ePLAN

SUBMIT | REVIEW | APPROVE

CITY OF MARKHAM

**APPLICANT HANDBOOK**
**Planning Applications**

# CONTENTS

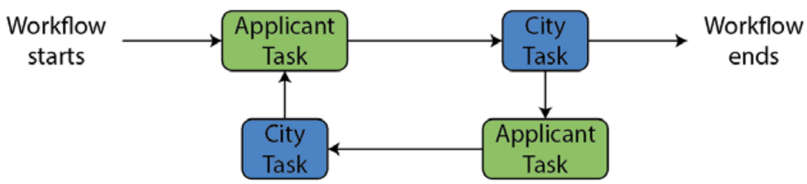
1 WHAT IS ePLAN? ..... 4
2 WHERE DO I START? ..... 5
2.1 What technology do I need to use ePLAN? ..... 5
2.2 How do I get to the ePLAN page? ..... 5
2.3 How to Register ..... 6
2.4 Making an application for the first time ..... 7
3 LOGGING ON ..... 12
4 NAVIGATION BASICS ..... 13
4.1 My Applications Page ..... 13
4.2 Details Page ..... 14
4.2.1 Uploading Drawings & Documents ..... 15
4.3 Home Page Navigation ..... 16
4.4 Main Toolbar ..... 17
4.5 Quick Reference Table ..... 17
5 PROJECT NAVIGATION ..... 18
6 PROJECT VIEW ..... 19
6.1 Entering a Project ..... 19
6.2 Project Page Navigation ..... 19
6.3 Detailed Project Information Page ..... 20
6.4 Project Folders ..... 21
6.5 View Project Files ..... 22
6.6 Project File Folder Controls ..... 23
6.7 Uploading to a Folder ..... 25
7 PROJECT WORKFLOW ..... 27
7.1 Workflow Status ..... 28
7.2 Notification of a Task ..... 28
7.3 Accepting and Completing Tasks ..... 29
7.3.1 Accept a Task ..... 29
7.3.2 eForms ..... 31
7.3.3 Completing a Task ..... 31
7.3.4 Viewing the Changemark Report ..... 32
8 FILE VIEWING FEATURES ..... 34
8.1 Versioning and File History ..... 34
8.2 View File History ..... 35

8.3 Compare File Versions ..... 37
8.4 Compare Two Files in Same Folder ..... 38
8.5 File Markups Icon ..... 40
8.5.1 Viewing Markups/Changemarks ..... 40
8.5.2 Downloading Markups/Changemarks ..... 42
8.6 Delete Files ..... 43
9 SEARCH FEATURES ..... 43
9.1 Simple Search ..... 43
9.2 Advanced Search ..... 44
10 SUBSCRIPTION MANAGER ..... 47
11 HELP ..... 49

# 1 WHAT IS ePLAN?

Back to Contents

ePLAN is a web-based electronic plan and document workflow solution that allows customers and City staff to initiate and complete the development application submission, payment, review, and approval process online as opposed to a manual, paper-based process. ePLAN creates an online virtual project workspace that enables remote customers to share the same information at the same time; facilitating communication and increasing productivity. It organizes the workflow between an Applicant and the City ensuring that a clear and orderly sequence of processes is carried out to successful completion. Specific tasks are assigned to either the Applicant or City staff in, typically, an alternating manner, until the plans and documents have been approved.




Here is how ePLAN enables online project information management and timely communication with the City:

- All shared project information (documents, drawings, etc.) is centralized in one location so it becomes visible, accessible and usable by everyone who has access to the project.
- The user friendly interface makes it easy for users at any technical skill levels to leverage the tools in ePLAN.
- ePLAN enables multiple-users access to the same information at the same time, enhancing team collaboration.
- Automation features exist to ensure quick distribution of important information.
- There are tools for interacting with information, such as view and markups, making internal and external communication timely, meaningful and productive.
- Complete details of all workspace activity are recorded, comprising an audit trail for documents, forms, annotations and markups, plus much more.

***Note:*** *ProjectDox is the software used for the electronic plans review portion of ePLAN. Both terms are used interchangeably in this Handbook.*

# 2 WHERE DO I START?

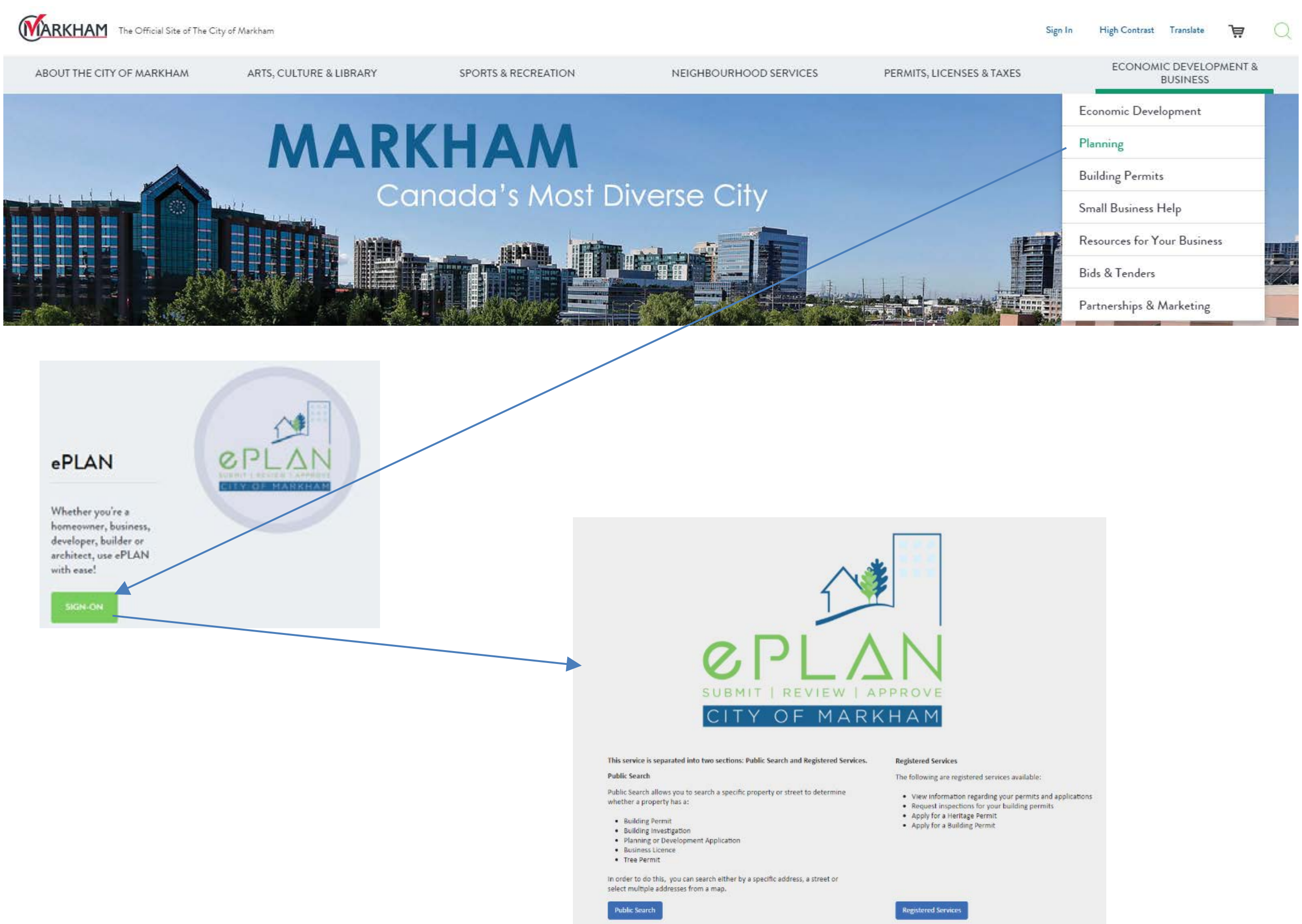
In order to begin using ePLAN to submit development applications and/or check on the status of your current applications you must first register. Please check that your computer system has the necessary components to effectively use ePLAN prior to registration.

## 2.1 What technology do I need to use ePLAN?

***Back to Contents***

As a web-based system, ePLAN requires Internet Explorer Version 10 or greater running on a Windows operating system. Active X and Silverlight will also be needed and can be downloaded from the ProjectDox website (see link below). The Reviewer's changemarks and thumbnails in the project can only be viewed when using Internet Explorer. Other browsers can be used for ePLAN, just not for viewing the changemarks.

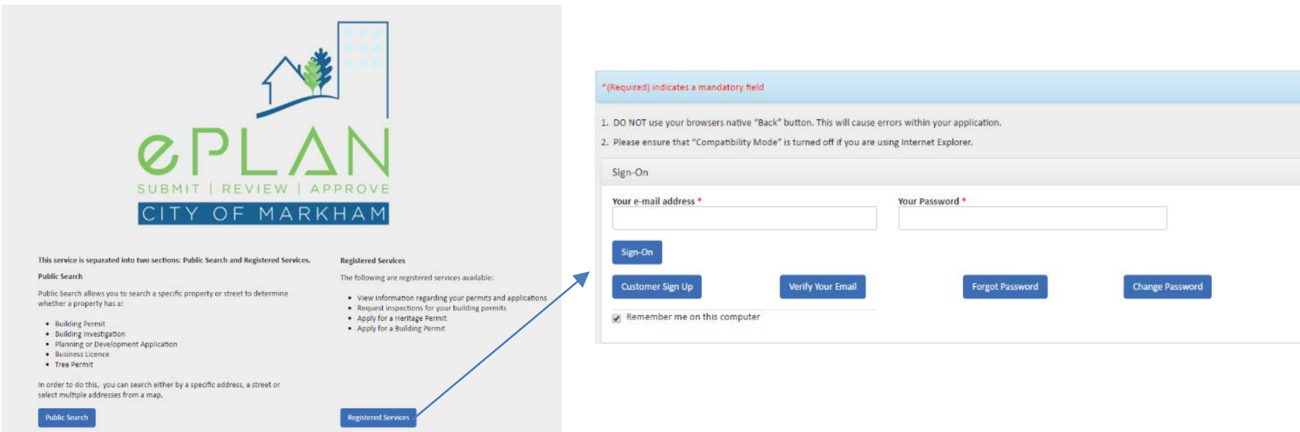
## 2.2 How do I get to the ePLAN page?



