 1).*
11. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
12. You are now finished with this task, and it will disappear from your Task List.
13. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 5 through 9 above.

Task Name: Upload Revised Drawings (Following Pre-Screen Review)

The Project Manager will review the drawings you uploaded to make sure they are ready to be sent to the PDCO Team for their review. If the Project Manager finds any issues that will prevent a complete PDCO Team review, he or she will reject the drawings and request that you revise your drawings and upload them again. If your drawings are approved on the first submission, you will skip this task.

1. A new task will appear in your Task List. Click on the link entitled “UploadRevisedDrawings.”
2. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. The “Task Instructions” section of the eForm will contain comments from the Project Manager about what revisions you need to make.

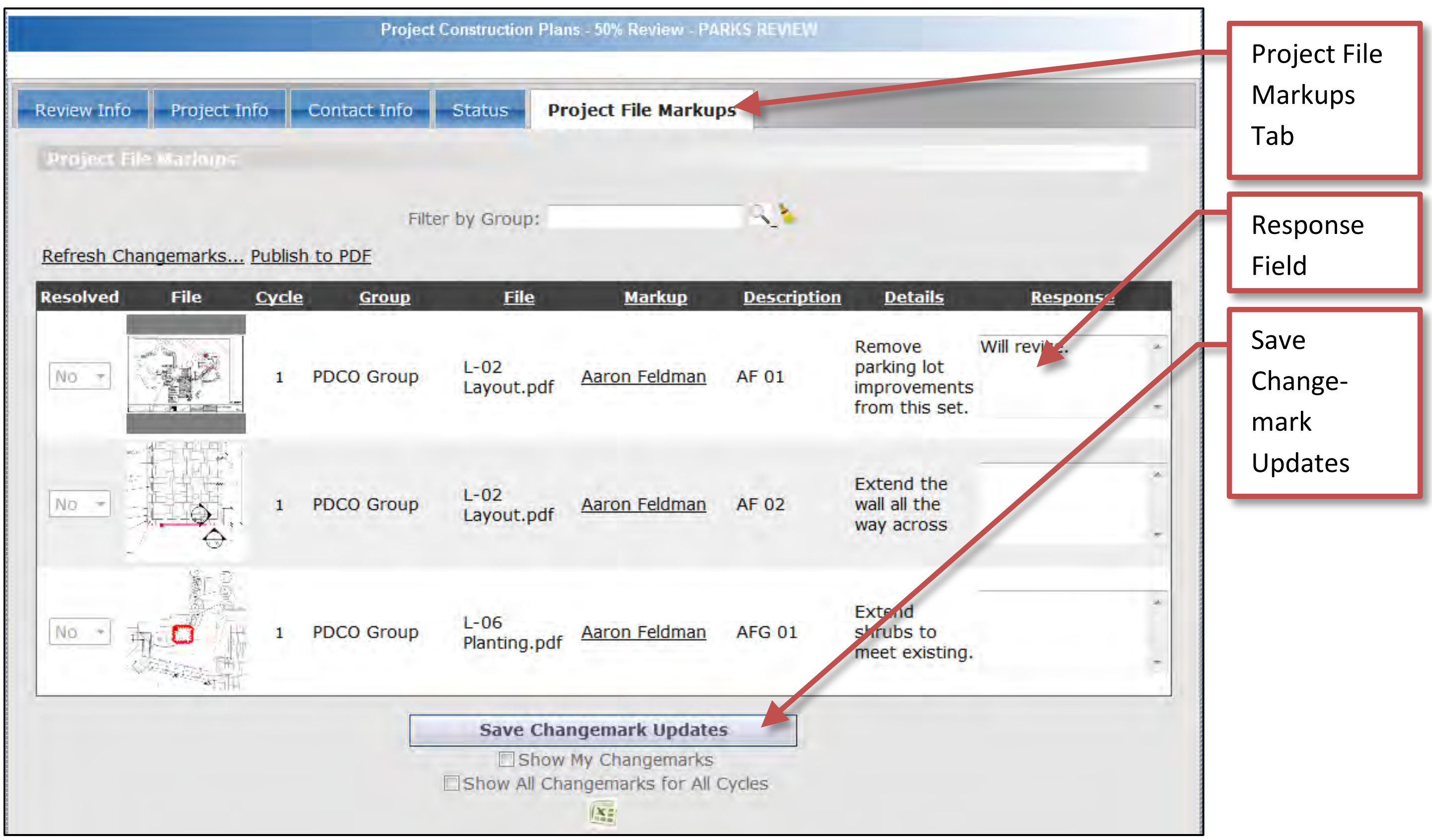


5. Make sure the file names of your revised drawings are identical to the original drawings. This will enable versioning, which allows users to overlay multiple files of the same name on top of each other to see changes from version to version. *Keeping identical file names does not overwrite older files with newer ones; a copy of the original file will still exist in ePlans.*
6. To upload project files, click on the link entitled "Click to Access Project." This will take you back to the project's Main Page. Follow the instructions in the Upload Project Drawings task to upload your revised drawings.
7. Return to the eForm and click the checkbox entitled "I have uploaded the corrected documents and/or drawings as indicated below."
8. Add any additional comments or notes in the Consultant's Notes Field.
9. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
10. You are now finished with this task, and it will disappear from your Task List. This task will be repeated as necessary until the Project Manager approves the drawings for review by the PDCO Team.
11. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 6 through 9 above.

Task Name: Upload Revised Drawings (Following PDCO Review)

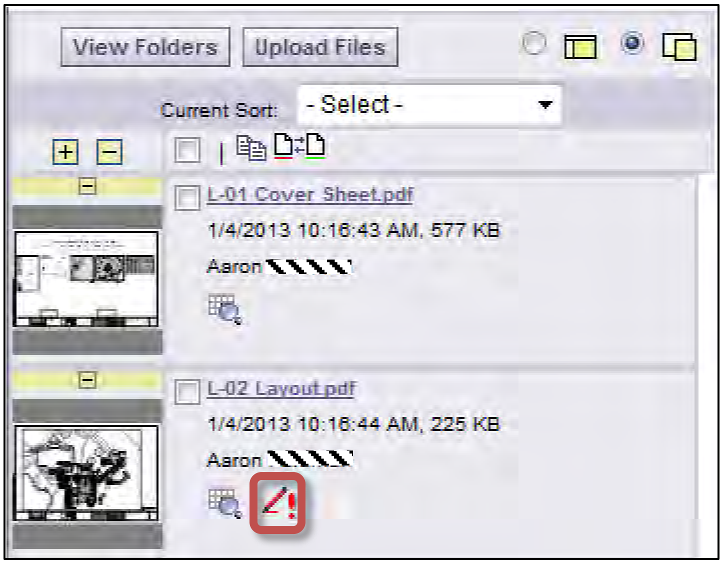
Once the Project Manager reviews and complies all of the PDCO Team comments, you will receive an e-mail notifying you that revisions need to be made to the drawings. The Project Manager will also provide you with a Consultant Resubmit Due Date.

1. A new task will appear in your Task List. Click on the link entitled "UploadRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Click on the "Project File Markups" tab at the top of the screen to see a list of every changemark made on the drawing.

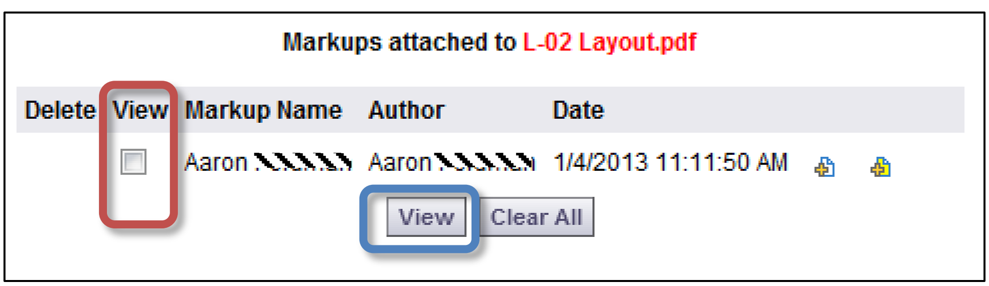


5. Respond to each changemark by entering a note in the "Response" field for that changemark. *Be sure to respond to all changemarks, even if the response is as simple as "will comply." This lets the Project Manager know that you have reviewed and considered every changemark.*

6. You can view changemarks within the context of an entire drawing by navigating back to the project's Main Page and selecting the folder to which your drawings are saved. *Do not close the eForm while you are viewing changemarks; it may be helpful to toggle back and forth between the two screens.*

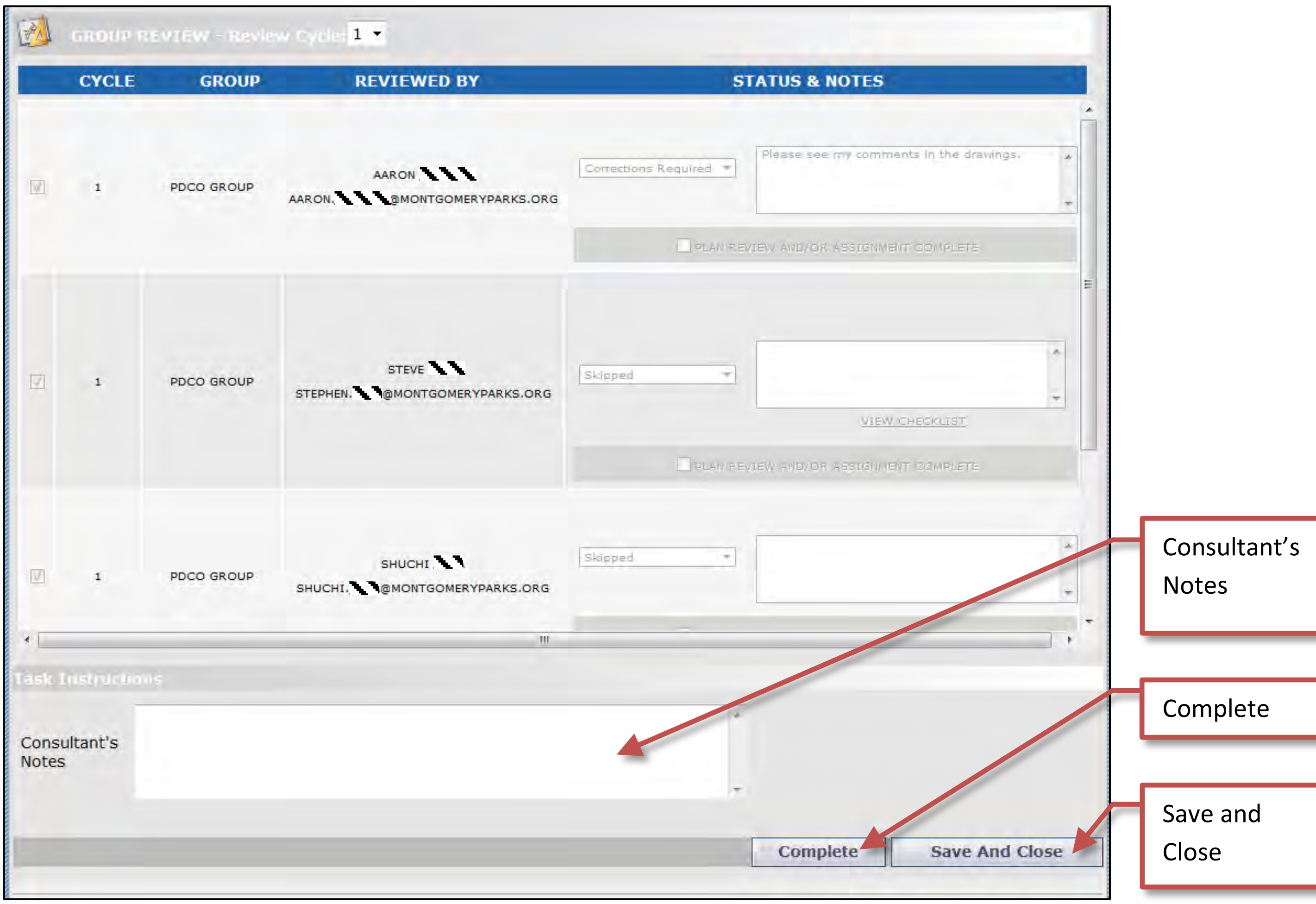


7. If changemarks exist within a drawing, the "Markups" icon will appear below the file name. Click on the "Markups" icon, and the View Markup Screen will appear.
8. To view changemarks, click on the "View" box for each markup name you would like to see. You can view as many or as few changemarks at the same time as you would like.
9. Once you have selected the changemarks you want to view, click the "View" button. The drawing and all of its changemarks will appear in the [Brava Viewer](). *Here, you can use the toolbar at the bottom of the screen to pan and zoom to areas of the drawing. You can also click on individual changemarks to see the text of each.*



10. After reviewing and responding to all of the changemarks click the "Save Changemark Updates" button in the Project File Markups Screen of the eForm and click the "Review Info" tab at the top of the screen.

11. After making all of the necessary revisions to your drawings, make sure the file names of your revised drawings are identical to the original drawings. This will enable versioning, which allows users to overlay multiple files of the same name on top of each other to see changes from version to version. *Keeping identical file names does not overwrite older files with newer ones; a copy of the original file will still exist in ePlans.*
12. Upload your revised drawings by following the instructions in the [Upload Project Drawings]() task.
13. Type any additional comments or general notes to the Project Manager in the Consultant's Notes Field.



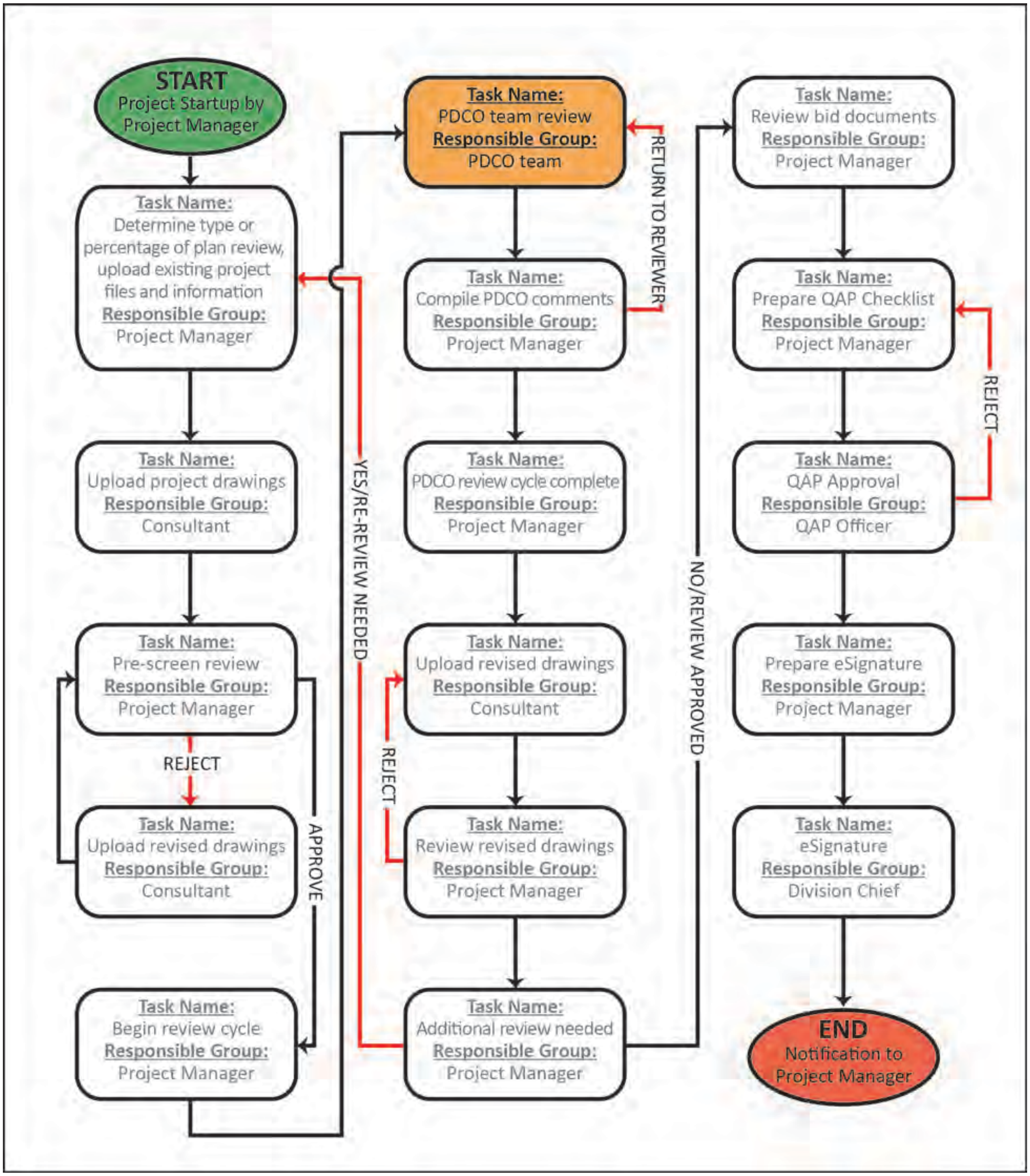
14. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
15. You are now finished with this task, and it will disappear from your Task List. This task will be repeated as necessary until the Project Manager accepts the drawings.

WORKFLOWS: PDCO Team

WORKFLOWS

PDCO Team

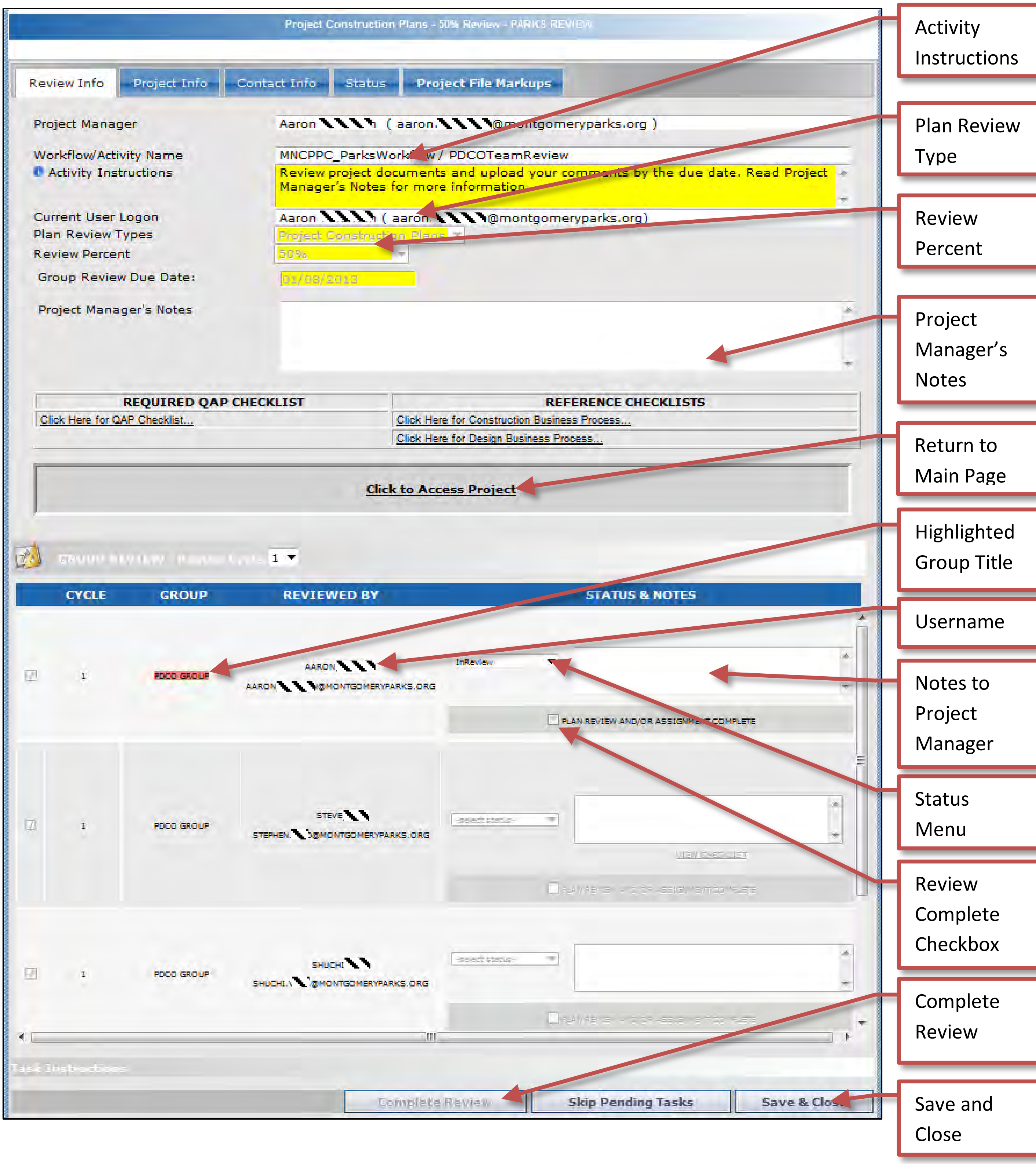
This section describes the PDCO Team's task within the Workflow.

