PlanWell PDMS Admin Console
Version 5.0

December 2005

The PlanWell PDMS Administrators Console exists to provide PlanWell administrators with the features necessary to upload, and administer projects which are posted on the PlanWell national website.

Each facility will have a person designated as the PlanWell Administrator. This person will be responsible for the creation, maintenance, and security of their company planroom. The PlanWell PDMS Administrators Console is the application that this person will use for that purpose.

You will also need to acquire and set up a PlanWell SQL Server. This server will be supplied by PlanWell's technology center, and pre-configured for inclusion into your network. You will also receive a special VPN router, which will allow the SQL server to communicate using a secured channel with the PlanWell national database.

Before the system can be setup at your location, you will need to insure that you have at least a T-1 connection to the Internet, and a RAID server of at least 40GB available on your network. You must have these items in-place before you can begin using the PDMS Admin Console.

If you have been running previous versions of PlanWell Enterprise, then no further changes to your network will be required in order to operate version 5.0.

Downloading the program setup

The PDMS Admin Console can be found online on the PlanWell Management Console. Log into the Management Console and choose the selection labeled [Download Library]. Please click on the Icon for the PlanWell 5.0 Installation program to begin the download, and then follow the steps in section 2 for installation.

Installation

In some facilities it may be practical to install the application on several computers, in which case, saving a copy of the setup program to a common network folder may be appropriate.

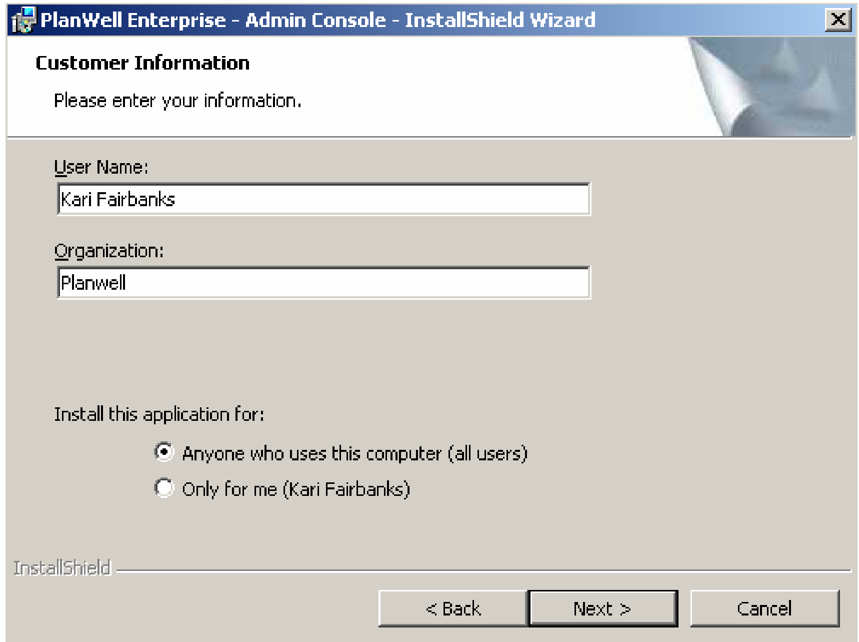
Once you have the setup program downloaded, place a copy of the Installation program into an ***EMPTY*** folder, and then you may double-click on the program icon to install the application.

Before proceeding with the installation, please note if you currently have an older version of the PlanWell Admin Console installed, you will need to uninstall this version before continuing.

On screen 1 of the installation program, simply choose [Next] to begin the installation.

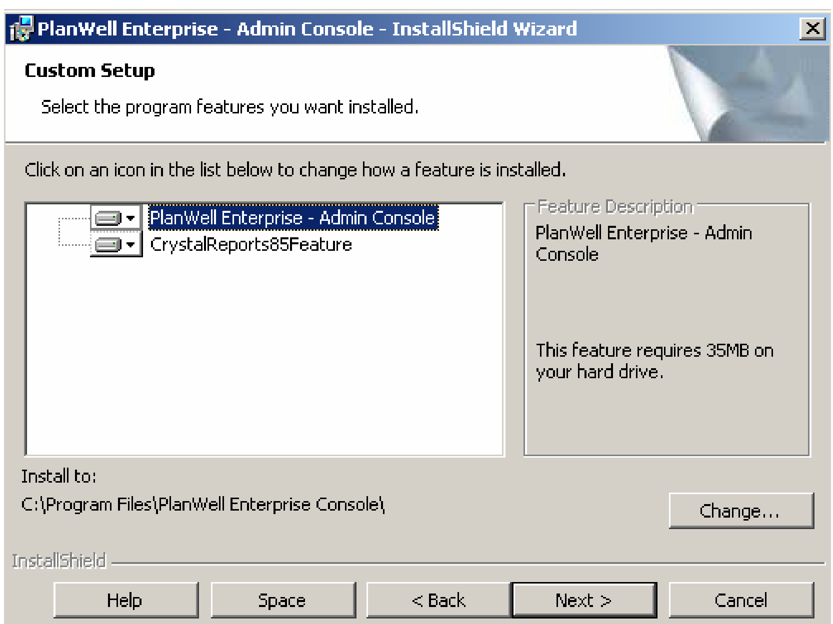
Please accept the terms of the license agreement on screen 2.

Please type in the required information on screen 3. You will want to select "Anyone who uses this computer (all users)" under "Install this application for:" then choose [Next].



Installation Screen 3

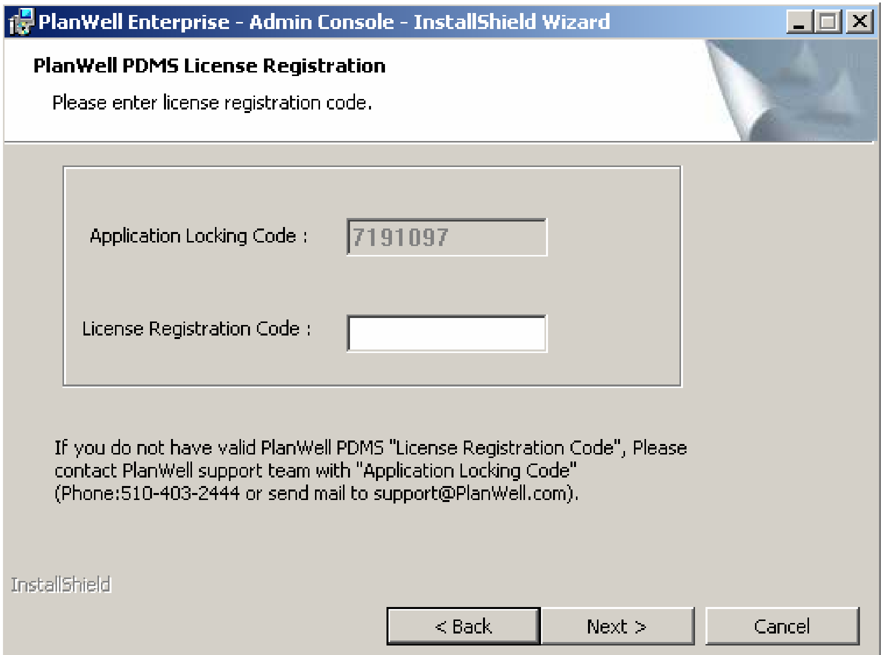
Accept the defaults on screen 4 by simply choosing [Next].



Installation Screen 4

All PlanWell 5.0 Administrator Console installations will require a license registration code. Screen 5 will provide you with a system specific application locking code. Please email this locking code to support@planwell.com. In turn, you will receive a license registration code which you will need to type in the appropriate box. Once this is complete, choose [Next].

Note: This application locking code is system specific and, as such, the generated license registration code will only work for the system in which the original locking code was generate on. Additional installations of the PlanWell 5.0 Administrator Console will produce a different locking code and will receive a different license registration code.



Installation Screen 5

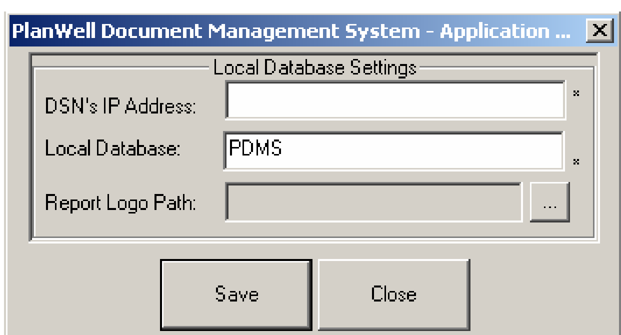
Please choose [Install] on screen 6 to complete the installation. Once all files are copied and the program is successfully installed, please choose [Finish] on screen 7.

Program Setup

Launch the PDMS Admin Console from the Start menu, by navigating to the “PlanWell Enterprise” folder, and selecting the “Admin Console” icon.

Upon a successful launch of the “PDMS Administrators Console”, you will be presented with the “PDMS Administrators Console Login Window. Please choose [Connect].

The first time launching the program, you will be prompted to set up your local database settings.

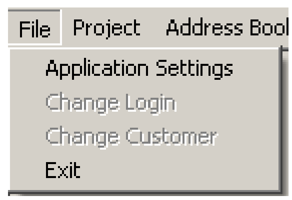


System Settings Window

Here, you will need to enter the network name (see Host file configuration below), or IP address for your PlanWell SQL server. Under [Local Database] the program will have pre-populated your local database name. You may also define a path to a logo, which the system will use for reports that are created with the console. This logo must be in Windows “BMP” format, and have dimensions of 0.7x0.85 inches. The folder which contains the bmp file must be accessible by the SQL server.

Once you have entered the required information, you may click [Save] to store these settings.

Note: These application settings may also be accessed by choosing [File] and [Application Settings]



Accessing Application Settings

Host File Configuration

In order to reference your SQL server by name, it will be necessary to include information inside of your Host file, so that it can be located with the TCP/IP protocol.

This will need to be done for each machine that will be operating the PDMS console.

To edit the file, Windows 2000 users will need to navigate to the “C:\WINNT\SYSTEM32\drivers\etc” folder while Windows XP users will navigate to the “C:\WINDOWS\SYSTEM32\drivers\etc” folder. Here you will need to locate the file named “hosts” which you can open and edit in notepad.

Sample Hosts File:

```
# For example:
#
#      102.54.94.97     rhino.acme.com          # source server
#       38.25.63.10     x.acme.com              # x client host

127.0.0.1       localhost
10.10.14.13     amc14loc0
```

At the bottom of this file, you may enter the local TCP/IP address of your SQL Server, followed by a TAB, and then you may enter the name that you would like to associate with the SQL Server. Generally, it is advised to maintain the naming convention which has been applied for your server by MPT.

In the example given, my machine “amc14loc0” resides at address 10.10.14.13

Once you have entered this information, you may copy the last line into your paste buffer, and save the file.

For some networks, it is also recommended that you add the line to the bottom of your lmhosts file as well.

If you do not have an lmhosts file, you may create one with notepad, but be sure that you name it without an extension.

Once opened, you may simply scroll to the bottom of the file, and paste the information from your buffer. After the server name, press the TAB key and enter [#dom:CORP]. This addition to the entry gives your system information to look outside of your local domain for the SQL Server. Using the above example, this entry should look as follows:

10.10.14.13   amc14loc0   #dom:CORP

Logging into the PDMS Admin Console

The Login ID and Password are the same ones that you would use to access the PlanWell Employee area on the Internet.

If you are unable to connect, please review your DSN settings as described previously before calling PW Support for assistance.

Press [OK] to continue.

Change Login

If you will be handing the console over to another PlanWell administrator during your session, it may be a good idea to log off, and have the other admin log back on to the system. You need not restart the application to accomplish this.

Choose [Change Login] from the [File] menu on the main console. This will log off the current user, and redisplay the login screen.

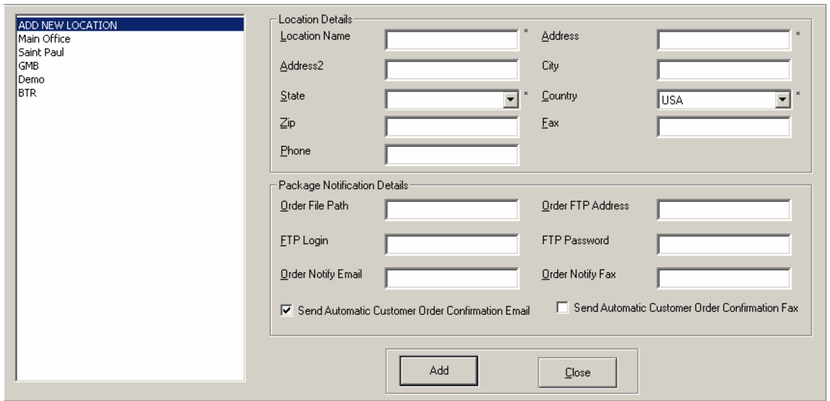
Managing Company Details

Details regarding your main office will have been created online in the Management Console however **many divisions have multiple locations which are connected to a central PlanWell server.**

Information regarding the branch offices may be entered online in the Management Console or from within the PDMS Admin Console.

To add additional branch information through the PDMS Admin Console, choose [Repro Services] – [Location Manager]. Highlight [ADD NEW LOCATION] and enter in all required information.

Note: Edit branch information within [Location Manager], by highlighting the branch name, making any necessary adjustments and choosing [Update].

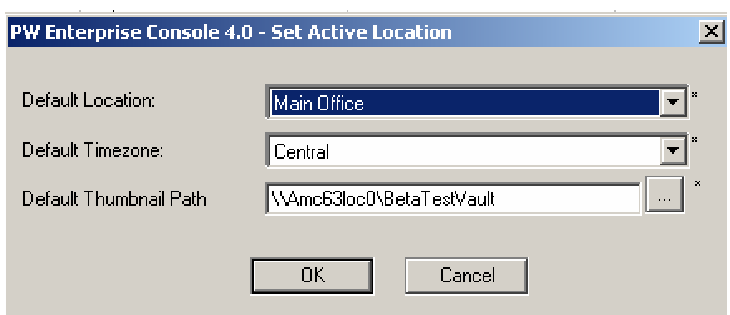


Location Manager Window

Location Defaults

Additional details regarding your location can be defined by choosing [Preferences] – [Location Defaults]. Specify the Default Location, Default Time zone and Default Thumbnail Path.

The [Location Defaults] window will allow you to specify which location is your default location. Remote branch locations should change the Default Location from the main office to the appropriate branch location. When you create a new project, you will have the ability to set which of your locations is actually responsible for the project at that time, but by default, it will show the location that you set in this dialog.



Location Defaults Window

Creating Queues

In order to create an automated job ticket with the PDMS Admin Console, you will first need to establish queues to receive and process them.

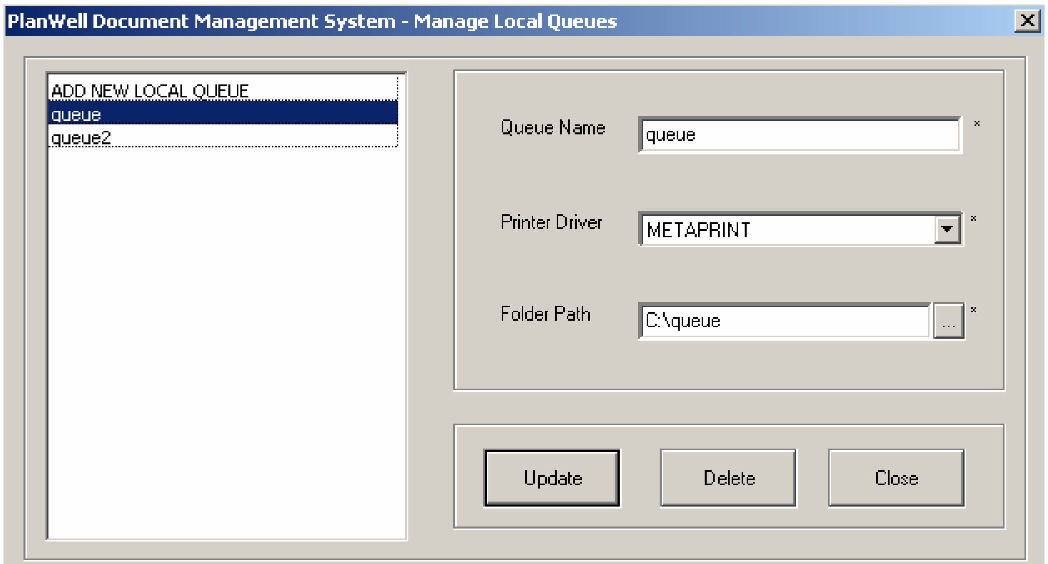
The PlanWell system, at present is compatible with Metaprint, Kip, Xerox and ReproDesk versions 4.21 and 4.25i.

Two types of Queues exist on the system: Local and Remote.

A local Queue will reference a directory somewhere on your network. Typically, it is suggested that you create a folder on each production workstation, to act as a queue for that machine.

Create Local Queues by choosing [Print Queue] – [Local Queue Manager]. To setup a new queue, you will first assign it a name, define the printer driver, and browse through Network Neighborhood to the directory you created. Choose [Add] to create this new queue.

Edit existing Local Queues within [Local Queue Manager] by highlighting the queue, making necessary adjustments and choosing [Update].

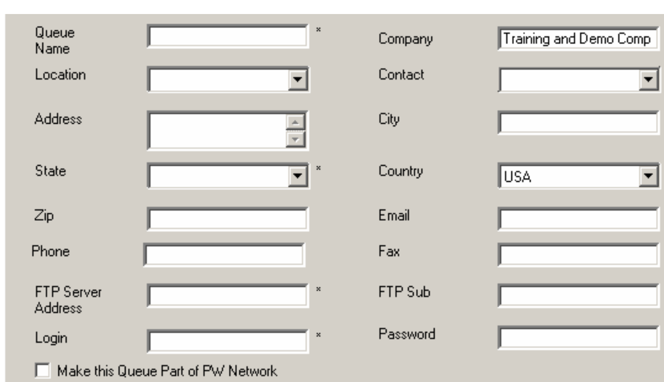


Local Queue Manager

Remote Queues are actually FTP Addresses. When you send a job ticket to a remote queue, it will ftp the job information, along with the print files to the address that you specify.

To create a remote queue, you will need to get a valid user id and password for the site that you wish to transfer your job tickets to.

Add a new remote queue by choosing [Print Queue] – [Remote Queue Manager]. You may then use the Remote Queue dialog to define the Queue name, location, login information, contact location and office address. When you have finished, click on [Add] to create this queue.



Remote Queue Window

Edit existing remote queues by highlighting the queue, make the necessary changes and choose [Update].

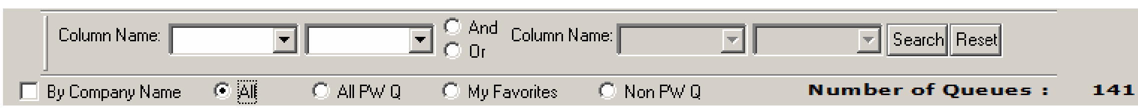
PlanWell Network

PlanWell 5.0 allows remote queues to become part of the PlanWell Network. By adding this remote queue to the PW Network, any other company running PlanWell Enterprise 5.0 may send orders to your location for printing and distribution.

To have your remote queue join the PlanWell Network, click on the box labeled “Make this Queue Park of PW Network”. This queue will now be accessible to all other PlanWell providers.

To utilize the PW Network, it is necessary for you to choose [Get Latest Changes]. This will populate your remote queue dialog window will all members of the PW Network. Information regarding any queue may be viewed by highlighting the queue name. Changes may only be made to the queues created within your office.

You may choose to narrow down the list of remote queues listed by utilizing the search options to quickly find the queue you would like to view or manage.



Remote Queue Search Options Sample

You may also choose to narrow down the remote queues you see by creating favorites. After clicking on the box or boxes of the remote queues you wish to include in your favorites, choose “Update My Favorites”. Now by choosing the search criteria “My Favorites” you will only be presented with those you have selected.

Adding Employees

Additional employees may be added into the PlanWell system either through the online Management Console or through the PDMS Admin Console.

In the PDMS Admin Console, choose [Repro Service] – [Employee Manager]. To add a new employee, highlight [ADD NEW EMPLOYEE] and type in all required information and choose [Add].

Optionally, you may choose to make this employee an administrator. This setting will automatically give this employee “write” permissions to all PlanWell PDMS Admin Console options. Permissions are discussed in greater detail in the “Setting Permissions” section of this manual.

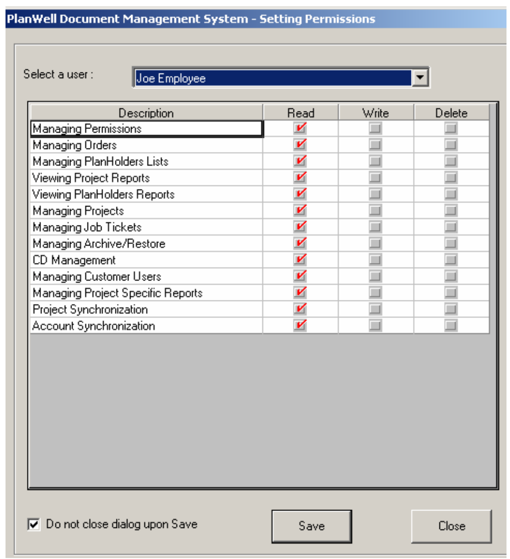
Additionally, you may choose to uncheck the “active” option for any employee. Utilizing this option will make the employee’s user name and password invalid until such time that you re-check the “active” option.