## 2.3 How to Register

Back to Content

Launch Internet Explorer as your web browser and navigate to markham.ca. Go to the ePLAN page and proceed to the Registered Services area.




1. Click Customer Sign Up.
2. Enter your contact information and click Sign Up.
3. You will be emailed a verification code. Retrieve the code and return to Registered Services area and click Verify Your Email to verify your email and create a password.
4. Click Confirm. You are now ready to login for the first time. Return to Registered Services again and login.

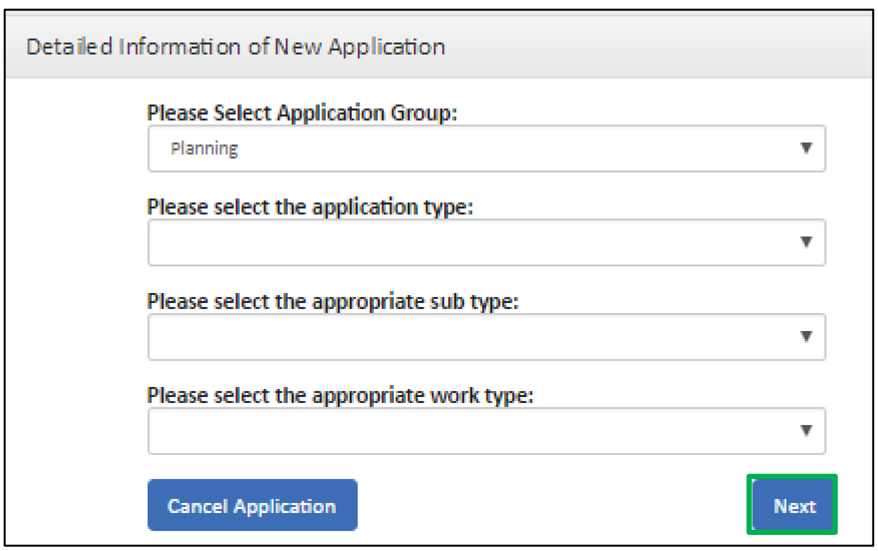
NOTE: If you have an account registered under our old OPAL system you may continue to use that account with ePLAN. Your password will remain the same.

- If you have forgotten your password and need to reset it or would like to change it you may do so. Should you need assistance with this, contact us at dsc@markham.ca.

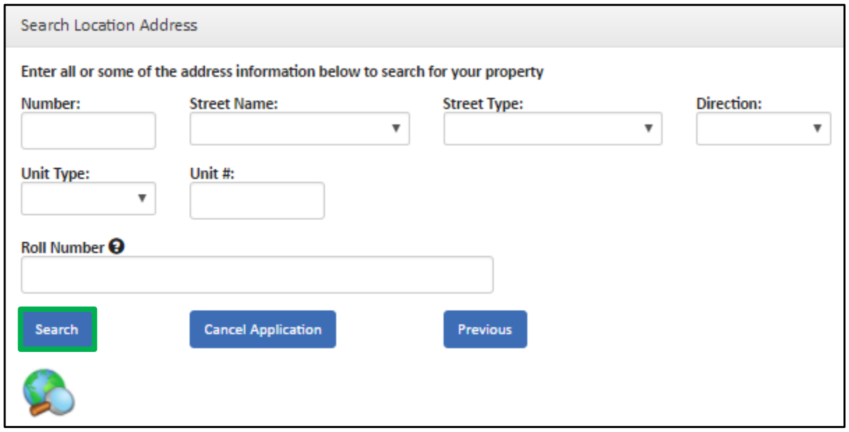
## 2.4 Making an application for the first time

Prior to making an application, please refer to the ***Markham ePLAN Submission Standards for Planning Applications***. This document explains the format required for drawing and document files. This is different from the requirements of complete application. Please refer to the ***Site Plan Guide*** or to the ***Complete Application Checklist*** for a list of submission requirements.

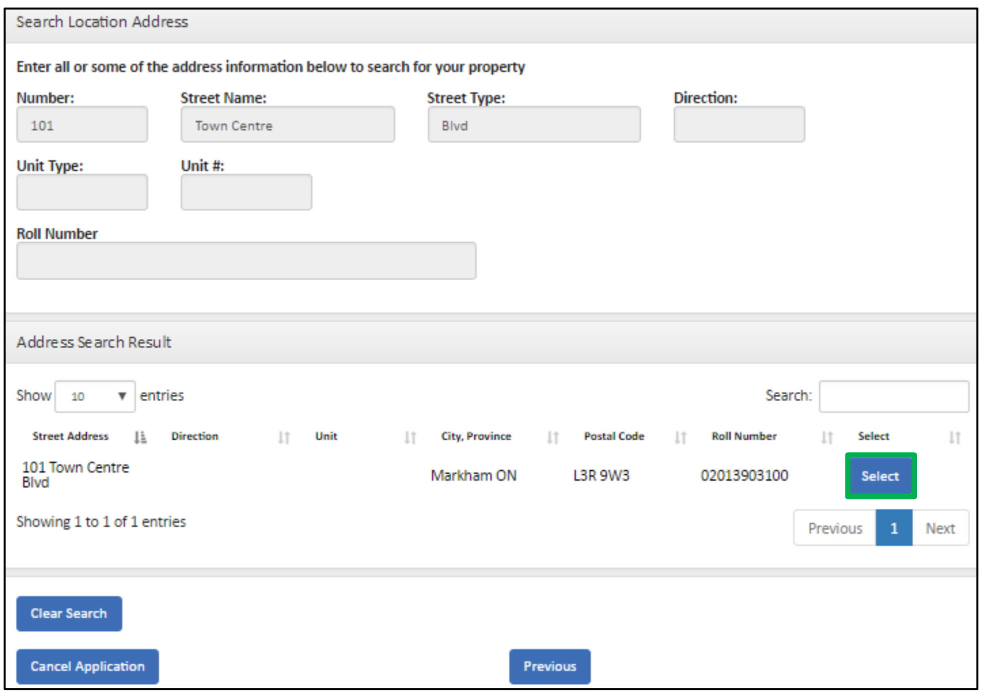

1. Registered and verified your email address.
2. Login and click Apply for a New Application at the top of the page.
3. Select the type of application you wish to submit.



4. Select the primary property associated to your application. You may search for the property the street or roll number. Alternatively you may click the map button to select the property from a map.

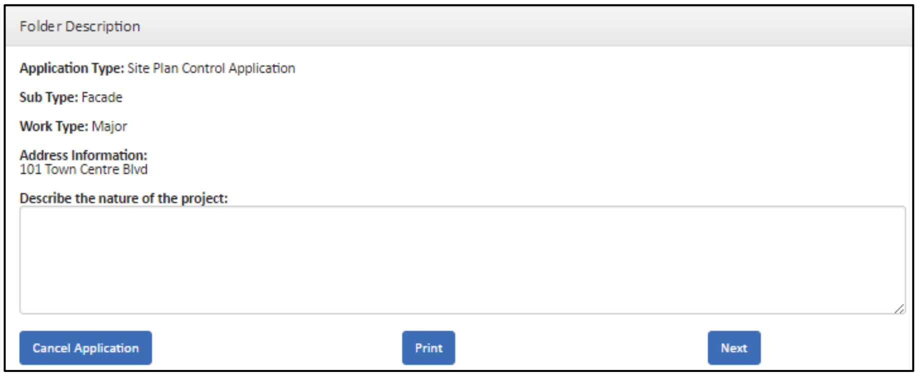



5. Your property search results will be displayed. There may be more than one result. Choose the most appropriate one by clicking the Select button beside your choice.

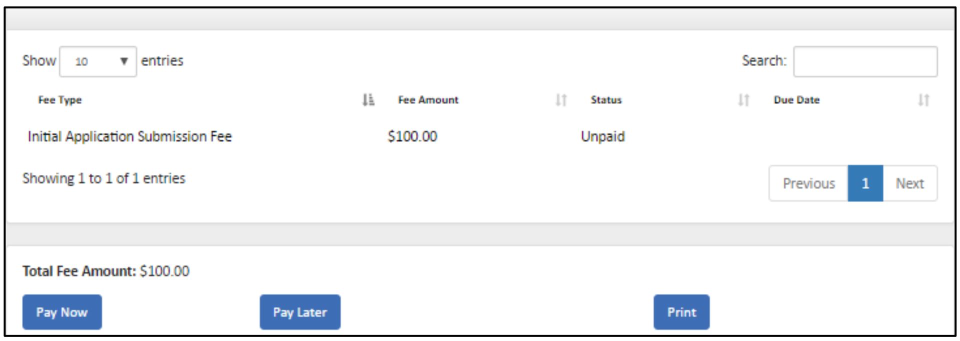



6. If there is another property associated to this application you make select it by click Add Another Property and repeat step 4. If there is no other property, click Next.