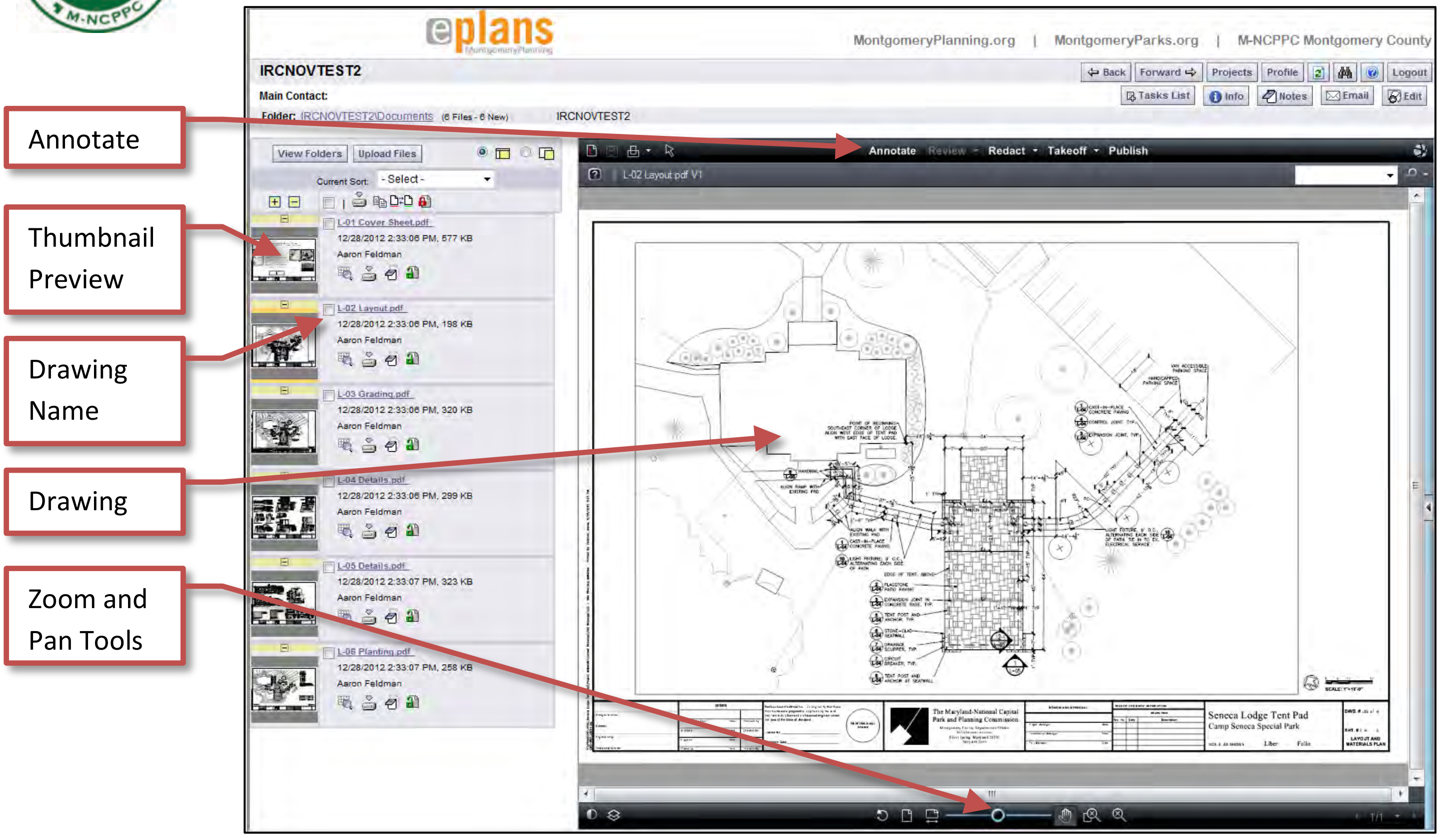


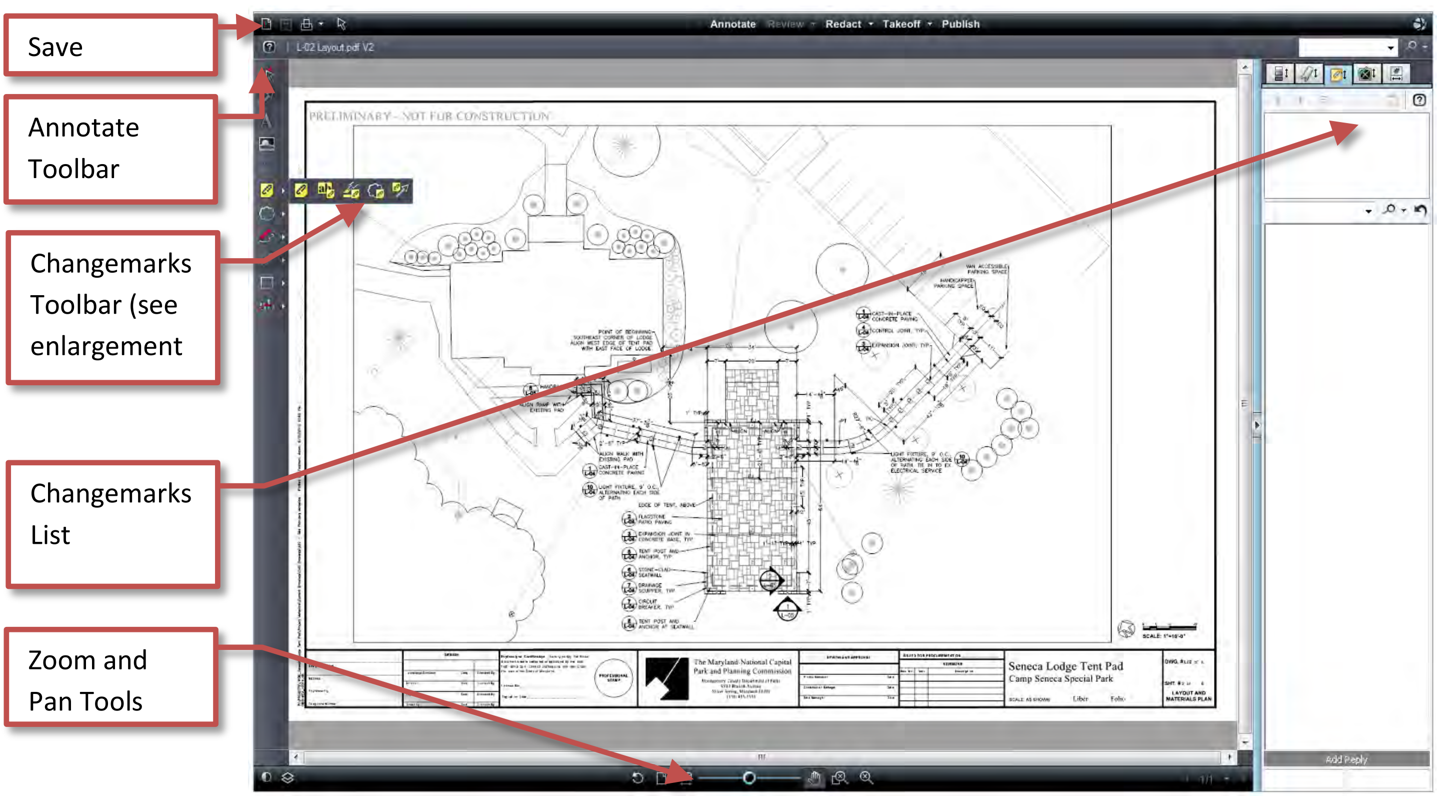
Task Name: PDCO Team Review

The Project Manager from the Park Development Division will create a file for the project in ePlans and send you an e-mail inviting you to join the project. If this is your first time logging on to ePlans, you will need to follow the steps in the Getting Started section before continuing. As a PDCO Team member, your main responsibility in the Workflow is to review the Consultant's drawings as they relate to your specific work program.

1. A new task will appear in your Task List. Click on the link entitled "PDCOTeamReview."
2. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
3. The Project Manager has already filled out the Type of Project, the level of completion (Percent Review) and the due date for you to complete your review (Group Review Due Date). Additionally, the Project Manager's Notes Field will include information about the submission you are about to review, such as the location of the project files within ePlans.
4. To review the consultant's drawings, click on the link entitled "Click to Access Project." This will take you back to the project's Main Page. *If there are no drawings in this submission relevant to your PDCO Team role, you can skip to step 16 of this task.*
5. The project's File List will appear on the left side of the screen. Click on the folder where the drawings are saved. *Unless otherwise directed by the Project Manager, these files will always be in the "Current Submissions" folder.*
6. To view a drawing, click the drawing's name or the thumbnail preview of that drawing. The drawing will appear in the Brava Viewer at the right. Use the tool bar at the bottom of the screen to zoom and pan to close-up views of the drawing. To view another drawing, click on another thumbnail image or another drawing name (see screenshot below).

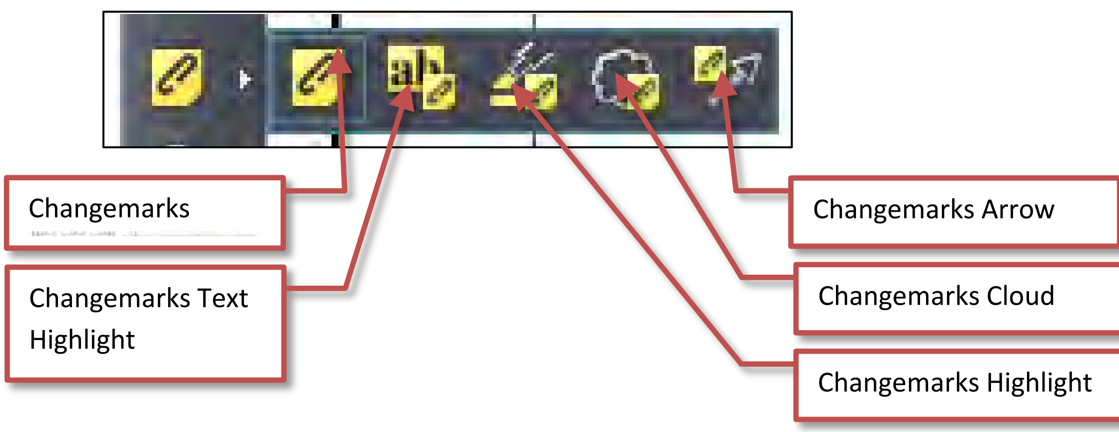

Review Info
Project Info
Contact Info
Status
Project File Markups
Project Manager
Aaron [redacted] (aaron.[redacted]@montgomeryparks.org)
Workflow/Activity Name
Activity Instructions
Review project documents and upload your comments by the due date. Read Project Manager's Notes for more information.
Current User Logon
Aaron [redacted] (aaron.[redacted]@montgomeryparks.org)
Plan Review Types
Project Construction Plans
Review Percent
50%
Group Review Due Date:
01/08/2013
Project Manager's Notes
REQUIRED QAP CHECKLIST
Click Here for QAP Checklist...
REFERENCE CHECKLISTS
Click Here for Construction Business Process...
Click Here for Design Business Process...
Click to Access Project
CYCLE
GROUP
REVIEWED BY
STATUS & NOTES
PDCO GROUP
InReview
PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
Complete Review
Skip Pending Tasks
Save & Close
Activity Instructions
Plan Review Type
Review Percent
Project Manager's Notes
Return to Main Page
Highlighted Group Title
Username
Notes to Project Manager
Status Menu
Review Complete Checkbox
Complete Review
Save and Close


Annotate
Thumbnail Preview
Drawing Name
Drawing
Zoom and Pan Tools
eplans
MontgomeryPlanning.org | MontgomeryParks.org | M-NCPPC Montgomery County
IRCNOVTEST2
Annotate Review Redact Takeoff Publish


Save
Annotate Toolbar
Changemarks Toolbar (see enlargement
Changemarks List
Zoom and Pan Tools
Annotate Review Redact Takeoff Publish

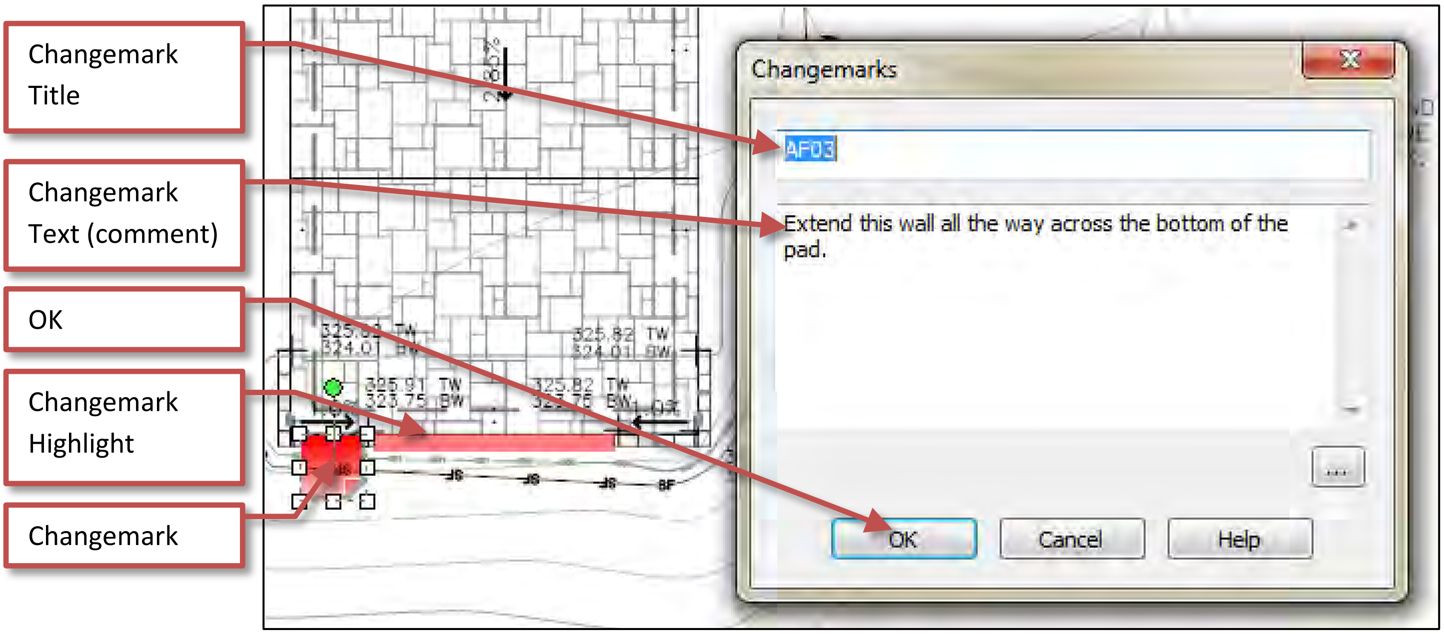
7. To conduct your review, click the “Annotate” link at the top of the Brava Viewer, and a toolbar will appear to the left of the drawing (see screenshot on the previous page).
8. Click on the small arrow to the right of the “Changemarks” tool  to expand the Changemarks toolbar. Click on the appropriate icon, described below, to initiate a changemark and then select the location for your changemark.

    Changemarks: Creates a changemark note (looks like a Post-It note) without any associated linework. Click once in the drawing at the desired location to create.
    Changemarks Text Highlight: Associates a changemark with a specific line of text highlighted in a document. Highlight the block of text to which you want to call attention.
    Changemarks Highlight: Creates a colored box and associated changemark. Click your mouse at the starting point of the desired area to highlight and hold. Drag the mouse to cover the desired area.
    Changemarks Cloud: Creates a revision cloud and associated changemark. Click your mouse at the starting point of the desired area to cloud and hold. Drag the mouse to cover the desired area.
    Changemarks Arrow: Creates an arrow and associated changemark. Click your mouse at the end point of the arrow and hold. Drag the mouse to the beginning pont for your arrow.

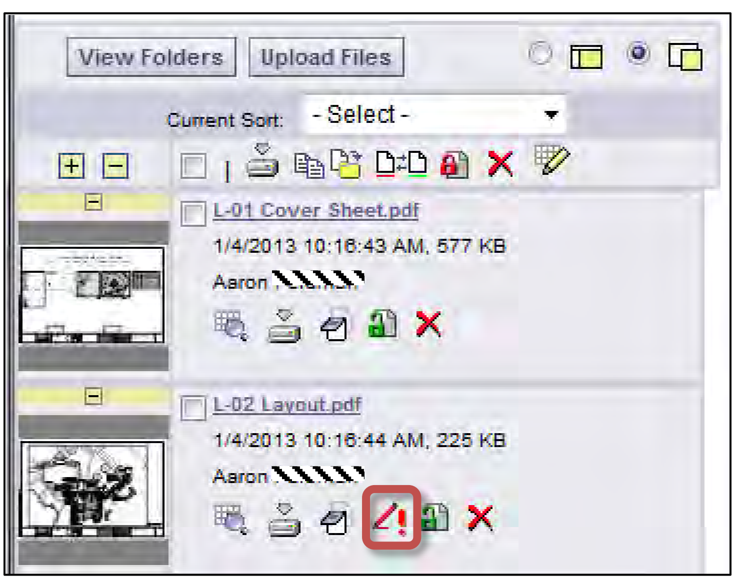


9. After designating the location for your changemark, an icon resembeling a Post-It note will appear, along with the Changemarks Dialog Box (see screenshot on the next page).
10. Provide a unique title in the top field of the dialog box. *Using your initials followed by a sequential number will help the Project Manager identify the author of each changemark.*
11. Enter your comment in the bottom field of the dialog box and click the “OK” button to save the changemark.

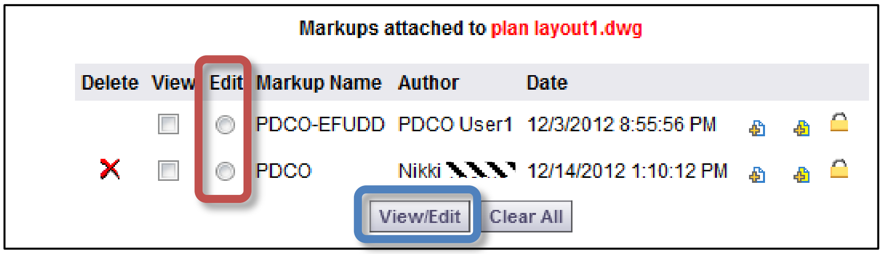
12. You can view all of your changemarks in the changemark list to the right of the drawing.



13. When you are done making changemarks in a drawing, click the “Save As” icon at the top left corner of the screen. A dialog box will pop up asking you to “Please input name.” Provide a unique name for this set of changemarks and click the “OK” button. *Using your name and the date will help the Project Manager identify the author of each set of changemarks.*
14. Repeat steps 7 through 13 for each drawing in the set.
15. You can make changes to an existing markup by clicking the “Markups” icon next to the drawing you want to continue commenting on. This will cause the View Markup Screen to appear.

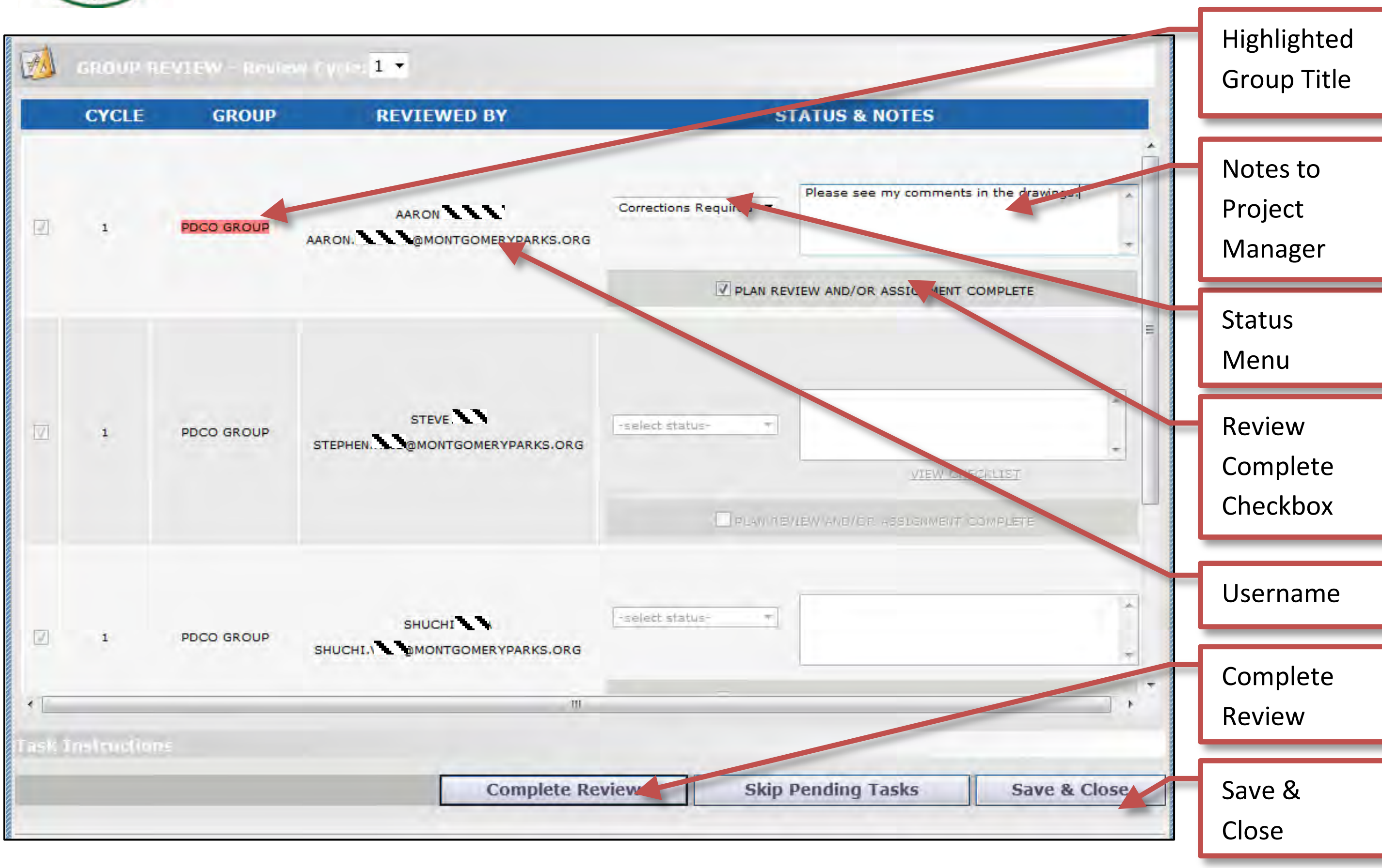


16. Click the radio button next to the set of changemarks you want to edit and then click the "View/Edit" button.

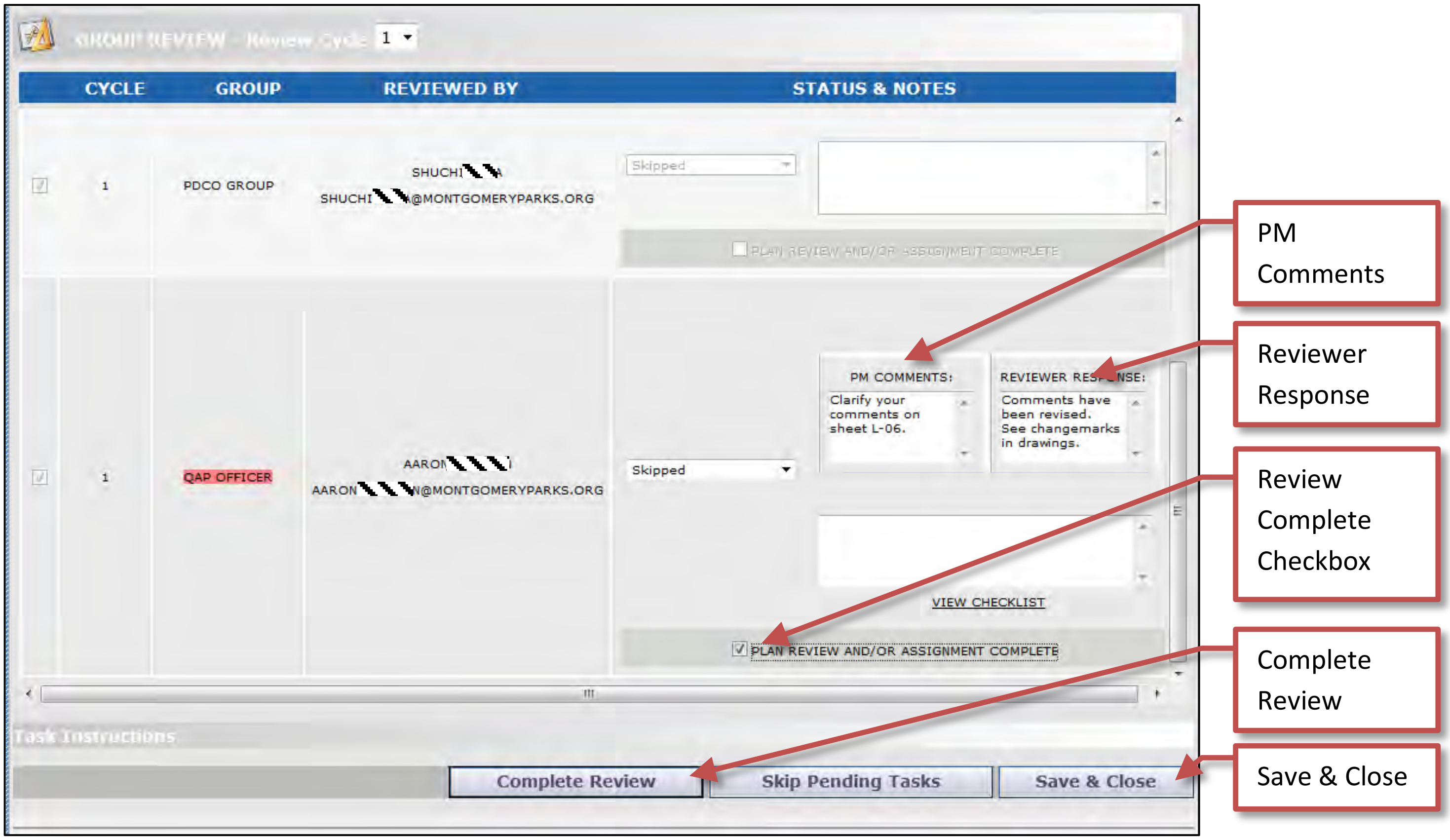


17. Once you have selected the changemarks you want to edit, click the "View/Edit" button. The drawing and changemarks will appear in the Brava Viewer.
18. Continue to make changemarks as before and then click the "Save" icon to save your work.
19. Once your review is complete, return to the Project File Markups Screen of the eForm and scroll to the bottom portion of the page to find your username in the Group Review List. *The group title next to your name will be highlighted in red.*
20. Select the appropriate status from the dropdown menu:

    In Review: You are still in the process of reviewing the drawings. *This is the default status. You can click the "Save & Close" button at the bottom of the screen to save your work and return to your review at a later time.*
    Corrections Required: You have entered changemarks for the Consultant to address during the next stage of work.
    Approved: You have reviewed the Consultant's drawings and have no comments.
    No Review Required: There are no drawings in this submission that are relevant to your PDCO Team role.
21. After selecting "Corrections Required," "Approved," or "No Review Required" from the dropdown menu, click on the "Plan Review And/Or Assignment Complete" checkbox. You can also enter any general notes for the Project Manager into the text field on the right-hand side of the screen.
22. Click the "Complete Review" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*



23. During his or her review of the PDCO Team's comments, the Project Manager may request additional information from you. If this happens, you will receive an e-mail notifying you of a new task in your task bar. Click the "Project File Markups" tab of the eForm and scroll down to your username in the Group Review List.
24. The PM Comments Field will display a note from the Project Manager. Respond to the Project Manager in the Reviewer Response Field. *The PM Comments Field and Reviewer Response Field show a record of all of the text entered into these boxes. Be sure to enter your most recent comments at the top of the box; adding a date at the beginning of each new comment may help to better organize your comments and responses.*
25. Click the checkbox entitled "Plan Review And/Or Assignment Complete," then click the "Complete Review" button to notify the Project Manager of your response. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
26. Once the Project Manager has resolved all comments with all PDCO Team members, he or she will complete the PDCO Review process and send the comments on to the Consultant.