To edit the information of an existing employee, highlight the employee’s name, make the necessary adjustments and choose [Update].

Setting Permissions

The PDMS Admin Console will provide you with all of the tools necessary to define projects, users, and company information for PlanWell. Because much of this information is sensitive or business critical in nature, it is suggested that you carefully assign employee permissions which will enable or restrict an individual's access to this information.

When you select [Preferences] – [Employee Permissions], you may assign Read, Write or Delete privileges to an employee, on a category-by-category basis.



Setting Permissions Dialog

In the example above, the user "Joe Employee" has been given only read permissions for each of the menus available on the PDMS system.

You may add or remove a permission setting by clicking on the checkbox associated with the permission. A checked box means that the selected user has been assigned the given permission.

By selecting the checkbox labeled "Do not close dialog upon save" will allow you to navigate from user to user, without having to reload the permissions dialog.
For each user that you change, you will need to click on the [Save] button to record your changes prior to moving on to the next employee account.

Employee Preferences

Employee preferences can be defined for certain PlanWell options. These preferences can be defined on a company level where all users of the company have the same setting, or can be defined on an individual user level.

To access these preferences, choose [Preferences] – [Employee Preferences]. Preference options can be set to “Yes”, “No” or “Ask Me”.

To define a preference setting for all users, choose the check the box in the gray “Company Level” row. On the following line, define the option setting. In our example below, preferences have been defined on a company level for all options with the exception of “Show Project Notes on project open”.

If you wish to define an option on a user-by-user basis, verify that the Company Level box is unchecked. You may now select each employee and define the option individually.

Employee Name	Show Project Notes on project open	Check for High Res files on project open	Show Advance Options on project save	Show Advance Options on Creation of Project	Close Project On Save
Company Level	☐	☑	☑	☑	☑
	Emp Level	Yes	Ask Me	Yes	Yes
Employee 1	Ask Me				
Employee 2	Ask Me				
Employee 3	Ask Me				
Employee 4	No				
Employee 5	Ask Me				
Employee 6	Ask Me				
Employee 7	Ask Me				
Joe Employee	Yes				

Employee Preferences Dialog

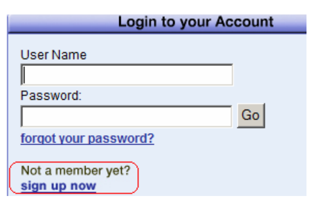
Adding Customers and Projects to the PDMS Database

Before a project can be created, a customer must exist in the database. In order for this to happen, an application must be completed and approved. This may be done in two ways – online or through the PDMS Admin Console.

To complete the application in the PDMS Admin Console, choose [Repro Services] – [Account Manager] – [New Account]. After completing all required information, choose [Add]. This new account is immediately available.

> Note: Adding in an account through the PDMS Admin Console assumes that the account has been approved by your accounting department.
>
> Note: A new account may also be accessed by selecting the  button.

To complete the application online, customers may access your PlanWell site, and fill out a new account application, or you may complete an application on their behalf, by selecting “Sign Up Now”.



Location of Application Access

Approving Online Applications

Applications completed online may be approved through the online Management Console or through the PDMS Admin Console. When approved through the online Management Console, this new account will be available in the PDMS Admin Console only after the completion of the "Account Synchronization" operation. The "Account Synchronization" operation occurs once a day and is performed by the "PDMS Replicator" application. You may also trigger an account replication manually within the PDMS Admin Console by selecting [Synchronization] – [Synchronize Accounts].

To approve this account through the PDMS Admin Console, choose [Repro Services] – [Account Manager] – [Account Application]. All applications in a status other than approved will be listed. Choose the appropriate account and change the status to “Approved” and [Save]. Once you select [Save], an account synchronization will automatically be requested. This account will be immediately available following this synchronization.

Changing Customer Information

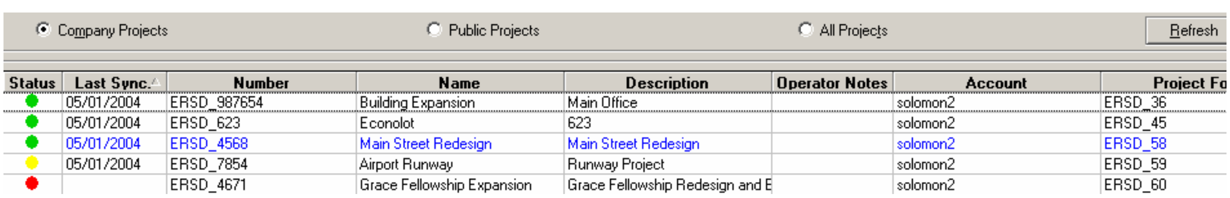
Changes to any customer’s information may be made by first highlighting the customer’s name in the customer list, choosing [Repro Services] – [Account Manager] – [Current Account]. After making necessary adjustments, choose [Update].

Customer List

Upon a successful login, you will see all of the customers that have previously been entered into the PlanWell database. If you have a long list of customers, you may refine the listing by utilizing the Search icon in the toolbar. When choosing [Search] you may specify your search parameters. All customers matching these parameters will be listed. You may reinitialize the list by selecting [Reset].

Once you have located the company name that you wish to access, you may double click on the customer name to proceed. The Project list for that specific customer will then be displayed.

Project List



Status	Last Sync.	Number	Name	Description	Operator Notes	Account	Project Fo
	05/01/2004	ERSD_987654	Building Expansion	Main Office		solomon2	ERSD_36
	05/01/2004	ERSD_623	Econolot	623		solomon2	ERSD_45
	05/01/2004	ERSD_4568	Main Street Redesign	Main Street Redesign		solomon2	ERSD_58
	05/01/2004	ERSD_7854	Airport Runway	Runway Project		solomon2	ERSD_59
		ERSD_4671	Grace Fellowship Expansion	Grace Fellowship Redesign and E		solomon2	ERSD_60

Project List Window

At the Project Selection Window, you may choose to list the Public, Company or All Projects for this customer. A Public Project will be accessible to all visitors, while a Company Project will only be accessible to users who have the correct project ID number and password.

By choosing the Search icon in the toolbar you may search through the projects by entering a keyword in the textbox provided. The list will be updated to show only those projects which match the selected criteria. You may reinitialize the list by selecting [Reset].

The Status color indicates the whether or not the project has been synchronized with the National Vault. Green indicates that the project is currently synchronized; Yellow indicates that updates have been made to the project since the last synchronization and Red indicates that the project has never been synchronized. Archived projects will be listed in blue text; locked projects will be listed in red text; virtual projects will be listed in purple text.

To choose a different customer, you may select [File] – [Change Customer] menu option to return to the previous window.

To edit a particular project, you need only double click on the listing.

The project list may be refreshed at any time by choosing the [Refresh] button

By right clicking on a project, you will be given a number of project options.

Copy Project / Delete Project / Additional Project Details / Move Project

Each of these options will be discussed in detail later in this document

Lock Project / Unlock Project

There are two types of locks which can apply to a PlanWell Project. The first type is an automatic database lock.

Each time a project is opened for editing, the system will apply an attribute to the local database which will prohibit any other console user from accessing the project while it is being edited. When the project is again saved, this attribute is removed, enabling another user to access the project once again. In some rare instances, such as a system crash, this attribute will not be automatically removed, placing the project in a locked state to everyone. Fortunately, you may manually override the database lock by choosing “Advanced Operations>Remove project from ‘In Use’”.

The second type of project lock is manually applied. Consider the situation where a Project Manager contacts your PlanWell Admin to inform them that a new issue is about to be released, and they do not want any subcontractor to order plans prior to the new release. In this case, you may apply a manual lock by selecting the project from the list, and then by using the right mouse button, bring up the extended project menu. When you then select Lock Project” you will be asked to enter information regarding the purpose of the lock. It would be a good practice to enter your name and an estimated time for unlocking into the message along with the reason for the lock. A user on-line would still be able to access and order from the project, but any orders that they place will not be allowed to print until the lock has been removed.

Each project which is currently locked will appear in the project listing in red, and only the person who applied the lock originally, will have the ability to unlock it with the right click menus.

Advanced Project Properties

This option will bring up the project properties dialog box. The information provided is non-editable from this window; editing this information must be done after accessing the project specifically. This is discussed in the “Add a Project” – “Advanced Properties” section of this manual.

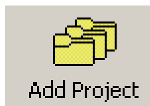
Export to Excel

This option will export your project list to an excel document.

Print

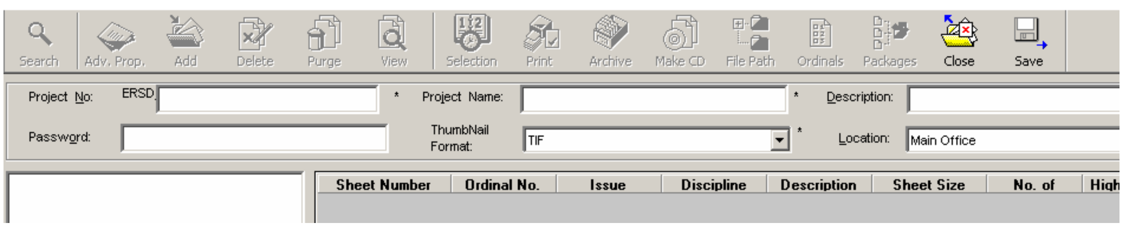
This option will send your project list directly to your default small format printer.

Adding a New Project



New Projects may be added into the system by selecting [Project] – [Add Project] or by choosing the [Add Project] icon shown above.

You will be asked to specify if this is a public or company project. Once you have made this selection, you will be brought into the Project Details page. Before you may add files to a project, you will first need to add some descriptive information, which will allow you, and your customers, the ability to search for a particular project.



Project Details Page

Project No:

This field will allow you to enter a unique project number for PlanWell. This may be the project number that the customer had assigned to the project, or it may be a number that you define. In either case, it must be unique in the database. No two projects may have exactly the same project number. The system will automatically pre-pend your 4-digit AMC location reference number to the beginning of the project number.

Project Name and Project Description:

Here, you may enter the name for this project. It is advised that you do not merely make one up, or guess the name based upon the title sheet, but rather, contact the project manager, and ask “How would you like your project to be named on the web?” As well, the customer may wish to provide a more marketable description to attract more bidders to the project.

Project Password:

All Company projects should have a password assigned to it; again it is advised that you ask the customer, rather than assigning one. Although passwords can be left blank, this is not recommended.

Thumbnail Format:

For each project created, the PlanWell Administrator may choose to create TIF or PDF thumbnail images. In order to properly create PDF thumbnails, it is necessary for a full version of Adobe to be installed on the workstation running the PDMS Admin Console.

Location:

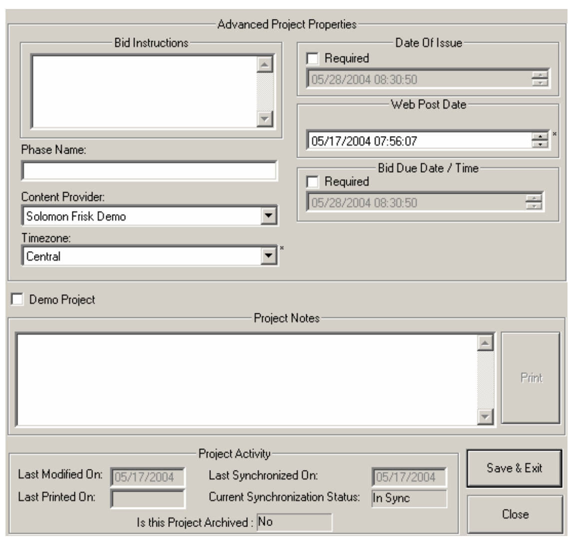
If your company has more than one location configured, then you will have the ability to select which location is actually hosting the files. It is important that this location be entered correctly as the product will automatically create job tickets which will need to reference the location of the original high-resolution print files.

Before continuing, you must choose [Save]. Once this is selected, you may either go into the Advanced Properties or begin the process of indexing the high-resolution files.

Advanced Properties 

Clicking on the [Adv. Prop.] button in the top toolbar will bring up the Advanced Project Properties Dialog window.

You may set several project specific values and privileges from this window.



Advanced Project Properties Dialog

Bid Instructions

You may type simple bid instruction information into this window, or you may indicate that more in-depth instructions are “Attached”.

Note: Attaching Bid Documents will be discussed later in this document.

Date of Issue

If “Required”, you will have the ability to change this date. This date should not be set arbitrarily. You should get this information from the Project Manager.

Web Post Date

You may set the “Web Post Date” to any date that you choose. By default it will represent the actual date that the project was first created with the console.

Bid Due Date/Time

If “Required”, you will have the ability to change this date. As with the date of issue, this date should not be set arbitrarily. You should get this information from the Project Manager.

Phase Name

Some projects are tracked by “Phase”, if the customer requests this, you may enter the current “Phase” name in this field.

Content Provider

It may happen that you will be asked to post the same project for two different companies. In this case, you may first post the project for the primary company, and then copy it for the other company. To keep things straight internally, you may select the name of the original content provider using this dropdown control.

Time Zone

In order to properly handle requests which may come from a different Time Zone, you will need to set the time zone property to reflect the time zone that pertains to the location which is holding plans for this project.

Demo Project

In order for PlanWell activity and revenue reports to remain accurate, it is important that you place a check in this box for any demo projects created. By selecting this, the activity and revenue from this demo project will not be included in any reports generated.

Project Notes

You may use this field to keep project or customer specific notes for later review.

Project Activity

This frame will automatically provide information pertaining to the last date of Synchronization, the date the project was last modified, the date of the last printing and the current synchronization status. This frame is not editable.

[Save & Exit]

This option saves your changes to the database.

[Close]

This option exits the dialog without saving your changes.

Indexing High Resolution Files

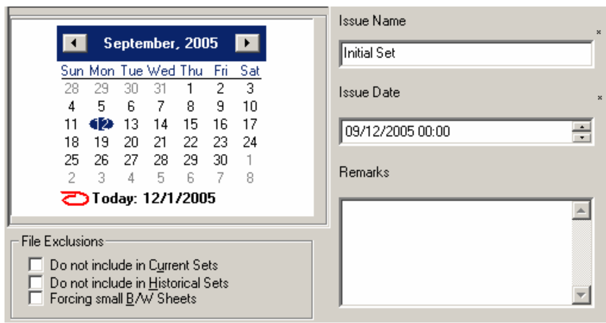
At the heart of the PDMS console is a sophisticated document management system. This system, called PDMS, for PlanWell Document Management System, will allow you to maintain a complete history of the files which have been released for a project. The system will in turn, allow you with the ability to create sets, based upon issue dates (revisions) and disciplines.

In this way, you, or your web based clients will be able to review a current set, or any specific discipline or historical issue, without the need for you to pull sheets from other folders.

Creating Project Issues

The start of any PlanWell project is the Initial Set of drawings. This is the first submission of files that a customer will give you to post to PlanWell. In order to add drawings to the project, you will first need to define the information associated with the Initial Set.

To add a new issue or an Initial Set, left click on the Project name in the tree window, and select "Add New Issue". The following window will be displayed.



Create a New Issue

To define a new issue, the following information will be required.

Issue Name

Please enter the name of the issue. This may be something like "Bid Set" or "Initial Set". It is always suggested that you communicate with the project manager, to insure that the issue is named in accordance with the naming conventions that are familiar to the members of the project team.

Issue Date/Time

Using the calendar control, you may pick the date of issue by selecting it with your mouse. The issue date is NOT, the date that you are adding the issue to PlanWell, but rather the date of issue as determined by the project manager. If multiple issues are released on the same date, you may also wish to set the release time.

Remarks

The remarks field is optional, and is visible only to employees who have access to the console. You may enter any issue specific remarks in this field.

Do not include in Current Sets

You may choose at the time of entry, or at a later date, to hide the active issue in the current sets option of PlanWell. By clicking on the checkbox labeled "Do not include in Current Sets", the issue, and its associated sheets will not be visible to users on the PlanWell browser when building or ordering a current set; however these documents may still be selected by online users with the permissions to view the issue tree or may be included in any packages.

Do not include in Historical Sets

As with the previous option, you may choose at the time of entry, or at a later date, to hide the active issue in the historical sets option of PlanWell. By clicking on the checkbox labeled “Do not include in Historical Sets”, the issue, and its associated sheets will not be visible to users on the PlanWell browser when building or ordering a historical set; however these documents may still be selected by online users with the permissions to view the issue tree or may be included in any packages.

Forcing Small B&W Sheets

When this option is chosen, you are indicating that any plans or sheets which will be added to this specific issue will be printed as Small Format B&W. You may use this special property to handle the storage of specifications, and other small documents relating to the project. By default, when this option is selected both “Do not include in Current Sets” and “Do not include in Historical Sets” are selected as well however you may remove these settings if you wish.

When you have finished entering the required information, you may click on [Save] to store the information in the database and return to the Project Details window. At this time, the tree control will sprout two new branches, one that is the issue name you have just created and another for Project Packages.

In the example above, the new issue is named “Initial Set”.

By right clicking on the issue you just created, you may add a new discipline, view the issue properties, add files to the selected issue, auto index documents or generate thumbnails.

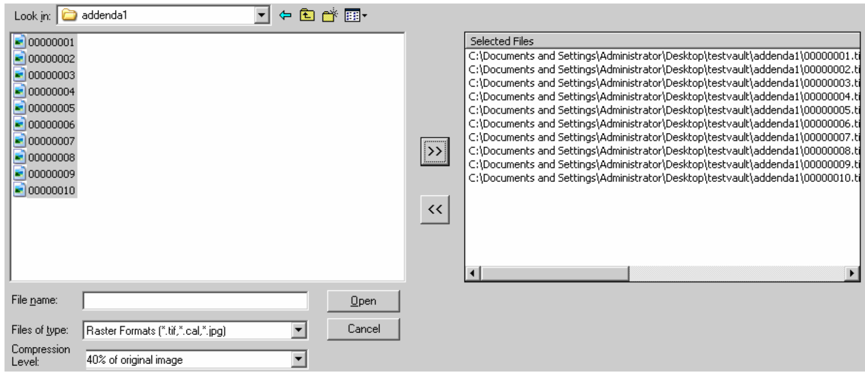
Adding a new discipline, auto indexing and generating thumbnails will be discussed later in this document.

The issue properties selection will bring up the same control that you used to create the issue, but will also give you an option to [Delete] the selected issue.

Adding files to an Issue 

Add files to an issue by either select the [Add] icon or by right clicking on the issue and choosing [Add Files]. When you select either of these options, you will be presented with the “Add Files Window” which will allow you to setup which files to load, and how you want them to be loaded into PlanWell.

From the “Add Files Window”, click on the [Browse] button to find the directory which holds the high resolution files for the issue that you wish to post.



Select Files

Once the folder has been located, you may add files individually by selecting them and then pressing the [>>] button to add them to the selected files list. You may also select all of the files by clicking in the folder list, and then pressing [CTL] + [A] to select all files and then pressing the [>>] button. Selecting multiple files in this manner will insure that they are transferred to the import list in the proper alphanumerical order.

Note: As shown in the above example, once files are added to the selected files list, the entire file path is listed. This file path will be written to the database and used every time the project is accessed within the PDMS Admin Console or for printing. For this reason, it is important that you do not browse to these files from a mapped drive rather browse to these files through their entire file path.

Note: You may also load files directly from a ReproDesk Job Ticket. Job tickets must be created with files that have been pathed to a local UNC path, or selected from the same directory which contains the print files. Job Tickets must contain only Tiff or Cals files. Plot file formats are not supported at this time. When loading from a ReproDesk job ticket, the application will automatically assume that you are “Loading Forward”. Rotations must be set on a file-by-file basis.

Once you have selected the files that you want to add to the issue, you will need to set the compression level for your thumbnails. Thumbnail images are created on the fly as you add files into the system.

When you have made your selection, press [Open] to continue.

Add Files Window

Next, you will be returned to the “Add Files Window”. This window will allow you to specify exactly how you would like to have the files loaded into the issue. Several options are available:

File Order

You may verify the order of the files with the viewer. When you select a file in the file list, it will be displayed in the viewer. You may zoom into the view to determine sheet numbers, and if you find that any of the sheets are not in the correct sequence, you may re-order them by first selecting the filename, then moving it up or down the list with the arrow keys to the left of the file list.

View Images
The view images checkbox will toggle the thumbnail viewer either on or off. You will probably want to keep it on at all times. Turning off the thumbnail viewer at this point will have no affect on the images online.

Issue Name:
You must select the correct issue from the list for the files that you are about to import.

Issue Date:
Based on the issue name selected, the system will populate this information automatically.