7. Provide a brief description of your application and then click.



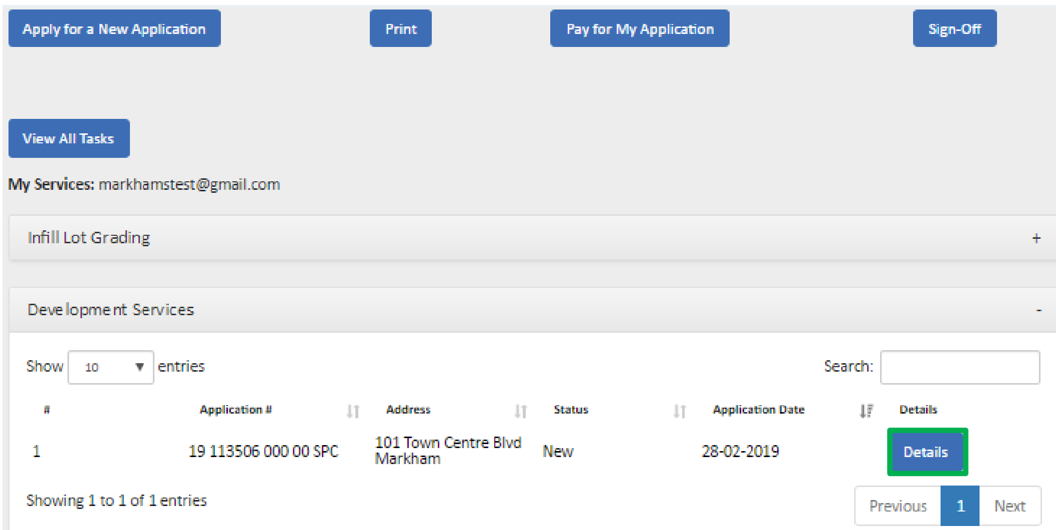

8. Provide the requested project information.
9. An Initial Application Submission fee may apply. You can choose to **Pay Now** or **Pay Later**.

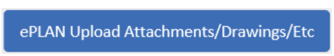



Whenever you decide to pay the applicable fee, you must eventually go to the shopping cart.


10. A message confirming successful submission will be displayed. Where a fee is required, please pay as soon as possible. Payment of an Initial Application Fee is required for most development applications. The application will not be accepted until this fee is paid and submission requirements are uploaded.

11. Once you have paid the fee, you MUST login again and **return to the Details page** of the application which allows for upload of drawings and supporting documents. Only the applicant has the ability to upload drawings and documents so co-ordination may be required with consultants.




12. The   will have appeared on the Details page. Click this button to upload your submission drawings and documents.

13. You will receive an email notification that you have an Applicant Upload task.

**Applicant Upload Task Assignment**

**Attention** [redacted]:

You have been assigned a task on Project: **19.113506.000.00.SPC**

The due date for this task is: **3/4/2019 3:24:29 PM**

Please Login to ePLAN to accept your task at your earliest convenience.

If you need more time to complete the task you can always select the "Complete Later" option.

Return to the eform at a later date when you are ready to complete the Applicant Upload Task.

**Task Instructions:**Ensure that **all** drawings and documents specified on your pre-consultation checklist have been prepared in accordance with City Drawing Standards & Specifications, including drawing size and digital format and are ready to be uploaded.

For information refer to the SITE PLAN GUIDELINES before completing the Applicant Upload Task.

**Next Steps:** Staff will review your submissions to check for completeness before circulating for review.

**Please don't hesitate to call our Development Application Client Services team at 905-475-4861 if you require any assistance with this task.**

| | |
|---|---|
| Project: | **19.113506.000.00.SPC** |
| Project Name: | **ABC Company Developments - This is the description of my project...... This is the description of my project...... This is the description of my proje** |
| Task: | **Applicant Upload** |
| **Go to ePLAN** | |

14. See section 4.2.1 (Uploading Drawing & Documents) for instructions on how to accept the task, upload your files, and acknowledge task completion.

15. City staff will check that all submissions requirements have been provided and advise of further applicable fees. Once fees are paid and required submissions are satisfactory the application will be formally accepted and circulated.

# 3 LOGGING ON

*Back to Contents*

Using Internet Explorer you can access the login page at:

**https://www.markham.ca/eplanlogin**

You may wish to bookmark address for ease of future access.


***Note:***

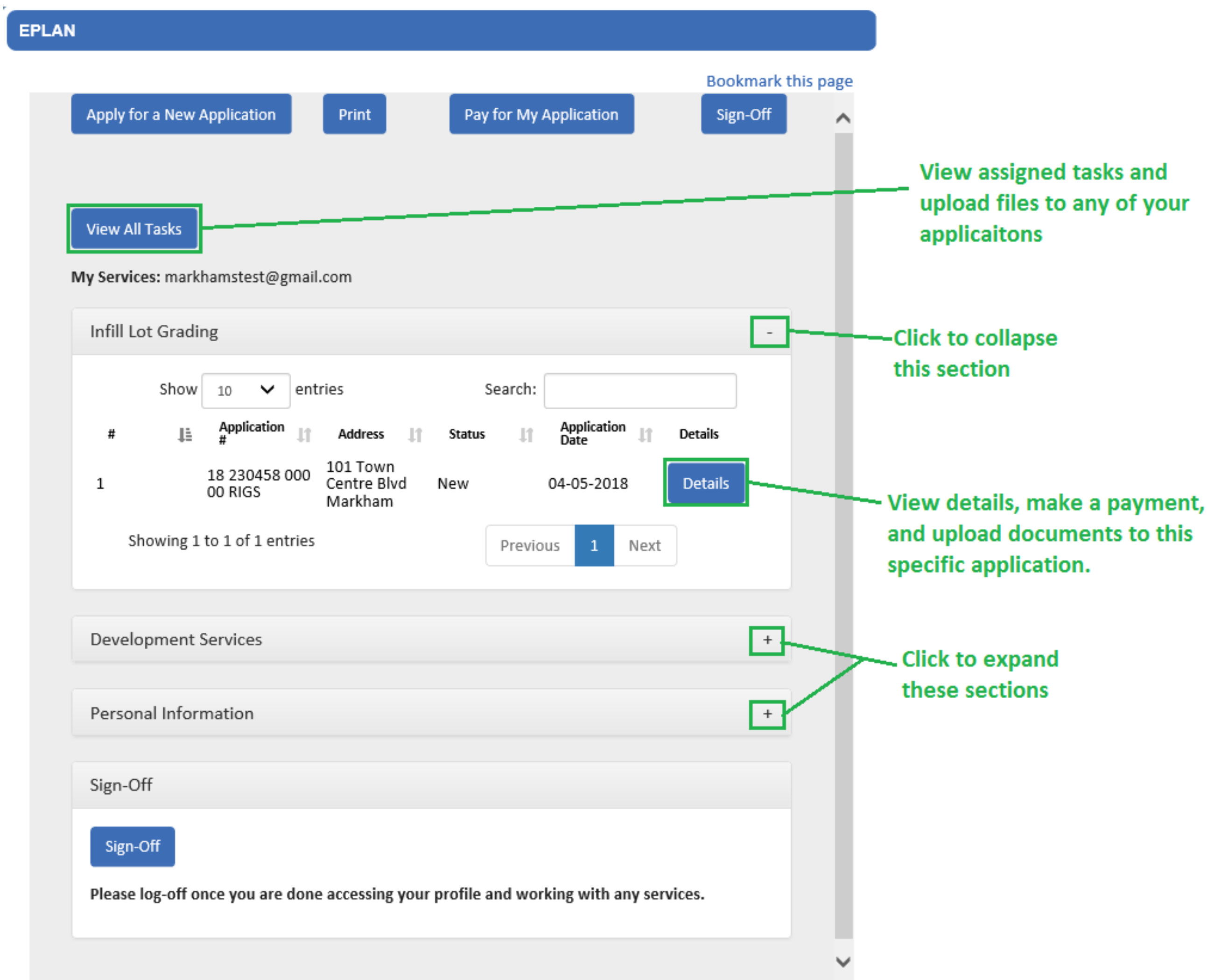
- Ensure that your Pop-up Blocker is turned OFF

# 4 NAVIGATION BASICS

Back to Contents

## 4.1 My Applications Page

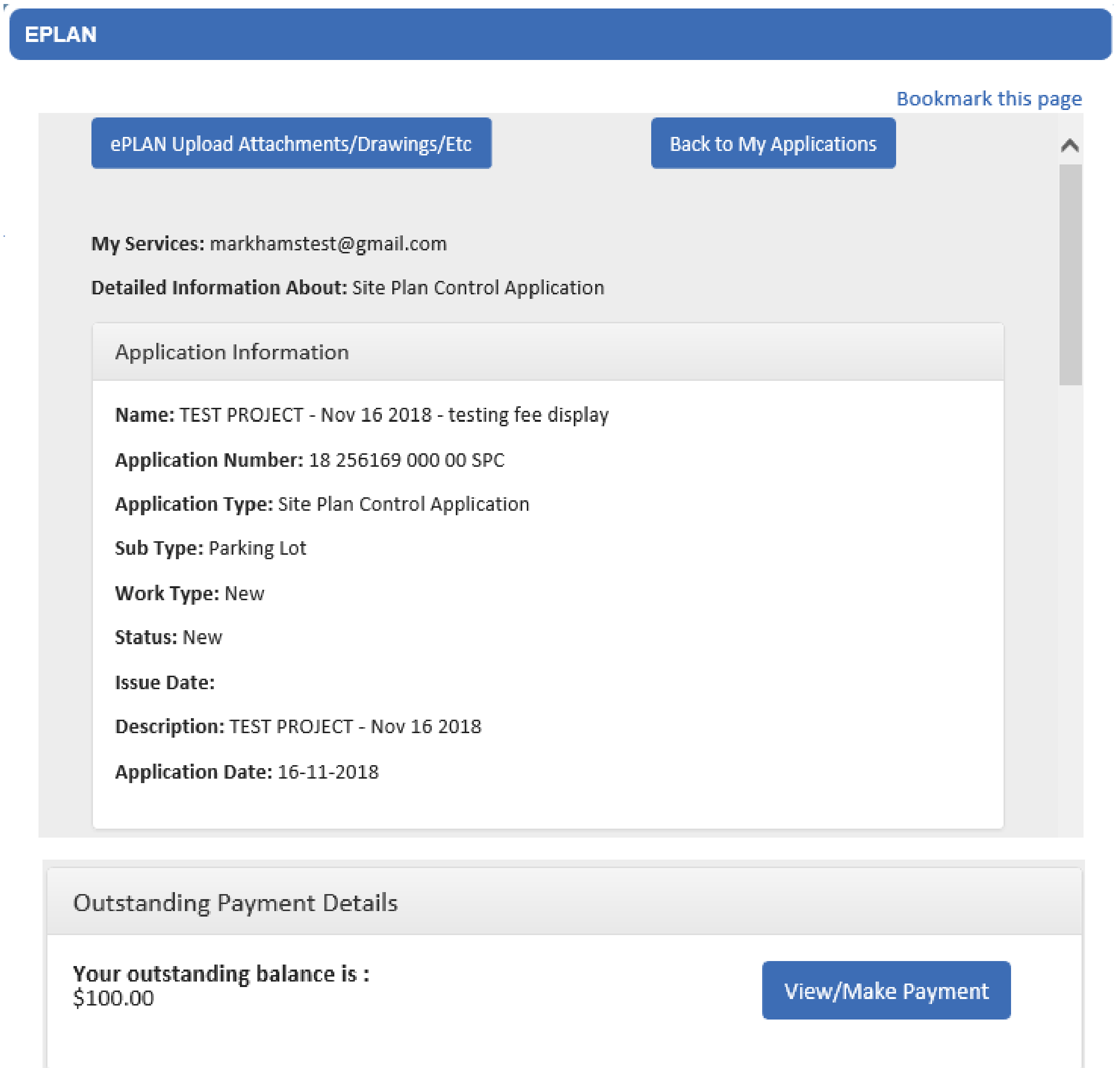
When you login, you are taken to the My Applications page:



## 4.2 Details Page

*Back to Contents*

Each application has a Details page. This page shows you detailed information about the application, any outstanding payments, access to upload submission drawings and documents.