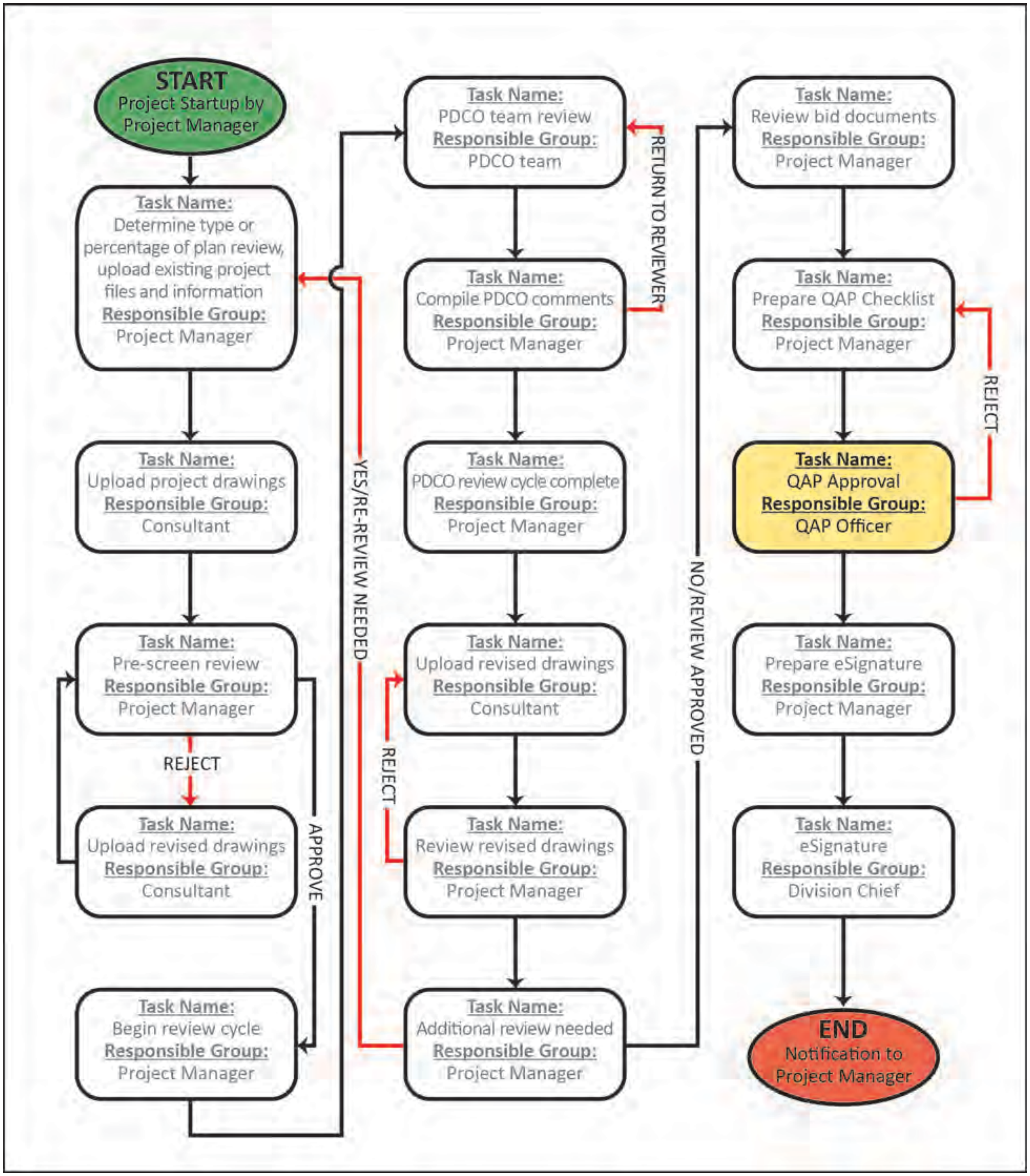

GROUP REVIEW - Review Cycle 1
CYCLE
GROUP
REVIEWED BY
STATUS & NOTES
1
PDCO GROUP
SHUCHI [redacted]
SHUCHI [redacted]@MONTGOMERYPARKS.ORG
Skipped
PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
1
QAP OFFICER
AARON [redacted]
AARON [redacted]@MONTGOMERYPARKS.ORG
Skipped
PM COMMENTS:
Clarify your comments on sheet L-06.
REVIEWER RESPONSE:
Comments have been revised. See changemarks in drawings.
VIEW CHECKLIST
PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
Task Instructions
Complete Review
Skip Pending Tasks
Save & Close
PM Comments
Reviewer Response
Review Complete Checkbox
Complete Review
Save & Close

WORKFLOWS:
QAP Officer

WORKFLOWS

QAP Officer

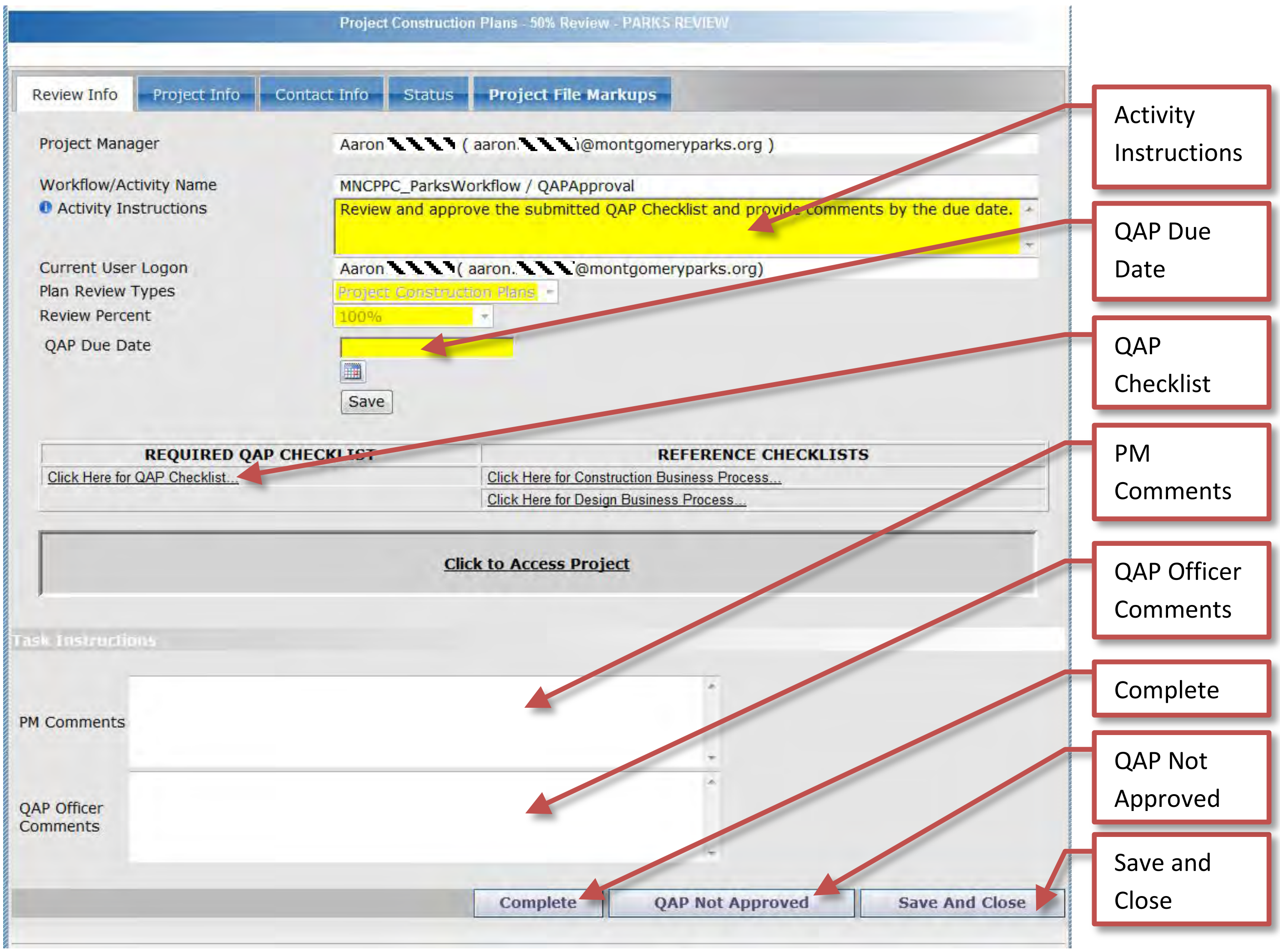
This section describes the QAP Officer's task within the Workflow.



Task Name: QAP Approval

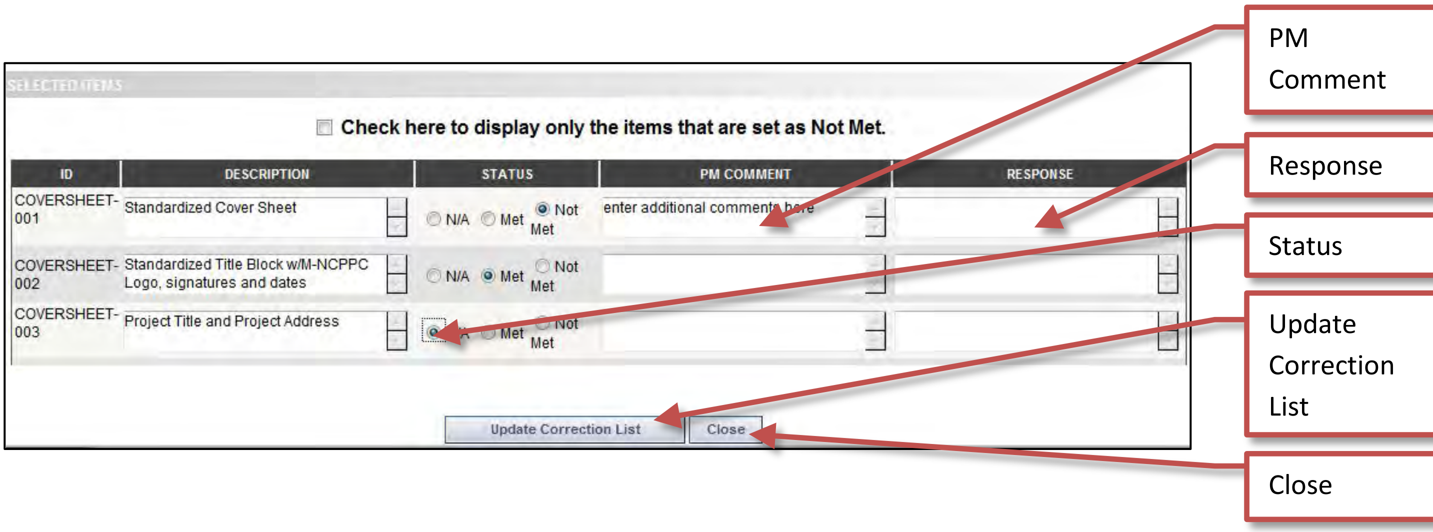
Once a Project Manager has received the 100% revised drawing submission from the Consultant, he or she will initiate the Quality Assurance Program (QAP) Approval process. This is the final task in the Workflow, aimed at ensuring all of the necessary components of a complete Bid Set are present. The QAP Approval is the only task in the Workflow that cannot be skipped.

1. A new task will appear in your Task List. Click on the link entitled “QAPApproval.”
2. A message will pop up asking if you want to accept the task. Click “OK” to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.



4. The Project Manager will have requested a date for you to complete the QAP Review in the QAP Due Date Field. Additionally, the PM Comments Field will include information about the submission you are about to review, such as the location of the project files within ePlans.

5. Once you have reviewed the information on the eForm, click the link entitled "Click Here for QAP Checklist." This will open the QAP Checklist in a new window.
6. Review the checklist to ensure the Project Manager has met all of the requirements. *The Project Manager will have entered an explanation in the "PM Comments Box" for any item marked "N/A."*
7. You can comment on any item in the checklist by entering a note in the Response Field of the checklist.



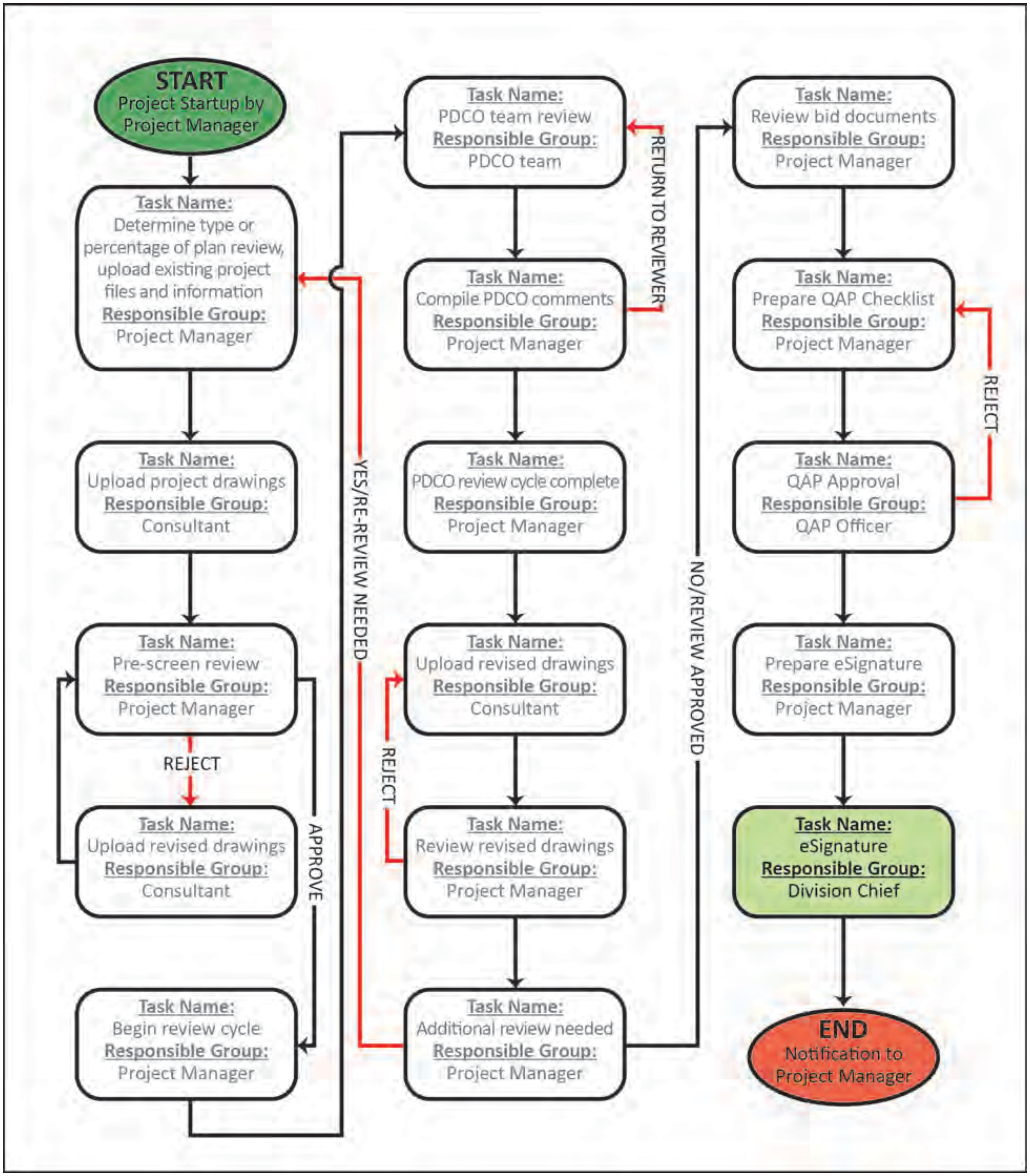
8. You can view the drawing set by navigating back to the project's Main Page and selecting the folder to which the drawings are saved. *Do not close the QAP Checklist window while you are viewing changemarks; it may be helpful to toggle back and forth between the two screens. If you closed the eForm or the QAP Checklist, you can get back to it by clicking the task in the Task List (see step 1).*
9. When you have finished your review of the checklist, click the "Update Correction List" button to save the checklist, and then click the "Close" button to return to the eForm. *If you need to stop working in the middle of this step and return at a later time, click "Update Correction List" and then "Close" to save your progress. Click the QAP Checklist link on the eForm to return to this point.*
10. If there are items in the QAP Checklist that need further review by the Project Manager, enter your comments in the QAP Officer Comments Field at the bottom of the eForm and click the "QAP Not Approved" button of the eForm. This will notify the Project Manager that he or she must make revisions before restarting this task.
11. When all of the requirements in the QAP Checklist have been met, click the "Complete" button to notify the Project Manager. You will be asked if you are sure that you want to complete this task. If so, click "OK." *If you want to leave ePlans and finish this task later, click the "Save and Close" button.*
12. You are now finished with this task, and it will disappear from your Task List.

WORKFLOWS:
Division Chief

WORKFLOWS

Division Chief

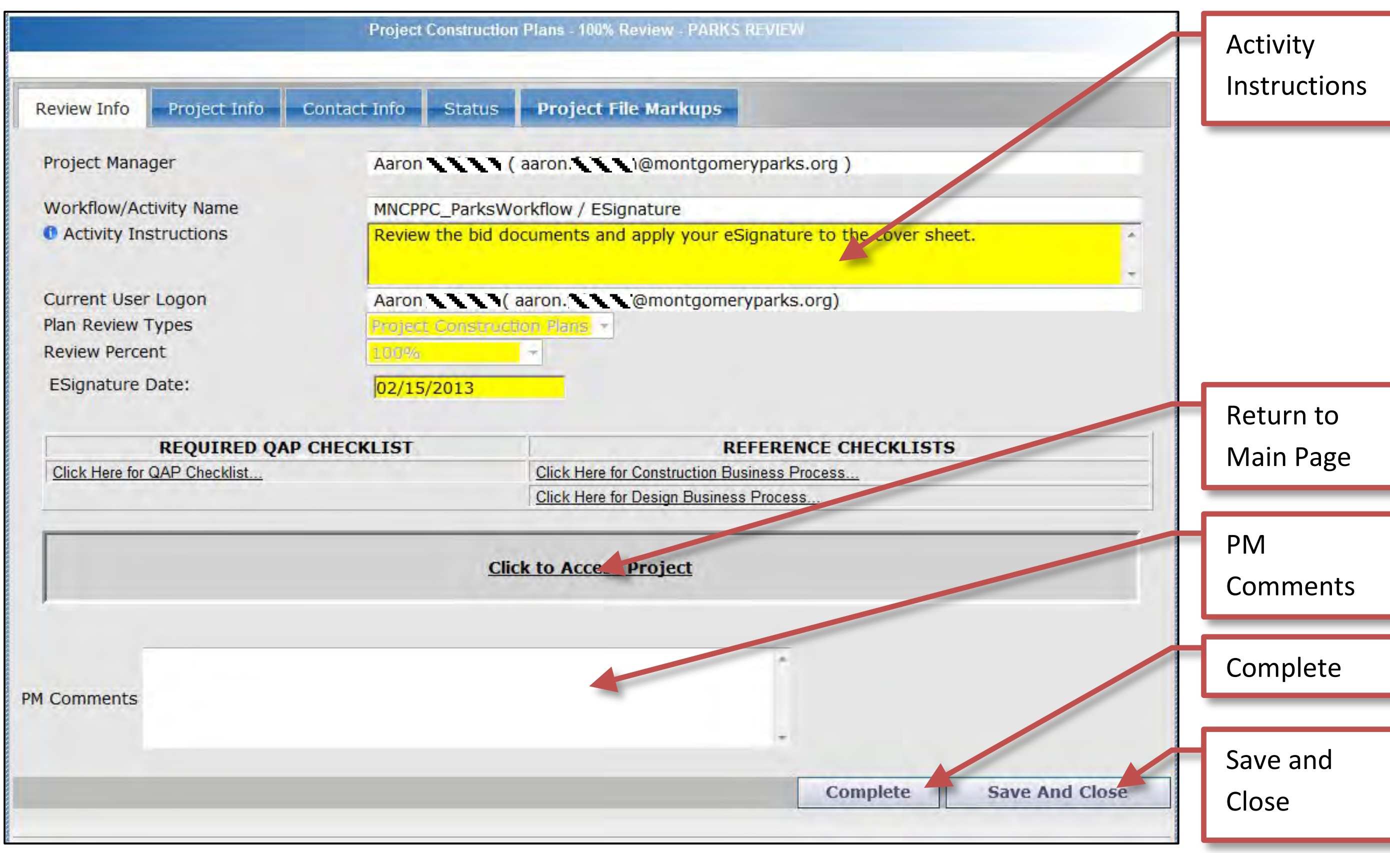
This section describes the Division Chief's task within the Workflow.