Sheet Size:
PlanWell will allow you to present pricing to your web clients from the PlanWell browser. In order to insure that the pricing is accurate, you will be responsible for selecting the correct sheet size for the images that you are adding. If you are at all unsure, please be sure to find an original and measure it, or you may load the file into an imaging application such as Imaging for windows, and look up the size in the file properties. Non Standard sheet sizes may be typed into this field, however, the must follow the following format:

Width in inches “X” Length in inches. “30X48”, “12X26” are valid examples; “A-size” is not a valid selection.

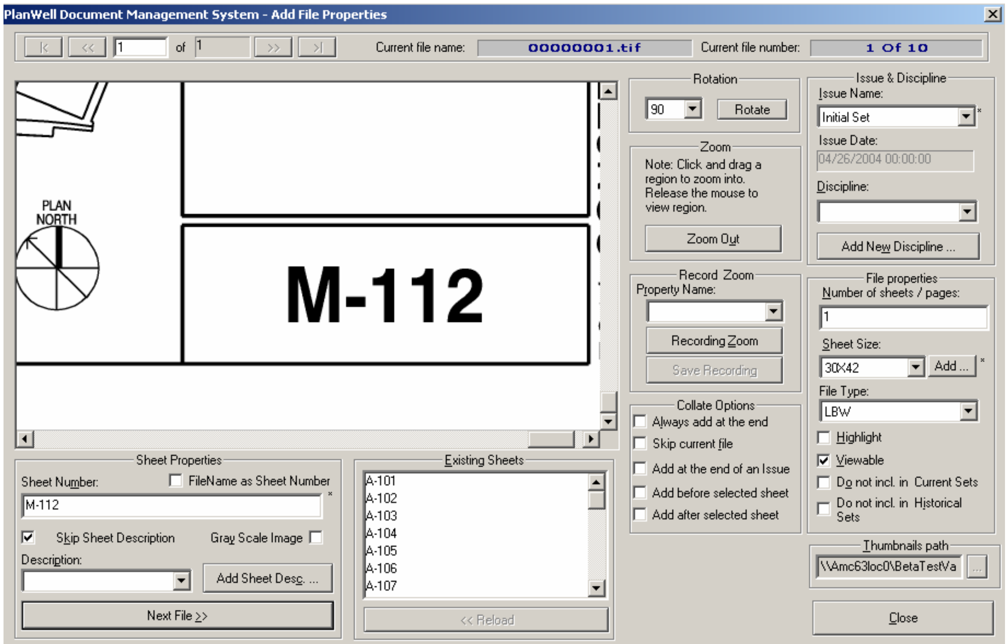
Compression level
Here, you may verify the compression level for your thumbnails.

Rotation
Since you have scanned your images in “Productive Format”, it may very well be necessary to rotate the image so that it will view properly once it is loaded in PlanWell. Please note, that rotation applies only to the thumbnail image, and does not alter the original High Resolution file in any way. Available options are 90°, 180° and 270°.

Load Forward/Backward
The system will allow you the ability to load the files in order, from the top of the list or from the bottom of the list. This will allow you the ability to scan the drawings from the top of the set (Forward), or from the bottom of the set (Backward). Either method is acceptable, but you will want to reinforce the idea that all projects within your company are scanned in the same fashion. Pressing one of the buttons will load the “Add File Properties” window.

Add File Properties Window

The Add File Properties window is where you may assign all of the file specific properties for images placed on PlanWell.



Add File Properties Window

Files will automatically be presented to you for indexing, in the order that you defined in the previous window. If this is the first issue to be added to a project, than files will automatically be appended to the Existing Sheets List. If this is not the first issue for the project, then you may be prompted to insert the drawing into the existing list.

There are many features and fields in this window; some of them are mandatory, while others are not. A full description of their function is listed below:

Current File Name
This field will display the original filename of the currently active sheet.

Current file number
This field will give you an indication of where you are in the list.

Issue Name
This field contains the name of the issue that you are updating.

Discipline
You may add or choose a discipline name from this control. You will have the opportunity to assign a Discipline to the file at a later time; however, it must be set before you can save the new issue.

Number of sheets per page
When you are adding a file which contains more than 1 page, you may enter the number of pages in this field.

Sheet Size
You may choose the sheet size for any image with this control.

File Type
You may select the file type for any image with this control

Display Properties

Highlight – Activates the red highlight for the current file
Viewable – Allow the customer to view the current thumbnail online. By un-checking this option, customers will see the sheet name/number and any description you have included but will not be able to view the thumbnail image. They may still order these sheets online
Do not incl. in current sets/historical sets – Do not list the current file when a user builds a current or historical set.

Thumbnail Path

This disabled textbox will display the UNC path to the temporary storage area that you designated for the placement of thumbnail files. This location can only be changed with the location defaults menu.

Rotation

Generally, all files in an issue will be the same size, and hopefully, will all be scanned in the same orientation. If for any reason, you encounter an image which is different, or was scanned incorrectly, you may change the rotation using this control.

Zoom Out

If you use the mouse to create a zoomed-in view of the current image, you may use the [Zoom out] button to return to a full sheet view.

Record Zoom

The console tracks two standard view locations: "Sheet Name" and "Sheet Description". As you click on one of the textboxes to enter a sheet name or description, the viewer will automatically zoom into the area of the drawing which contains that information. Since sheets are not all created in exactly the same way, it will become necessary from time to time to redefine the area relating to one of these fields.

To redefine a view, follow these steps:

1. Click on the [Zoom out] button to show a full sheet view.
2. Select the view that you wish to update from the Property name dropdown.
3. Click on the button labeled [Recording Zoom] to activate the zoom editor.
4. Using your mouse, select the area on the viewer that you wish to zoom into.
5. If the zoom is correctly placed on the area that you were looking for, you may then click on the button labeled [Save Recording] the save the active view.

Collate Options

Always add at end – choosing this option will cause a uniquely named sheet to be automatically placed at the end of the existing sheet list.
Skip current file - Choosing this option will bypass the current file, and load the next file in the list.
Add at the end of an issue – Choosing this option will add a uniquely named sheet to be automatically placed at the end of an issue.
Add before selected sheet/Add after selected sheet - Choosing either of these options will add a uniquely named sheet to be automatically placed before or after the selected sheet

Sheet Number

When you click on this field, you will trigger the viewer to zoom into the area that has been defined for the Sheet Name. You will then be able to type the sheet name into the text box, exactly as it appears on the Drawing. When you press [Enter], the cursor will move to the Sheet Description field, and the viewer will automatically update to reflect the zoom that has been recorded for that field.

File Name as Sheet Number
This option will automatically populate the file name into the sheet number box.

Skip Sheet Description
If selected, the cursor will move directly to the Next file button, when [Enter] is pressed from the Sheet Name field.

Description
Here, you may enter the Sheet Description, exactly as it appears on the drawing.
This description is optional, and entering a value in this field may depend on pricing arrangements that have been made with the customer, or on your own company policies.

Add Sheet Description
You may choose to save some commonly used sheet descriptions for ready access in other projects. It would be a good idea not to add descriptions which would likely be unique, as this will needlessly increase the size of the list, making it more difficult to find a more common description. In general, you will probably want to keep the number of saved descriptions down to about 20 or less, otherwise, it may take you more time to find one than it would to merely type a description in.

[Next File >>]
When you click on [Next File], you will record the information that you have entered for this file, and if everything is correct, the next file will be automatically loaded.

There are, however some conditions which may also need to be set before the next file will load:

If this is the first issue in the project, the system will automatically place this record at the end of the list of current files.

If this is an additional issue for an existing project, you may be prompted to identify where to place this drawing in the set. You will then need to select an adjacent file from the sheet list, and then select whether you would like the new sheet placed before, or after the selected sheet. To avoid being asked for all new files, use the collate options listed above to define a placement option for all remaining files in this issue.

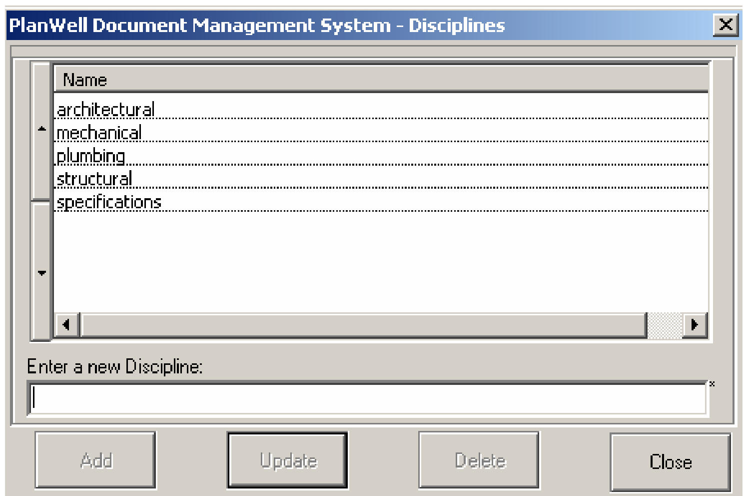
If the sheet you are adding has the same name as an existing sheet, from a prior issue, the system will add the file, and automatically assign its sheet position, description, and discipline information based upon the prior sheet. Because of this, it is fairly important to make sure that you enter all of the information that is required for the file with the first issue. In this way you will minimize the effort that will be required to enter a file in subsequent issues.

Each new file that you add to a project will appear in red, in the file list box. In the event that you make a mistake, and do not realize it before you press enter, you may return to the file and correct your mistake by clicking on the red sheet name in the file list box, and then clicking on [Reload]. This will bring up the editor for that sheet, and you may then correct your information.

You may continue to add sheet information until you have identified all of the sheets which you had selected. When you have finished, the Add Files Properties window will close, and you will be automatically returned to the Project Window.

Creating Project Specific Disciplines

Every project that you store on PlanWell will be comprised of one or more disciplines. A discipline is the trade, or specialty associated with a particular area of construction. In order to properly separate project files into their respective disciplines in the database, it is necessary to create a list of disciplines which are in use for a particular project, so that you may then associate files with them.



Add Discipline Dialog

To create a list of disciplines, use your mouse to left-click on the issue name in the project tree, and select “Add Discipline” from the pop-up menu.

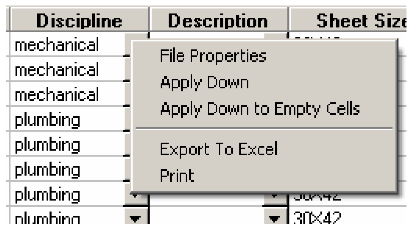
Here, you may enter the name of a discipline in the Textbox, then click on [Add] to add the name to the current list. You may repeat this process until you have entered the names of all of the disciplines that you are aware of in the project. Additional disciplines may be added at any later date.

When you have finished entering discipline names, you may click on [Save] to record the new names, or [Close] to abandon your choices.

> Note: You may also change the name of a discipline at a later date, if you find that it was entered incorrectly. To edit a discipline name, open the “Add New Discipline” dialog, select the discipline name that you wish to change, and it will appear in the text box, where you may edit it. When you have finished your changes, click on the button labeled [Update] to update the database. When you then select [Close], all files which referred to the original discipline will be automatically updated to reflect the new discipline name.

You may now associate a discipline with the files that you have added to the issue.

On the Project file list, choose the discipline dropdown on the row which contains the file that you wish to update. The dropdown will display the list of disciplines that you have added, and you may select one.



Assigning Disciplines Example

At this point, you may choose to apply the same discipline to all of the remaining files in the list. You may do this by left clicking on the discipline cell, and then either choosing "Apply Down" or "Apply Down to Empty Cells" from the dropdown menu.

"Apply Down" will assign the selected discipline to all sheets below the one you are working with. You may then move to the first row which contains a drawing for a different discipline, and update, and apply down the discipline information.

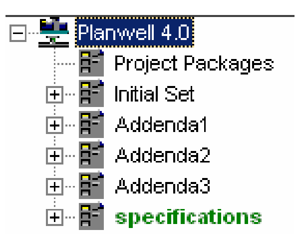
"Apply Down to Empty Cells" will apply the discipline only to sheets below the one you are working with which do not already have a discipline assigned. You may find this the better option when working with Addenda.

Using either of these methods, you will be able to quickly apply discipline information to the entire list of drawings.

Issue Tree

After you have created and populated one or more issues, you may use the issue tree to navigate through the files which are grouped within these issues.

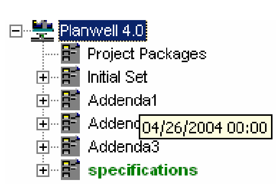
The issue tree will display the issues that you have defined for a project within PlanWell. You may choose to view the issues in ascending or descending order by right clicking on the Project Name and selecting the view you wish. The view you choose will be the view shown online.



Issues in ascending order

Issues in descending order

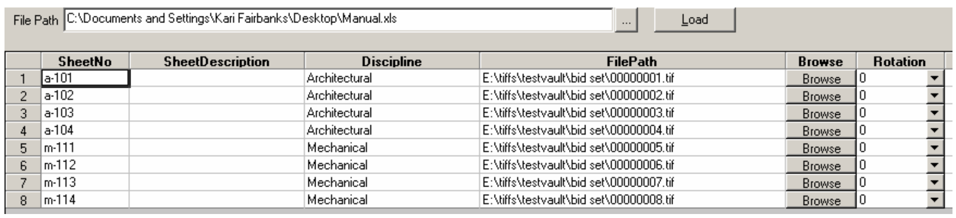
As you hover over an issue in the tree, a tool tip will display which will show you the issue date.



When you select an issue from the tree, the file list will update to show you all of the files which are contained within that issue.

Auto Indexing

Rather than indexing files in the manner listed above, you may also choose to have PlanWell index them for you instead. To access this functionality, right click on the issue name and choose [Auto Indexing]. After making this selection you will be presented with the auto indexing window where you can now browse to the location of the document you wish to use for auto indexing. After choosing to either place the sheets at the end of the project or the end of the issue, you may now choose [Validate File Path] and [Import].



	SheetNo	SheetDescription	Discipline	FilePath	Browse	Rotation
1	a-101		Architectural	E:\tiffs\testvault\bid set\00000001.tif	Browse	0
2	a-102		Architectural	E:\tiffs\testvault\bid set\00000002.tif	Browse	0
3	a-103		Architectural	E:\tiffs\testvault\bid set\00000003.tif	Browse	0
4	a-104		Architectural	E:\tiffs\testvault\bid set\00000004.tif	Browse	0
5	m-111		Mechanical	E:\tiffs\testvault\bid set\00000005.tif	Browse	0
6	m-112		Mechanical	E:\tiffs\testvault\bid set\00000006.tif	Browse	0
7	m-113		Mechanical	E:\tiffs\testvault\bid set\00000007.tif	Browse	0
8	m-114		Mechanical	E:\tiffs\testvault\bid set\00000008.tif	Browse	0

Auto Indexing Window

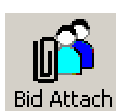
> Note: When accessing this option, it is recommended that you utilize the formatting instructions document available in the right corner of this window.

Generate Thumbnails

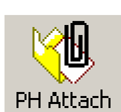
Occasionally you will make changes to a project and need to regenerate the thumbnail images viewed online. In PlanWell 5.0 this may be done through a batch process by right clicking on the project name, a specific issue, a specific discipline or a specific sheet within an issue and choosing [Generate Thumbnails]. By selecting [Start] all thumbnails within the selected area will be regenerated.

Note: If you select [Generate Thumbnails] from the project name level, it will regenerate all thumbnails for the project. If you only need specific images regenerated, it is recommended that, rather than selecting the project name, you drill down through the issue tree to narrow down the number of thumbnails being regenerated.

Additional Toolbar Icons:

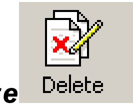
Bid Attachments 

By selecting this icon, you may attach detailed bid instructions. Users online will be able to view this document without being required to add it to an order.

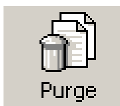
PH Attach 

Occasionally your customer may request that Planholders information be attached for online viewing. Selecting this icon will allow you to attach this requested information.

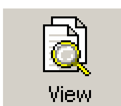
> Note: The ability to view these Planholders attachments online is assigned through project permissions discussed later in this document.

Delete 

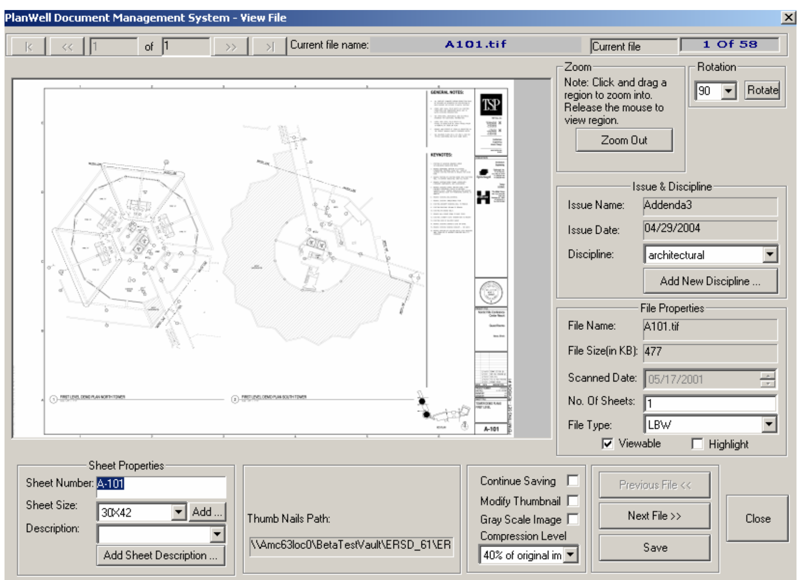
There will be occasions when a sheet, which has existed in a project, is no longer required. The information contained on it may have been merged with information on another sheet, or perhaps the scope of the project has changed, and the sheet is just no longer required. In order to maintain an accurate set of historical documents, you will need to mark the latest revision of this sheet as deleted. This does not actually delete the image, but merely sets a flag for that sheet that will indicate that beyond a particular date, the sheet is not to be included in any current set. To accomplish this, you must first select the sheet in the list, and then click on [Delete]. Here you will be prompted to enter a date. On subsequent set selections, this file will not appear in sets selected with a date greater than this “Delete Date”.

Purge 

You may remove a file record from your project by first selecting it, and then clicking on [Purge]. Please note, that this merely removes the record from the database it does not actually delete the high-resolution print file.

View 

To view a file or a group of files in the console, you may select it, and click on [View] to see it in the viewer.



View Window

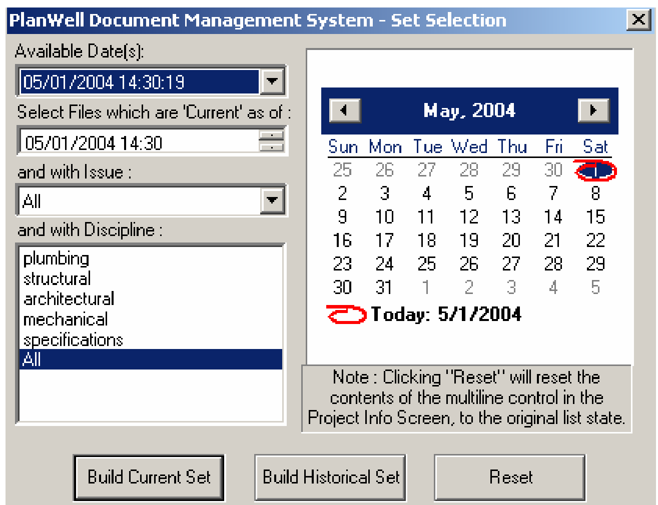
Files may be viewed one at a time, and all file properties may be updated in this window. You may zoom in or out to get a better look at the details of the drawing, and you may rotate the view by clicking on one of the rotate buttons. To navigate forward or backward through the project files, you may click on the [Previous File] or [Next File] buttons. Only Tiff, Cals or PDF files may be viewed in this window.

Many of the properties for a selected file may also be edited with the viewer. You may, as appropriate, update the sheet name, if you find that it was typed incorrectly. Change the sheet size, apply a download cost, or enter the number of sheets for a multi-page file.

This is a great tool to preview your image rotation, and verify that all file specific information is accurate before you post the project to the web.

Selection 

Certainly, one of the more powerful aspects of PlanWell is the ability to dynamically create a set of drawings from a project. The [Selection] button within the PDMS Admin Console allows you to do to this.



Set Selection Dialog

Select files which are current as of
When this dialog opens, this field will contain the current date. You may choose any previous issue date by opening the dropdown control, or by selecting any date with the Calendar control. The selections that will be made against the database will be restricted to files which have an issue date prior to the date selected in these controls.