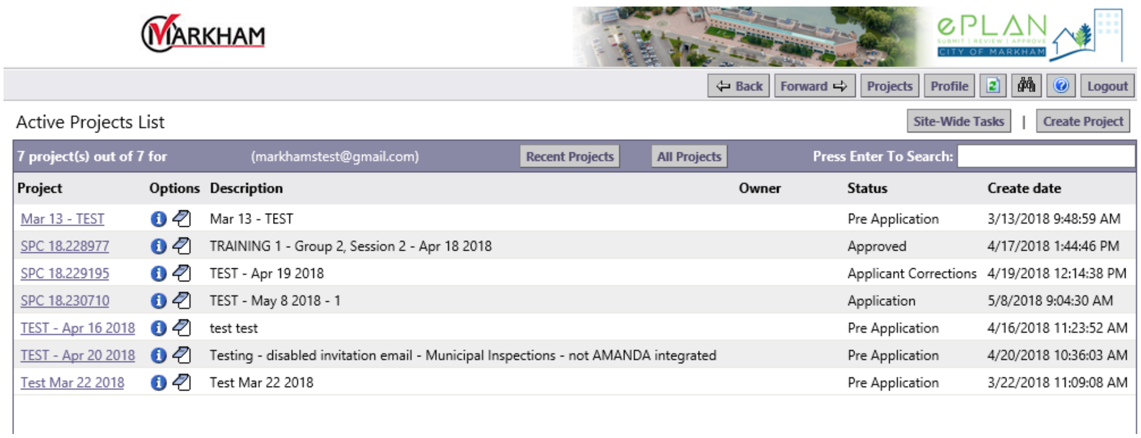


### 4.2.1 Uploading Drawings & Documents

***Back to Contents***

Only the applicant has the ability to upload drawings and documents. Co-ordination with consultants may be required.

From the Details Page. Click ePLAN Upload Attachments/Drawings/Etc to get this page below:

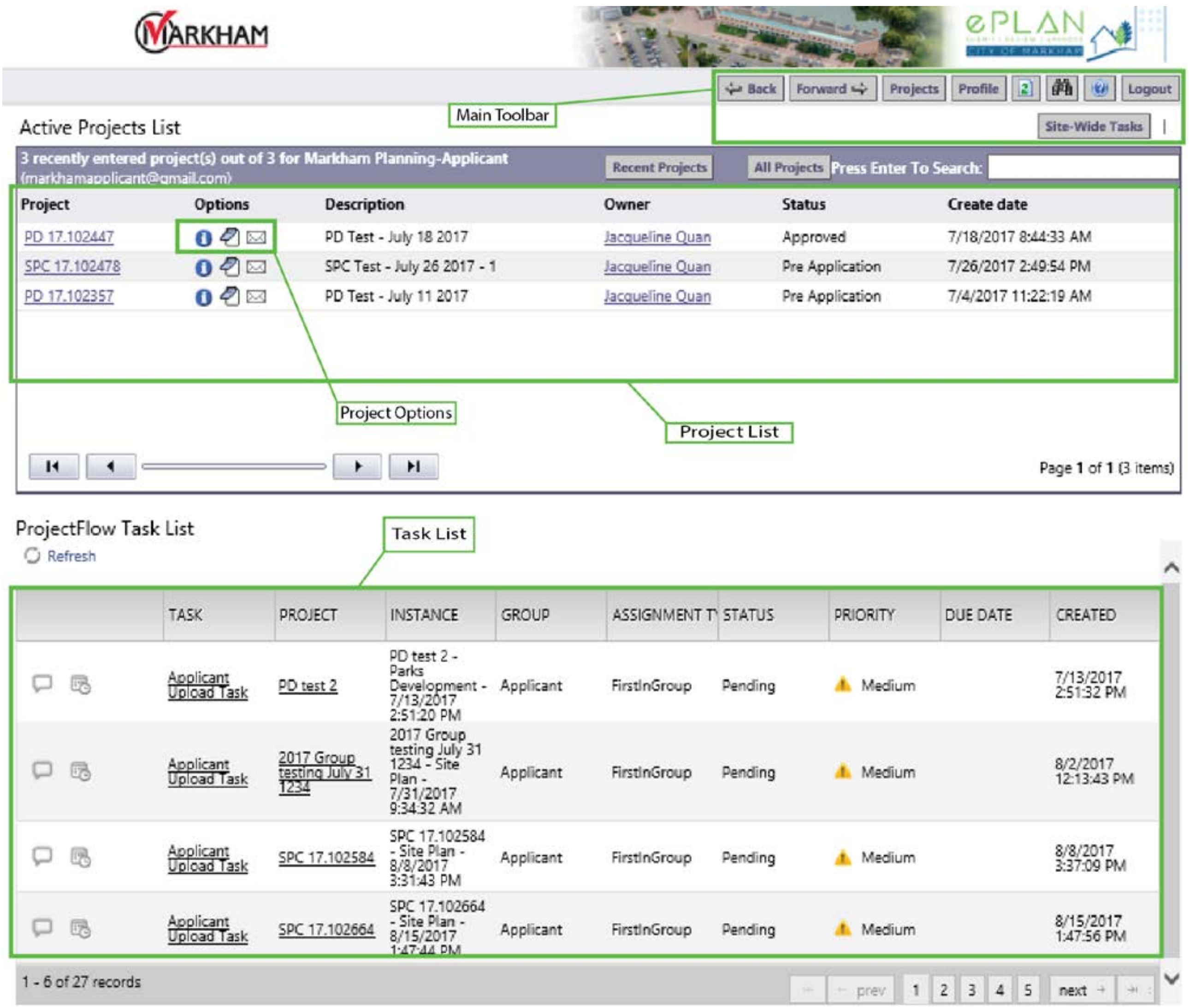



| Project | Options | Description | Owner | Status | Create date |
|---|---|---|---|---|---|
| Mar 13 - TEST | | Mar 13 - TEST | | Pre Application | 3/13/2018 9:48:59 AM |
| SPC 18.228977 | | TRAINING 1 - Group 2, Session 2 - Apr 18 2018 | | Approved | 4/17/2018 1:44:46 PM |
| SPC 18.229195 | | TEST - Apr 19 2018 | | Applicant Corrections | 4/19/2018 12:14:38 PM |
| SPC 18.230710 | | TEST - May 8 2018 - 1 | | Application | 5/8/2018 9:04:30 AM |
| TEST - Apr 16 2018 | | test test | | Pre Application | 4/16/2018 11:23:52 AM |
| TEST - Apr 20 2018 | | Testing - disabled invitation email - Municipal Inspections - not AMANDA integrated | | Pre Application | 4/20/2018 10:36:03 AM |
| Test Mar 22 2018 | | Test Mar 22 2018 | | Pre Application | 3/22/2018 11:09:08 AM |

Please see further instructions in section 6.7 (Uploading to a Folder).

## 4.3 Home Page Navigation

***Back to Contents***




***Note:***

- Your Active Project List shows your most recently accessed projects by default. If you wish to see other projects not currently displayed click the **All Projects** button. If you are not seeing a project you are expecting you may need to click this button. Alternatively, you may need to scroll through the list of projects as the list may span multiple pages.

## 4.4 Main Toolbar

Back to Contents

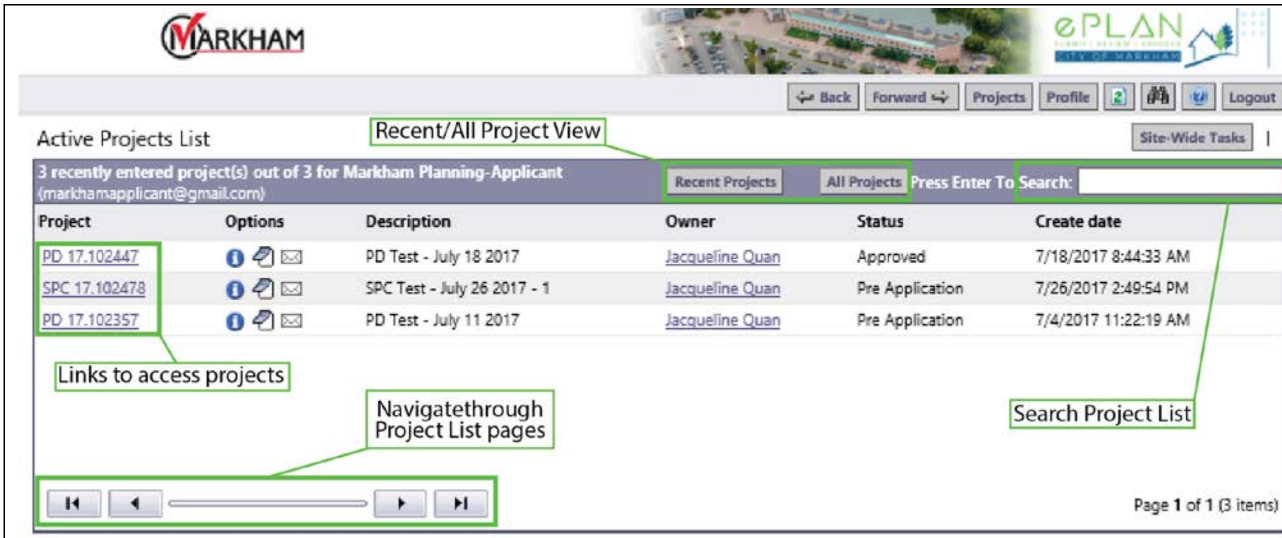

| | |
|---|---|
| Back Forward | Functions much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed |
| Projects | Takes you back to the home page where your list of active projects and tasks will display |
| Profile | Takes you to your User Profile, where you can edit your contact information, change your password, or password reset question and answer. Additionally, you can use the tabs to view your User Metadata (optional), and project and group memberships |
| | Refreshes the current page's display |
| | An advanced search tool that shows you ALL instances of whatever text you search across ALL projects. It will show you file contents, markups, folder names, discussion boards, and incoming emails containing the text you typed |
| Site-Wide Tasks | Launches a window that shows your Task List |
| | Displays the ProjectDox online Help. Use the index or search functions to find information on specific aspects of ProjectDox |
| Logout | Logs you out of ProjectDox |