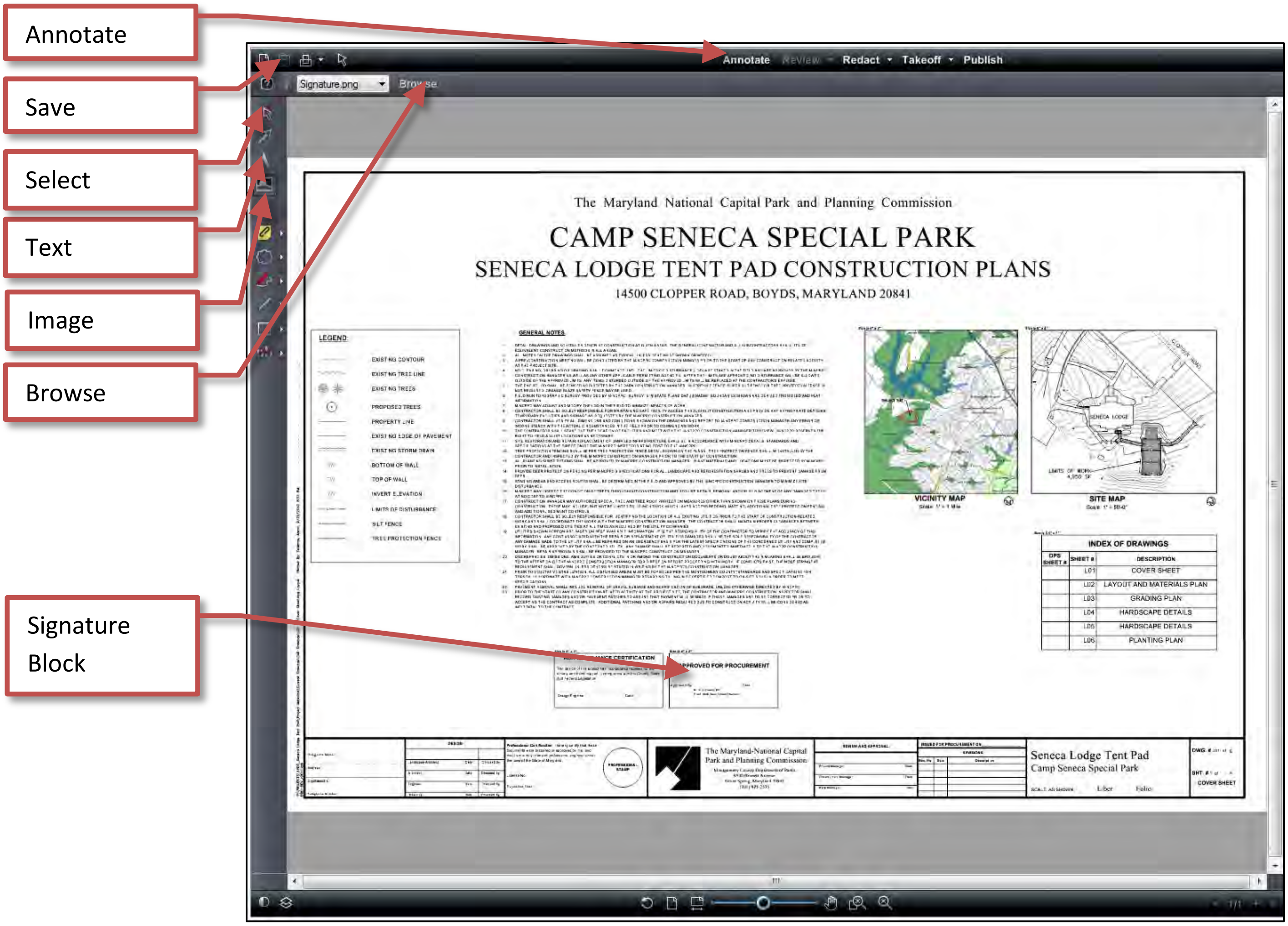
Task Name: eSignature

After the QAP Officer has determined that the Bid Set meets the standards for procurement set forth by Montgomery County Parks, the Division Chief must approve the documents by applying his or her eSignature to the cover sheet of the Construction Drawings. An eSignature is simply a copy of one's signature, scanned and saved to a digital file format.

1. Prepare your eSignature file by scanning a copy of your signature and saving it to your computer's hard drive as a Portable Network Graphics (.png) file. *Saving your eSignature to your computer's hard drive ensures that only you have access to the file.*
2. A new task will appear in your Task List. Click on the link entitled "QAPApproval."
3. A message will pop up asking if you want to accept the task. Click "OK" to accept the task and open the eForm.
4. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
5. To review the consultant's drawings, click on the link entitled "Click to Access Project." This will take you back to the project's Main Page.



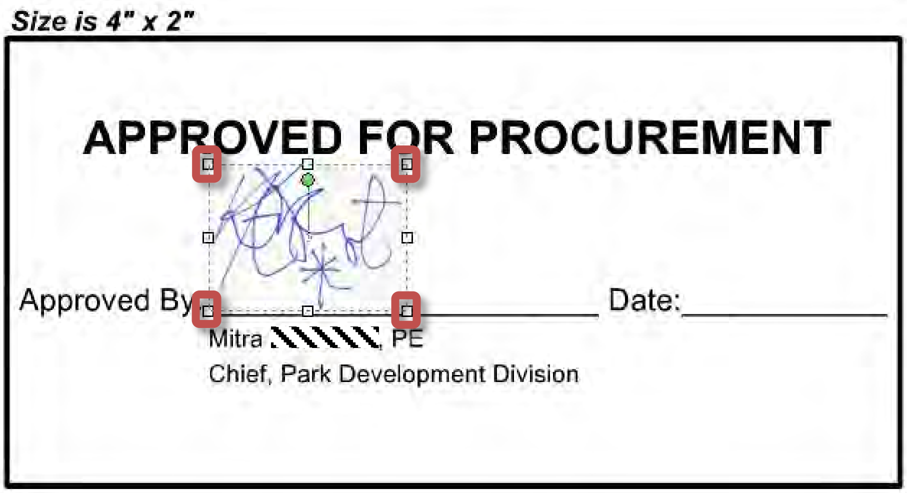
6. The project’s File List will appear on the left side of the screen. Click on the folder where the drawings are saved. *Unless otherwise directed by the Project Manager, these files will always be in the “Current Submissions” folder.*
7. To view a drawing, click the drawing’s name or the thumbnail preview of that drawing. The drawing will appear in the [Brava Viewer](#) at the right. If you are satisfied that the Bid Set is complete, click the thumbnail for the project’s cover sheet to open it in the Brava Viewer.



8. Click the “Annotate” link at the top of the screen to open the Annotate Tool Bar.
9. Click the “Image”  button in the Annotate Tool Bar at the left side of the screen. A drop down menu will appear immediately above the Annotate Tool Bar.
10. Click the “Browse” button just to the right of the drop down menu to open a Windows Explorer window.
11. Navigate to the eSignature file on your computer’s hard drive and click “OK.” The eSignature file name you just selected should now appear in the drop down menu above the Annotate Tool

Bar. *Until you select a new file or change the eSignature file's location, this file will always appear in the drop down menu after you click the "Image" button.*

12. Place the eSignature by clicking once on the drawing, near the Signature Block. After placing the drawing, click the "Select"  button. *This will prevent you from inadvertently inserting a second copy of the eSignature. Once in select mode, you can also move, rotate, resize or delete an image file.*



13. Resize your eSignature to fit on the "Approved By" line by dragging one of the white boxes at the corner of the image. *You can maintain the aspect ration of the image by holding the "Shift" key down while you resize the image.*

14. To enter the date of the approval, click the "Text"  button in the Annotate Tool Bar and place a text box in the drawing by clicking on the desired location of the text box and typing the date.

15. Resize the text by dragging one of the white boxes at the corner of the image. *You can maintain the aspect ration of the image by holding the "Shift" key down while you resize the image.*
16. Resize the text box (without resizing the text) by dragging one of the two black dots at the top of the text box.
17. Click the "Save" icon at the top left corner of the screen. A dialog box will pop up asking you to "Please input name." Type your name and click the "OK" button.
18. Return to the the eForm and click the "Complete" button. The Project Manager will receive an email notification that you have signed the Cover Sheet and the project is ready to go to bid.

OTHER FUNCTIONS

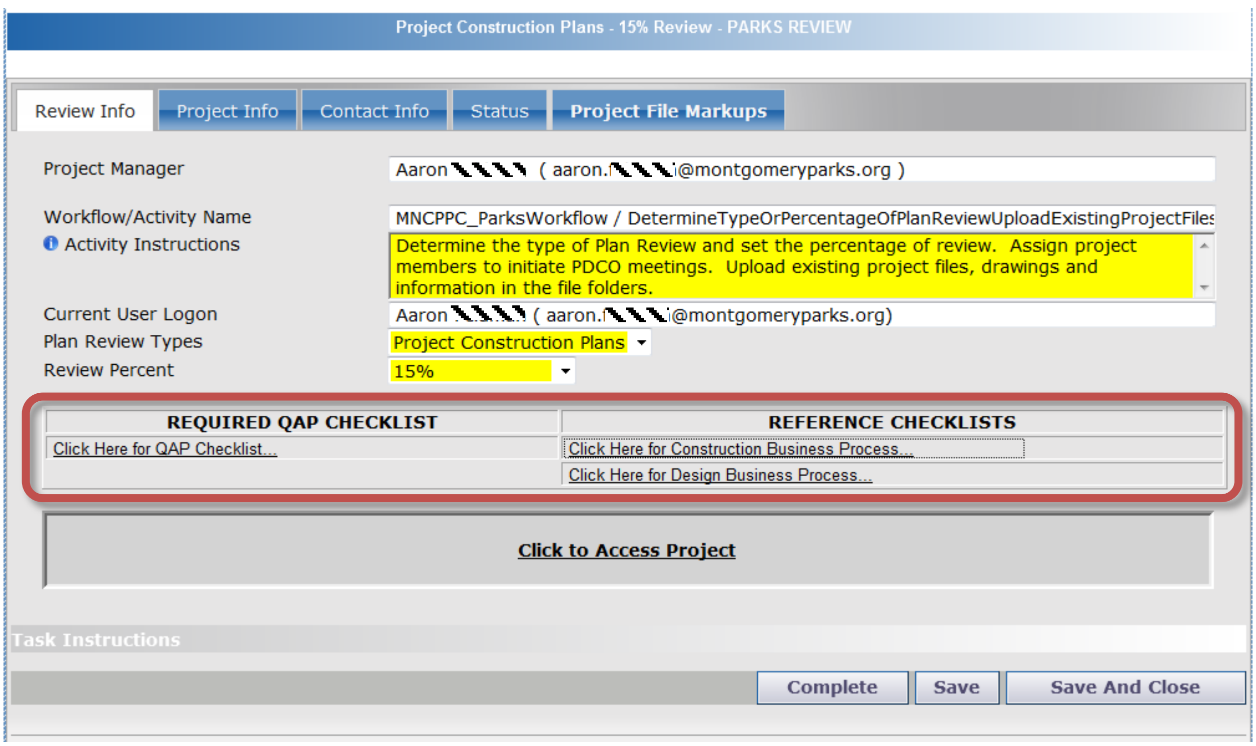
Reference Checklists

Each eForm contains links to a number of checklists. These checklists are provided for reference throughout the design review process to ensure all of the requirements of a Park Development project are met. With the exception of the QAP Checklist, these checklists are not a required part of the workflow.

<u>QAP Checklist</u>: This checklist is to be prepared by the Project Manager following the acceptance of the 100% Construction Documents from the Consultant. It is then sent on to the QAP Officer to ensure all of the requirements of a set of Contract Documents are included before the set goes out to bid. This is the only step in the Workflow that cannot be skipped, so the checklist is provided throughout the Workflow to ensure the requirements are being met as the Consultant is developing his drawings.

<u>Construction Business Process Checklist</u>: This checklist is used to facilitate the transition from the design phase to the construction phase of a project. The checklist ensures a clear line of communication between the Project Manager, Construction Manager, Construction Inspector and Contractor.

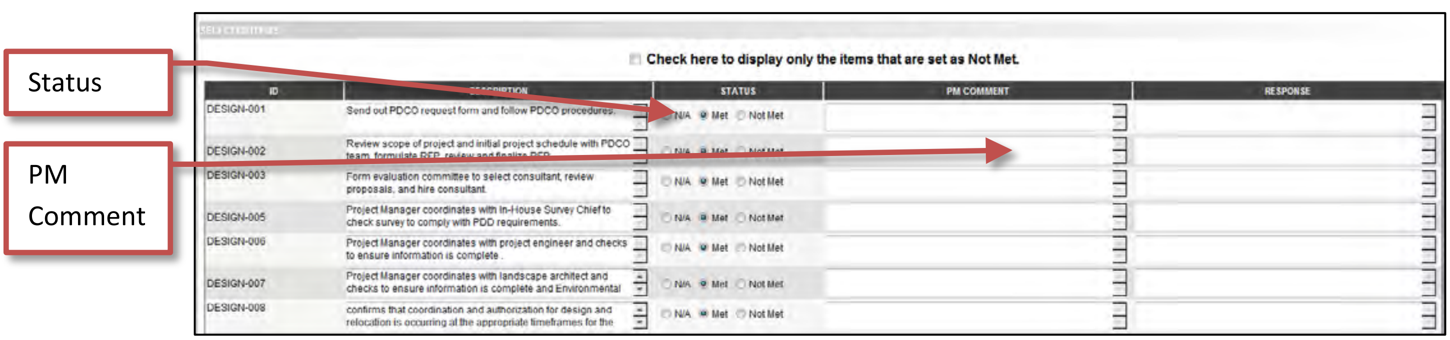
<u>Design Business Process Checklist</u>: This checklist outlines all of the coordination steps within a design process. The Project Manager should use this checklist to ensure that he or she keeps all relevant parties in the loop throughout the process and receives the appropriate approvals to proceed with bidding and construction. The ePlans Workflow was created based on this checklist.



1. Click the link for the checklist you wish to complete. This will open the checklist in a new window.

2. At the top of the page, click the checkbox for all of the relevant steps within the process and click the "Select Items" button at the bottom of the page. *For the QAP Checklist, you will need to select all of the steps. You can do this by clicking the "Check All" button.*

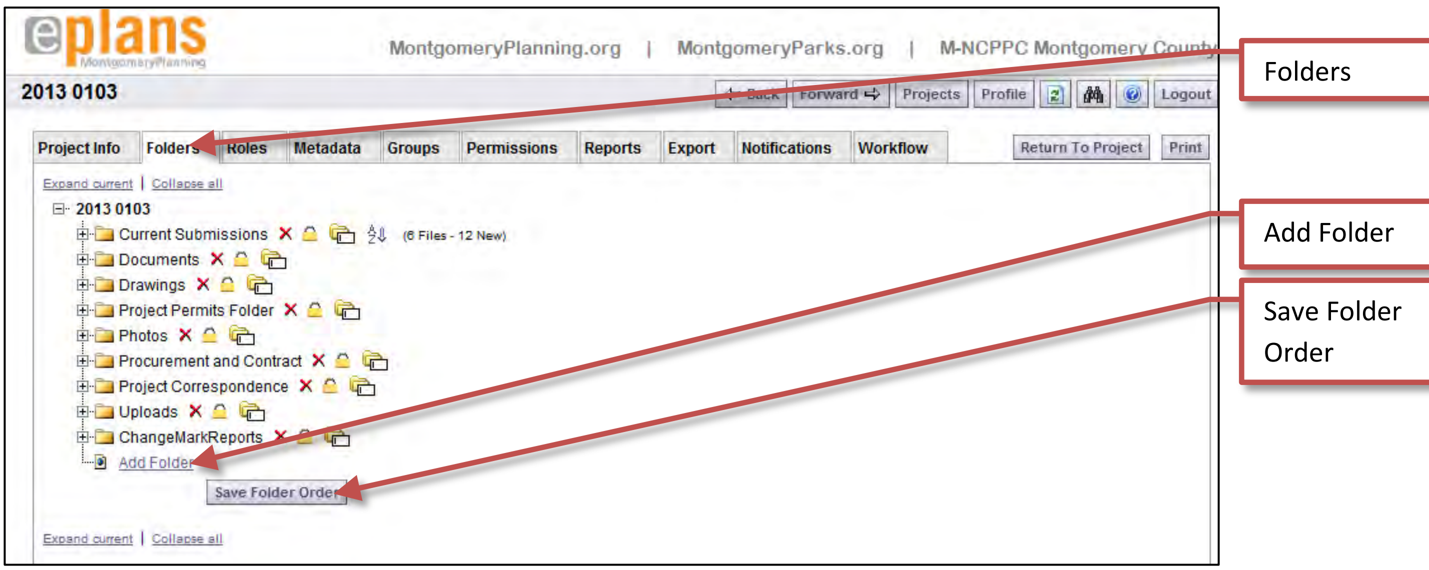
3. Click the "Select Items" button at the bottom of the list. This will move all of the checklist items into the form at the bottom of the page.
4. The items you selected will appear in another checklist at the bottom of the page. As you complete each item, you can change the status to "Met" and enter notes in the PM Comment Field.
5. You can close this window to return to the eForm.



Folder Management

The ePlans platform is designed to be a secure, online location to store drawings, reports, correspondence and other project-specific documentation. A default file organization tree has been set up within the “PARKS – Project” template. While this folder structure is standard to the Park Development Division and every effort should be made to adhere to these standards, the folder structure can be modified at any point during a project by the Project Manager.

1. To edit a project’s folder structure, click the “Edit” button in the Main Tool Bar of the project’s Main Screen. Click the “Folders” tab at the top of the screen.

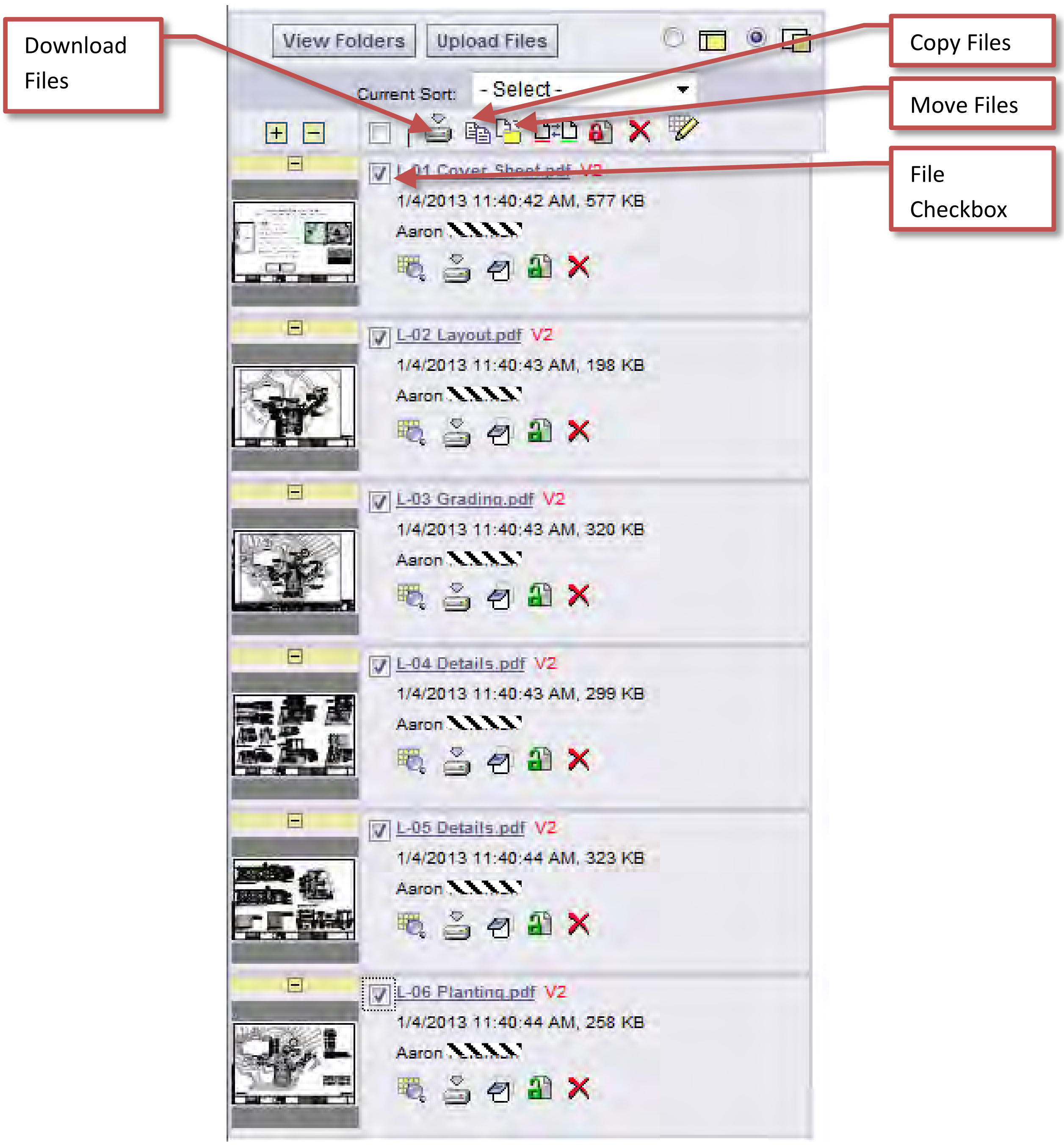


2. To modify individual folders, use the icons to the right of the folder name.
   - Click the “Delete” icon to delete a folder and all of its contents.
   - Click the “View Permissions” icon to changes which users have access to view, modify or add to a folder.
   - Click the “Rename” icon to rename the folder.
3. To change the order folders are viewed in the project’s Main Page, click and drag the folder you wish to move to the location you wish to move it to. Click the “Save Folder Order” button when you are finished organizing folders. *During the design review phase of a project, the “Current Submissions” is the most commonly accessed folder by all users, which is why its default location is at the top.*
4. To create a new folder, click the “Add Folder” link.

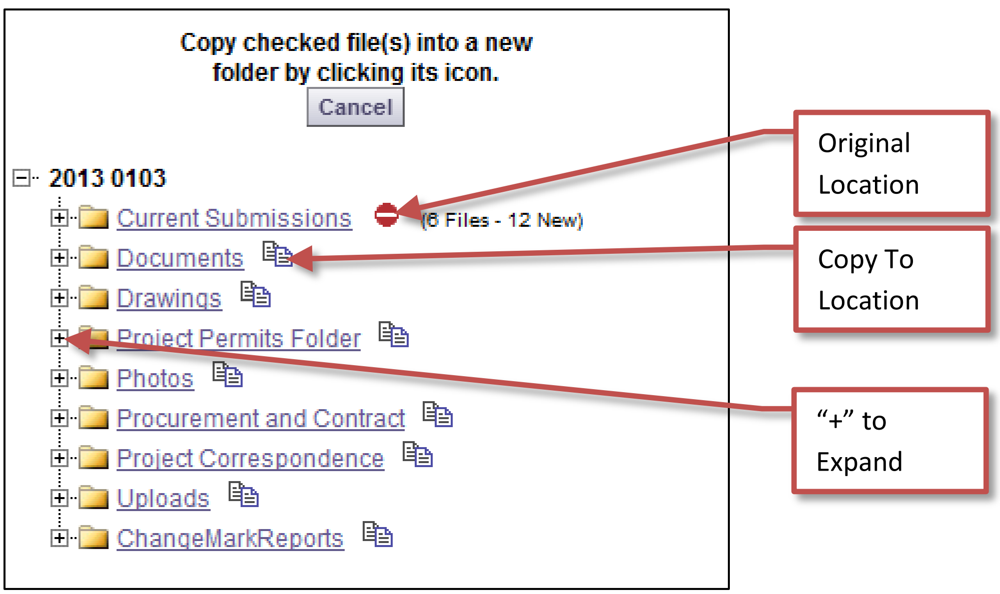
The Maryland-National Capital Park and Planning Commission
Montgomery Parks

File Management

Once a phase of a project is complete, you may want to create record sets of Consultant submissions or move older, working files to archive folders.   Instead of downloading and uploading files to your computer, this can all be accomplished within the ePlans platform. Project Managers have the ability to move or copy files anywhere within their project and can set permissions for other users to move or copy files to any location or to specific folders.