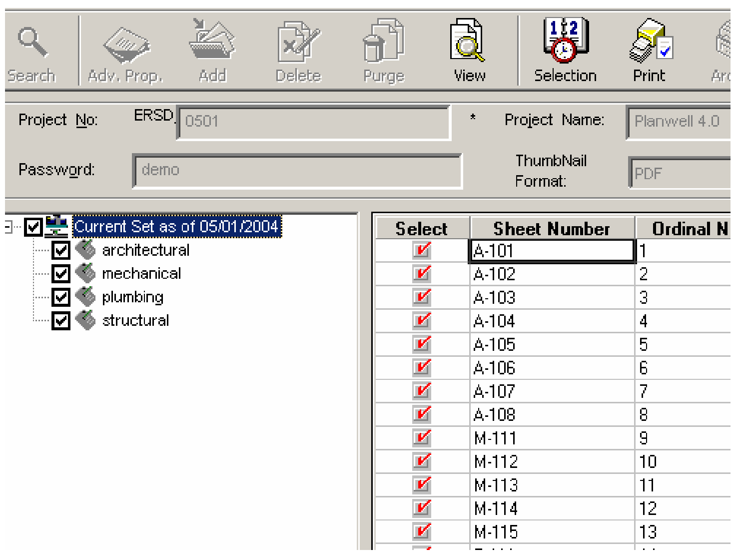
And with issue
You may also restrict your search to a particular issue. By selecting an issue in this dropdown control, your subsequent search will contain only those files which are contained in the chosen issue. Choosing a date in conjunction with an issue will have no effect, as an issue will only relate to one particular date.

And with Discipline
Here you may restrict your results to one or more specific disciplines. For example, you may wish to create a current or historical set of "Architectural" drawings. A customer may also wish to distribute a current set of "Architectural and Structural" drawings to a subcontractor. This will be the control that will allow you to make this selection.

Build Current Set
Once you have entered you search criteria, you may select this button to automatically select all of the files in your project which meet the chosen criteria, and represent the most current version of the selected files. If you have marked one or more sheets as "Deleted", they will not appear in a Current set, if the selected date is after the "delete date".
Build Historical Set
Frequently, an owner or project manager will wish to review an historical set of drawings. You may use this tool to assemble a complete list of all drawings which have been posted to a project, which meet any discipline and date criteria that you define. When selected, files will be listed by ordinal, with the most recent issue first.

Once you have created either a "Current" or "Historical" set selection, you may deselect files from the list by clicking on the checkboxes in the sheet list. These files may now be viewed or sent to a printer by using the toolbar options.

Note: When a set is created, all toolbar options with the exception of [View], [Selection] and [Print] are grayed out. These options will become functional again after resetting the selection



Built Set and Toolbar Options

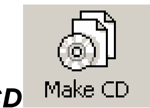
Reset
Once you have completed a set selection, you may restore your drawing list to show all sheets, and a fully functional toolbar, by choosing [Selection] – [Reset]

Print 

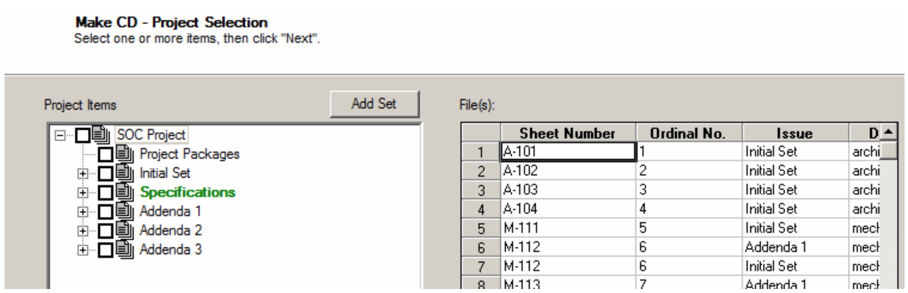
By choosing the Print icon, you will have the ability to send all files currently in the files list window to a print queue for printing. You may utilize the issue tree or the "Selection" option to populate the file list window with just the files you wish to print. Actual printing processes will be discussed later in this document

Archive 

There will come a time when you have so many projects on your RAID drive that you will need to either free up some space, or add an additional RAID. The Archive feature will allow you to do this. This feature will be discussed in detail later in this document

Make CD 

PlanWell will also allow you to create a CD of a project for distribution. The resulting CD will contain a viewer utility, which will allow the user to navigate through issues or disciplines in much the same way that they can on the web.



Make CD

When you choose this option, you will need to select which documents to include on this CD. You may choose to add all documents by clicking on the box next to the project name or you may choose to include one or more issues by clicking on the box next to the desired issue(s).

After choosing [Next], you will be able to define display preferences and the initial display those who receive this CD will have.

The [Display Preferences] option allows you to select what the recipient can and cannot do and/or see when reading the CD.

> Note: If you choose “Placing Order”, the recipient of the CD must have a PlanWell account.

The setting selected under [Initial Display] will assign the view the recipient will initially see when opening the CD. This setting cannot override the display preferences. For example if the display preferences do not allow for a customer to build a current set, the initial display cannot be to show current set.

After choosing [Next], you must browse to, or supply a name for an Empty folder for the storage of the temporary CD contents.

You may then supply a title for the CD, or allow the PDMS system to create one for you, based upon the job name.

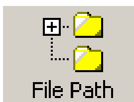
The estimated project size in MB will automatically be calculated and populated.

The Media option allows the PlanWell Administrator to select the media to which this information will be written.

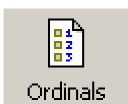
You will also be able to define a media title and label. The previously determined project size will be listed. If the estimated size is larger than the selected media capacity, multiple items will be listed under the “CD” column and the data will be divided logically between each media.

When you click on the [Finish] button, all of the selected files for the project will be copied to the chosen folder, along with an installation program which will install the PDMS Viewer on your customer’s computer.

Once the operation has completed, you may burn the contents of the folder to blank media to provide to your client.

File Path 

It is very important that the PDMS Admin Console is always able to locate the high-resolution files for all projects. If the high-resolution files are moved you will need to “tell” the PDMS Admin Console where the files are now located. By selecting [File Path] you will be brought to a browser window where you can select the new location of the files.

Ordinals 

Sheet Number	Ordinal No.	Issue	Discipline	Description	
ML-1	1	Initial Set			30
DA-1	2	Initial Set			30
DA-2	3	Initial Set			30
DA-3	4	Initial Set			30
1-1	5	Initial Set			30
1-2	6	Initial Set			30

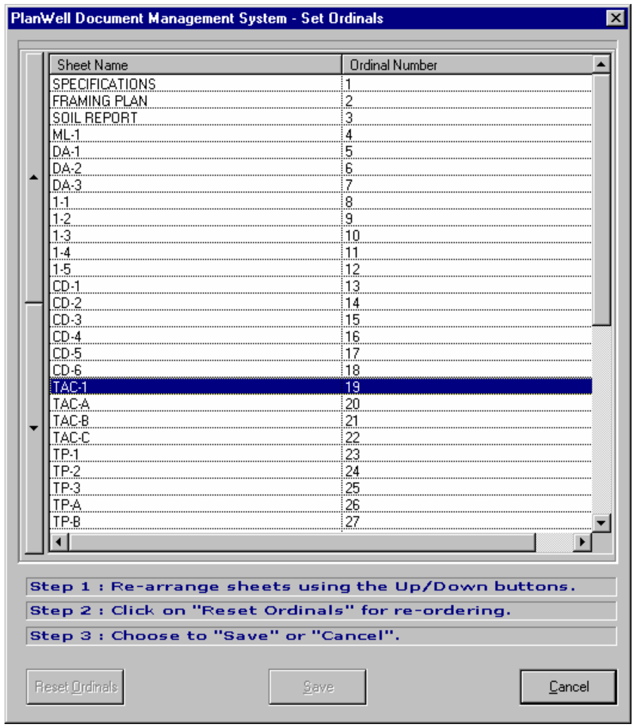
Project File List

After you have added files to an issue, your project file list should look like the example above. Please note, that each sheet in your project has been assigned an “Ordinal”.
The sheet ordinal represents the sheets position within a set. An ordinal of 1 for example, will mean that that sheet is the first page in a set. As you add new issues to a project, you will notice that sheets with the same name, will share a common ordinal, this will insure that when current, or historical sets are created with PlanWell, and that all of the sheets will print out in the correct order.

If you find that a sheet has been placed in the wrong position you may change its position by choosing [Ordinals] from the tool bar at the top of your project page.

When this window loads, it will only show 1 instance of each uniquely named sheet in the project. At this time you may select a single sheet, or a group of sheets for relocation within the project. Once highlighted, you may move the file/s by clicking on either the “Up” or “Down” arrows.

When you are satisfied with your changes, you may click on [Update Ordinals] to save the order. Pressing [Save] will then close the window.



Set Ordinals Window

Packages 

Packages are bundles or groups of documents available for ordering. There are two types of custom packages which may be created from this interface: Normal Packages, and Fixed Price Packages.

A normal package must consist entirely of files for a specific service. You should not mix small format and large format files within a normal package.

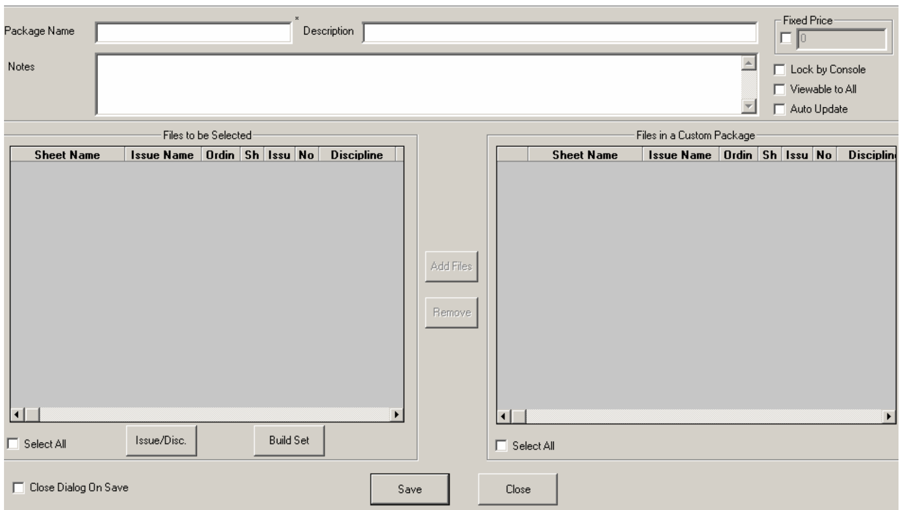
When a normal package is ordered, the user will be able to specify all of the production options for media and binding, and the e-commerce engine will calculate the package pricing based upon the total amount of media and binding which will be necessary to produce the package. This pricing will be discounted and scaled according to the user's specific price list.

A fixed price package may contain any combination of files from the same or different services. The user will therefore not be able to specify any of the normal production options, so it will be important that you discuss this with the PM prior to setting the fixed pricing for the package. When a fixed price package is added to a user's cart, the options line will display as "Pre-configured". Since there is a price associated with this package, all users ordering it will pay the same price regardless of any special pricing they typically receive.

You may access the custom Packages for a project by clicking on the [Package] button from the top toolbar.

To create a new package, press the [Create] button from the custom Packages window.

Note: The project must be synchronized to the national vault prior to being allowed into this window.



Custom Packages Window

In the Custom Packages Properties window, you will need to supply the following information:

Package Name

Enter a descriptive name for the package. The PM will probably want to supply you with one.

Package Description

Enter any text which will further define the content and purpose of the new package

Notes

For a fixed price package, it will be important that you enter all production options, which have been pre-determined for pricing the package, so that it may be properly produced when orders are placed for the package.

Fixed Price

By clicking on the Fixed Price option box, you can set this package as a fixed price package. You must then enter the pre-determined price for the package.

Lock by Console

Packages with this setting will not be available online; rather they will simply be available within the PDMS Admin Console for printing.

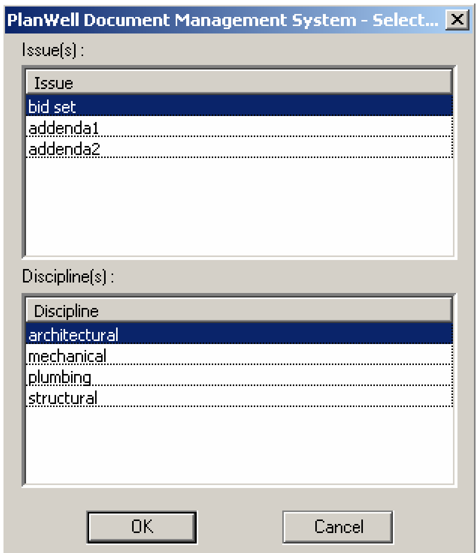
Viewable to All

Packages with this setting will be available online for ordering by any user with permissions to view custom bundles. How this permission is set is discussed later in this document under [Advanced Project Options] – [Project Options].

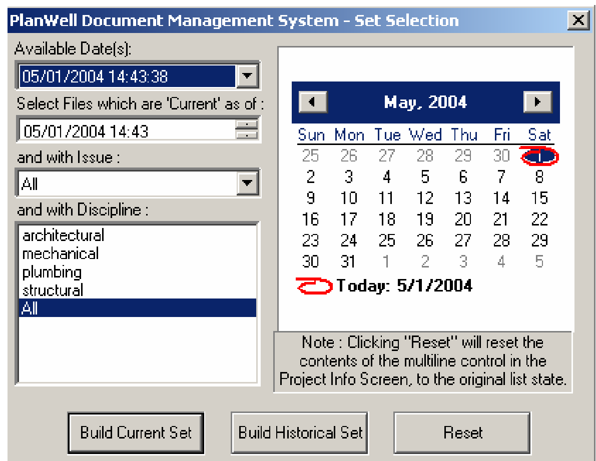
Auto Update

By selecting this option, all drawings added into the package will remain current as new revisions are created.

Files for this package may be selected two ways, by issue and/or discipline or by building a set.



Issue/Discipline Option



Build a Set Option

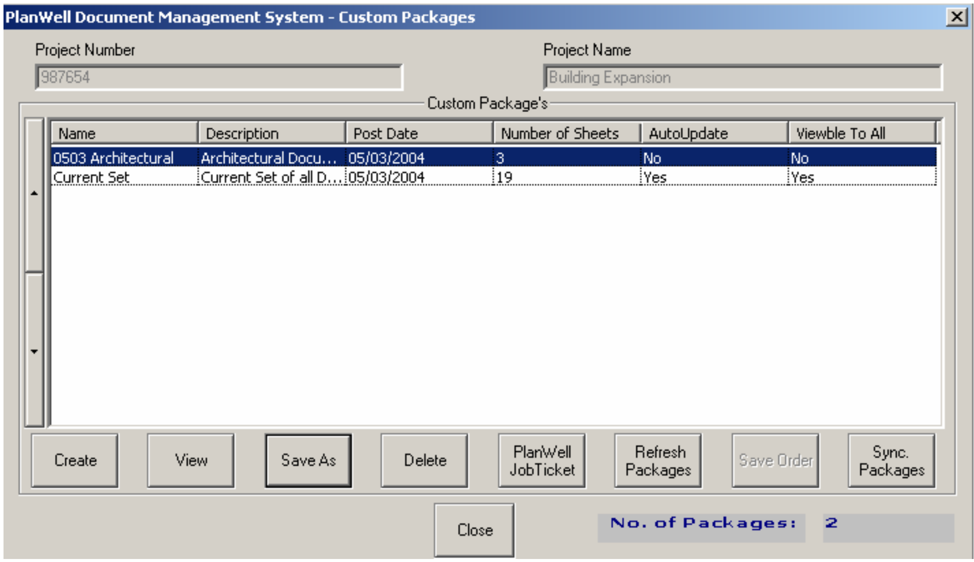
To select documents by issue or discipline, select the [Issue/Disc] button. Narrow down your selection to the appropriate issue and discipline and choose [OK]. This option will also provide you with the ability to select files which have their properties set to “Do not include in Sets”, which otherwise would not be available for selection.

To select documents by building a set, select the [Build a Set] button. Similar to our [Selection] option listed earlier, specify your specific criteria based on date, issue and/or discipline. Choose either the [Build a Current Set] button or the [Build a Historical Set] button.

In both instances, all files meeting the criteria specified will populate the left “Files to be Selected” box in the Custom Package window. By default, all files will be highlighted. You may add all files into the “Files in a Custom Package” box by choose [Add Files].

If you would prefer to add in individual files rather than all files, unselect the “Select All” box, highlight the desired files and choose [Add Files].

Files may be removed from the package by highlighting the appropriate file and choosing [Remove Files]. If you wish to remove all files, select the appropriate “Select All” box and choose [Remove Files].



Packages Listing

Once you have one or more packages created, you will be shown a listing of the available packages from the Custom Packages window.

View
You may review or change the properties for any existing package by pressing on the [View] Button. This will open the package properties window, where you may update the information for the chosen package.

Save As
The [Save As] option allows you to create a replica of a highlighted package and save it under a new name. In addition to changing the name, you will also be able to change the files added and change the original package options such as "auto update".

Delete
You may, at any time delete an existing package by first selecting it from the list, and then clicking on the [Delete] button.

PlanWell Job Ticket
You may print a package by selecting the [PlanWell Job Ticket] button from the Packages Listing window. This will bring up the standard PDMS Job Ticket window, where you may then specify all of your printing options. The printing process is discussed in more detail later in this document.

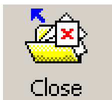
Note: When an order is received for a custom package, all of the needed information to print the order will be contained within the order ID.

Refresh Packages
By selecting "Refresh Packages" all documents within packages created to Auto Update will be immediately refreshed to the most current versions.

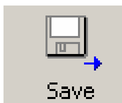
Save Order

You may change the order the packages are listed by highlighting a package and moving it up or down the list using the arrow buttons. Once the package order is how you would like it, choose [Save Order]

Sync. Packages
The synchronize packages button will force an immediate synchronization between the console and the browser of all package additions, deletions or changes.

Close 

By selecting this option, the project will close without saving any of your changes

Save 

By selecting save, all project information will save.

When you choose the [Save] button, three settings from within the employee preferences will apply. These settings are “Show Advanced Project Options upon Save”, “Show Advanced Project Options on Creation of Project” and “Close Project on Save”.

Project Synchronization

Upon closing a project, you will be prompted if you would like to “Synchronize” the project. Synchronizing a project will update any changes that you have made to the national vault where it will then be reflected online.

The synchronization process is discussed in more detail later in this document.

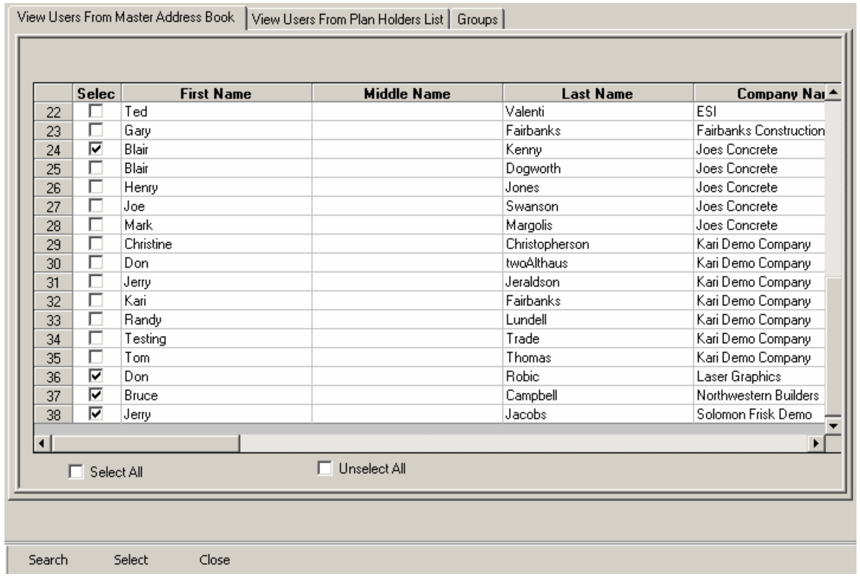
Advanced Project Options

Depending upon your user preferences settings, upon saving a project, you may be automatically brought into the Advanced Project Options window or asked if you wish to enter it. Within this window, you will be able to create the project address book, define the web settings and online project options, create the FAQ notification list and enable project popup text by selecting the appropriate page tab.

Address Book
For each project that you host on PlanWell, your customer can create and maintain a project specific address book. This Project Address book is populated from the Master Address book Users or Groups list. The creation of the master address book and of groups will be discussed later in this document.

This Project address book will generally serve as a distribution list, and may be modified at any time to include, or exclude recipients as needed during the course of a project. You may move users to the Project Address book by first selecting [Add from Address Book] from the Address book window.

From here you will be able to select user from the Master Address Book by placing a check in the box next to their name and choosing [Select]. You may utilize the [Search] button to locate the desired user more quickly.



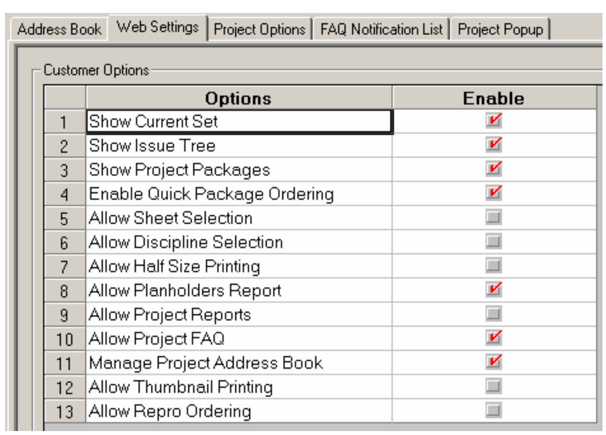
Master Address Book View

You may also choose the [Groups] tab to select users. From within this window, you may select entire groups to add to the Project Address Book.