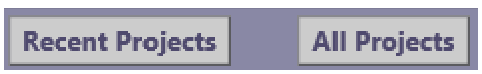
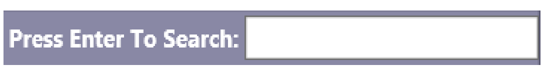
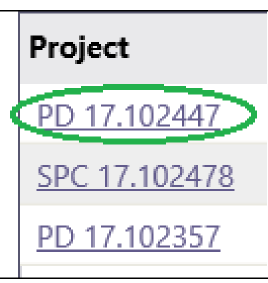
## 4.5 Quick Reference Table

| Icons | | | | | |
|---|---|---|---|---|---|
| | Refresh Page/ Pane | | Delete | | Print |
| | View Project Info | | Download File | | Show Changemark Details |
| | Help (General) | | Compare Two Selected Files | | View File Details/ History (file only has one version) |
| | Help (File Viewer) | | Markup exists for this file | | View File Details/ History/Versions/ Compare Versions |
| | Advanced Search Tool | | Setting not editable or closed | | |
| | View File in Pane | | View File in Separate Window | | |

# 5 PROJECT NAVIGATION

*Back to Contents*



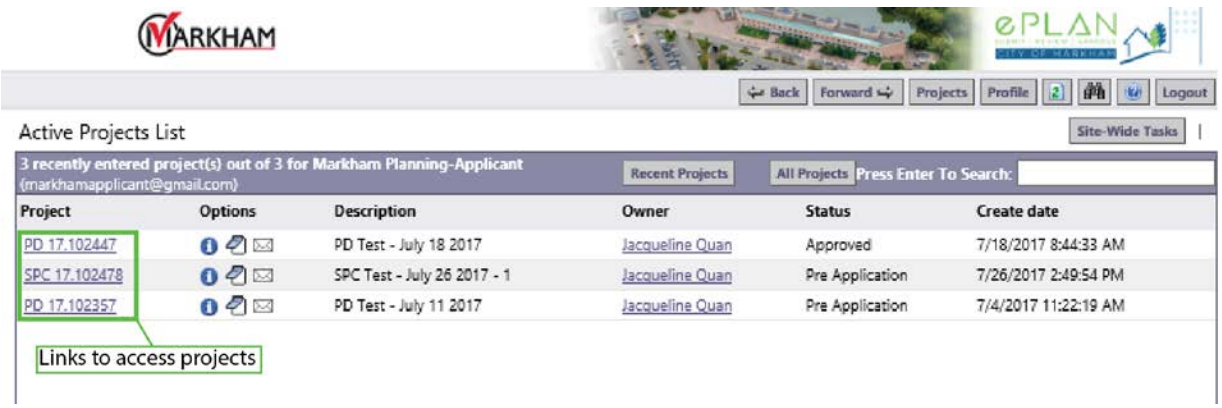

| | |
|---|---|
|   | Allow you to switch between viewing a list of the projects you have most recently accessed and the list of ALL your projects. By default, it shows your Recent Projects and you need to select “All Projects” to view the others. |
|   | Filters the projects list by whatever you have type into the this field for any of the columns listed: Project, Description, Owner, and Status |
|  | Allows you to flip between the various pages of your Project List. If you do not see the project you are looking for try scrolling through to find it. |
|   | Enter a project by clicking the underlined link in the Project column. |
|  | Project Info – Displays basic project information |
| **Note:**<br>The Active Projects List can be sorted by any of the columns by clicking the column header. You can reverse the sort order by clicking the header again. | |

# 6 PROJECT VIEW

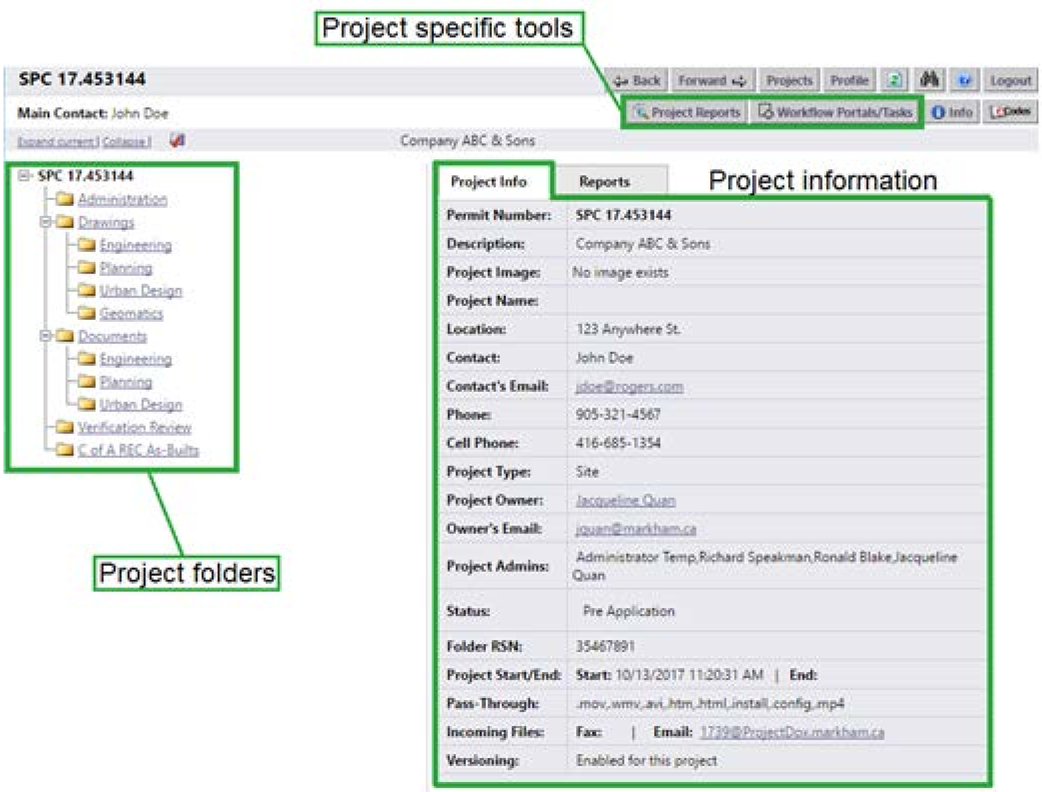
## 6.1 Entering a Project

*Back to Contents*

To enter a project, click the link in the Project column of the Active Project List.