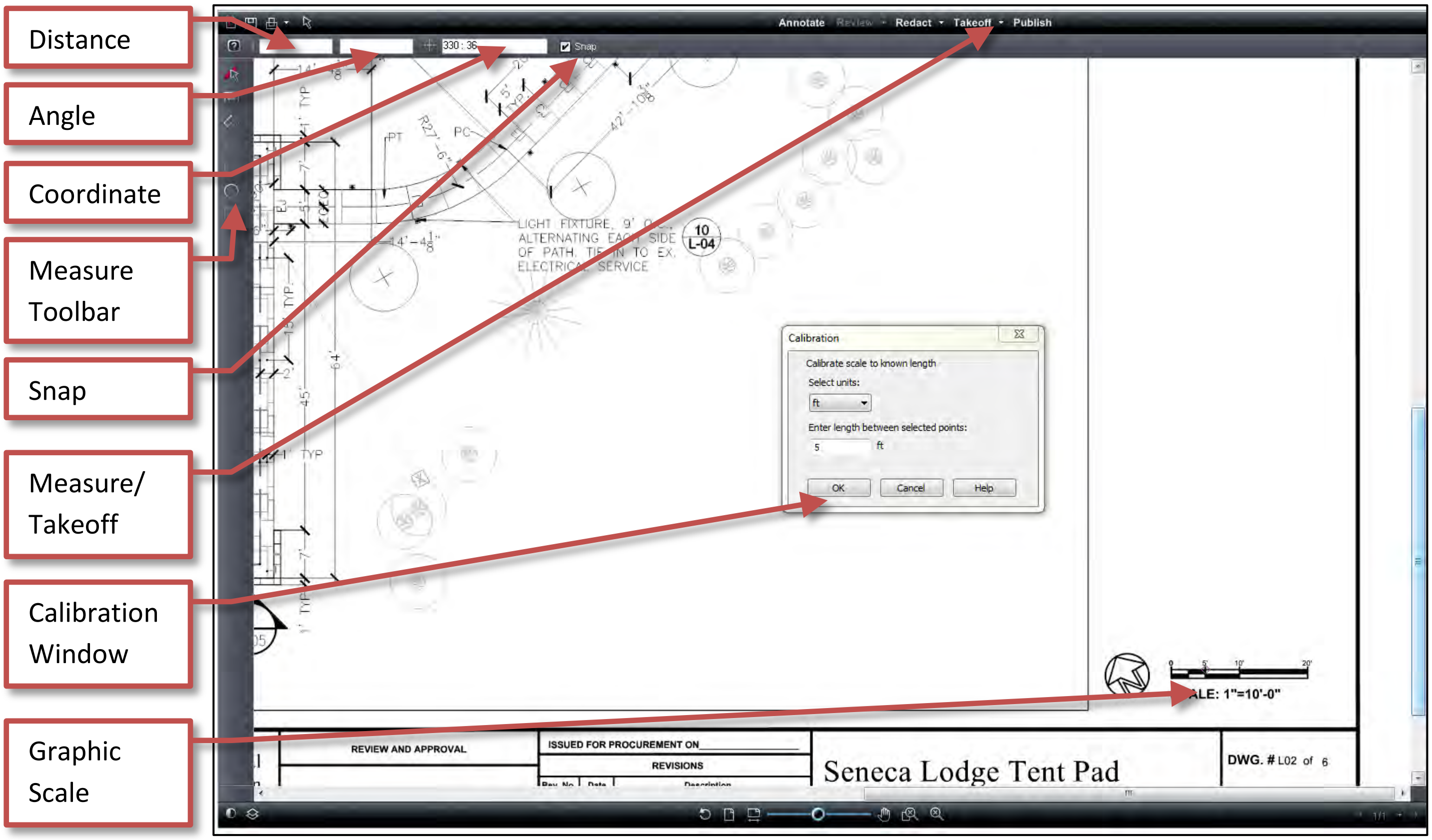
1. On the left side of the project's Main Page, navigate to the files you want to move by clicking the folder in which they are located.
2. Select the files you wish to move by clicking the checkbox next to the file's name.
3. Select the action you wish to perform.
    - To copy the selected files to another folder, click the "Copy" icon at the top menu bar. A message will appear asking if you would like to continue. Click the "OK" button.
    - To move the selected files to another folder, click the "Move" icon. A message will appear asking if you would like to continue. Click the "OK" button.
    - To download the selected files to your computer, click the "Download" icon. A message will appear asking if you want to open or save the file. Click the "Open" button to view the file in Adobe Acrobat. Click the "Save" button to save the file to your computer. *Files should be downloaded when you want to view them from a location without internet access (such as on-site). Remember that any changes made to downloaded files will not appear in ePlans unless you re-upload the modified files.*
4. The File Preview Pane at the left side of your screen will be replaced by a new folder tree. Click on the "Copy" or "Move" icon next to the folder you wish to move the file to. Click the "+" button to expand a folder and view its subfolders.



5. A message will appear at the top of the screen indicating that the action was successful.

Measure Tools

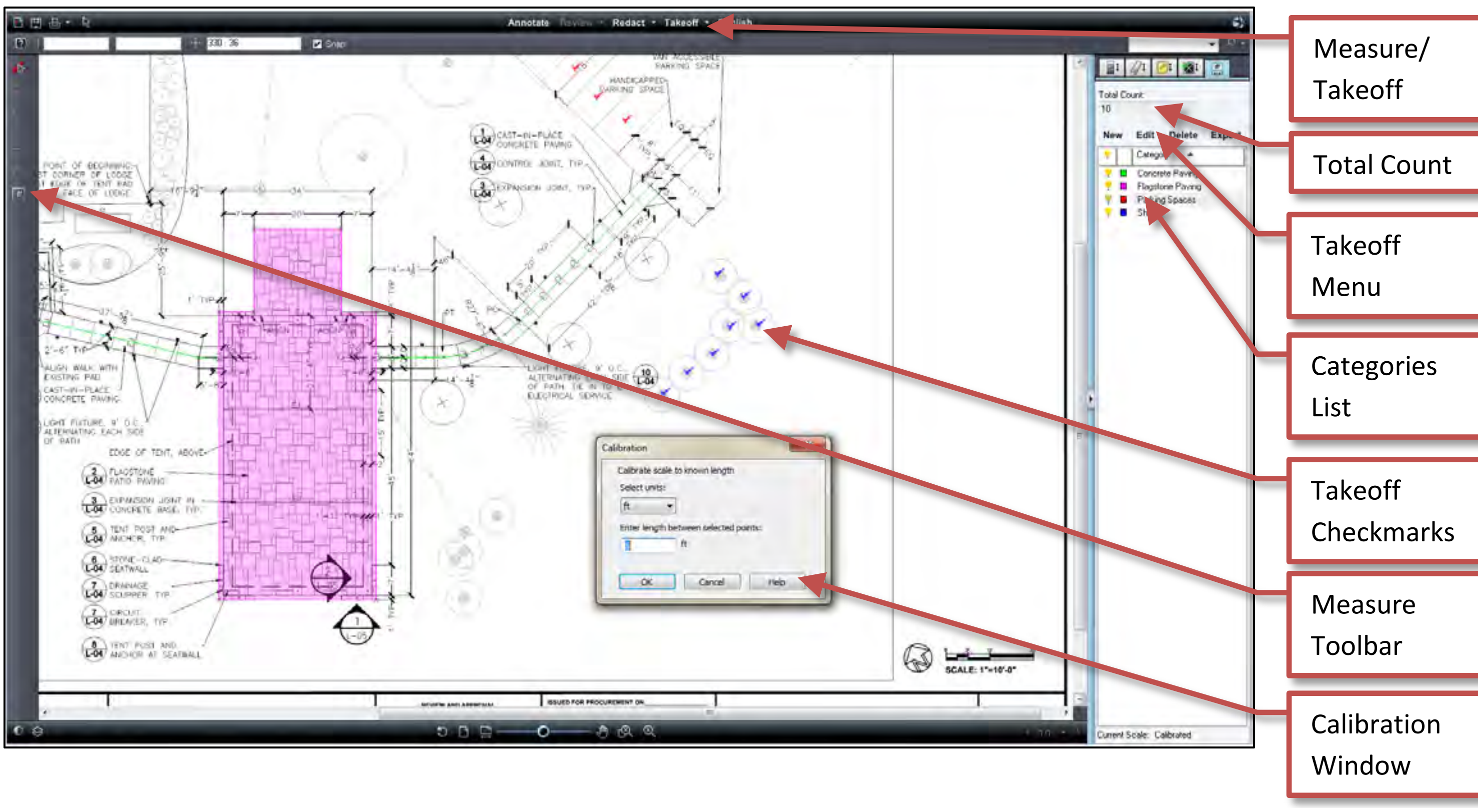
The Brava Viewer allows users to take accurate measurements from scaled drawings right on the computer screen. The measure tool can be calibrated to any drawing scale, automatically calculating real-world distances from scaled drawings.



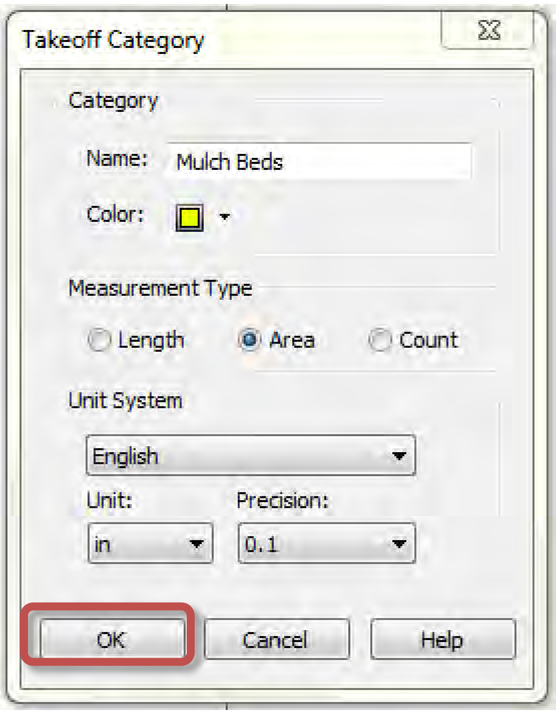
1. Open a drawing in the Brava Viewer by clicking its thumbnail in the Project File List.
2. Zoom to the drawing's graphic scale. If no graphic scale exists, zoom to a known dimension.
3. Click the small arrow button to the right of the "Measure" or "Takeoff" link at the top of the Brava Viewer, and select "Calibrate…" from the drop down menu.
4. Make sure the "Snap" checkbox is checked.
5. Place your cursor at the "0" hash mark of the graphic scale and click once. *If no graphic scale exists, use the beginning point of a known dimension.*
6. Place your cursor at the next hash mark of the graphic scale and click once. *If no graphic scale exists, use the end point of a known dimension.*
7. Select the units you wish to use from the "Select units" drop down menu.
8. Type in the dimension of the line you just traced and click "OK" to calibrate the drawing.
9. Click the small arrow button at the top of the Brava Viewer and select "Measure" from the drop down menu. Use the Measure Toolbar at the left side of the screen to measure elements in the drawing. Hold your cursor over each button in the tool bar to see that button's function.

Takeoff Tools

The Brava Viewer has the ability to count the number, length or area of several different elements at once, keeping a separate tally of everything measured. This feature is particularly useful when creating cost estimates, determining quantities of materials to order or verifying whether proposed work falls within required limits.



1. Open a drawing in the Brava Viewer by clicking its thumbnail in the Project File List.
2. Zoom to the drawing's graphic scale. If no graphic scale exists, zoom to a known dimension.
3. Click the small arrow button to the right of the "Measure" or "Takeoff" link at the top of the Brava Viewer, and select "Calibrate…" from the drop down menu.
4. Make sure the "Snap" checkbox is checked.
5. Place your cursor at the "0" hash mark of the graphic scale and click once. *If no graphic scale exists, use the beginning point of a known dimension.*
6. Place your cursor at the next hash mark of the graphic scale and click once. *If no graphic scale exists, use the end point of a known dimension.*
7. Select the units you wish to use from the "Select units" drop down menu.
8. Type in the dimension of the line you just traced and click "OK" to calibrate the drawing.
9. Click the small arrow button again and select "Takeoff" from the drop down menu.
10. Click the "New" link in the Takeoff Menu at the right side of the screen. The Takeoff Category Window will appear.



11. In the “Name” field, enter the type of element you want to count.
12. Select the color you wish to use. *You may want to differentiate between separate elements or materials by assigning a different color to each.*
13. Select the Measurement Type you want to use. The appropriate buttons in the Measure Toolbar will become active, depending on which Measurement Type you select.

    Length – Calculate the overall length of a specific element or material. This is helpful in calculating the total linear footage of fencing or piping.

    Area – Calculate the total area of a space or material. This is helpful in calculating the total square footage of various paving types, seed mixes required for lawn or forest cover.

    Count – Tally the quantity of a certain type of element or feature. This is helpful in counting parking spaces or individual plants. Select your preferred Unit System, Unit, and Level of Precision from the dropdown menus.

14. Click the “OK” button. Repeat steps 10 through 14 for each element you want to count. *Your level of specificity should depend on the level of completion the documentation has reached. For instance, create separate categories for trees and shrubs if that is what is identified on a landscape plan. If a detailed plant schedule has been provided, you may want to create a separate category for each type of vegetation to confirm the consultant’s plant counts are accurate.*

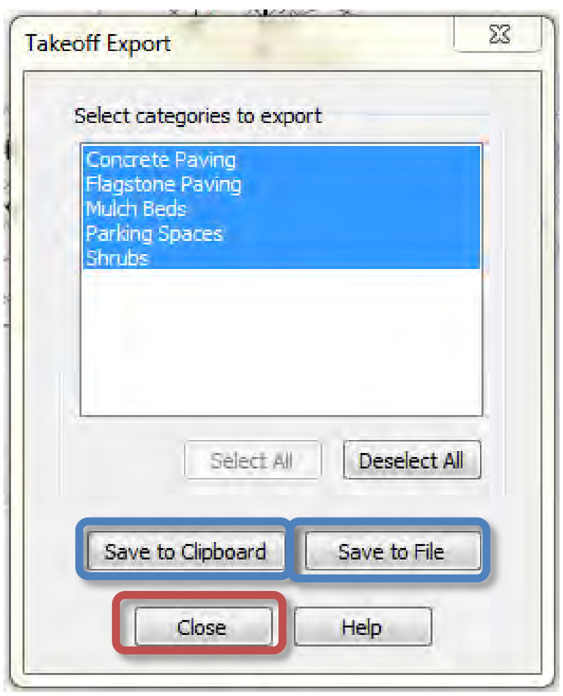
15. Begin calculating quantity takeoffs by highlighting from the Categories List the category of element you want to count. The appropriate buttons in the Measure Toolbar will become active, depending on which Measurement Type you selected when you created that category.

    Length –You can use the "Measure Line" button, the "Measure Polyline" button or the "Measure Circle" button to calculate length. Trace any line of which you want to calculate the length by clicking on each midpoint of that line. Hit the "Enter" key to stop calculating a line. The Total Count Field at the top of the Categories List will keep track of the length of all lines measured within the highlighted category.

    Area – You can use the "Measure Polygon" button, the "Measure Rectangle" button or the "Measure Circle" button to calculate areas. Trace the outline of any shape that you want to calculate by clicking on each point of that shape. Hit the "Enter" key to close the shape and calculate the area. The Total Count Field at the top of the Categories List will keep track of the total area of all shapes measured within the highlighted category.

    Count – Use the "Measure Count" button to place a checkmark on top of each item you want to count. The Total Count Field at the top of the Categories List will keep track of the total number of checkmarks placed within the highlighted category.

16. To save quantity takeoffs as a spreadsheet or text file, click the "Export" link in the Takeoff Menu. The Takeoff Export window will appear.



17. Select the Categories you would like to export. *Hold the "Ctrl" key down and click to select multiple categories. Alternately, click the "Select All" button to export all categories.*
18. Determine the format to which you want to save your data.

    Save to Clipboard – This will copy each category and quantity as a string of text. You can paste this information directly into the text of an email, or into a word processing document.

    ```
    "Concrete Paving", 125.6 , ft
    "Flagstone Paving", 2755.4, sq. ft
    "Mulch Beds", 0.0, sq. in
    "Parking Spaces", 11, count
    "Shrubs", 7, count
    ```

    Save to File – This will save a comma separated value (.csv) file that can be opened in a spreadsheet program, such as Microsoft Excel.

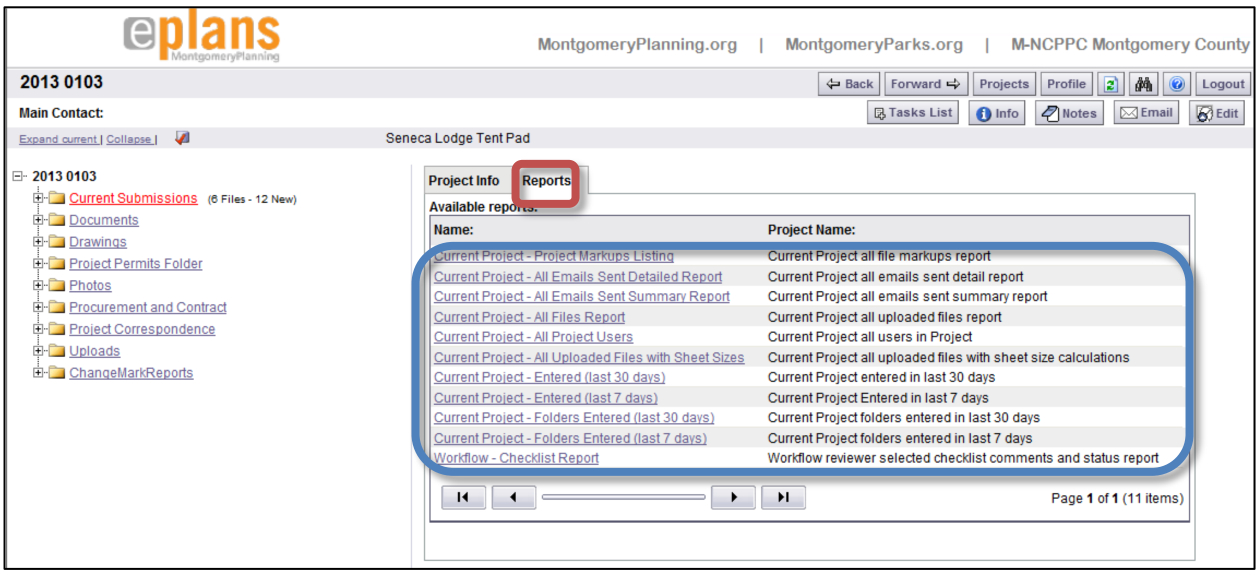
	A	B	C
1	Concrete Paving	125.6	ft
2	Flagstone Paving	2755.4	sq. ft
3	Mulch Beds	0	sq. in
4	Parking Spaces	11	count
5	Shrubs	7	count

19. When you have finished exporting data, click the "Close" button on the Takeoff Export Window.
20. To save all of the takeoffs you have calculated, click the "Save As" button at the top left corner of the Brava Viewer. Enter your name in the Save As Window that appears and click "OK."
21. To return to a Takeoff file you previously saved, open the drawing in the Brava Viewer and click the "Review" link at the top of the Brava Viewer. Select the file name you want to view and click "OK." Click the "Takeoff" tab at the top of the Takeoff Menu.

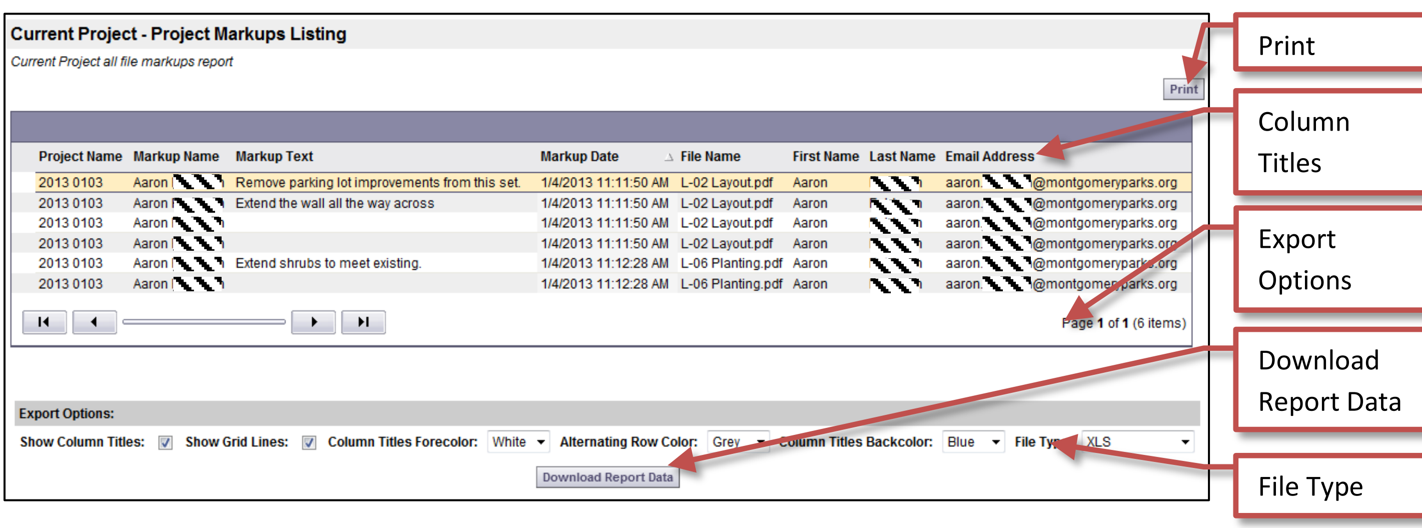
Reporting

Any time a user performs an action in ePlans, a record of that action is saved to the ePlans server. Using this information, ePlans users can generate a number of different reports to find out various activities occurring in their projects. Reports are available in two places. Reports about project user activity are available through the project's Main Page. Reports of actions taken within a workflow are available below the Task List.

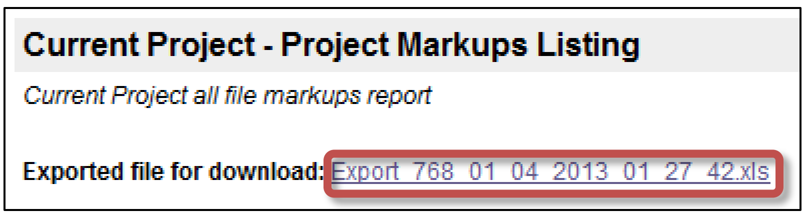
1. For reports about project user activity, go to the project's Main Page and click the "Reports" tab next to the "Project Info" tab at the top of the screen. A list of all of the available reports for that project will appear, along with a brief description of each report.