Web Settings

The project options tab will allow you to assign the "Manage Permissions" option to one or more users in the customer's administrators group. A customer account which has been granted the option to "Manage Project Permissions" within the project options tab (discussed in the next section), will then be able to assign or deny the features which have been selected in this menu to other employees or user profiles for the specific project online. Only the options which have been selected will be visible to users with this permission.

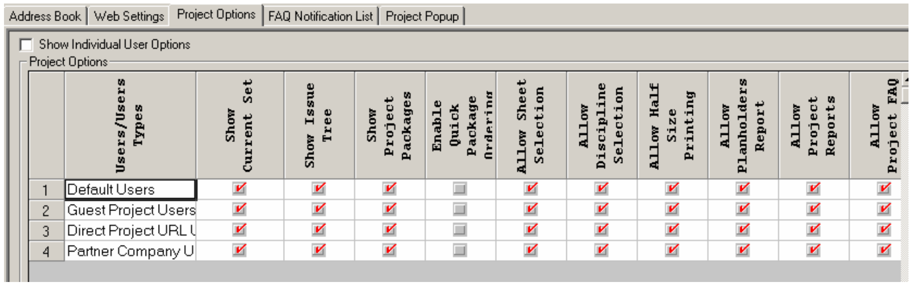
It is important to note, that options selected in the Web Settings tab do not have any automatic sychronization to the permissions given in the "Project Options" tab. Meaning, that if you provide a "Web Settings" option to allow half size printing, but did not enable a half size printing permission in the "Project Settings" tab, the user would then be able to assign themselves the permission after accessing the project online.



Web Settings Window

Project Options

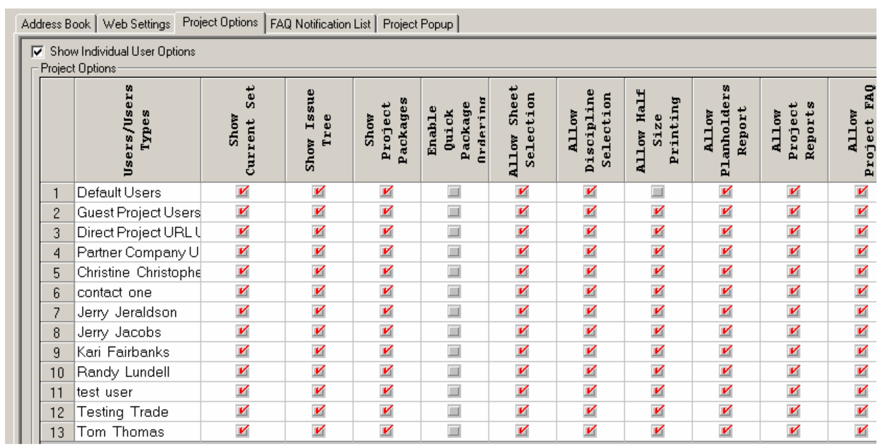
You may set different online project views to groups or individuals through the Project Options window.



Project Options Wndow – Groups View

These views can be defined for multiple groups of individuals: Default (Company) Users; Guest Project Users; Direct Project URL Users; and Partner Company Users. By placing a check in a box, you are turning that specific view "on".

By Selecting the box for "Show Individual User Options" you can further define these views for individuals who have placed online orders.



Project OptionsWindow – Groups and Users View

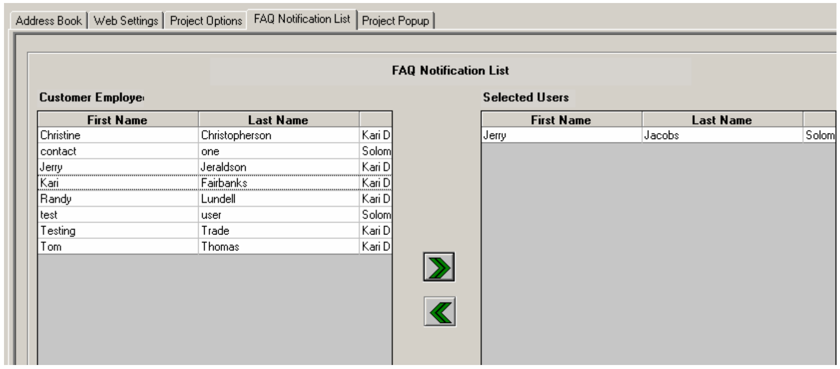
It is important to note that some permissions can only be assigned to users in the administrator's group.

> Note: As discussed previously in this document, if you attached any project documents through the "PH Attach" option, for this to be viewable online you must place a check in the box labeled "Planholders Custom"

> Note: As discussed in the previous section, in order for the "Web Settings" option to be enabled, you must place a check in the box labeled "Manage Project Permissions". This option is only available to administrators.

FAQ Notification List

Questions posted into the FAQ section can generate email notifications to select users.

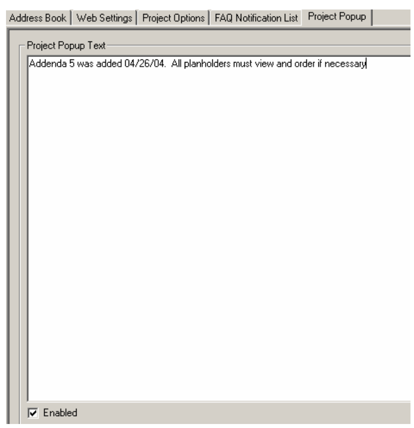


FAQ Notification List Window

The FAQ Notification List screen will show all Customer Employees within the box on the left. From these customer employees, highlight the appropriate name and move into the "Selected Users" box by choosing the [>>] button. Customer employees may be moved in and out of the notification list as necessary throughout the life of the project.

Project Popup

Occasionally our customers will have a message they would like all online users to receive. This can be done through the Project Popup screen. Any messages typed into this screen will automatically appear in a popup window whenever a user logs into the project online.



Project Popup Window

When you have made all necessary settings within the Advanced Project Options, choose [Save] to save these settings or [Exit] to close the advanced project options window without saving.

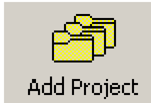
After closing the Advanced Project options window, you will be returned to the Project List window.

Toolbar Options Available in Project List Window

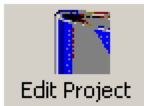
The menu bar in the project list window contains many options available for the creation, maintenance and printing of all projects in PlanWell. Many of these options have been discussed previously in this document and therefore will not be described in detail now.

Project Menu

The project menu lists options for adding, editing, deleting, moving and copying projects.

Add Project 

By selecting this option you may begin the process of adding a new project into PlanWell.

Edit Project 

Project may be edited by double clicking on the project name or by highlighting the project and selecting [Edit Project]

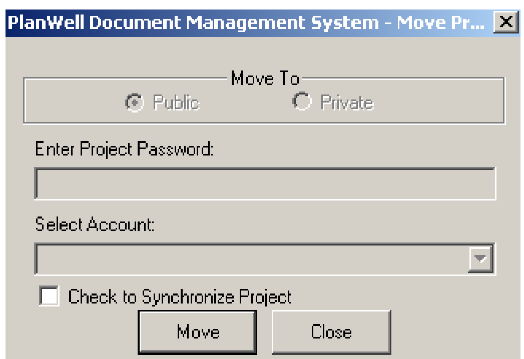
Delete Project

You may decide that a project is not worth Archiving, and you would just like to delete it. You may do this by selecting the [Delete Project]. Choosing this option will delete all of the database records associated with the currently selected project so be absolutely sure of your choice before proceeding. As with all of the tools in the PDMS console, this will only affect your database records, and will not delete your original High Resolution print files. If these are to be deleted as well, you will need to do that manually outside of the PDMS Admin Console.

Move Project

With the PDMS Console, you may move a project between the public and private Planrooms or from one company to another.

To move a project, you must first select it from the project list, and then select [Move Project]



Move Project Dialog

Here you may select whether you would like the moved project to be in the Public or Private Area. If private is selected, you will then have the option to create a project password, which users will need in order to access the project on the web.

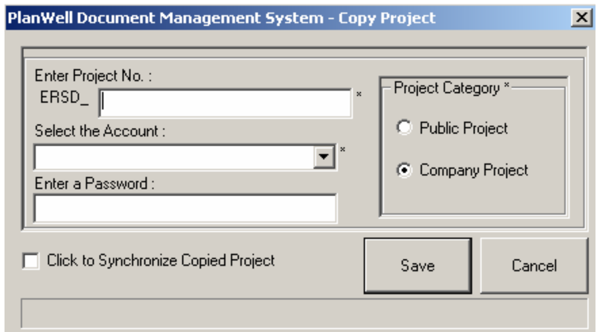
If it is moving to a private planroom, you may also choose which company you would like to move the project to. This may be any registered company which exists on your PlanWell site.

If you wish to update the National Vault to reflect the move, please be sure to select the “Check to synchronize” checkbox.

When you have finished entering the required information, you may select [Move] to complete the process, or Close to abort the move.

Copy Project
There may be times when a project needs to be hosted by more than one company. Perhaps the job has begun construction, and the General contractor would like to have a duplicate of the project accessible to his own group of sub contractors.

You may make a copy of a PlanWell project, by first selecting the project from the projects list and then selecting [Copy Project].



Copy Project Dialog

With the Copy Project Dialog window, you will then be able to assign a new project number, as well as define the account that you want to have host the copied project.

You may also select whether you would like the copied project to be Public or Private. If you choose to make it Private, you will need to assign a password to restrict access to only those users which have been invited to view the project.

To replicate this new information to the National Vault, be sure to select the checkbox labeled “Click to Synchronize Copied Project”.

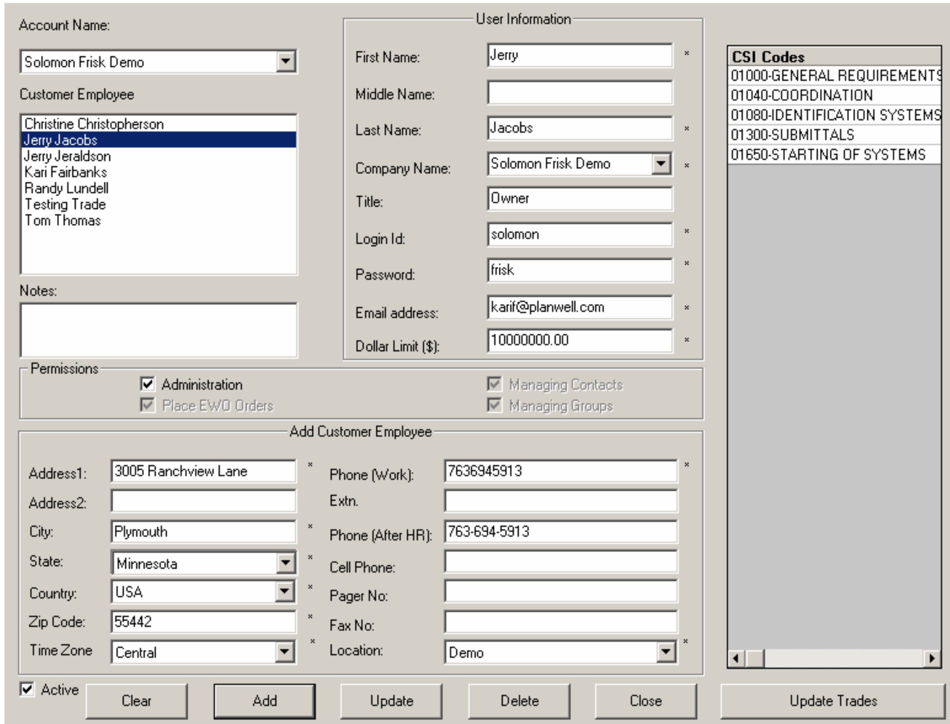
To complete the copy process, you may click on [Save] to record your changes, or [Close] to abort the copy process.

The status bar at the bottom of the Copy Project dialog box will allow you to verify the project copied successfully.

> Note: The copy function only copies the project in its current state. If a new issue is added to the project, this new issue must be manually added to both the original and copied projects.

Address Book Menu
The address book menu contains all options necessary to add and manage your customers address book.

Add Customer Employee
When a customer’s account is initially set up only one user account is created. PlanWell can provide very detailed information on online activity as long as every user has a unique log in username. By selecting [Add Customer Employee], you will be able to create additional login accounts for the customer’s employees. This will guarantee that online activity can be tracked to a specific user.



Add Customer Employee Window

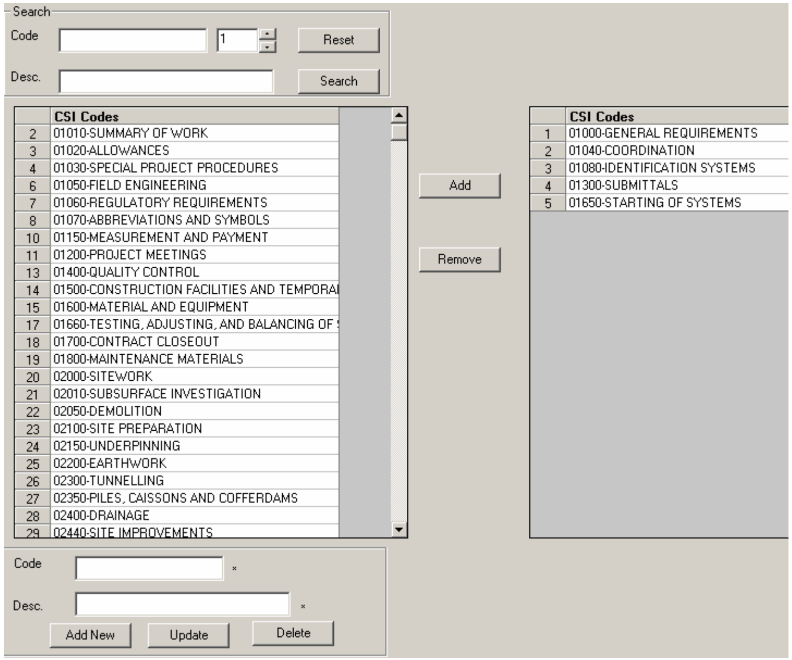
The Add Customer Employee window allows you to add, edit or delete any customer employees who will be using the system.

To add a new employee, begin by typing all required information including name, login ID, password, email address and dollar limit. The dollar limit assigned is the maximum amount this employee will be able to place an order for. For example, if you set this amount for $500.00 and the order comes to a higher amount than that, the order will not be able to be completed online.

Permissions will also need to be assigned to this employee. Make sure that you discuss this with the main contact at the customer's location to verify that you assign these correctly.

In addition to the above information, you will also need to specify an address for this employee. By default, the main company address will automatically populate.

You may also assign one or more Trade types to the user. By selecting [Update Trades], you will be brought into the window where you may select the appropriate trades for this individual.



Assign CSI Code

These codes can be assigned by highlighting the code and choosing [Add]. A new code may be added to this list by typing in the required information and choosing [Add New]. Existing codes may be edited or deleted.

Once all appropriate codes are assigned to the user, choose [Save]. This will bring you back to the main [Add Employee] window.

Once all required employee information is entered, select [Add]. To add another employee without closing out, select [Clear] and begin the process again.

To edit an existing employee, highlight the employee's name, make the necessary adjustments to the information and select [Update].

To delete an existing employee, highlight the employee's name and select [Delete].

Select [Close] to return to the project file list window.

Add Customer Contact

In addition to employees, customers will also want to add their contacts into the system. Select [Add Customer Contact] to complete this task.

The Add Customer Contact window will look identical to the Add Employee Contact window however you will not have the ability to assign a username, password, dollar limits or permissions.

To add a new contact, begin by typing all required information including name, login ID, password and email address.

In addition to the above information, you will also need to specify an address for this contact. By default, the main company address will automatically populate. If the customer wishes you to handle distribution to this contact, be sure to change the address to the contact’s address.

As is the case when adding a customer employee, you will have the opportunity to assign one or more Trade codes to this contact.

Once all required information is entered, select [Add]. To add another contact without closing out, select [Clear] and begin the process again.

To edit an existing contact, highlight the contact’s name, make the necessary adjustments to the information and select [Update].

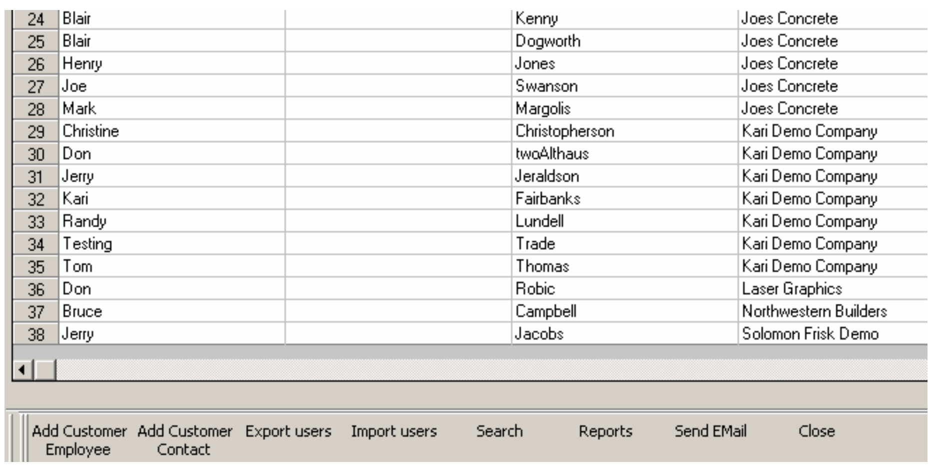
To delete an existing contact, highlight the contact’s name and select [Delete].

Select [Close] to return to the project file list window.

Address Book

Address Book – Users Tab

Although the Add Customer Employee and Add Customer Contact options allow for easy address book population and management, you will find that the additional capabilities of the Address Book option further simplifies the management of your customer’s employee and contact lists. From this window, you will be able to add or modify users, Assign users to groups, modify your group information, Import new users from a tab delimeted file, export users to a tab delimeted file, print a report of users and groups and send emails.



Address Book Window

Add Customer Employee / Add Customer Contact

By selecting either the [Add Customer Employees] or the [Add Customer Contacts] buttons, you will be brought into the same windows as previously discussed.

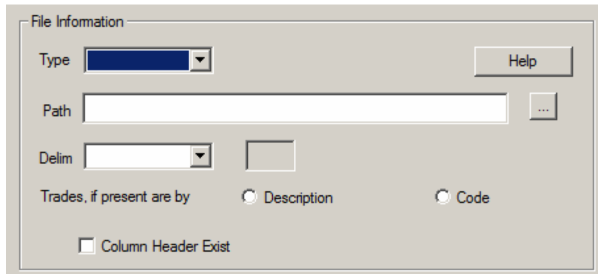
Export User

All address book users may be exported to an Excel document by selecting [Export Users]. After entering in a storage location for this file, choose [Save] to complete this export.

Import Users

Since many of our customers already have a rather extensive list of contacts that they may wish to have added to their address book, one of the most powerful tools within the Address Book is the ability to import in this list.

Once you receive an import file from your customer, you may import it by selecting the [Import Users] button from the Address book for that customer.



Address Book Import Window

You will need to identify the type of file being imported, the path to this file, the delimited information and finally if this file has a column header.

By selecting [Next] you will be brought into the Map Fields window. Each field PlanWell requires will be listed in bold text. By selecting the dropdown arrow next to each option, you will see information regarding the first user in the selected file. You will need to indicate the appropriate field value to each required field.

	Field Name	Field Value	Column No	Default Values
1	**First Name**	**Andrew**	**First Name**	
2	Middle Name		Middle Name	
3	**Last Name**	**Smith**	**Last Name**	
4	**Company Name**	**CDI**	**Company Name**	
5	Title		Title	
6	**Email**	**karif@planwell.com**	**Email**	
7	**Work Phone**	**555-5555**	**Work Phone**	
8	Work Ph Ext		Work Ph Ext	
9	Evening Phone		Evening Phone	
10	Cell Phone		Cell Phone	
11	Pager		Pager	
12	Fax	763-225-0624	Fax	
13	**Address1**	**4765 8th Avenue**	**Address1**	
14	Address2		Address2	
15	**City**	**Bloomington**	**City**	
16	**State**	**Minnesota**	**State**	
17	**Country**	**USA**	**Country**	
18	**Zip**	**55347**	**Zip**	
19	Trade&Rating			
20	UnionType			
21	MBE_Cities			
22	MBE_State			
23	WBE_Cities			
24	WBE_State			
25	DBE_Cities			
26	DBE_State			
27	DVBE_Cities			

Map Fields Window

For example, for the field name “First Name”, by selecting the dropdown arrow under “Field Option” the information regarding the first user in the imported address book will be listed. Scroll through this information and select the user’s first name. Continue this same process for all required fields. When completed, choose [Next].

> Note: It is only necessary to match the fields for the first user being imported; all other users will match up according to the settings defined.

All users will be listed in the Import Data Window. Names listed in green text are ready for import, names listed in grey text are invalid and names listed in red text indicate a failed import. Reasons for invalid or failed to import items will be listed. Once the information is corrected, choose [Finish] to import all users.