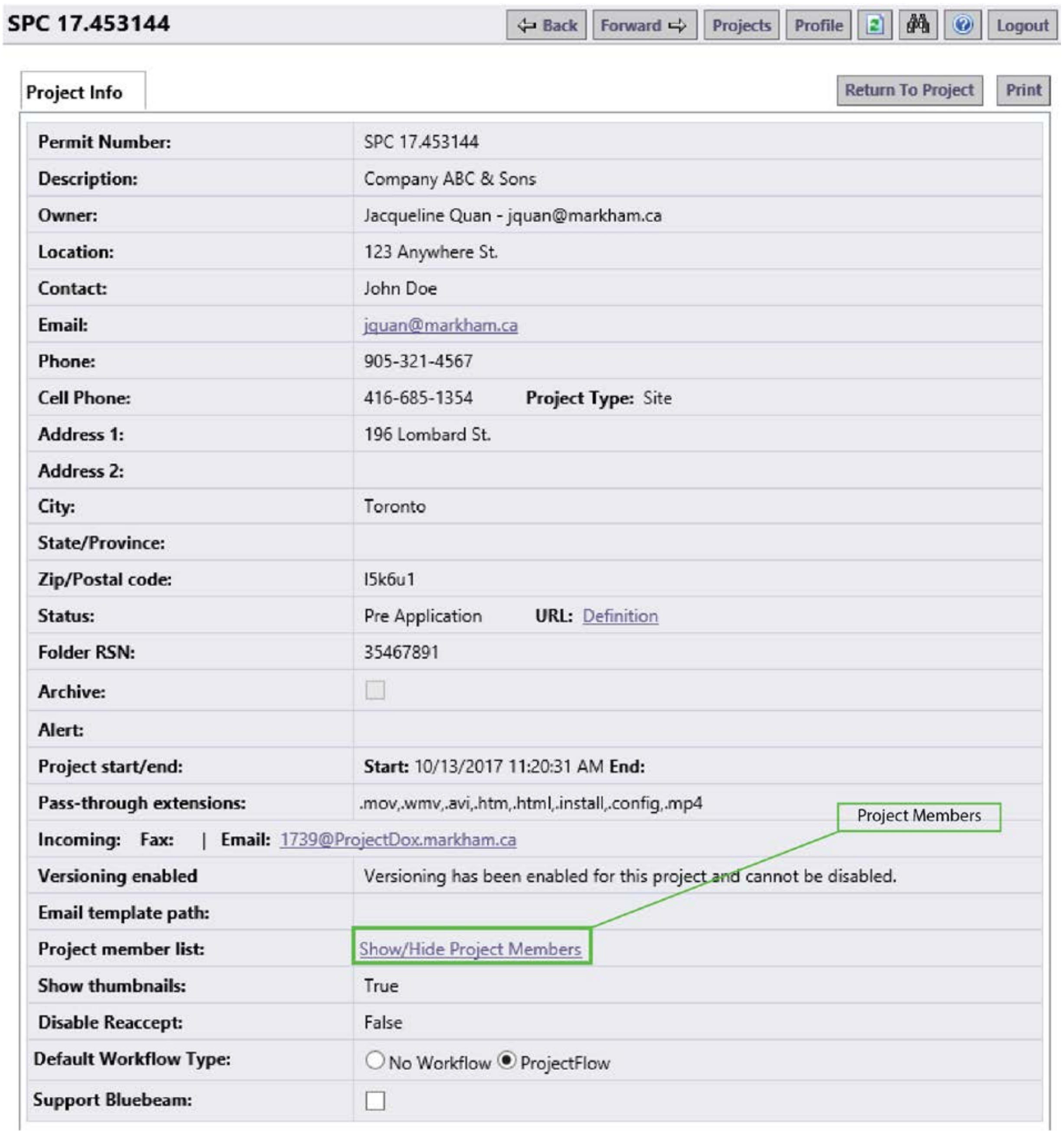

## 6.2 Project Page Navigation



## 6.3 Detailed Project Information Page

***Back to Contents***

By clicking the Info button at the top of the screen you can view more detailed info including a list of all Project Members (i.e. all internal and external people associated with the file).


SPC 17.453144

Back | Forward | Projects | Profile | Logout

Project Info

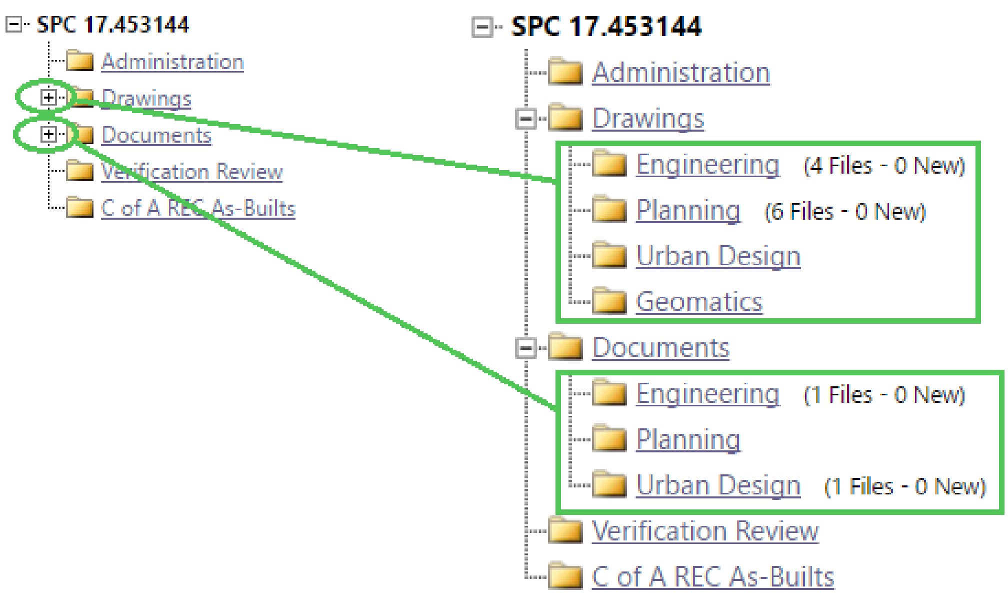
Return To Project | Print

| | |
|---|---|
| **Permit Number:** | SPC 17.453144 |
| **Description:** | Company ABC & Sons |
| **Owner:** | Jacqueline Quan - jquan@markham.ca |
| **Location:** | 123 Anywhere St. |
| **Contact:** | John Doe |
| **Email:** | jquan@markham.ca |
| **Phone:** | 905-321-4567 |
| **Cell Phone:** | 416-685-1354 **Project Type:** Site |
| **Address 1:** | 196 Lombard St. |
| **Address 2:** | |
| **City:** | Toronto |
| **State/Province:** | |
| **Zip/Postal code:** | l5k6u1 |
| **Status:** | Pre Application **URL:** Definition |
| **Folder RSN:** | 35467891 |
| **Archive:** | ☐ |
| **Alert:** | |
| **Project start/end:** | **Start:** 10/13/2017 11:20:31 AM **End:** |
| **Pass-through extensions:** | .mov,.wmv,.avi,.htm,.html,.install,.config,.mp4 |
| **Incoming: Fax:** \| **Email:** 1739@ProjectDox.markham.ca | |
| **Versioning enabled** | Versioning has been enabled for this project and cannot be disabled. |
| **Email template path:** | |
| **Project member list:** | Show/Hide Project Members |
| **Show thumbnails:** | True |
| **Disable Reaccept:** | False |
| **Default Workflow Type:** | ○ No Workflow ◉ ProjectFlow |
| **Support Bluebeam:** | ☐ |

## 6.4 Project Folders

***Back to Contents***

Navigation in the folder structure follows conventions typical in Windows: click a ⊞ symbol to view a folder's subfolder; click a ⊟ symbol to collapse the view back to a single folder. Note that the folder names are actually links: click on a folder name to view its contents.




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

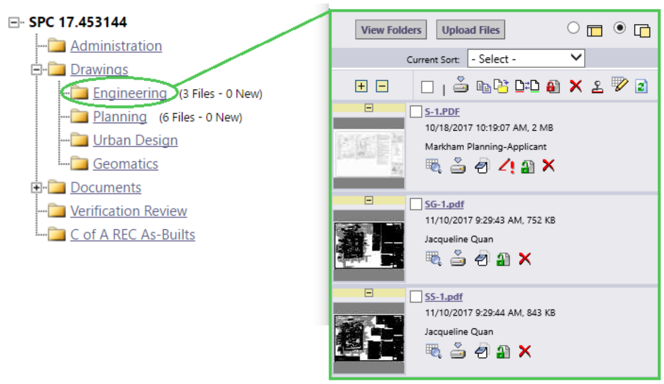
***Notes:***

- A parent folder will not show a count for files contained in its subfolders.
- A file is considered "New" for a certain number of days after it arrives in the folder. The number of days the file shows as "New" is determined by the System Administrator, but is typically established for three (3) calendar days. Once a file's age in the folder passes 3 days, it will be part of the FILES count, and drops out of the "New" count.

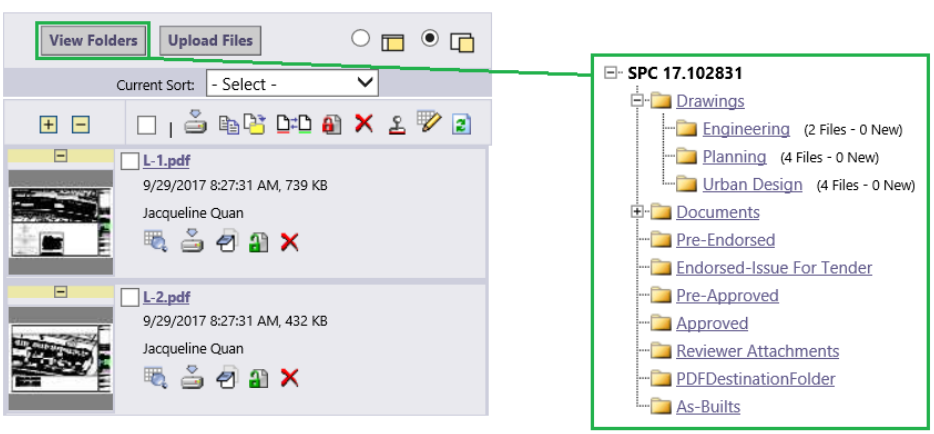
## 6.5 View Project Files

[***Back to Contents***]

Click the folder name in the folder tree to enter the folder and view the files contained within.



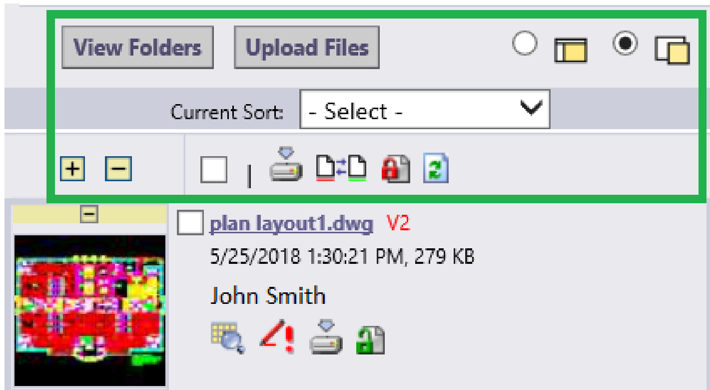

To return to the list of folders click **View Folders**

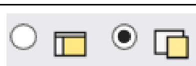
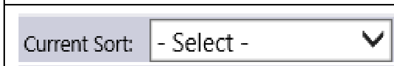
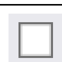
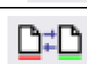