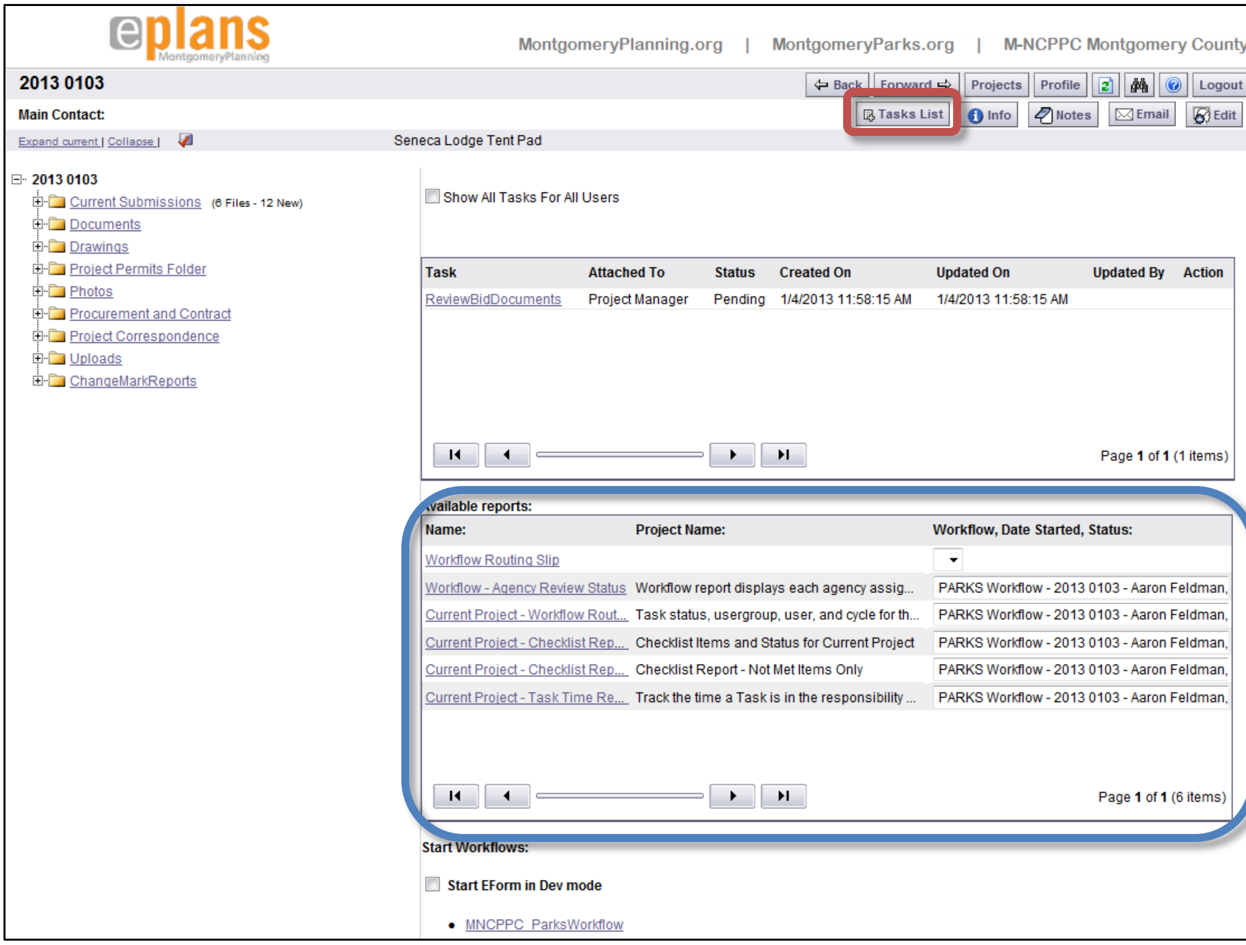
2. Click the report you wish to generate. The report will appear in a new window. Click the column titles to sort the report entries by that title.



3. You can print a hard copy of the report by clicking the “Print” button at the top right of the screen.
4. You can save the report to your computer in a number of different file types, depending on how you plan to use the data. Start by customizing the report’s appearance using the checkboxes and pull down menus in the “Export Options.” At the far right of the Export Options, you can choose which file type you want to create.
    - <u>CSV</u>: Comma separated value
    - <u>DOC</u>: Microsoft Word document
    - <u>HTML</u>: Internet-ready document
    - <u>MS Office XML</u>: Microsoft Office Extensible Markup Language
    - <u>XLS</u>: Microsoft Excel spreadsheet
    - <u>XML</u>: Extensible Markup Language
5. Once you have selected your Export Options, click the “Download Report Data” button. A new window will appear with a link to the report for you to download. Click the link to open it or to save it.



6. For Workflow reports, click the “Tasks List” button on the Main Tool Bar of a project’s Main Page. The bottom of the page will list all of the Workflow reports that are available for this project (see screen shot on the next page).
7. Click the report you wish to generate and follow steps 2 through 6 above.


eplans
MontgomeryPlanning
MontgomeryPlanning.org | MontgomeryParks.org | M-NCPPC Montgomery County
2013 0103
Back
Forward
Projects
Profile
Logout
Main Contact:
Tasks List
Info
Notes
Email
Edit
Expand current | Collapse |
Seneca Lodge Tent Pad
2013 0103
Current Submissions (6 Files - 12 New)
Documents
Drawings
Project Permits Folder
Photos
Procurement and Contract
Project Correspondence
Uploads
ChangeMarkReports
Show All Tasks For All Users
Task
Attached To
Status
Created On
Updated On
Updated By
Action
ReviewBidDocuments
Project Manager
Pending
1/4/2013 11:58:15 AM
1/4/2013 11:58:15 AM
Page 1 of 1 (1 items)
Available reports:
Name:
Project Name:
Workflow, Date Started, Status:
Workflow Routing Slip
Workflow - Agency Review Status
Workflow report displays each agency assig...
PARKS Workflow - 2013 0103 - Aaron Feldman,
Current Project - Workflow Rout...
Task status, usergroup, user, and cycle for th...
PARKS Workflow - 2013 0103 - Aaron Feldman,
Current Project - Checklist Rep...
Checklist Items and Status for Current Project
PARKS Workflow - 2013 0103 - Aaron Feldman,
Current Project - Checklist Rep...
Checklist Report - Not Met Items Only
PARKS Workflow - 2013 0103 - Aaron Feldman,
Current Project - Task Time Re...
Track the time a Task is in the responsibility ...
PARKS Workflow - 2013 0103 - Aaron Feldman,
Page 1 of 1 (6 items)
Start Workflows:
Start EForm in Dev mode
MNCPPC_ParksWorkflow

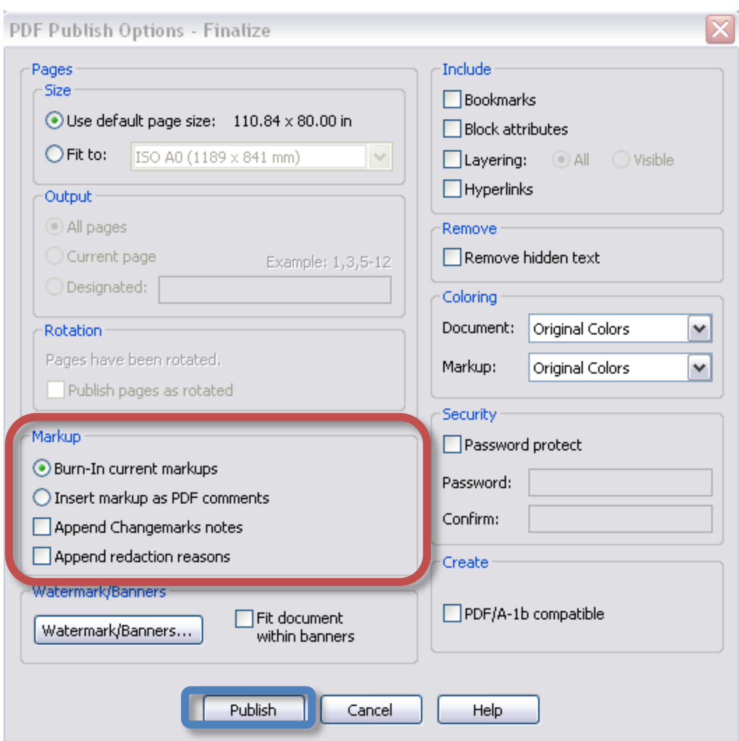
Publishing Changemarks

After each PDCO Team Review cycle, you may want to save a record copy of all the changemarks made on the Consultant's drawings. ePlans allows you to save changemarks embedded within a drawing, or as a comprehensive list, organized in an Excel spreadsheet.

1. To save changemarks embedded within a drawing, use the folder list on the left side of the project's Main Page to navigate to the drawing you wish to publish. Click the "Markups" icon and select which changemarks you wish to view. Click the "View/Edit" button to open the Brava Viewer.
2. Click on the "Publish" link at the top of the screen and select the "Publish to PDF" option.
3. A dialog box will appear offering a number of options for publishing the drawing. You do not need to change any of the settings in this dialog box if you do not want to. One section to consider, however, is the Markup Menu.

   <u>Burn-In current markups</u>: This setting will insert all of the open changemarks as a layer in the drawing. The changemarks are not editable using this feature.

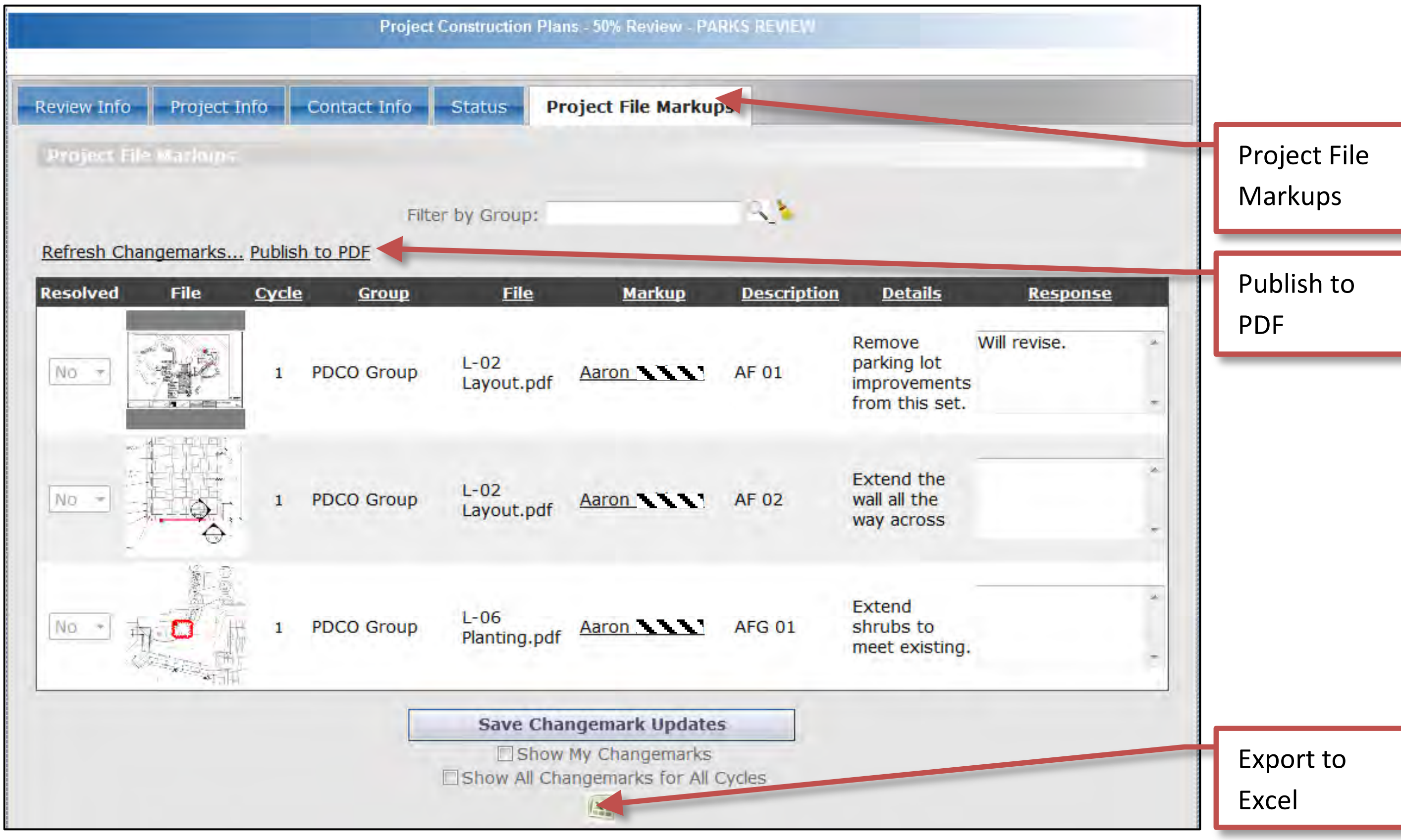
   <u>Insert markup as PDF comments</u>: This setting converts all of the files changemarks to Adobe PDF comments, allowing you to manipulate them as you would in Adobe Acrobat.



4. Click the "Publish" button. A message will pop up asking if you want to "Save to file" or "Email as attachment." Select "Save to file" and click the "OK" button.

5. A Windows Explorer screen will appear. Navigate to the location on your computer where you want to save the drawing to and click the “Save” button.
6. To save changemarks as a list, click the “Project File Markups” tab of any eForm.
7. To create a PDF document, Click on the “Publish to PDF” link at the top of the changemarks list.

   To export all of the changemarks to an Excel spreadsheet, click the Microsoft Excel logo at the bottom of the changemarks list.

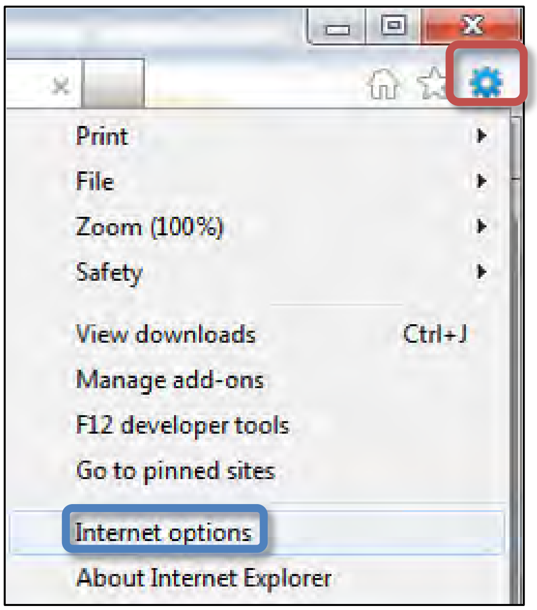


APPENDIX

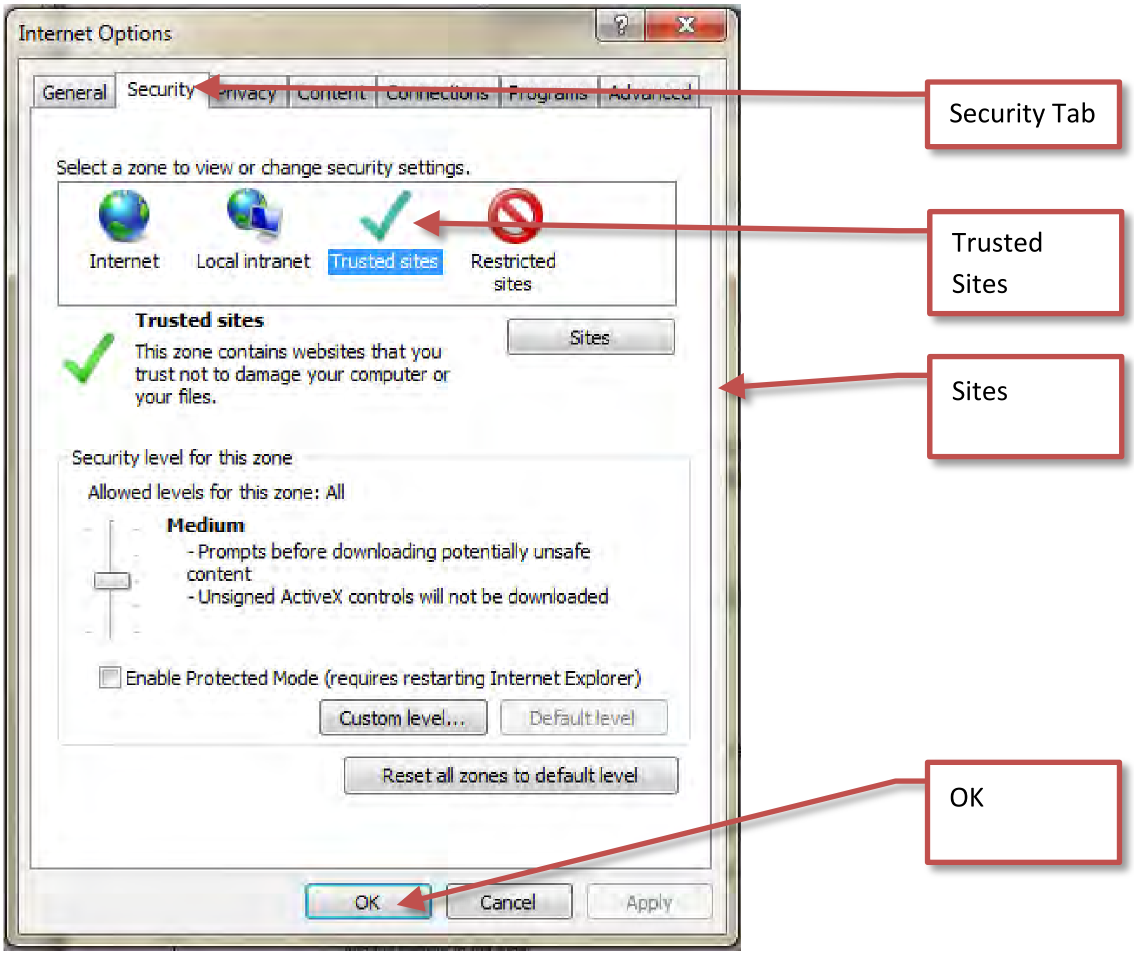
Allow Trusted Sites

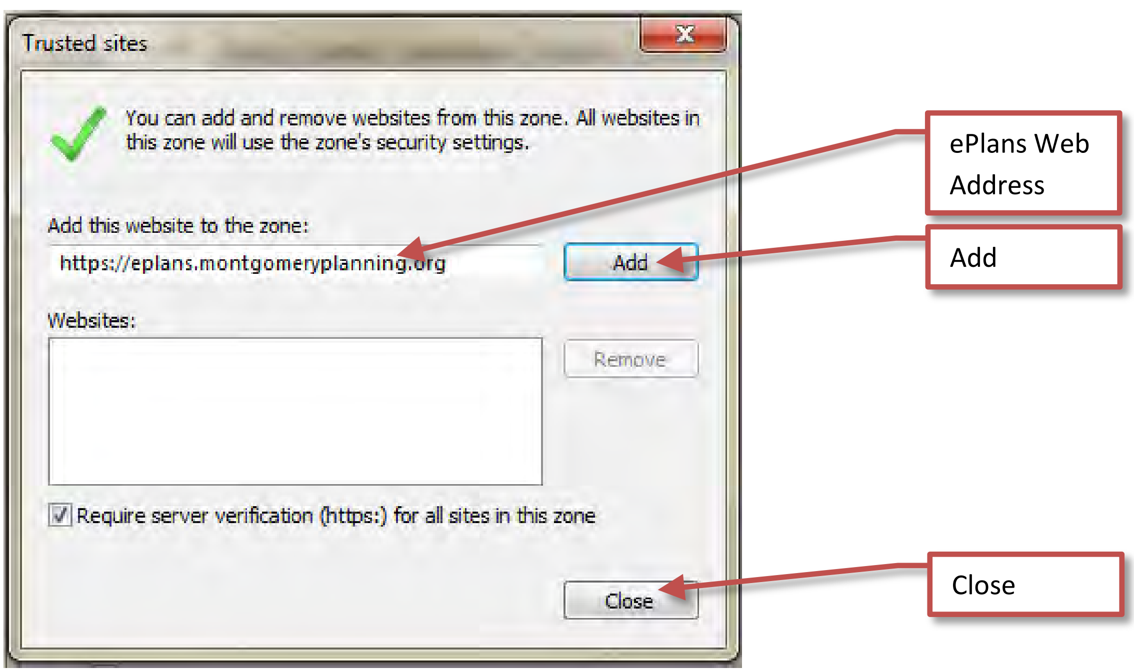
Before installing any of the components necessary to run ePlans on your computer, you need to verify that ePlans is recognized as a Trusted Site by your copy of Internet Explorer. Because of the amount of information transmitted between your computer and the ePlans server, Explorer may mistakenly identify ePlans as a malicious website. By identifying it as a Trusted Site, you can ensure Explorer will allow you to access the site. *Administrative rights to your computer are required to install these components.*

1. Open Internet Explorer and click the "Tools" icon. Select "Internet Options" from the dropdown menu. The Internet Options Menu will open in a new window.



2. Click the "Security" tab.
3. Click the "Trusted Sites" button in the menu titled "select a zone to view or change security settings." This will activate the "Sites" button just below that window.
4. Click the "Sites" button. This will open a dialog box that allows you to add ePlans as a trusted site to Internet Explorer.
5. Type or paste the main ePlans web address (https://eplans.montgomeryplanning.org) and click the "Add" button, and then click the "Close" button to return to the Internet Options Menu.
6. Click the "OK" button in the Internet Options window to close that window and return to Internet Explorer.

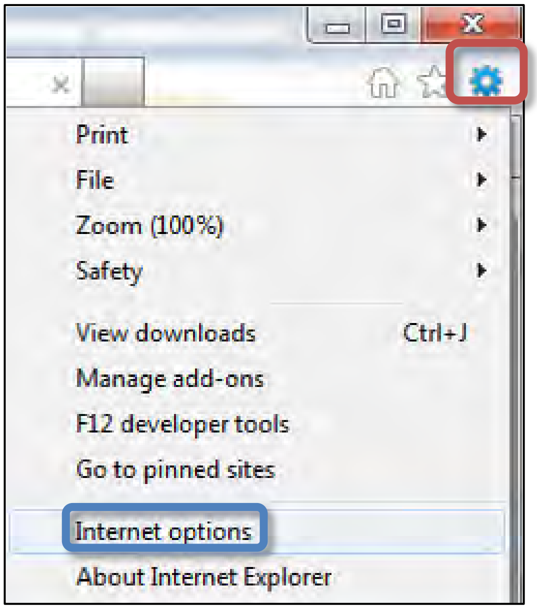

Internet Options
General
Security
Privacy
Content
Connections
Programs
Advanced
Select a zone to view or change security settings.
Internet
Local intranet
Trusted sites
Restricted sites
Trusted sites
This zone contains websites that you trust not to damage your computer or your files.
Sites
Security level for this zone
Allowed levels for this zone: All
Medium
- Prompts before downloading potentially unsafe content
- Unsigned ActiveX controls will not be downloaded
Enable Protected Mode (requires restarting Internet Explorer)
Custom level...
Default level
Reset all zones to default level
OK
Cancel
Apply
Security Tab
Trusted Sites
Sites
OK


Trusted sites
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
Add this website to the zone:
https://eplans.montgomeryplanning.org
Add
Websites:
Remove
Require server verification (https:) for all sites in this zone
Close
ePlans Web Address
Add
Close