Reports

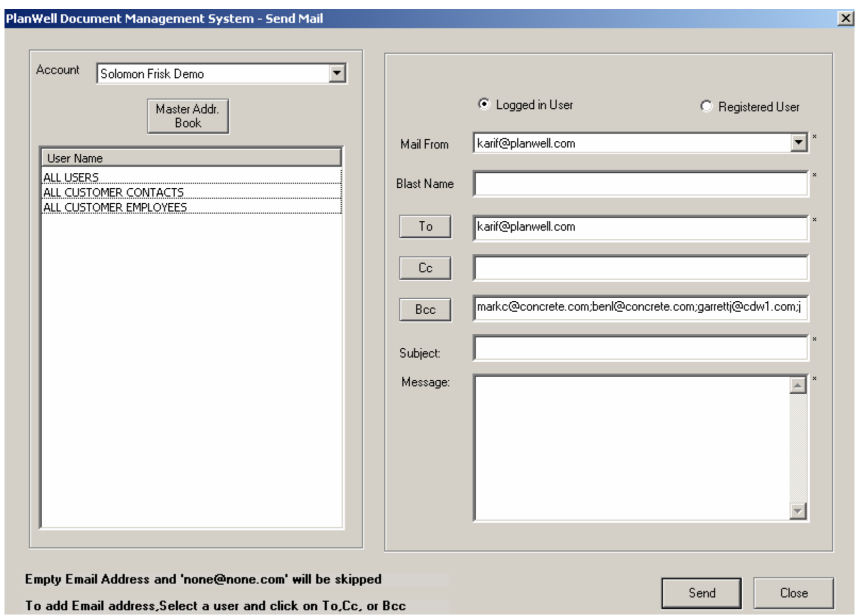
You may elect to print a report from the master address book, by selecting the [Reports] button.

At this point, you may determine if you wish to a report of users, groups, or users within groups report.

Pressing [OK] on this dialog will launch a crystal Report, which contains all of the basic details available for each user. Since the report is written for crystal Reports, you may print the report, or export the data directly into one of many available formats.

Send Email

Through the Address Book, you may also send emails to any users in the address book.



Send Email Window

Along the left column you will see a listing of potential email recipients. You may add individuals to this list by choosing [Master Addr. Book], selecting the desired recipients, and choosing [Save]. This will expand the list of potential recipients to include those selected individuals.

Along the right column, begin by specifying if the email is to come from you or a registered user by choosing the appropriate radial button. If you select registered user, you will have a dropdown list available of all registered users.

Select a Blast Name for this email. This name will be used later if you choose to review the status of this email.

Next, highlight recipients from the left column and choose the appropriate location in the right column. You may either move them into the Cc line or the Bcc line.

Type in the subject of the email. Remember, as with all email messages, it is vital that you clearly define the subject in the Subject line.

Finally, type in the message text and choose [Send].

Close
By selecting [Close], the address book will close and you will be returned to the project list window.

Address Book – Groups Tab
The second tab in the address is book for Groups maintenance and management. Within this window, you will be able to Create, Edit, view Reports, Send Email, Search and Close the address book.

Create
Users can be organized into logical groups through the Create option. Begin by defining a group name then simply move users from the bottom address book window into the upper group window. When all appropriate users have been added, choose [Save].

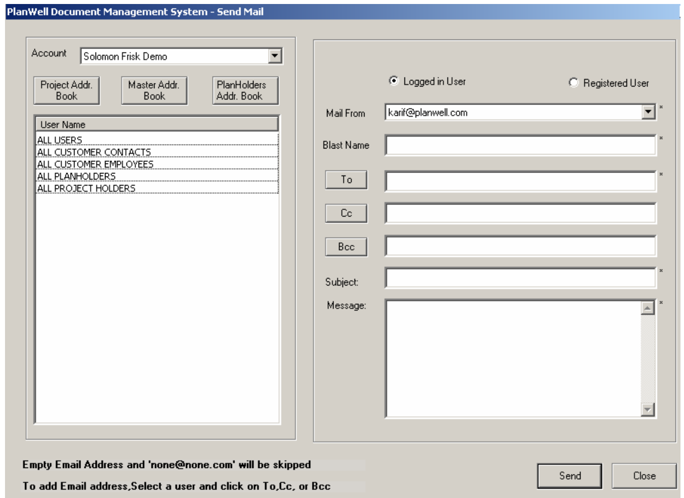
From within the Create option, you may also highlight any group and either edit or delete the group.

Edit
This options provides another method or changing group membership or deleting a group altogether.

Reports / Send Email / Search / Close
All options operate the same within the groups tab as through the users tab. Further information may be found in the previous section.

Address Book Import
This option will bring you straight into the Address Book Import process outlined above.

Send Project Emails
Project specific email may be sent by first highlighting a project and then selecting [Send Email]. Unlike the send email option inside the address book, this Send Email window will include the ability to select recipients from the project address book or plan holders list.



Send Email – Project Specific

The functionality is the same as it was in the Send Email option within the Address Book.

View Sent Project Emails

Often you will find the need to view email sent. This may be done by choosing [View Send Emails]. All blasts will be listed along with information on which account sent it, who it was address from, the "from" address, the sent date and the status. This message may be resent as it was initially by selecting [Resend].

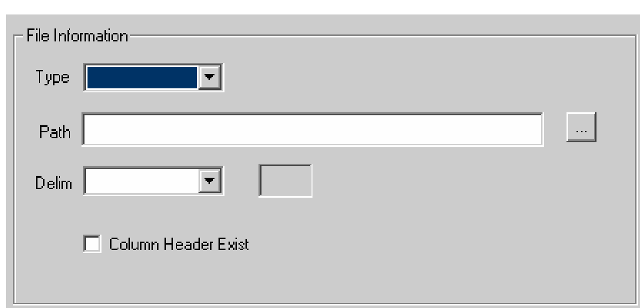
These emails may also be opened and reviewed by either double clicking on the appropriate name or by highlighting the email and choosing [View]. This is an easy way to include an additional recipient while guaranteeing that he receives the exact same message.

Manage Trades

For each customer using PlanWell, you may customize their trades listing. By choosing [Manage Trades] you will be provided with a current listing of the customer's trades listing. You may choose to add, edit or delete any of the existing trades.

Import Trades

Your customer may have a unique listing of trades he wishes to add into PlanWell. Rather than adding these trades in individually, you may use the Import Trades option to do this in mass. Once you receive an import file from your customer, you may import it by selecting the [Import Trades] option.



Import Trades Window

You will need to identify the type of file being imported, the path to this file, the delimited information and finally if this file has a column header.

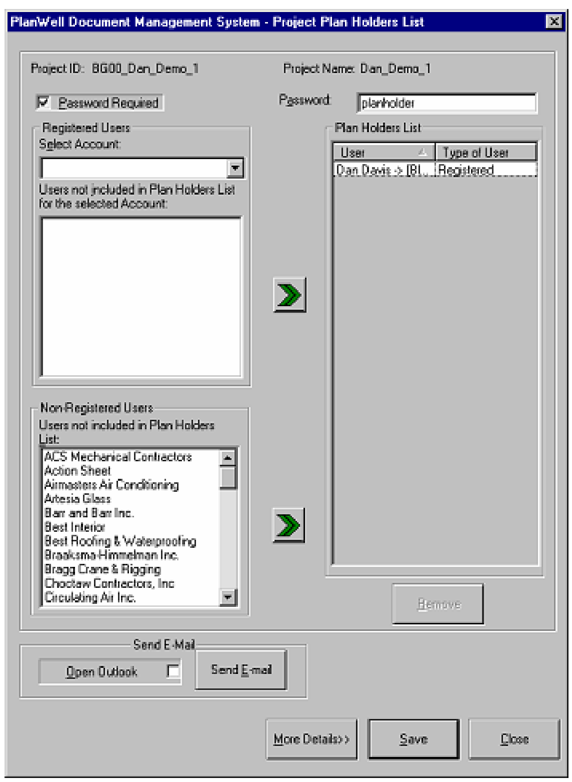
By selecting [Next] you will be brought into the Map Fields window. Each field PlanWell requires will be listed in bold text. By selecting the dropdown arrow next to each option, you will see information regarding the first user in the selected file. You will need to indicate the appropriate field value to each required field. Continue this same process for all required fields. When completed, choose [Next].

All information will be summarized on the next screen. Finish the import by choosing [Finish].

Plan Holders Menu Option

Edit Plan Holders List
By highlighting a project, you may add or remove names from the plan holders list by selecting [Edit Plan Holders List].

Since the Plan holders list will track all orders placed on the system for a particular user, a user does not need to order something from the project before they can be added to the list. This is useful when someone wants to receive change notices on the project, but may not wish to actually order anything.



Plan Holders List

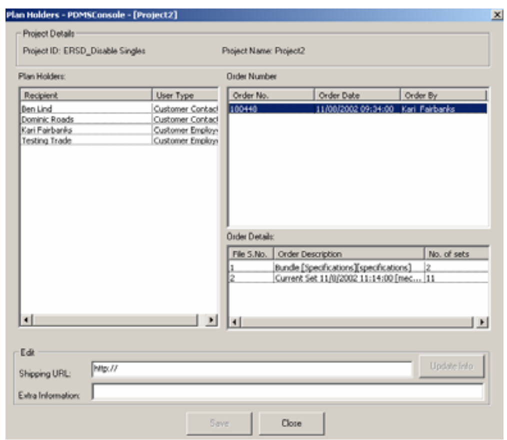
You may also add Walk-in (non-registered) users to the Plan holders list. However, before any user may be added to the list, they must first be added to the PLANWELL database. For information on adding a non-registered user to the database, please see “Adding a Non-registered user” later in this document.

You may also set a password which will restrict access to the plan holders list to only those people whom you choose to authorize. To do this, place a check in the box labeled “Password Required”, and a textbox will appear, allowing you to enter a secure password.

You may send an email message to any user on the list by first selecting their name from the list, and then clicking on the [Send Mail] button. If you do not check the “Open Outlook” option, you will be given a small text editor in which to prepare your message. Otherwise Microsoft Outlook will load, if installed, and you may enter your mail message with it.

Details

You may also view and update the details associated with orders that have been placed on the system, by selecting either selecting the [More Details>>] button in the Edit Plan Holders window or by selecting [Details] under the Plan Holders menu option.



Plan Holder Order Detail Window

From this window, you may edit or add order details for display on the Plan Holders list. To add details to a particular order, you may select the plan holder from the list, which will bring up a list of orders relating to that user. You may then browse through the list of orders made by that individual, to select the one that you are looking for.

Once selected, the ‘Shipping URL” and “Extra Information” textboxes will be activated to show you any additional details that have been entered for the order, or to allow you to type some information in.

To save the information, and make it available on PlanWell, you must click on the button labeled [Update Info] for each record that you modify.

Print Queue Menu Option

This menu option contains information on both local and remote printing queues.   These have been discussed previously in this document.

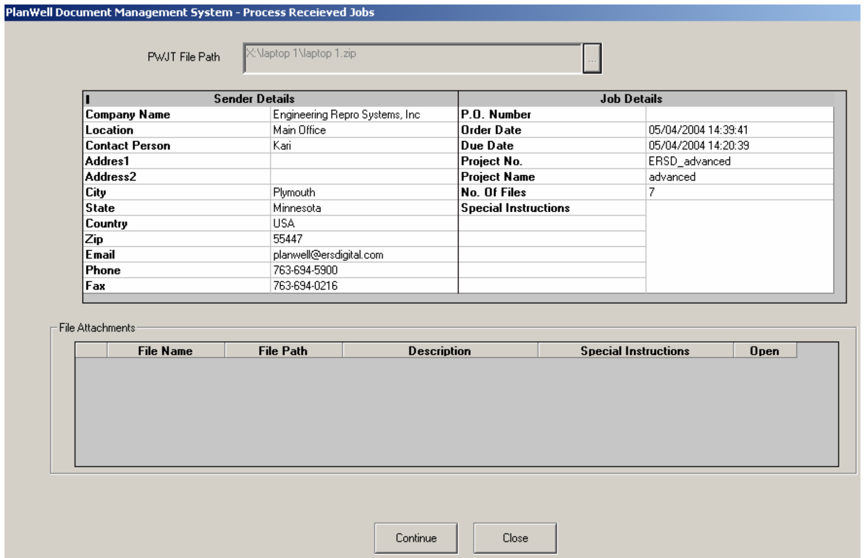
Order Processing Menu Option

PlanWell 5.0 allows for online and remote orders to be processed quickly and easily through the PDMS Admin through options in the Order Processing menu.

Process Remote Order

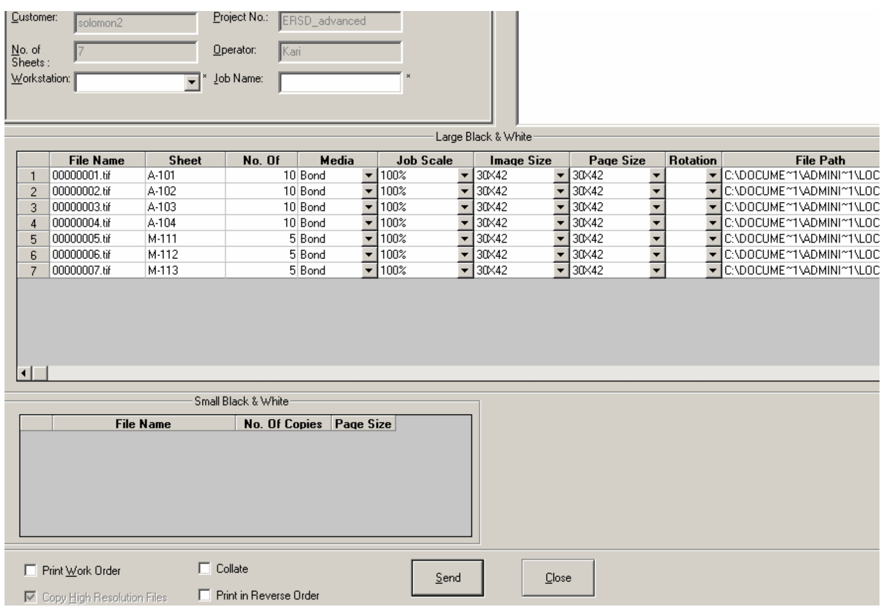
Remote orders coming into your office will be dropped into the location you specified when you created your remote queues. This creation process was discussed previously in this document.

You will be notified of all remote orders both via email and through the order monitor. Begin the printing process by selecting [Process Remote Order].



Process Remote Order – Select Order

Browse to the location of your remote queue and select the appropriate job name. This will automatically populate the remaining required information. Be sure to check for any separate file attachments. Choose [Continue].



Process Remote Order – PlanWell Job Ticket

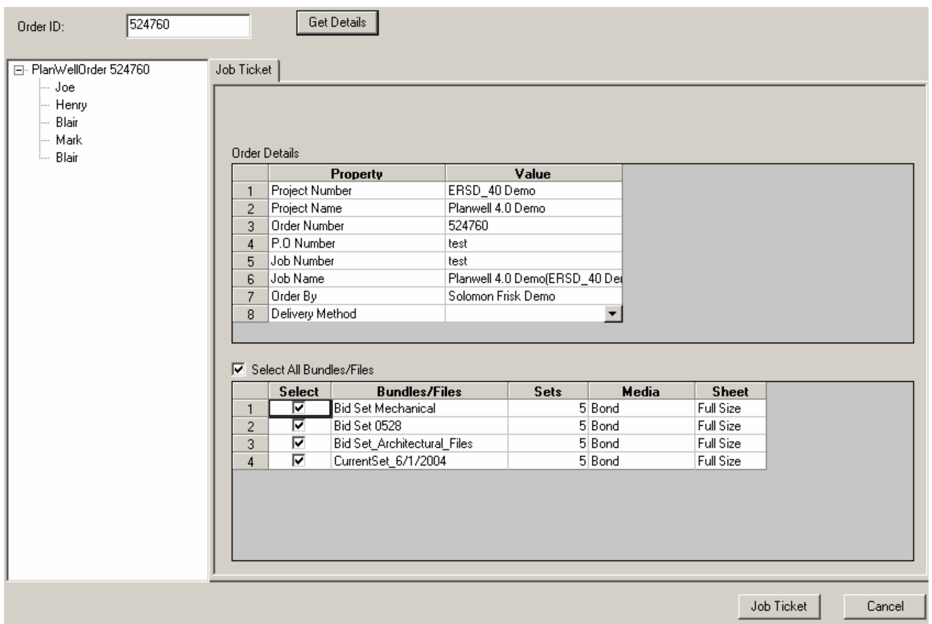
You will now be finishing the printing process as you would any local print jobs by selecting a queue, assigning it a name and setting any additional necessary options.

When the printing is done and you select [Close], you will be prompted if you wish to delete the remote job information from your FTP location.

Process Order

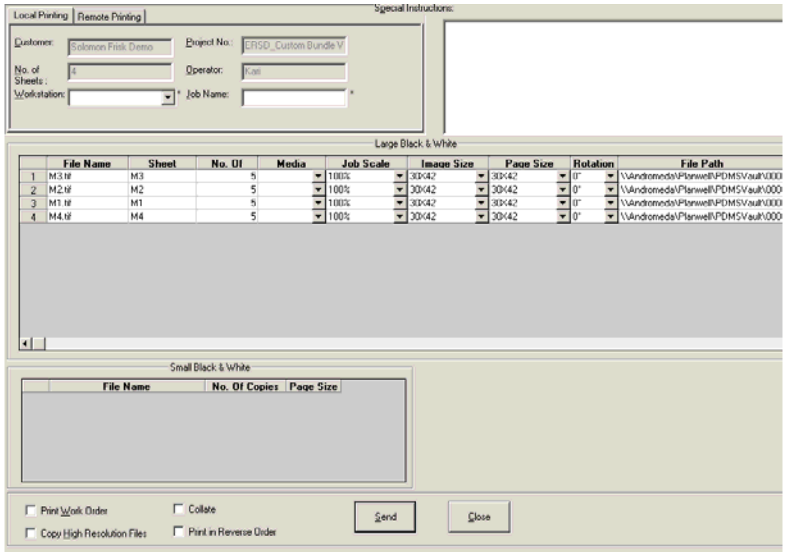
When a customer places a PlanWell order from the web, you will be notified via the "Order Monitor" on your Employee Browser. This notification will provide an order number with all order details embedded in it. This number can be used by the console to automatically generate a Job Ticket for processing through your production software.

Begin the job ticket creation process by selecting [Process Order]. Type in the order number and select [Get Details].



Information regarding the order will automatically populate the rest of the window. All bundles and files included in the order will be listed and, by default, selected. You may choose to send all items to one print queue or break the order up between multiple queues as well. If you choose to send them to separate queues, be sure to verify that all bundles and files have been accounted for.

Once all desired bundles and files have been selected, choose [Job Ticket].



PlanWell Queue

Within the PlanWell queue, you will first need to select if this is to be printed locally or remotely.

Local Printing
If you select to print the order locally, begin by specifying the workstation – or print queue – to send the order to. The creation of these queues was discussed previously in this document. Next, type in a job name and any special instructions.

All documents included in the order will be broken down by "Large Black and White" and "Small Black and White".

Additional options available are:

Print Work Order
When this checkbox is selected, a Job Ticket Print Order will be printed detailing the sheets and print information that you specified in this menu. You may use this as a production work order, or keep it as a print receipt for distribution tracking.

Collate

Print in Reverse Order
If you are printing on equipment which flips the sheets as they are printed, you may choose to Print in Reverse order so the documents come out of the printer in the correct order.

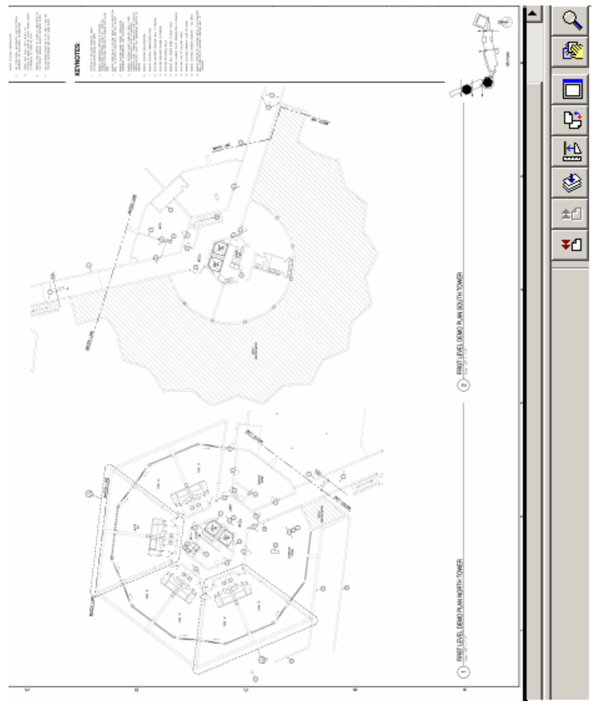
Copy High Resolution Files
You may choose to send a copy of the high-resolution files along with the print request.