## 6.6 Project File Folder Controls

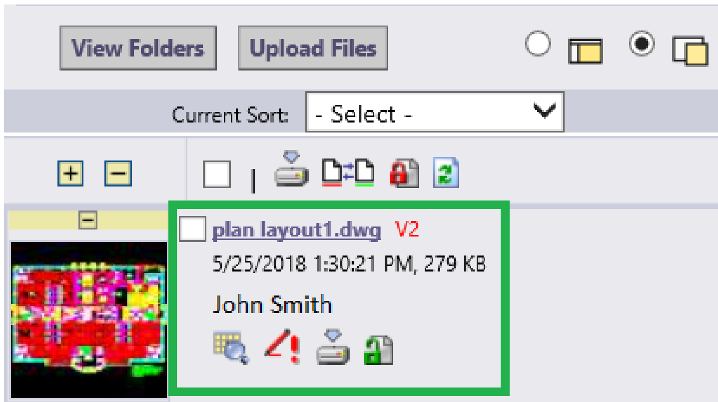
Back to Contents

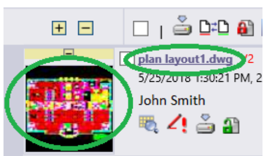
There are controls that allow you to perform actions on multiple files. These controls are located at the top of the list of files as shown in the green box below. Whichever files you select, by placing a check beside them, will be acted upon by these controls.




| | |
|---|---|
|  | Allows to you control whether you view files within the current window or whether a separate window will launch to display the file. To launch the file viewing/markup tool in a separate window select . To view the files in the right panel of the screen click |
|  | Allows you to sort the files based on the criteria you select from the dropdown list |
|  | Allows you to collapse or expand the view of the files |
|  | Click in this box to select all the files in the folder. A check mark will appear when all the files have been selected. To deselect all files click in the box again. Note: you may also select files individually by putting a check in the box adjacent to the file name. |
|  | Allows you to download selected files. |
|  | Allows you to compare to selected files in the SAME folder |
|  | Allows you to delete all selected folders |
|  | Refreshes the folder contents |

There is information and controls relevant to an individual file. These features are situated beside the file thumbnail as show in the green box below).



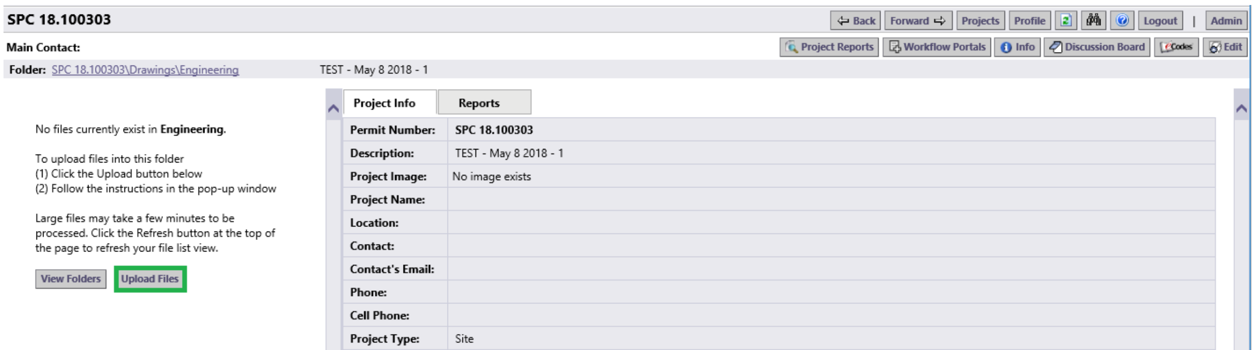

| | |
|---|---|
|  | Allows you to collapse the thumbnail of the file |
|  | Clicking on either the thumbnail or the file name you will view the latest version of the file (i.e. the version number displayed adjacent to the file name) |
| V2 | Indication of the current version number of the file you will view if you click on this file thumbnail or file name. |
|  | Allows you to see details and previous versions of the file. Also, allows you to compare any two versions of the file. |
|  | Allows you to download the file |
|  | Indicates that there are markups created for this file. By hovering you cursor over the icon it will tell you how many markups there are. |
|  | Allows you to delete this file |

## 6.7 Uploading to a Folder

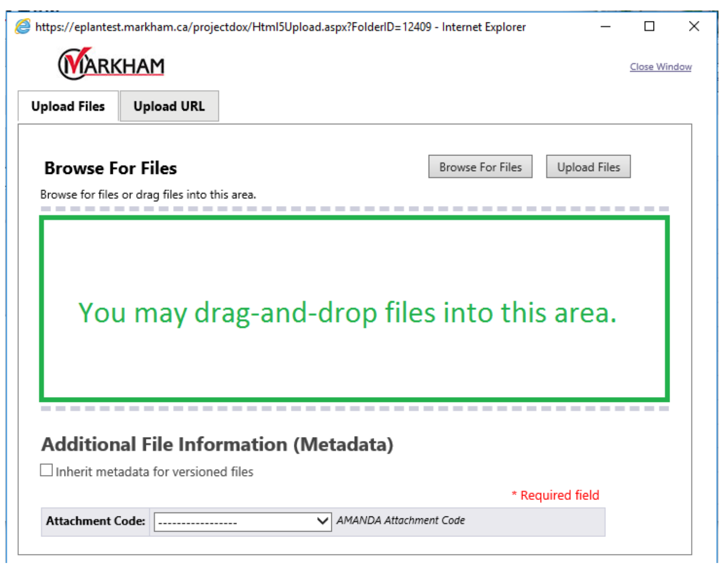
Back to Contents

Follow these steps to upload a drawing or document file to a folder in a project:

1. Enter the project
2. Click Upload Files



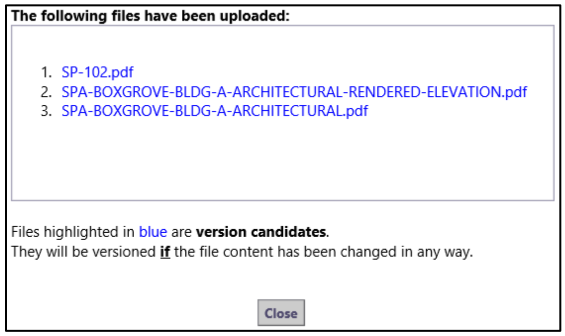

3. The Upload window will appear. Click Browse For Files and select your files or you may drag-and-drop files into the window.




4. Click Upload Files

***Note:***

- When the file uploading has completed, a dialog box appears. If many or large files are uploaded it may take a few seconds to appear in the folder.




- To verify that files have been successfully uploaded you may wish to refresh/reload the folder by clicking this icon above the folder tree structure. When the file is successfully uploaded a thumbnail of the drawing will appear.

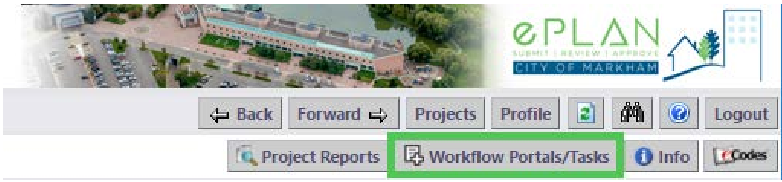
- The System administrator determines which file types are allowed to be uploaded. If you attempt to upload a file type that is not allowed, you either will not be able to see it in the list (if using *Browse For Files*, or if using drag-and-drop, you will receive a message indicating the file type is not allowed.

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

# 7 PROJECT WORKFLOW

*Back to Contents*

By clicking the Workflow Portals/Tasks button you can view the status of all other users' tasks as well as the stage in the workflow that project is currently at.




Immediately after clicking the Workflow Portals/Tasks button you are shown the tasks assigned to you at the top page under the heading ProjectFlow Task List and below you that is the Workflow Instances section. If you have no tasks waiting with you to complete, it will say "No tasks are available at this time".

**ProjectFlow Task List**

Start Workflow  Refresh

☐ Show all tasks for all users

No tasks are available at this time.

**Workflow Instances**

| | NAME | COORDINATOR GROUP | STATE | VERSION | STARTED | COMPLETED |
|---|---|---|---|---|---|---|
| | PLAN 19.106372 - Planning - 10/16/2019 1:27:19 PM | Project Coordinator | Active | 3 | 10/16/2019 1:27:19 PM | |

1 - 1 of 1 records

Below the ProjectFlow Task List is a section called Workflow Instances. Workflow Instances is where you will be able to see the current stage of the workflow.

**ProjectFlow Task List**

Refresh

| | TASK | PROJECT | INSTANCE | GROUP | ASSIGNMENT TYPE | STATUS | PRIORITY | DUE DATE | CREATED | ADDRESS |
|---|---|---|---|---|---|---|---|---|---|---|
| | Applicant Upload Task | 19.106212.000.00.SPC | 19.106212.000.00.SPC - Site Plan - 5/17/2019 9:38:39 AM | Applicant | FirstInGroup | Pending | Medium | | 10/29/2019 9:17:40 AM | |