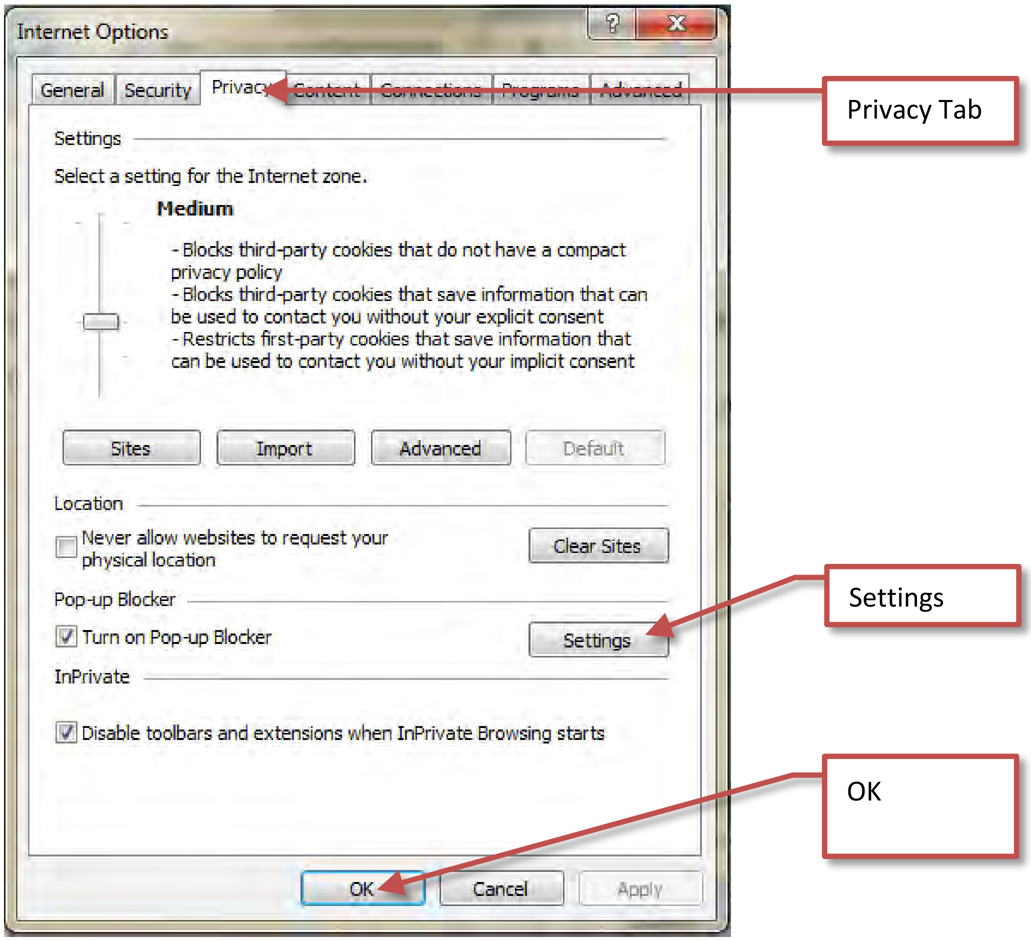
Disabling Pop-Up Blocker

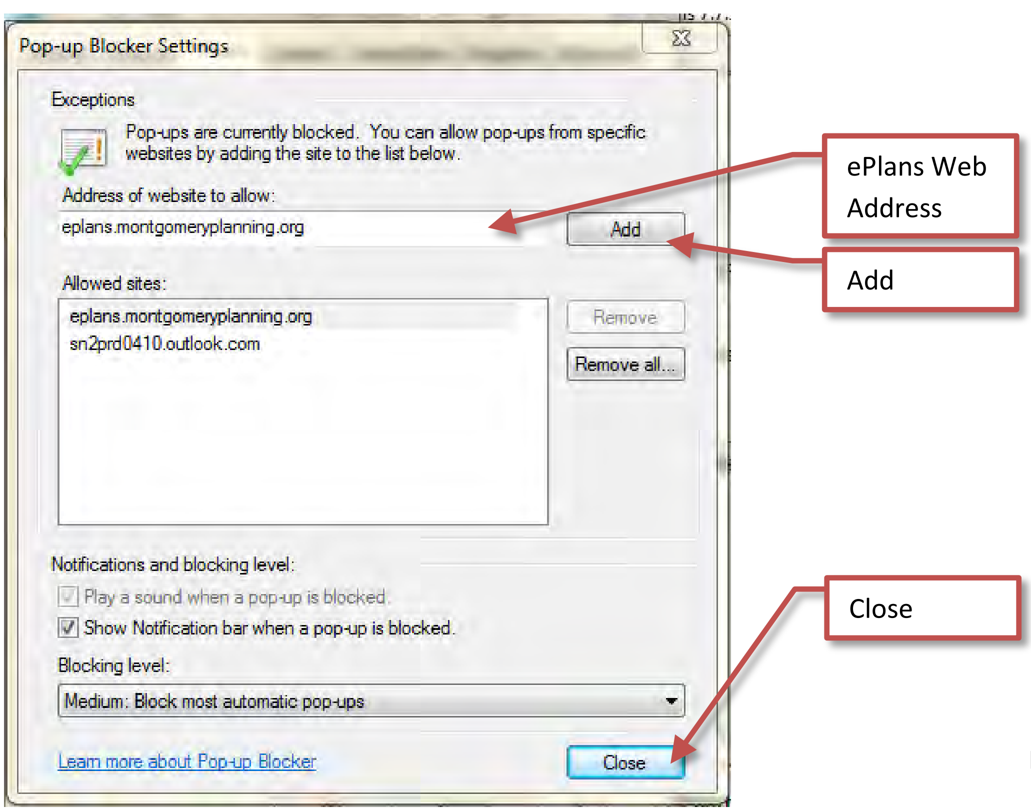
In order for ePlans to function properly, the platform needs to automatically open new windows within Internet Explorer. To make sure Internet Explorer allows this, you will need to disable the Pop-Up Blocker for ePlans.

1. Open Internet Explorer and click on the "Tools" icon. Select "Internet Options" from the dropdown menu. The Internet Options Menu will open in a new window.



2. Click the "Privacy" tab.
3. Click the "Settings" button to open the Pop-Up Blocker Settings Window.
4. Type or paste the main ePlans web address (https://eplans.montgomeryplanning.org) and click the "Add" button, and then click the "Close" button to return to the Internet Options Menu.
5. Click the "OK" button in the Internet Options Window to close that window and return to Internet Explorer.

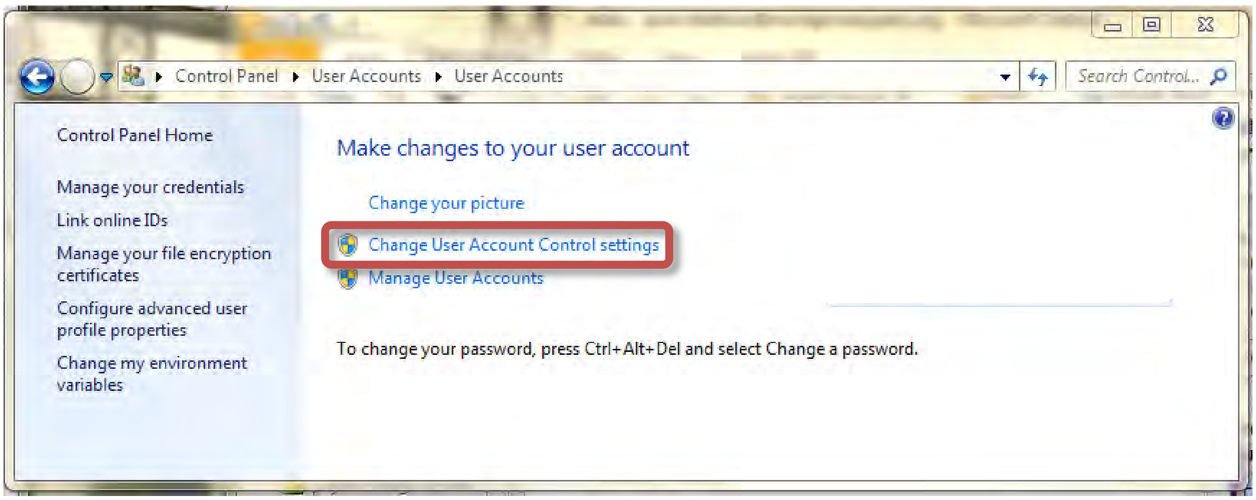

Internet Options
General
Security
Privacy
Settings
Select a setting for the Internet zone.
Medium
- Blocks third-party cookies that do not have a compact privacy policy
- Blocks third-party cookies that save information that can be used to contact you without your explicit consent
- Restricts first-party cookies that save information that can be used to contact you without your implicit consent
Sites
Import
Advanced
Default
Location
Never allow websites to request your physical location
Clear Sites
Pop-up Blocker
Turn on Pop-up Blocker
Settings
InPrivate
Disable toolbars and extensions when InPrivate Browsing starts
OK
Cancel
Apply
Privacy Tab
Settings
OK

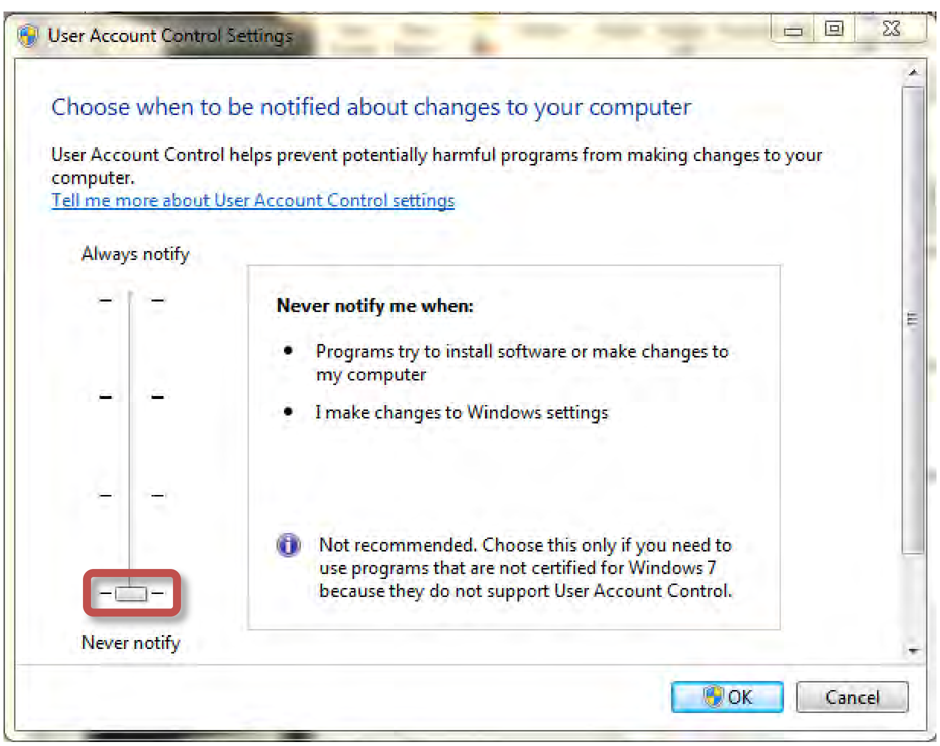

Pop-up Blocker Settings
Exceptions
Pop-ups are currently blocked. You can allow pop-ups from specific websites by adding the site to the list below.
Address of website to allow:
eplans.montgomeryplanning.org
Add
Allowed sites:
eplans.montgomeryplanning.org
sn2prd0410.outlook.com
Remove
Remove all...
Notifications and blocking level:
Play a sound when a pop-up is blocked.
Show Notification bar when a pop-up is blocked.
Blocking level:
Medium: Block most automatic pop-ups
Learn more about Pop-up Blocker
Close
ePlans Web Address
Add
Close

Disabling User Account Control

Computers running Windows Vista or Windows 7 may require you to disable the User Activated Control (UAC) feature before allowing you to install ActiveX Controls. Disabling UAC should be discussed with your Network Administrator prior to making changes to your system. In all cases, the UAC can and should be returned to its former settings once you are finished installing ActiveX controls.

1. From the Windows Start Menu, open the Control Panel and navigate to the User Account Menu.
2. Click the “Turn User Account Control On or Off” (Vista) or “Change User Account Control Settings” (Windows 7) link. This will open the UAC Settings Menu.



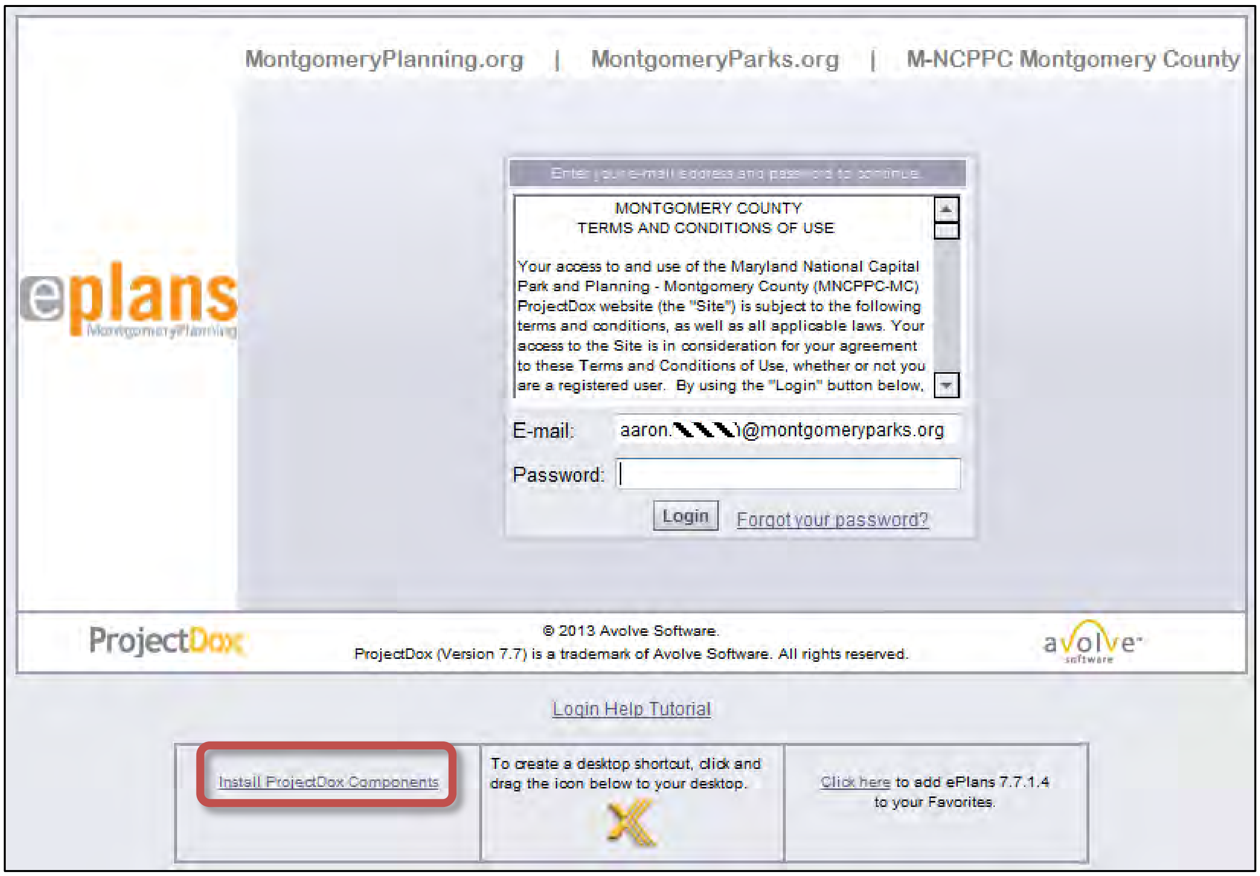


3. Update the UAC by following the instructions below:
    - Vista: Uncheck the "Use User Account Control (UAC) to help protect your computer checkbox.
    - Windows 7: Drag the scroll bar down to "Never Notify."
4. Click "Ok."
5. Restart your computer for the changes to take effect.
6. Once ActiveX Controls have been installed, follow steps 1 through 5 above to return to your original UAC settings.

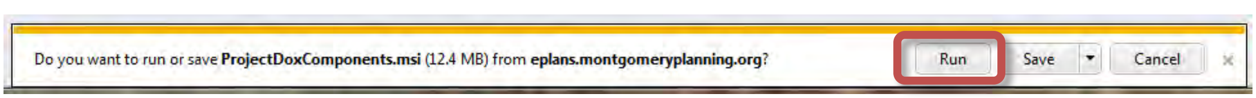
Install ActiveX Controls

ProjectDox requires the installation of several ActiveX Controls to be able to perform certain actions in ProjectDox. These actions include: Uploading Files, Downloading Files, Viewing Files, and Viewing Help Information.

1. At the ePlans Login Screen, click the “Install ProjectDox Components” link at the bottom left corner of the screen.



2. A small window will appear out of the bottom or top edge of your Internet Explorer Window asking if you want to run or save a file. Click the “Run” button. If this window does not appear, you will need to call the Help Desk to obtain administrative access to download and run ActiveX Controls.



3. Once the file is downloaded, the ProjectDox Components 7.7 Setup Wizard will automatically launch. Follow the instructions in the Setup Wizard. When the Setup Wizard is complete, you should be able to run ePlans on your computer.

Park Facility Codes

Each project created within ePlans is assigned a unique Project Number, consisting of several pieces of information that relate directly to the location, timing and type of work being done. The first component of the Project Number is the Park Facility Code. Every facility within the Montgomery County Parks system has a unique Facility Code consisting of a letter followed by a two-digit number. All of the Park Facility Codes for Montgomery County Parks are listed below.

E24	Aberdeen Local Park
A01	Acorn Urban Park
S01	Adventure Conservation Park
N48	Adventure Nature Center Building
K07	Ag History Farm Park - Activity Center
K01	Agricultural History Farm Park
B28	Amity Drive Neighborhood Park
D02	Aquarius Local Park
D03	Arcola Local Park
C01	Arctic Nca
D04	Argyle Local Park
N61	Argyle Local Park Recreation Facility
F22	Arora Hills Local Park
F01	Aspen Hill Local Park
F10	Avenel Local Park
D05	Ayrlawn Local Park
N47	Ayrlawn Recreation Building
A03	Battery Lane Urban Park
M01	Bauer Drive Local Park
B81	Becca Lilly Neighborhood Park
D06	Bedfordshire Neighborhood Park
B01	Bel Pre Neighborhood Park
C02	Beret Nca
C45	Berryville Park Nca
D08	Beverly Farms Local Park
D09	Big Pines Local Park
C03	Birch Drive Nca
M48	Black Hill Boat Rentals
N27	Black Hill Maintenance Facility
N29	Black Hill Park Police Substation
G07	Black Hill Regional Park
M57	Black Hill Visitors Center
F20	Blair Local Park
S02	Blockhouse Point Conservation Park
D10	Blueberry Hill Local Park
F16	Blunt Road Local Park
C26	Bonifant Nca
P69	Booze Creek Stream Valley Park
C38	Boundary Park Nca
D11	Bowie Mill Local Park
F21	Boyds Local Park
C04	Bradley Hills Nca
D13	Bradley Local Park
B02	Breewood Neighborhood Park
P88	Broad Run Stream Valley Park Unit #1
D14	Broadacres Local Park
B65	Brookdale Neighborhood Park
B03	Brookmont Neighborhood Park
M03	Brookside Gardens
M59	Brookside Visitor Center
D15	Brookview Local Park
C46	Browns Corner Nca
B04	Buck Branch Neighborhood Park
P02	Buck Branch Stream Valley Park
P01	Bucklodge Branch Stream Valley Park
S12	Bucklodge Conservation Park
E57	Bullis Local Park
D17	Burning Tree Local Park
N31	Burnt Mills East Special Park
N34	Burnt Mills West Special Park
D18	Burtonsville Local Park
P03	Cabin Branch Stream Valley Park

N41	Cabin John Ice Rink Bldg
M06	Cabin John Ice Rink Propert
N38	Cabin John Indoor Tennis Bldg
M05	Cabin John Indoor Tennis Property
D19	Cabin John Local Park
M43	Cabin John Regional Action Playland
M24	Cabin John Regional Athletic Area
M35	Cabin John Regional Family Picnic Area
M36	Cabin John Regional Group Camping Area
M33	Cabin John Regional Group Picnic Area
M99	Cabin John Regional Headquarters
M34	Cabin John Regional Maintenance Facility
G01	Cabin John Regional Park
M49	Cabin John Regional Train
P04	Cabin John Stream Valley Unit #1
P05	Cabin John Stream Valley Unit #2
P06	Cabin John Stream Valley Unit #3
P07	Cabin John Stream Valley Unit #4
P08	Cabin John Stream Valley Unit #5
P71	Cabin John Stream Valley Unit #6
N92	Cabin John Train Station Bldg
M55	Cabin John Train Station Property
L16	Callithea Farm Special Park
F03	Calverton Galway Local Park
B05	Calverton Nca
N62	Camp Seneca Spcl Park Rec Faciility
L02	Camp Seneca Special Park
D20	Cannon Road Local Park
H06	Capital Crescent Trail Special Park
A29	Capitol View Park Open Space
D21	Capitol View-Homewood Local Park
N63	Captl View Homewood Local Park Rec Facility
C06	Carderock Springs Nca
A08	Caroline Freeland Urban Park
M07	Carson Farm Special Park
D22	Cashell Neighborhood Park
E64	Cedar Creek Local Park
S10	Cedar Island Conservation Park
F17	Centerway Local Park
C07	Charred Oak Nca
A04	Chase Avenue Urban Park
A05	Cheltenham Drive Urban Park
D82	Cherrywood Local Park
D24	Chevy Chase Local Park
C47	Chevy Chase Open Space Urban Park
B83	Cindy Lane Neighborhood Park
E47	Clarksburg Neighborhood Park
N64	Clarksburg Neighborhood Park Rec Bldg
A31	Clarksburg Triangle Urban Park
E23	Clarksburg Village North Local Park
D27	Clearspring Local Park
D29	Cloverly Local Park
N65	Colesville Local Park Recreation Facility
D30	Colesville Local Park
B06	Colesville Manor Neighborhood Park
B07	College View Neighborhood Park
B75	Colt Terrace Neighborhood Park
F02	Columbia Local Park
E58	Concord Local Park
B72	Connecticut Avenue Neighborhood Park
B08	Countryside Neighborhood Park
P09	Crabbs Branch Stream Valley Park
E74	Cross Creek Club Local Park
B09	Dale Drive Neighborhood Park
B10	Damascus Neighborhood Park
G02	Damascus Recreational Park
K09	Darby Historical/Cultural Park
D31	Darnestown Local Park
A26	Darnestown Square Urban Park
A06	Dartmouth Nca
B86	Derwood Station Neighborhood Park
D32	Dewey Local Park
G03	Dickerson Conservation Park
D33	Dickerson Local Park

L03	Dowden's Ordinary Special Park
C08	Drake Drive Nca
B11	Druid Drive Neighborhood Park
P10	Dry Seneca Creek Stream Valley Unit #1
P75	Dry Seneca Creek Stream Valley Unit #2
D34	Dufief Local Park
C43	Duvall Road Nca
D35	East Norbeck Local Park
A07	East Silver Spring Urban Park
C30	East-West Highway Nca
B69	Edgewood Neighborhood Park
B76	Edith Throckmorton Neighborhood Park
D36	Ednor Local Park
N46	Ednor Recreation Building
A09	Ellsworth Urban Park
A10	Elm Street Urban Park
C10	Elmhirst Parkway Nca
C37	Emory Grove Hills Nca
C11	English Court Nca
M38	English Manor Elementary School
B12	Evans Parkway Neighborhood Park
C41	Fairdale Road Nca
G04	Fairland Recreational Park
A11	Fairview Road Urban Park
D38	Falls Road Local Park
D39	Farmland Drive Local Park
A12	Fenton Street Urban Park
D40	Fernwood Local Park
D41	Fleming Local Park
A13	Flower Avenue Urban Park
E50	Flower Hill Local Park
B13	Flower Valley Neighborhood Park
B14	Forest Glen Neighborhood Park
B16	Forest Grove Neighborhood Park
E71	Fountain Hills Local Park
B17	Fox Chapel Neighborhood Park
B18	Fox Hills West Neighborhood Park
B19	Garrett Park - Waverly Neighborhood Park
N42	Garrett Park Day Care Center
D43	Garrett Park Estates Local Park
N45	Garrett Park Library
B20	General Getty Neighborhood Park
D44	Georgian Forest Local Park
D45	Germantown East Local Park
A25	Germantown Square Urban Park
A28	Germantown Town Center Urban Park
B21	Glen Echo Heights Neighborhood Park
B22	Glen Haven Neighborhood Park
F05	Glen Hills Local Park
B23	Glen Mar Neighborhood Park
D47	Glenfield Local Park
A27	Glenmont Greenway Urban Park
D48	Glenmont Local Park
N66	Glenmont Local Park Recreation Facility
D49	Good Hope Local Park
P11	Goshen Branch Stream Valley Park
S13	Goshen Elm Conservation Park
G05	Goshen Recreational Park
P78	Great Seneca Stream Valley Unit #1
P79	Great Seneca Stream Valley Unit #2
P80	Great Seneca Stream Valley Unit #3
P81	Great Seneca Stream Valley Unit #4
P82	Great Seneca Stream Valley Unit #5
P83	Great Seneca Stream Valley Unit #6
P84	Great Seneca Stream Valley Unit #7
P85	Great Seneca Stream Valley Unit #8
P86	Great Seneca Stream Valley Unit #9
S03	Green Farm Conservation Park
E59	Greenbriar Local Park
B24	Greenwich Neighborhood Park
D51	Greenwood Local Park
B70	Gregerscroft Neighborhood Park
E53	Griffith Local Park
H01	Gude Drive Recreational Park