Copy SBW File
You may choose to send a copy of the small black and white files along with the print request.

Do Not Print SBW
You may choose to print your small black and white documents through a different means. This option will allow you to accomplish this task.

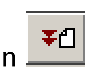
You may now adjust the placement of your individual plans on the page, in order to compensate for mismatched originals, or a poorly fed scan.

The Print Alignment window is accessed from the Job Ticket list, by right clicking on a filename, and selecting “Alignment” from the pop up menu.



Print Alignment Window

Here you may the icons along the right toolbar to properly align the document.

Once you are satisfied with the changes, you may click on [Next File] icon  to set the values in the current Job Ticket.

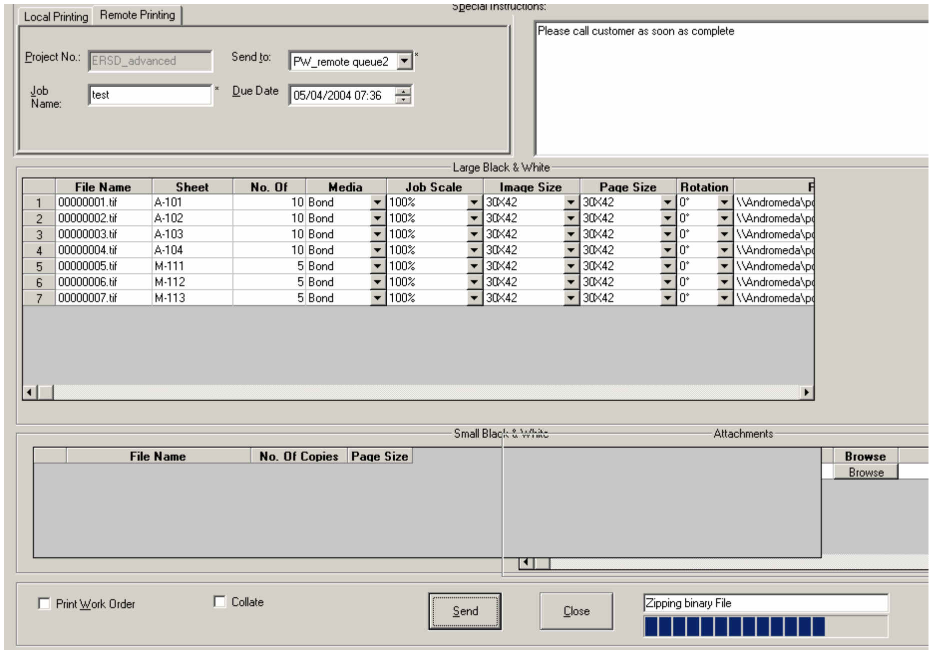
If the shift that you make is going to be common to all of the sheets that you have selected for printing, you may automatically apply these values to all sheets by clicking on the [Apply All]  icon.

Once all necessary settings are completed, return to the job ticket window by selecting the [Job Ticket] tab at the bottom left corner of the window.

The order can now be sent to the print queue by choosing the [Send] button.

Remote Printing

The process for sending an order to a remote queue is similar to the process for printing to a local queue. In the case of a remote printing request, copies of the high resolution print files will be placed into a “Zip” file, along with a PlanWell job ticket, which references them from a current directory.



Begin by selecting the remote location you wish to send this to from the dropdown list. Assign a Job Name, Due Date and any special instructions.

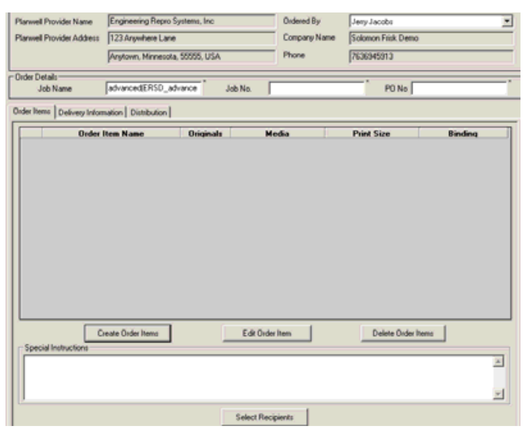
You may also choose to attach a separate document. You may choose to utilize this feature to include a distribution list or additional special instructions. As with local printing you may choose to print a work order or collate the order.

When all details are set, choose [Send]. A progress bar will indicate the status of the file transfer. When the transfer is complete, you will receive a success message.

Place Order

In previous versions of PlanWell, phone, email and/or fax orders from customers became a difficult process, as there was no functionality allowing for these orders to automatically go into the order history or Plan Holders List. PlanWell 5.0 has introduced a Place Order feature which will now allow you to do just that.

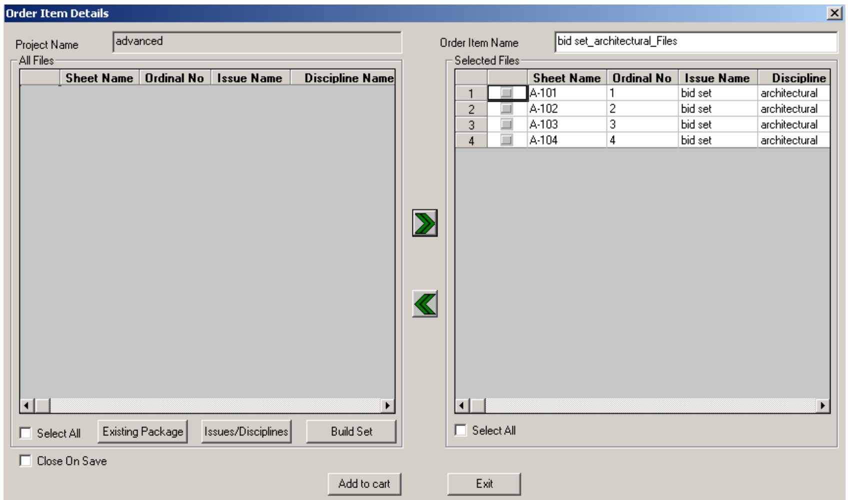
Begin the order process by selecting [Place Order].



Order Items Window

Select “Ordered By” from the dropdown box. Specify a job name, job number and PO number if provided to you. This information must come from the customer, do not simply create a job or PO number.

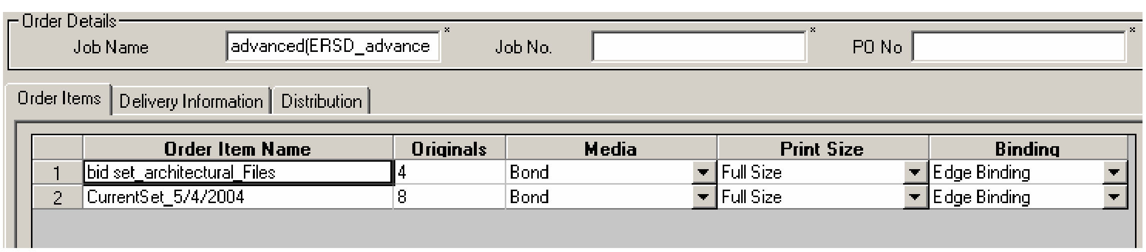
Next Select [Create Order Items]



Add Items to Cart

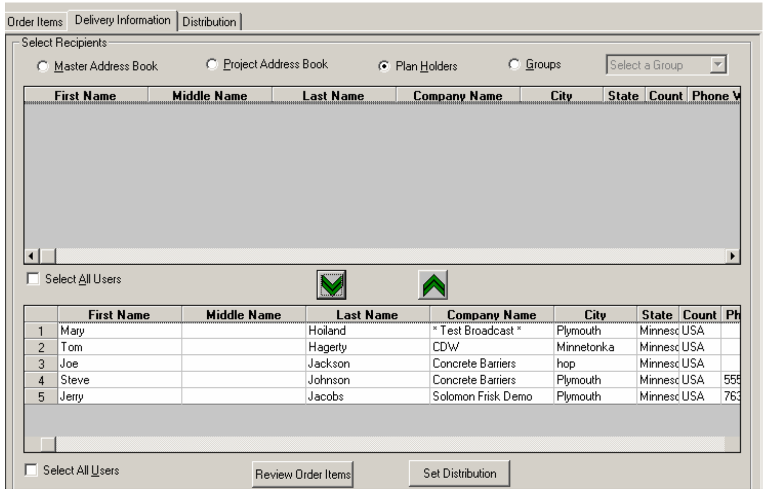
Documents may be selected by “Existing Packages”, “Issues/Disciplines” or by “Build a Set”. All documents or packages which meet the criteria you specific will be listed under the “All Files” section. These items may be moved into the “Selected Files” section by clicking on the [>>].

If you wish to add multiple packages or bundles choose [Add to Cart] to move the selected files into the cart and allow you to begin the selection process again. Continue to build selections and add to cart until all items have been selected. Choose [Exit] to return to the main Place Order window.



Items in Cart

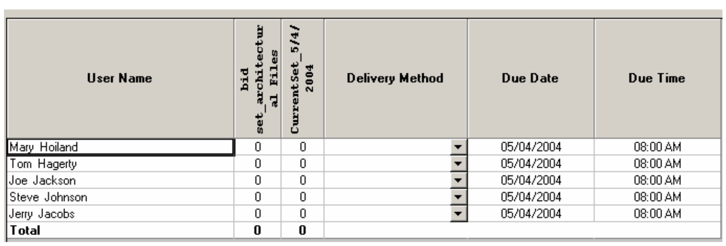
You will now find all items selected listed in your cart. You may either click on [Continue] or select the “Delivery Information” tab.



Distribution List

You will now have the opportunity to create a distribution list. You may find users by selecting the Address Book option. Within this option are tabs for Master Address book, Project Address Book and Plan Holders List. You may choose users from any of these areas. They may all be added by choosing “Select All Users” or you may add users one by one.

By choosing [Set Distribution] the order process will continue.



User Name	bid set_architectural Files	CurrentSet_5/4/2004	Delivery Method	Due Date	Due Time
Mary Hoiland	0	0		05/04/2004	08:00 AM
Tom Hagerty	0	0		05/04/2004	08:00 AM
Joe Jackson	0	0		05/04/2004	08:00 AM
Steve Johnson	0	0		05/04/2004	08:00 AM
Jerry Jacobs	0	0		05/04/2004	08:00 AM
Total	**0**	**0**			

Quantity and Delivery Information

As with online orders, it is necessary to define the quantity for each item ordered, delivery method, due date and due time. Information entered may be applied down by right clicking on the information and selecting “Apply Down”.

The order will be placed by selecting [Place Order]. You will receive an order confirmation which will include an order number so you may begin the printing process.

Repro Services Menu Option

All items within this menu option have been discussed previously in this document.

Preferences Menu Option

All items within this menu option have been discussed previously in this document with the exception of Display Options.

Display Options

By selecting Display Options, you will have the opportunity to define the Project List view. You may select which columns you wish to view and set the order of these columns.

Note: Project Status, Project Name and Project Number are not editable columns.

Synchronize Menu Option

Highlighting a project and selecting [Sync Project] will update any project information which is new or has changed.

Choosing “Synchronize Accounts” will update any account information which has been changed through the Employee Browser to the PDMS console.

When you choose to synchronize projects or accounts with the national database, a request is placed with the replicator application running on the PlanWell SQL server.

To view the status of your synchronize request, you may click on the icon labeled “Synchronize Status” to display the “Synchronization Monitor”.

As you refresh the monitor, you may see the status of your request change from “Pending” to “in process”, and finally the status will change to either “Success” or “Failed”.

This process will generally complete in just a few minutes, if you notice that it has been in process or pending for an unusually long period of time (like an hour), then you may want to have your IT department look at the server to be sure that it is running, and properly connected to the network and VPN.

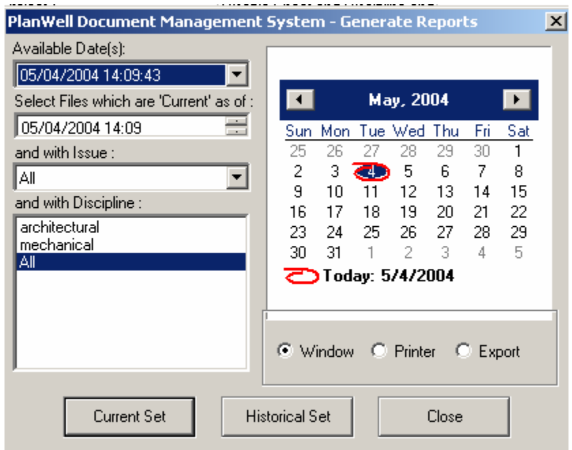
With a successful replication, your project and / or changes will be available on PlanWell. You may remove any completed items from this list, by selecting them, and then pressing “Purge Request”. Items which display as “In-Progress” may not be purged.

With the “Select search mode” options, you may restrict the items shown to reflect all requests which have been made from your location, or only those that have been requested by the current user. An additional option, Scheduler requests, will display all replication requests which are made by the server itself.

Reports Menu Option

Project Report
Now that you have assembled all of the issues, disciplines and files into a well-structured project database, you may use the Reports features to create very detailed reports which may be used to provide feedback to a customer, or as an internal tracking tool for your in-house staff.

To create a report, you must first select a project from the Project list, and then select [Project Report].

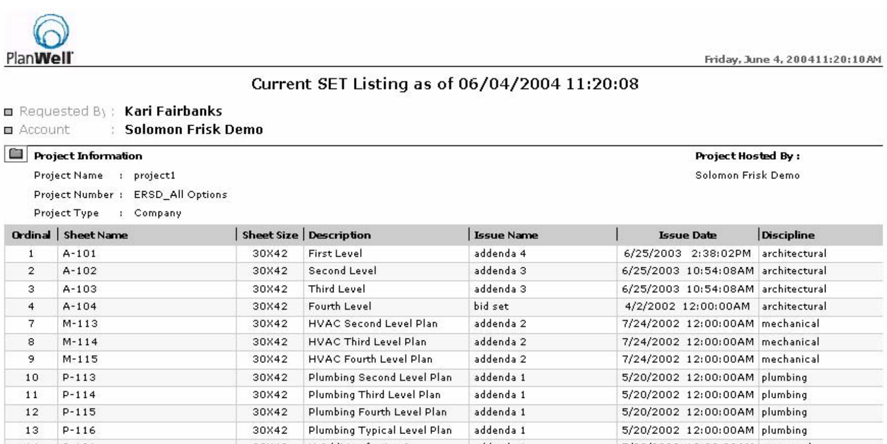


When you select "Generate Report", you will be given a set selection dialog so that you may determine exactly which files you would like to include in your report.

Next choose the type of output that is desired for the report. The choices include:

Window – a preview will be displayed on screen which you may then print, or export.
Printer – Your report will be printed directly to any available printer on your network.
Export – You may also choose to export the information directly to an Excel spreadsheet, comma delimited file, Word document or one of several other formats, which you may then email to a customer, or use with another application.

Once you have defined the selection criteria, you may then select either a "Current Set" or a "Historical Set" report.



PlanWell

Friday, June 4, 2004 11:20:10 AM

Current SET Listing as of 06/04/2004 11:20:08

Requested By : Kari Fairbanks
Account : Solomon Frisk Demo

Project Information

Project Name : project1
Project Number : ERSD_All Options
Project Type : Company

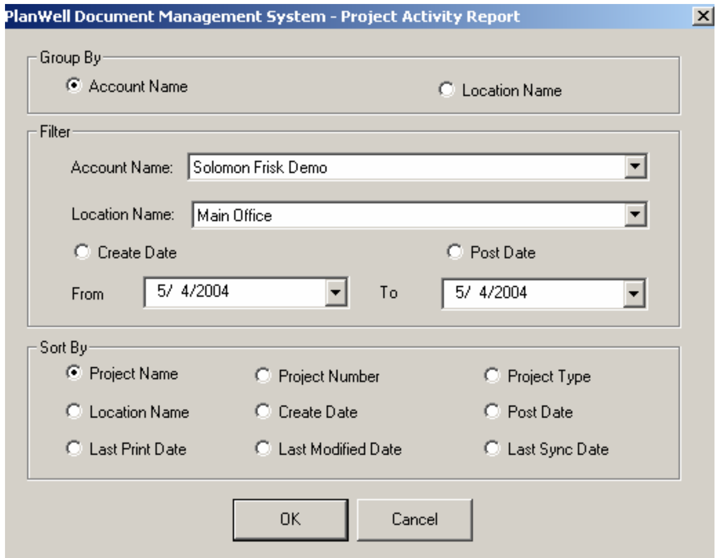
Project Hosted By :
Solomon Frisk Demo

Ordinal	Sheet Name	Sheet Size	Description	Issue Name	Issue Date	Discipline
1	A-101	30X42	First Level	addenda 4	6/25/2003 2:38:02PM	architectural
2	A-102	30X42	Second Level	addenda 3	6/25/2003 10:54:08AM	architectural
3	A-103	30X42	Third Level	addenda 3	6/25/2003 10:54:08AM	architectural
4	A-104	30X42	Fourth Level	bid set	4/2/2002 12:00:00AM	architectural
7	M-113	30X42	HVAC Second Level Plan	addenda 2	7/24/2002 12:00:00AM	mechanical
8	M-114	30X42	HVAC Third Level Plan	addenda 2	7/24/2002 12:00:00AM	mechanical
9	M-115	30X42	HVAC Fourth Level Plan	addenda 2	7/24/2002 12:00:00AM	mechanical
10	P-113	30X42	Plumbing Second Level Plan	addenda 1	5/20/2002 12:00:00AM	plumbing
11	P-114	30X42	Plumbing Third Level Plan	addenda 1	5/20/2002 12:00:00AM	plumbing
12	P-115	30X42	Plumbing Fourth Level Plan	addenda 1	5/20/2002 12:00:00AM	plumbing
13	P-116	30X42	Plumbing Typical Level Plan	addenda 1	5/20/2002 12:00:00AM	plumbing
14	S-101	30X42	N Addition footing &	addenda 1	5/20/2002 12:00:00AM	structural

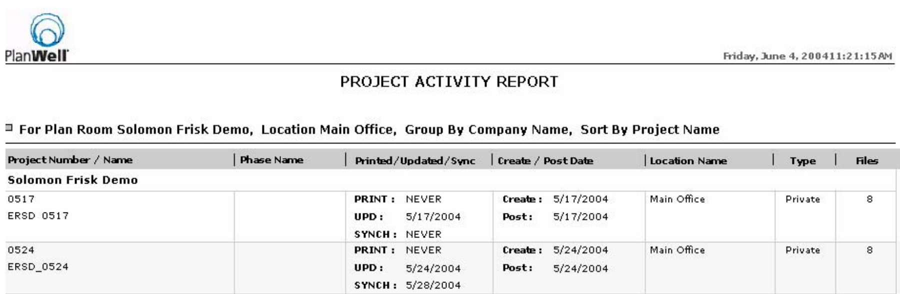
Project Report Example

This will generate a report summarizing all documents which meet the criteria you specified.

Activity Report
Reports can also be generated listing customer or location specific PlanWell activity by selecting [Activity Report].



Begin by defining if this is to be a report based on account name or location. Specify the necessary filters and select the “Sort By” settings. Choose [OK] to create the report.



PlanWell

Friday, June 4, 200411:21:15AM

PROJECT ACTIVITY REPORT

For Plan Room Solomon Frisk Demo, Location Main Office, Group By Company Name, Sort By Project Name

Project Number / Name	Phase Name	Printed/Updated/Sync	Create / Post Date	Location Name	Type	Files
Solomon Frisk Demo						
0517 ERSD 0517		**PRINT :** NEVER **UPD :** 5/17/2004 **SYNCH :** NEVER	**Create :** 5/17/2004 **Post:** 5/17/2004	Main Office	Private	8
0524 ERSD_0524		**PRINT :** NEVER **UPD :** 5/24/2004 **SYNCH :** 5/28/2004	**Create :** 5/24/2004 **Post:** 5/24/2004	Main Office	Private	8

Activity Report Example

Advanced Operations Menu Option

The Advanced Operations menu option contains additional project management tools, many of which we have discussed previously.

Archive / Restore Project

If you are hosting projects which have not been accessed for a few months, and have little likelihood of generating any orders in the near term, you should probably consider archiving them to CD.

The Archiving process, will create an exact duplicate of the folders which exist on your RAID, along with all of the necessary information that the system will need to restore the project, should it ever come “Back to Life”.

> Note: When a project is “Archived”, you will not be able to access it with the PlanWell console until such time that it has been restored. Customers however will be able to see it and access it online.

To archive, highlight the project, and select [Archive/Restore Project]. As discussed previously, projects may also be archived by opening the project and selecting the Archive icon.

The system will then ask you to select a directory for the purpose of holding the copied files. It is important that you select an empty directory, with enough space available to hold all of your High Resolution files.

You may enter a name for the CD Volume, or let the system define one for you based upon the project name.

When you press [Prepare Arch.] the process will begin. A status bar will show you the progress that is being made.

When this process is complete, you may then load a blank CD into your CD burner, and record the contents of this temporary directory to it.

After you have completed the CD, you may then select the "Verify CD" checkbox, and press [Archive] to allow the PlanWell system to compare its database to the information which has been written to the CD. If everything is as it should be, the system will prompt you that the archive process has completed successfully, and you may then delete the project folder from your RAID.

> *Important Note:* Please be sure to label your CD with the Volume label that was entered during the Archive Process. It should then be stored in a secure place in case it is ever needed again.

Restore

If at a later date, you find that this project needs to be accessed in the PDMS Admin Console, you may select the project from the project list, enter the Archived CD in your CD drive, and select [Archive/Restore Project].

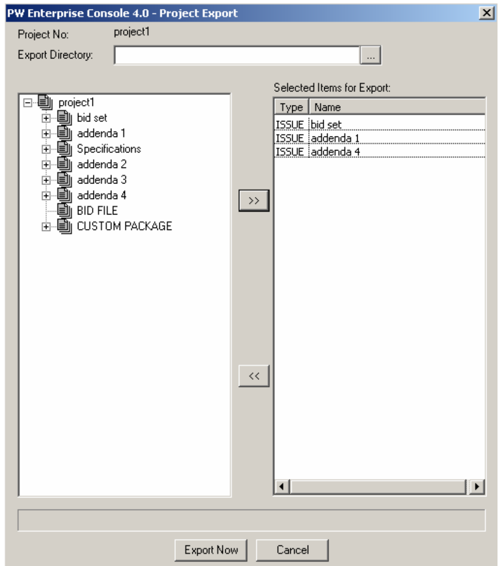
This process will re-create the original files into a new directory on your RAID, and allow you to manage the project as any normal project.

Export/Import Project

PlanWell Enterprise allows you the ability to Export a project, along with its complete database, so that it can be imported by another company running PlanWell Enterprise for their own management and control.

Export Project

To export a project, you must first highlight it from the project selection list and then select [Export/Import Project].



Export Project

Here, you will be allowed to browse for, or enter a folder name where you wish the temporary files to be located. Be sure that you have enough space available to hold the entire project.

Next, you may select which portion of the project you would like to export. For instance, you may select the project name to export the entire project or you may choose to simply export an issue, discipline or custom package. Make the selection by highlighting the appropriate item then move it to the “Selected Items for Export” column by clicking on the [>>] button.

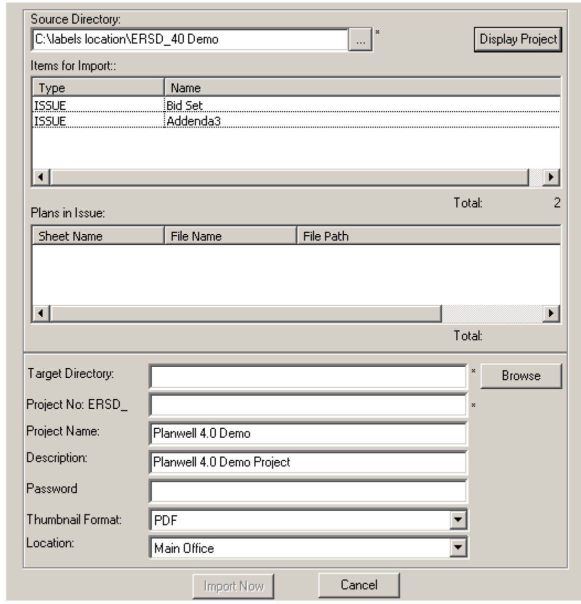
When you then select [Export Now], all of the High Resolution files matching your export selection, and related database information for the project will be copied to the folder, where you may then send them via FTP, or write them to a CD, for import by another PDMS user.

Import Project

To Import a project which has been created with the Export routine described above, you must first select the company that you are going to import the project for, and make it active by selecting it from the Company Selection window. You may then select [Export/Import Project].

The system will then ask if this is to be a “Company” or a “Public” project for PlanWell.

When you made your selection, you may select [OK] to continue the import process.



The Import Project Window

With this form, you must first navigate to the folder which contains the "Exported" files.
Once found, by selecting [Display Project] the Project Files List will be updated to reflect the files that are to be imported.

You may then enter a target directory on you RAID which will serve as the storage location for the High Resolution files.

At this point, you may enter a unique project number for the project, and select [Import Now] to complete the process.

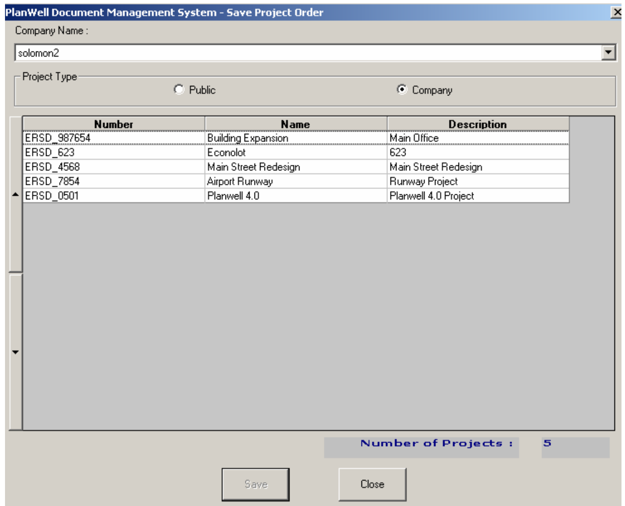
After you have verified that the project has imported successfully, you must synchronize it before it will appear in PlanWell.

Important Note: An imported project will not contain any PlanHolders information. This information is collected uniquely, for each location.

Advanced Project Options
Advanced Project options have been discussed previously in this document. In order to access the Advanced Project Options from the project lists window, you must first highlight the project then select [Advanced Project Options].

Save Project Order
By default, the project list will show projects in the order that they were entered into PlanWell. This may not be the way that you will want to have them listed online.

You may re-arrange the project order by clicking on the "Save Order" icon. This will load the "Save Project Order" dialog window.



Save Project Order

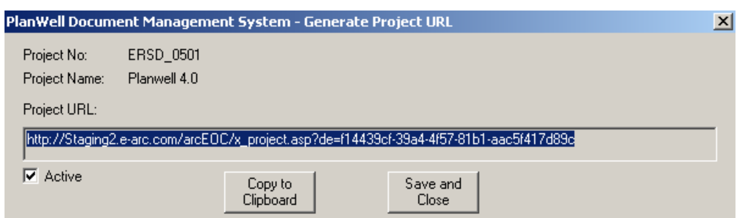
Here, you may select a project from either the company or public list that you wish to move, and then press on the [↑] or [↓] arrow to move the project up or down in the list.

When you are happy with your changes, you may click on [Save] to record the changes, or [Close] to exit without saving.

The project list online will now be updated to reflect the new project order.

URL for Project

For all projects in PlanWell, you may create a direct URL into the project. To create this URL, highlight the project and select [URL for Project].



URL for Project

You may now copy the provided information into your clipboard and provide it to your customer.

To deactivate a URL, uncheck the box next to "Active". This will stop any users from utilizing this URL to access the project.

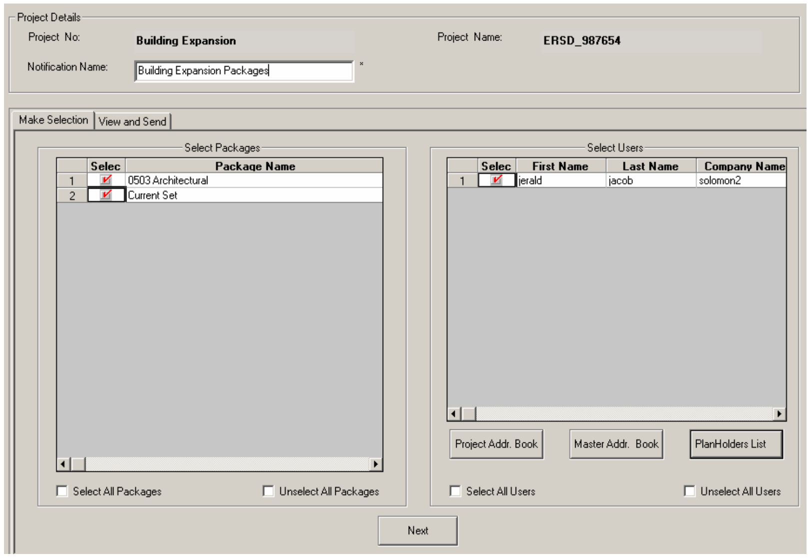
Important Note: Since this URL goes directly into the project, it bypasses the security you may have put into place. For example, all private projects are password protected however users of this URL will be brought into the project without providing that password. For this reason, be very careful whom you give this URL to.

Send Package Notifications

We discussed previously in this document the process of sending email to users in the address book. The Send Package Notification feature expands this functionality to send information regarding packages to users. Generally, this feature will be used to allow the

Project Owner to send package notifications to their subcontractors. In addition, through this notification you may define a specific number of package sets the Project Owner may be willing to cover the cost of for the subcontractor.

To open the package notification window, select [Send Package Notifications].



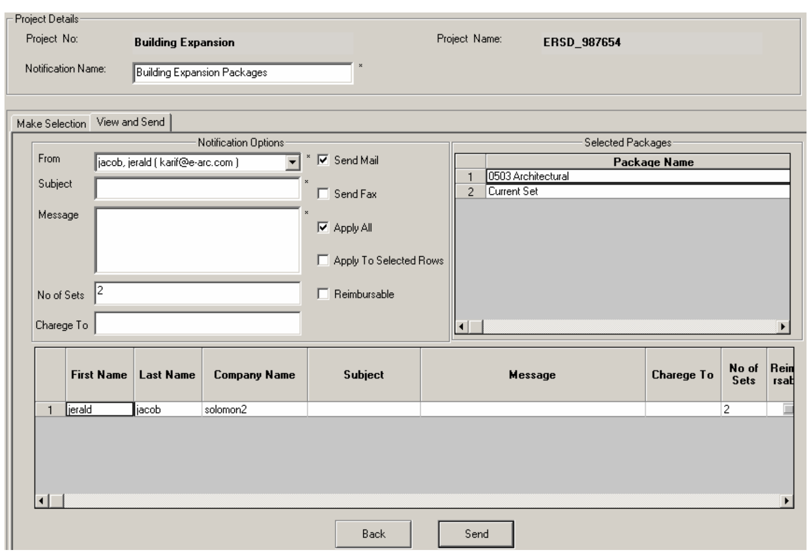
Package Notification Window

Begin the process by defining a name for this notification. You will need this name later when viewing the status of these notifications.

You may now select which packages you wish to notify the recipient of by selecting the box next to the package name.

Recipients of this email may be found though the project address book, the master address book or the plan holders list. All selected recipients will be added to the “Select Users” window.

Choose [Next] to continue.



View and Send Package Notification Window

The notification name will automatically be populated along with the selected packages and recipients.

You may use the dropdown box to select whom this notification will address from. You will need to type an easy to recognize subject line and message.

Next, select the number of sets, if any, the project owner is authorizing to be ordered. You may also indicate "Charge To" information.

Next, select how these notifications are to go out. The options are "Send Email" or "Send Fax". By using the "Apply to All" and "Apply to Selected Rows" buttons, you may set that one recipient receives the notification via email while another via fax.

Finally, select if this all orders generated from this notification are reimbursable. This option should be selected if the project owner is willing to pay for these sets.

To send these notifications select [Send]. You may also select [Back] to return to the previous screen.

Note: Recipient of this notification will be provided with a link directly into the order process for PlanWell. They may now select only up to the defined number of sets for the packages and complete the order process. Once an order is placed through this method, the link from the notification will no longer function.

View Status of Notifications

It is important that at any point we are not only able to notify the project owner the number of email or fax notifications which went out but that we can also provide them with information on how many notifications went out successfully and how many, if any, failed. This can be accomplished by selecting [View Status of Notifications]. All notifications sent will be listed along with status information.

	Notification Name	Created By	No. Pack ages	No. Users	Created Date and Time	No. Success ful Emails	No. Pending Emails	No. Failure Emails	No. Success ful Faxes	No. Pending Faxes	No. Failure Faxes
1	Building Expansion Packages	Kari	2	1	05/04/2004 14:31:07	1	0	0	0	0	0

View Package Notification Window

You may view the details of the notification sent by either highlighting the notification and choosing [View] or by double clicking it.

Release Project From In-Use

PlanWell Administrators or Champions may find that when attempting to access a project after a "cold" shutdown of either the PDMS Admin Console or their workstation (i.e.: the power goes out in the building causing a "cold" shutdown of their workstation), receive a message that the project cannot be accessed as it is "in use". This message can be corrected by highlighting the project and choosing [Release Project from 'In Use']. The project will now be accessible.

Additional Project Details

The additional project details option is available for those projects that have enabled BidCaster functionality. By selecting this option, you may view and/or edit all project details included in most BidCaster broadcasts.

Show Virtual Projects
This option will be discussed in the BidCaster Management section of this document.

Help Menu Option

The Help menu option in PlanWell 5.0 maintains an activity log to assist PlanWell Support in troubleshooting any issues you may have. These logs may be opened and read or sent directly to PlanWell Support via email.

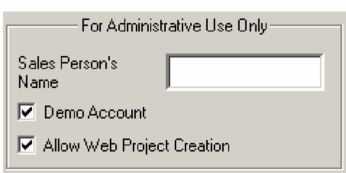
The Help menu option also contains an "About PDMS" selection which will list the current version of the PDMS Admin Console running on the system.

BidCaster Management
A powerful addition to the PlanWell Enterprise product has been the integration of PlanWell BidCaster. This section is devoted to detailing the management features of BidCaster found within the PDMS Admin Console. A detailed BidCaster user manual outlining all online BidCaster functionality can be found on your PlanWell login page.

BidCaster management can be broken into two functions … managing virtual projects and allowing BidCaster ITB broadcasts.

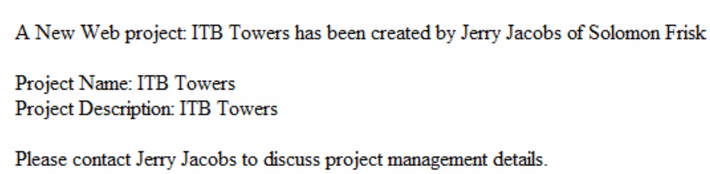
Managing Virtual Projects
With proper permission Administrators of your customer's company can begin the project creation process online. To allow this feature, you must first enable it within the customer's account.

Begin by highlighting the customer's name in the customer list, choosing [Repro Services] – [Account Manager] – [Current Account] and place a check in the box labeled "Allow Web Project Creation"



Any changes to an existing account will automatically trigger account synchronization. Once completed, an employee within your customer's account with the "Administrator" setting will have the ability to create virtual projects online.

As customers utilize this feature online, you will be notified of newly created virtual projects via email. Projects may remain 'virtual' until such time that customers ask you to take over management functions of this project by adding documents to it.


A New Web project: ITB Towers has been created by Jerry Jacobs of Solomon Frisk

Project Name: ITB Towers
Project Description: ITB Towers

Please contact Jerry Jacobs to discuss project management details.

Sample Email Message

To begin this process, you must first pull this project into your PDMS Admin Console. This is accomplished by choosing [Advanced Operations] – [Show Virtual Projects]. A listing of all virtual projects created by this customer will be shown; highlight the desired project and choose [Synchronize]. At this point, the project will be added to your customer's project list in purple text.

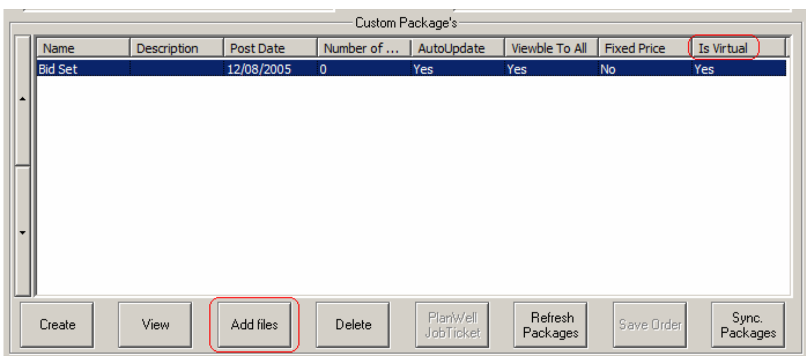
Proj	Project Number	Project Name	Project Password	Description	Account Name
	DEMO_SOC Project	SOC Project	demo	SOC Project	Solomon Frisk
	DEMO_21346	ITB Towers	demo	ITB Towers	Solomon Frisk

Sample Project List

By double-clicking on the project, you will be brought into the project details window. At this point, the project will look much like all other projects. You may immediately begin indexing documents by first indicating your thumbnails format then follow the standard steps described in the "Indexing High Resolution Files" section of this manual beginning on page 15. After indexing all files, you may now save and synchronize this project.

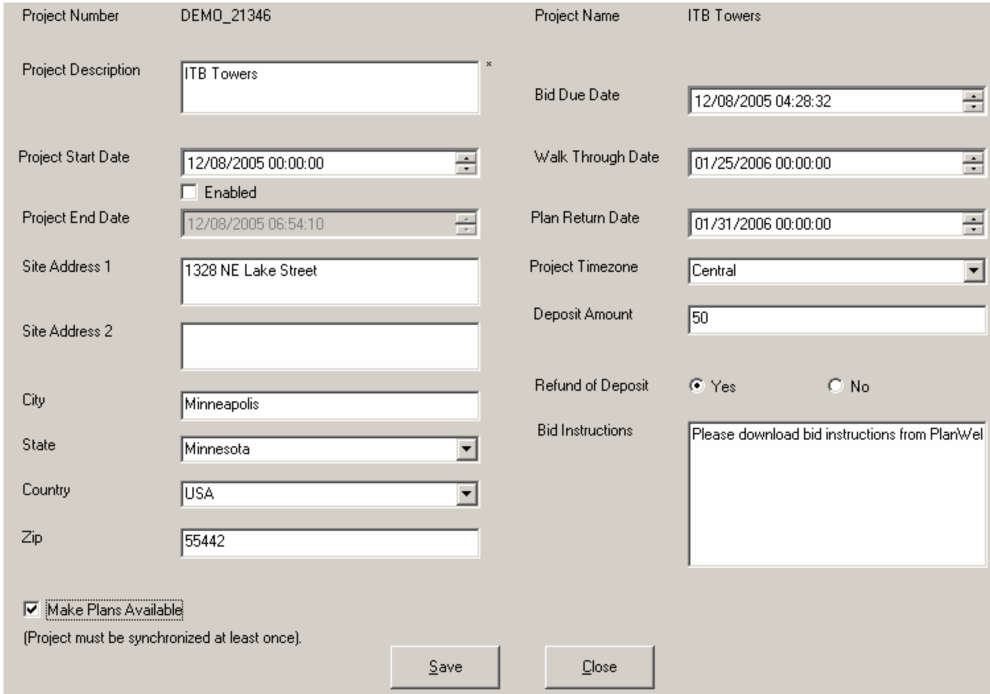
After the first completed synchronization, it is recommended that you go back into the project details and check if your customer created virtual packages for this project. After accessing the packages option, you will note a new package description field of "Is Virtual". Any packages showing "Yes" in this field must have documents added to them. Highlight the package name and choose [Add Files]. You may now add files to this package following the standard steps described in the "Packages" section of this manual beginning on page 31.

> Note: the [Add Files] option will only be viewable prior to adding a file into the package.



Packages Window Example

At this point, you have added files to the project and to any existing packages and the project is synchronized however you will notice that the project is still listed as 'virtual' in your project list window. To finish the process of making this project "live", you must highlight the project and choose [Advanced Operations] – [Additional Project Details]. The resulting window will show all BidCaster specific information your customer provided when creating this virtual project. Place a check box next to "Make Plans Available" and choose [Save]. The project will now be shown in black text in your project listing window and will no longer have any 'virtual' markers associated with it.



Additional Project Details Window Example

Adding BidCaster Functionality to an Existing Project

The ability for a customer to create a BidCaster ITB broadcast online can be enabled for any project by highlighting the project and choosing [Advanced Operations] – [Advanced Project Options] – [Project Options]. The final option, or "permission", that can be assigned is "Allow Broadcast". Place a checkbox in this option for any customer employee who you have been notified will send broadcasts. Further details on this option can be found in the "Project Options" section of this manual beginning on page 37.

Additional PlanWell Notes

File Formats

The PDMS Console is designed to accept the following file formats:

Tiff Group IV files. These are color or monochrome raster scans made from the actual construction plans.
Zip files – Zip files may contain one or more Tiff or Cals raster scans, or, may be empty (Lightweight).
PDF files – Specifications are to be scanned, then converted with an OCR software package and saved in Adobe PDF format.
TXT files – Specifications, which have been OCR'd as above, and then saved in text format.
CALS files – Also Monochrome raster scans. Generally used in government projects.

Special Note: Although CALS files are supported through PlanWell, they are not recommended due to limited support in other viewers and applications.

You may, of course, add any type of file to the PlanWell. However, if it does not conform to one of the file types listed above, it may not behave in an expected manner, and therefore, is not recommended.

With PlanWell it is not necessary to create issue or discipline bundles. The system will allow the user to select these files as dynamic sets with the [Create a Set] tools.