D52	Gunner's Branch Local Park
D53	Gunner's Lake Local Park
C33	Gunner's Village Nca
B25	Harmony Hills Neighborhood Park
C13	Hastings Nca
P13	Hawlings River Stream Valley Park
B54	Heritage Farm Neighborhood Park
B26	Highland Stone Neighborhood Park
N60	Hillandale Adult Edu Center
N67	Hillandale Local Park Recreation Facility
D54	Hillandale Local Park
N18	Hillandale Park Office Building
B27	Hillmead Neighborhood Park
B82	Hillwood Manor Neighborhood Park
L18	Historic Hyattstown Open Space Spcl Park
B84	Hopefield Neighborhood Park
S15	Hoyles Mill Conservation Park
E68	Hoyles Mill Village Local Park
D23	Hunters Woods Local Park
C35	Hunters Woods Nca
D55	Indian Spring Terrace Local Park
N68	Indiansprng Terrace Local Park Rec Facility
C40	Inverness Forest Nca
D56	Jesup-Blair Local Park
B29	John Haines Neighborhood Park
D37	Johnson Local Park
B30	Jones Mill Road Neighborhood Park
L17	Josiah Henson Special Park
E67	Juniper-Blair Neighborhood Park
N69	Kemp Mill Estates Local Park Rec Facility
D57	Kemp Mill Estates Local Park
A14	Kemp Mill Urban Park
N70	Ken-Gar Palisades Local Park Rec Facility
D58	Ken-Gar Palisades Local Park
D59	Kensington Cabin Local Park
B31	Kensington Heights Neighborhood Park
P14	Kensington Parkway Stream Valley Park
B32	Kensington-Frederick Ave Neighborhood Pk
P15	Kilgour Branch Stream Valley Park
E69	Kings Crossing Local Park
D61	Kings Local Park
D83	Kingsview Local Park
A15	Kramer Urban Park
M56	Lake Needwood Snack Bar
F06	Layhill Local Park
D63	Layhill Village Local Park
H09	Laytonia Recreational Park
D64	Laytonsville Local Park
D46	Leaman Local Park
B74	Leland Neighborhood Park
C31	Leland-Beach Triangle Nca
P16	Little Bennett Creek Stream Valley Park
M52	Little Bennett Golf Course Property
N26	Little Bennett Maintenance Facility
G06	Little Bennett Regional Park
M53	Little Bennett Regional Park Camp Ground
P17	Little Falls Stream Valley Unit #1
P18	Little Falls Stream Valley Unit #2
P23	Little Seneca Greenway Stream Valley Pk
P19	Little Seneca Stream Valley Unit #1
P20	Little Seneca Stream Valley Unit #2
P21	Little Seneca Stream Valley Unit #3
P22	Little Seneca Stream Valley Unit #4
M25	Locust Grove Nature Center
B33	Locust Hill Neighborhood Park
L10	Lodge At Seneca Creek
D65	Long Branch Local Park
P24	Long Branch Stream Valley Unit #1
P73	Long Branch Stream Valley Unit #1a
P76	Long Branch Stream Valley Unit #2
B66	Long Branch-Arliss Neighborhood Park
B77	Long Branch-Garland Neighborhood Park
D66	Long Branch-Wayne Local Park
D67	Longwood Local Park

D68	Luxmanor Local Park
N71	Lynnbrook Local Park Recreation Facility
D69	Lynnbrook Local Park
P25	Magruder Branch Stream Valley Unit #1
P77	Magruder Branch Stream Valley Unit #2
C48	Maiden Lane Urban Park
E65	Manor Oaks Local Park
C36	Manor Park NCA
N72	Maplewood-Alta Vista Recreation Facility
D71	Maplewood-Alta Vista Local Park
H02	Martin Luther King Recreational Park
L09	Matthew Henson State Park Unit #1
L11	Matthew Henson State Park Unit #2
L19	Matthew Henson State Park Unit #3
L20	Matthew Henson State Park Unit #4
S04	Maydale Conservation Park
N44	Maydale Nature Center
L01	McCrillis Gardens Special Park
B34	McKenney Hills Neighborhood Park
S08	McKnew Conservation Park
E36	McKnew Local Park
N73	Meadowbrook Local Park Recreation Facility
F08	Meadowbrook Local Park
N03	Meadowbrook Maintenance Yard
N22	Meadowbrook Maintenance Yard Annex
M09	Meadowbrook Riding Stables
D72	Meadowood Local Park
M10	Meadowside Nature Center
B35	Merrimac Neighborhood Park
A16	Metro Urban Park
C15	Middlebrook Hill NCA
D74	Middlevale Neighborhood Park
M47	Mildred Pumphrey Community Center
C42	Miles Road NCA
P26	Mill Creek Stream Valley Park
D75	Mill Creek Towne Local Park
C16	Mineral Springs NCA
N32	MLK, Jr. Maintenance Yard
B36	Montgomery Hills Neighborhood Park
N05	Montgomery Regional Office-MRO
D76	Mount Zion Local Park
C17	Moyer Road Local Park
P27	Muddy Branch Stream Valley Unit #1
P28	Muddy Branch Stream Valley Unit #2
P29	Muddy Branch Stream Valley Unit #3
E56	Muncaster Manor Local Park
H03	Muncaster Recreational Park
M50	Needwood Boat Rental Area
M08	Needwood Visitor Center Property
B37	New Hampshire Estates Neighborhood Park
S11	New Hope Island Conservation Park
D77	Newport Mill Local Park
E62	Nike Missile Local Park
D78	Nolte Local Park
N74	Nolte Local Park Recreation Facility
B38	Norbeck Meadows Neighborhood Park
B39	Norbeck-Muncaster Mill Neighborhood Park
N75	Norbeck-Muncaster Mill Recreation Facility
P30	North Branch Stream Valley Unit #2
P31	North Branch Stream Valley Unit #3
P32	North Branch Stream Valley Unit #4
N76	North Chevy Chase Local Park Rec Facility
D79	North Chevy Chase Local Park
N77	North Four Corners Local Park Rec Facility
D80	North Four Corners Local Park
D81	North Gate Local Park
S05	North Germantown Greenway Stream Valley Park
C18	North Point NCA
M13	Northwest Branch Golf Course
G08	Northwest Branch Recreational Park
P37	Northwest Branch Stream Valley Unit #7
P34	Northwest Branch Stream Valley Unit #3
P35	Northwest Branch Stream Valley Unit #4
P36	Northwest Branch Stream Valley Unit #5

D07	Norwood Local Park
N78	Norwood Local Park Recreation Facility
C19	Norwood Village NCA
H04	Oak Ridge Conservation Park
N07	Oakley Cabin Museum Park
C20	Old Farm NCA
B40	Olney Acres Neighborhood Park
D84	Olney Family Neighborhood Park
N33	Olney Manor Maintenance Facility
H05	Olney Manor Recreational Park
B41	Olney Mill Neighborhood Park
B42	Olney Square Neighborhood Park
B67	Opal A. Daniels Neighborhood Park
D85	Orchard Neighborhood Park
P12	Ovid Hazen Wells Greenway
L07	Ovid Hazen Wells Recreational Park
D86	Owens Local Park
N79	Owens Local Park Recreation Facility
B43	Paint Branch Neighborhood Park
P38	Paint Branch Stream Valley Unit #4
P39	Paint Branch Stream Valley Unit #5
P40	Paint Branch Stream Valley Unit #6
N17	Park Police Headquarters-Saddlebrook
N25	Park Police-Special Operations-Woodlawn
F09	Parkland Local Park
M45	Parklawn Group Camping Area
M44	Parklawn Group Picnicking Area
D87	Parklawn Local Park
N09	Parkside Headquarters
S07	Patuxent River Watershed Conservation Pk
C21	Peach Orchard Neighborhood Conservation Area
B44	Peachwood Neighborhood Park
K06	Pennyfield Lock NCA
A17	Philadelphia Avenue Urban Park
E75	Piedmont Crossing Local Park
N80	Pilgrim Hill Local Park Recreation Facility
D88	Pilgrim Hill Local Park
N81	Pinecrest Local Park Recreation Facility
D89	Pinecrest Local Park
D90	Pleasant View Local Park
D91	Plumgar Local Park
N11	Pope Farm Nursery
D62	Potomac Community Neighborhood Park
L06	Potomac Horse Center Special Park
C39	Potomac Palisades Conservation Park
B45	Quebec Terrace Neighborhood Park
D92	Quince Orchard Knolls Local Park
B46	Quince Orchard Valley Neighborhood Park
N82	Quince Orchard Valley Recreation Facility
G09	Rachel Carson Conservation Park
D93	Randolph Hills Local Park
D94	Ray's Meadow Local Park
K08	Red Door Store Historical/Cultural Park
P42	Reddy Branch Stream Valley Unit #1
P43	Reddy Branch Stream Valley Unit #2
P44	Reddy Branch Stream Valley Unit #3
D95	Redland Local Park
L13	Rickman Farm Horse Park Special Park
H07	Ridge Road Recreational Park
S14	River Road Shale Barrens Conservation Park
M37	Rock Creek Hills Local Park
N28	Rock Creek Maintenance Facility
M11	Rock Creek Regional Needwood Golf Course
N06	Rock Creek Regional Needwood Mansion
G10	Rock Creek Regional Park
P45	Rock Creek Stream Valley Unit #1
P52	Rock Creek Stream Valley Unit #11
P53	Rock Creek Stream Valley Unit #12
P54	Rock Creek Stream Valley Unit #14
P55	Rock Creek Stream Valley Unit #15
P56	Rock Creek Stream Valley Unit #16
P46	Rock Creek Stream Valley Unit #2
P47	Rock Creek Stream Valley Unit #3
P48	Rock Creek Stream Valley Unit #4

P49	Rock Creek Stream Valley Unit #5
P50	Rock Creek Stream Valley Unit #6
P51	Rock Creek Stream Valley Unit #7
P68	Rock Run Stream Valley Park
N55	Rockwood Education Center Cabin Tall Timber
N54	Rockwood Education Center Cabin The Oaks
N53	Rockwood Educational Center Cabin The Western Hill
N21	Rockwood Education Center
O01	Rockwood Manor House Building
N24	Rockwood Manor House Property
N52	Rockwood Special Park Maintenance Garage
N51	Rockwood Special Park French House
N50	Rockwood Special Park Skyview House
L08	Rockwood Special Park
D96	Rosemary Hills-Lyttonsville Local Park
A18	Royce Hanson Urban Park
E54	Saddlebrook Local Park
C23	Saint Paul NCA
D98	Sangamore Local Park
B47	Scotland Neighborhood Park
B48	Seek Lane Neighborhood Park
F18	Seneca Crossing Local Park
K05	Seneca Landing Boat Ramp
K02	Seneca Landing Special Park
N36	Seneca Log Cabin Building
F19	Seneca Springs Local Park
O11	Seneca Stone Barn
S16	Serpentine Barrons Conservation Park North Unit
S17	Serpentine Barrons Conservation Park South Unit
D99	Seven Locks Local Park
B49	Seven Oaks Neighborhood Park
O07	Shady Grove Mini Golf Splash Playground Ticket Building
O12	Shady Grove Splash / Golf Property
N12	Shady Grove Maintenance Yard
B71	Sherwood Forest Manor Neighborhood Park
C24	Sherwood Forest NCA
M61	Shirley Povich Field
B50	Silver Spring Intermed Neighborhood Park
B51	Sligo Avenue Neighborhood Park
N84	Sligo Avenue Recreation Facility
B52	Sligo Cabin Neighborhood Park
B80	Sligo Creek North Neighborhood Park
L04	Sligo Creek Public Golf Course
P57	Sligo Creek Stream Valley Unit #1
P72	Sligo Creek Stream Valley Unit #1a
P58	Sligo Creek Stream Valley Unit #2
P59	Sligo Creek Stream Valley Unit #3
P60	Sligo Creek Stream Valley Unit #4
P61	Sligo Creek Stream Valley Unit #5
C44	Sligo Mill NCA
B85	Sligo Mill Overlook Neighborhood Park
B53	Sligo-Bennington Neighborhood Park
N85	Sligo-Dennis Avenue Local Park Recreation Facility
E01	Sligo-Dennis Avenue Local Park
H08	Soccerplex Of South Germantown
B15	South Four Corners Neighborhood Park
G11	South Germantown Recreational Park
E02	South Gunner's Branch Local Park
E03	Southeast Olney Local Park
E04	Spencerville Local Park
E05	Stewartown Local Park
C25	Stonecrest NCA
E06	Stonegate Local Park
E66	Stonehedge Local Park
N87	Stoneybrook Local Park Recreation Facility
E07	Stoneybrook Local Park
E08	Strathmore Local Park
E09	Stratton Local Park
E10	Strawberry Knoll Local Park
L15	Sugarland Special Park
F07	Sundown Road Local Park

E11	Takoma - Piney Branch Local Park
B78	Takoma Park Neighborhood Park
B79	Takoma Park South Neighborhood Park
A19	Takoma Urban Park
M58	Takoma-Langley Community Center
B55	Tamarack Neighborhood Park
E51	Tanglewood Neighborhood Park
S06	Ten Mile Creek Conservation Park
P87	Ten Mile Creek Greenway Stream Valley Park
E12	Tilden Woods Local Park
P63	Tilden Woods Stream Valley Park
N88	Tildenwoods Local Park Recreation Facility
E52	Timberlawn Local Park
B56	Tobytown Neighborhood Park
E72	Traville Local Park
C27	Tuckerman NCA
C28	Twinponds NCA
B57	Unity Neighborhood Park
B68	Upper Long Branch Neighborhood Park
P41	Upper Paint Branch Stream Valley Park
E73	Upper Rock Creek Local Park
L05	Valley Mill Special Park
B58	Valleywood Neighborhood Park
N89	Veirs Mill Local Park Recreation Facility
E13	Veirs Mill Local Park
E14	Wall Local Park
D73	Waring Station Local Park
A30	Warner Circle Special Park
S19	Washington Grove Conservation Park
B59	Washington Square Neighborhood Park
N30	Waters House Special Park
E61	Waters Landing Local Park
P64	Watts Branch Stream Valley Unit #1
P65	Watts Branch Stream Valley Unit #2
P66	Watts Branch Stream Valley Unit #3
P67	Watts Branch Stream Valley Unit #4
P70	Waverly-Schuylkill Neighborhood Park
B60	Wells Neighborhood Park
B61	Wembrough Neighborhood Park
E15	West Fairland Local Park
N49	Westmoreland Hills Local Park Cabin
E16	Westmoreland Hills Local Park Property
M16	Wheaton Regional Ice Rink Property
M31	Wheaton Regional Indoor Tennis Property
M15	Wheaton Community Building
E17	Wheaton Forest Local Park
N40	Wheaton Ice Rink Building
N39	Wheaton Ice/Inline Building
N37	Wheaton Indoor Tennis Building
M26	Wheaton Regional Group Camping Area
M28	Wheaton Regional Athletic Area
M04	Wheaton Regional Brookside Nature Center
M41	Wheaton Regional Carousel
M30	Wheaton Regional Children's Play Center
M29	Wheaton Regional Family Picnic Area
M62	Wheaton Regional In-Line Property
M27	Wheaton Regional Maintenance Facility
G12	Wheaton Regional Park
M54	Wheaton Regional Picnic Area Snack Bar
N08	Wheaton Regional Shorefield House
M17	Wheaton Regional Stables
M51	Wheaton Regional Train Property
N93	Wheaton Train Station Building
A20	Wheaton Veteran's Urban Park
E18	Wheaton Woods Local Park
N90	Wheaton-Claridge Local Park Recreation Facility
E19	Wheaton-Claridge Local Park
B62	White Flint Neighborhood Park
E20	Whittier Woods Local Park
P74	Wildcat Branch Stream Valley Park Unit 1
P62	Wildcat Branch Stream Valley Park Unit 3
B63	Willard Avenue Neighborhood Park
E21	Winding Creek Local Park
C29	Windsor NCA

E55	Winter's Run Local Park	K03	Woodlawn Cultural Special Park
M63	Wisconsin Place	N35	Woodlawn Manor Historic House
F12	Wood Local Park	A21	Woodside Urban Park
E22	Woodacres Local Park	L14	Woodstock Equestrian Park
E63	Woodfield Local Park	B64	Wyngate Woods Neighborhood Park

GLOSSARY

ActiveX Controls – Small programs added on to Internet Explorer that allow users to perform certain tasks in the ePlans platform. See page 121 for instructions on how to install ActiveX Controls on your computer.

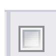
Activity Instructions – Directions for completing a task. Activity instructions can be found in a yellow text box at the top of every eForm.

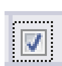
Approve – The documents being reviewed are acceptable. Clicking the "Approve" button in an eForm will move the workflow to the next task. In most cases, clicking the "Approve" button cannot be undone.

Brava Viewer – The program within ePlans that allows you to view and comment on drawings. See page 35 for basic viewing instructions. See page 47 for a description of "Compare Mode." See page 74 for instructions on making Changemarks. Go to ftp://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf for further information.

Changemark – Annotations made on top of drawing files within the Brava Viewer as part of a document review. Changemarks are the primary means of making comments on drawings within the ePlans platform. See page 74 for instructions on making Changemarks.

Checkbox - A graphic element that allows users to make multiple selections from a number of options.

 = Unchecked Checkbox

 = Checked Checkbox

Complete – The task is finished. Clicking the "Complete" button in an eForm will move the workflow to the next task. In most cases, clicking the "Complete" button cannot be undone.

Consultant - A person or group hired by the Park Development Division to complete a set of contract documents for a specific park development project. The Consultant is responsible for uploading their documents to ePlans for review by the Project Manager and the PDCO Team. The Consultant will also receive and respond to comments made by the Project Manager and PDCO Team. See page 59 for an overview of all of the Consultant's tasks in a Workflow.

Dialog Box – A window that appears, containing a message and requiring a user to take a certain action. The simplest type of dialog box is an alert that requires the user to click the "OK" button to move on.

Division Chief - A member of Montgomery County Parks' Park Development Division, responsible for overseeing all project managers. Standard practices require the Division Chief to apply his or her eSignature to the cover sheet of any set of construction drawings before they go out to bid. See page 87 for an overview of the Division Chief's tasks within a workflow.

eForm – The digital form that appears at the beginning of each task in a workflow. eForms contain a number of components including instructions about completing the task-at-hand, document review types and due dates, messages between various user groups in a workflow, access to reference checklists and lists of comments made on a drawing.

ePlans - An online document review, storage and submittal platform tailored for the Park Development Division of Montgomery County Parks, using Avolve software for ProjectDox. Also referred to as ProjectDox. See page 8 for an overview of ePlans.

eSignature – A scanned copy of one's signature that serves as a digital verification that a set of contract documents are complete and ready to be sent to contractors for bidding. The eSignature is the final step in the Workflow, applied to the cover sheet by the Division Chief. See page 90 for an overview.

Group – A collection of related users, responsible for completing similar tasks within a workflow. See page 9 for a description of all of the Project User Groups.

Main Tool Bar – A group of buttons found at the top right corner of most screens in ePlans that provide primary navigation functions. See page 17 for a description of all functions within the Main Tool Bar.

PDCO Team – Planning, Design, Construction and Operations Team. A group of internal stakeholders from across the Montgomery County Parks Department that provide input during the design and construction stages of park development projects. See page 71 for an overview of the PDCO Team's tasks in the Workflow.

Pre-Screen Review – A review of Consultant's drawings conducted by the Project Manager to ensure the drawings are acceptable to send on to the PDCO Team for their review. This is the second step in the Workflow. See page 34 for further information about the Pre-Screen Review.

ProjectDox – A web-enabled collaboration platform that empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, conventional means. Also referred to as ePlans. See page 8 for an overview.

Project List – Basic information about every project assigned to a particular user. This list is visible in the Active Projects Screen, immediately after logging in. See page 17.

Project Manager - A member of Montgomery County Parks' Park Development Division, responsible for overseeing all aspects of park development projects. The Project Manager is listed as the "Project Coordinator" in the Project Info Page (See page 19). See page 25 for an overview of all of the Project Manager's tasks within the Workflow.

Project Template – A collection of default settings most commonly used for Park Development projects. The project template can be used as-is or customized to meet the needs of each specific project. Most projects will not require any changes to the template. See page 27 for instructions on editing the project template.

QAP – Quality Assurance Program. An initiative of the Park Development Division to assure the professional quality and uniform format of construction documents.

QAP Checklist – A guide for Project Managers and Consultants to verify that construction documents meet the standards and requirements developed by the Park Development Division for document content and format prior to issuing them for procurement and construction. The QAP Checklist must be completed by the Project Manager and verified by the QAP Officer prior beginning the procurement process. See page 52 for instructions to the Project Manager on preparing the QAP Checklist. See page 84 for instructions to the QAP Officer on verifying the QAP Checklist.

QAP Officer - The last person to review a set of contract documents before they go out to bid. Following a standard checklist of requirements, the QAP officer ensures that a set of contract documents meets the standards set forth by Montgomery County Parks. See page 81 for an overview of all of the QAP Officer's tasks in the Workflow.

Radio Button - A graphic element that allows users to make only one selection from a number of options.

 = Deselected Radio Button

 = Selected Radio Button

Reject – The submitted documents are not acceptable and must be returned to their author for revisions before moving on. Clicking on the "Reject" button will restart the task at hand.

Review Cycle – The entire sequence of tasks required to complete a Workflow one time through.

Save and Close (Save & Close) – An option for users who wish to save their progress within a specific task and return to ePlans to complete the task at a later date. Clicking the "Save and Close" or "Save & Close" button in an eForm will save the user's progress and close the eForm window. To return to the eForm, click on the associated task within the Task List.

Step – One element within a task. All of the steps must be completed in sequence to complete a task.

System Administrator – An ePlans user with the highest level of permissions and access to all projects, folders and functionality. Contact a System Administrator with any troubleshooting questions or requests for additional permissions.

Task List – Information about any tasks within a Workflow that require the user's action.   Clicking a task will take a user to the eForm for that task. Refer to Page 19 for an overview of the Task List.

Task – A step within the Workflow. Each task must be completed sequentially before moving on to the next task. The Project Manager has the ability to skip any task in a Workflow, with the exception of the QAP Checklist.

Task – Accepted – A task's status within the Task List that indicates the user responsible has started working on the task but is not yet finished. The task status changes from "Pending" to "Accepted" as soon as the user has clicked on the task in the Task List.

Task – Pending – A task's status within the Task List that indicates the user responsible has not yet begun working on the task. The task status changes from "Pending" to "Accepted" as soon as the user has clicked on the task in the Task List.

Task – Complete – A task's status within the Task List that indicates the user responsible has finished the task. The task status changes from "Accepted" to "Complete" as soon as the user clicks on the "Complete" or "Approved" button in the eForm.

User – An individual with an ePlans username and password. Users are separated into User Groups and assigned specific tasks within a Workflow. See page 9 for a description of all of the User Groups.

Versioning – A feature of ePlans that allows users to upload multiple files of the same name and compare the differences from one version of a file to the next using "Compare Mode" in the Brava Viewer . The file's previous version is kept and logged in ePlan's history along with its associated markups. All topics and notes remain as a single record, containing a full file history of all versions of the file. Floating the cursor over the link to a file reveals to which version of the file a specific topic refers. See page 47 for a description of "Compare Mode."

Workflow – One single, entire sequence of tasks that comprise a standard document review process, based on the Park Development Division's business process for construction document review. The entire Park Development Workflow can be seen on page 11.