1 - 1 of 1 records

**Workflow Instances**

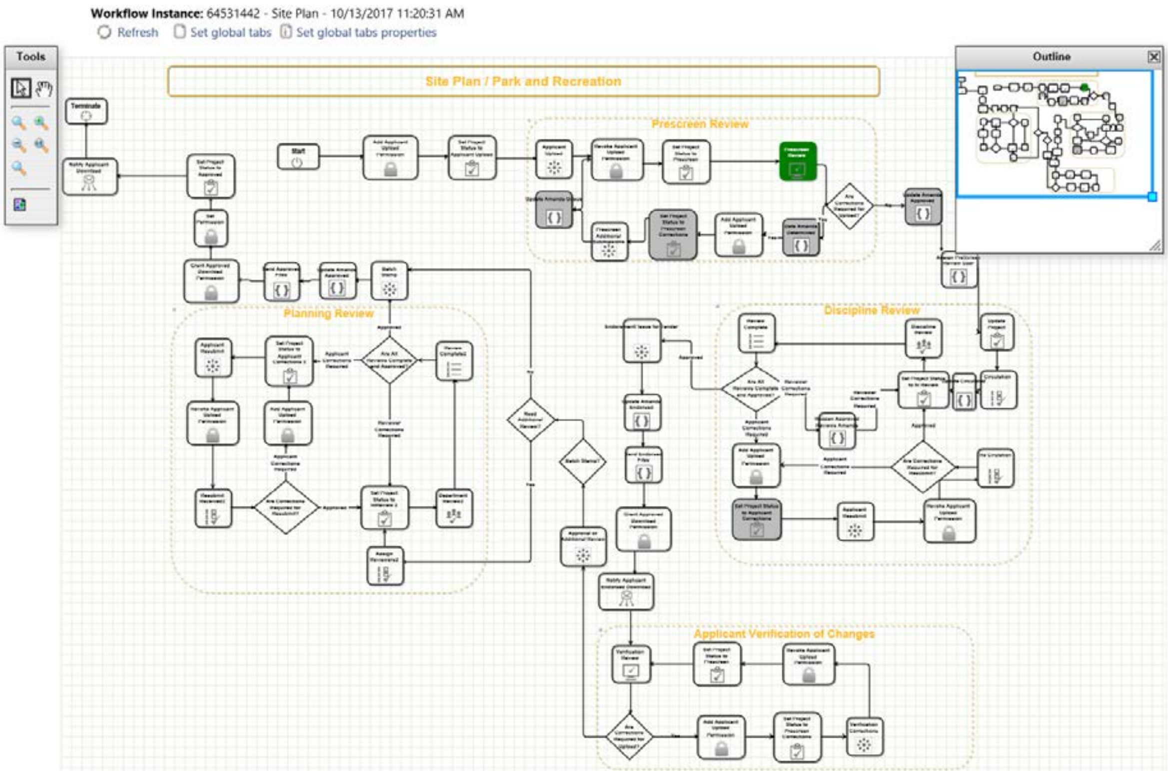
| | NAME | COORDINATOR GROUP | STATE | VERSION | STARTED | COMPLETED |
|---|---|---|---|---|---|---|
| | 19.106212.000.00.SPC - Site Plan - 5/17/2019 9:38:39 AM | Project Coordinator | Active | 1 | 5/17/2019 9:38:39 AM | |

1 - 1 of 1 records

## 7.1 Workflow Status

***Back to Contents***

In order to see the stage in the workflow you are at you click the *workflow* icon in the Workflow Instances section. The green box is the current stage.




## 7.2 Notification of a Task

You will receive notification of tasks assigned to you by email. It is important for you to logon to ePLAN and **'accept' your task as soon as possible**. You can click the "Login to ePLAN" link for quick and easy logon to ePLAN.

**Attention John Smith:**

You have been assigned a task on Project: **18.100380.000.00.SPC**

The due date for this task is:

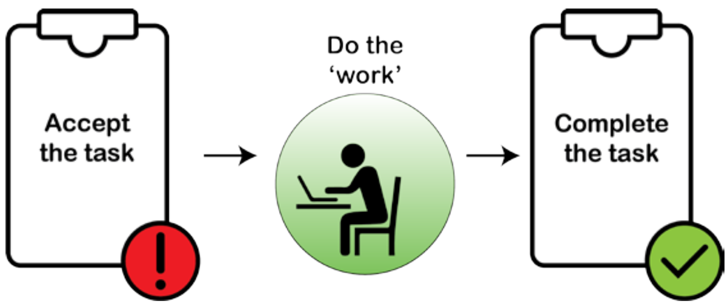
Please Login to ePLAN to begin your task.

| | |
|---|---|
| Project: | **18.100380.000.00.SPC** |
| Task: | **Applicant Upload** |
| **Go to ePLAN** | |

## 7.3 Accepting and Completing Tasks

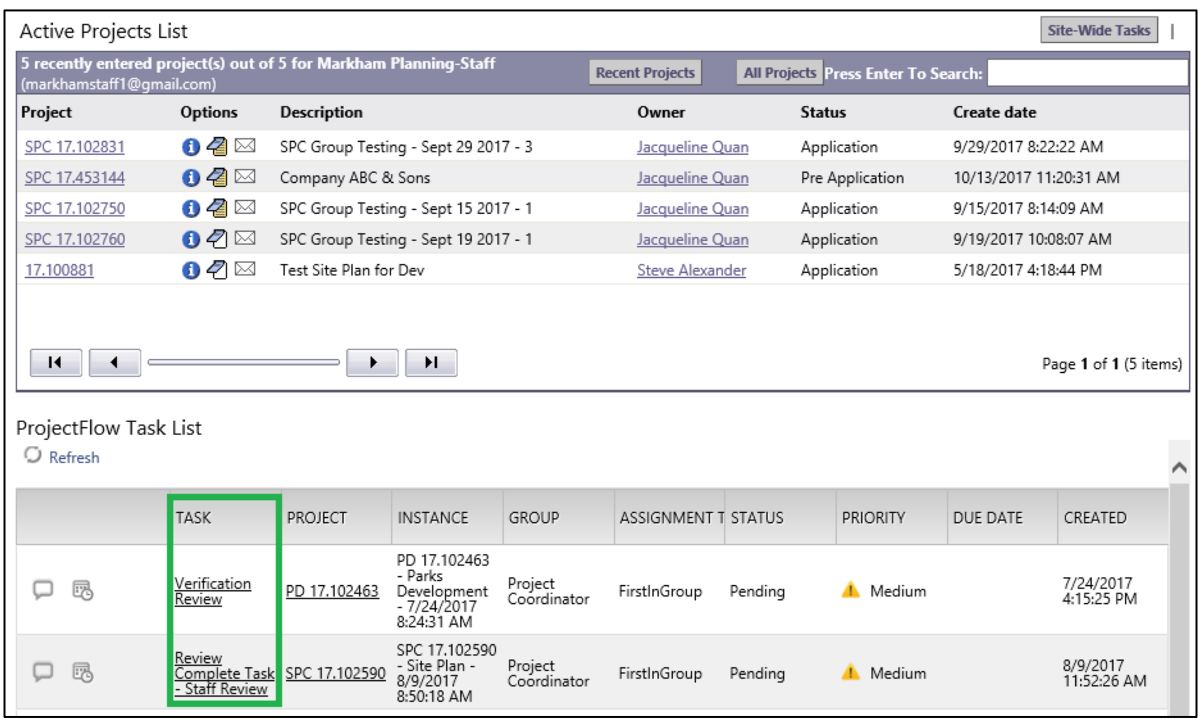
[Back to Contents](#)

Although the nature of the tasks you are assigned to perform are different, all tasks should be handled the same way. When you are emailed notification that you have a task you need to:




### 7.3.1 Accept a Task

You can view the task by either by finding in your Task List at the bottom of the Home Page and clicking on the link in the Task column. If you have many projects underway, there may be several tasks in your Task List and you may have to scroll through the list to find the particular one you are looking for. You may sort the list in various ways by clicking the column headings.



Active Projects List

Site-Wide Tasks

5 recently entered project(s) out of 5 for Markham Planning-Staff (markhamstaff1@gmail.com) | Recent Projects | All Projects | Press Enter To Search:

| Project | Options | Description | Owner | Status | Create date |
|---|---|---|---|---|---|
| SPC 17.102831 | | SPC Group Testing - Sept 29 2017 - 3 | Jacqueline Quan | Application | 9/29/2017 8:22:22 AM |
| SPC 17.453144 | | Company ABC & Sons | Jacqueline Quan | Pre Application | 10/13/2017 11:20:31 AM |
| SPC 17.102750 | | SPC Group Testing - Sept 15 2017 - 1 | Jacqueline Quan | Application | 9/15/2017 8:14:09 AM |
| SPC 17.102760 | | SPC Group Testing - Sept 19 2017 - 1 | Jacqueline Quan | Application | 9/19/2017 10:08:07 AM |
| 17.100881 | | Test Site Plan for Dev | Steve Alexander | Application | 5/18/2017 4:18:44 PM |

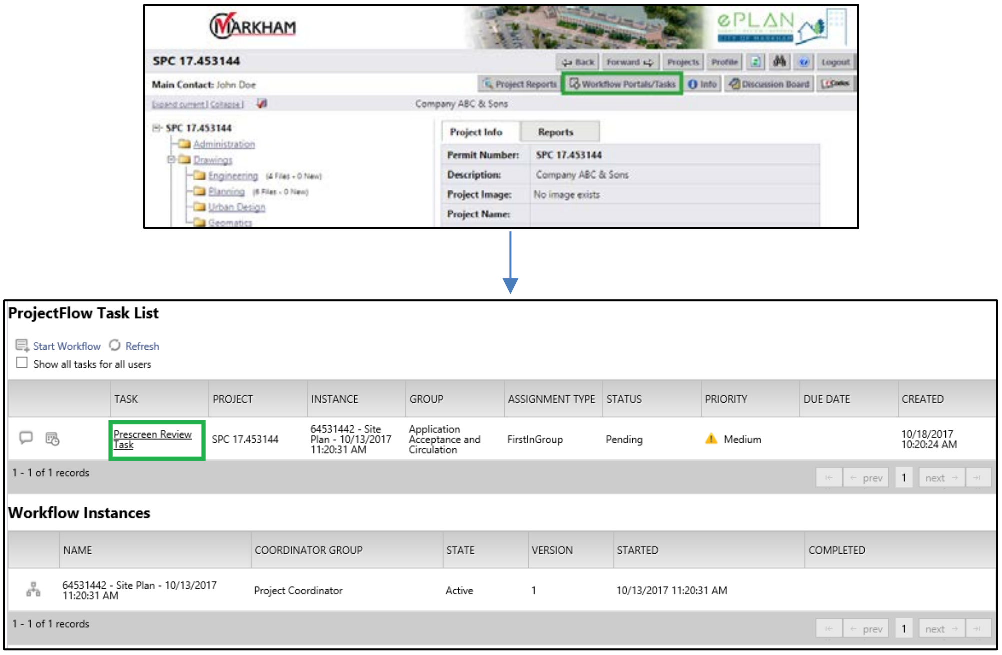
Page 1 of 1 (5 items)

ProjectFlow Task List

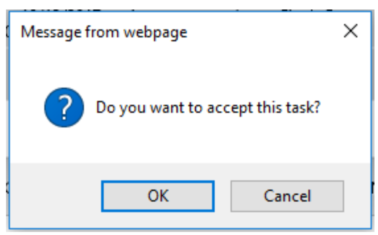
Refresh

| | TASK | PROJECT | INSTANCE | GROUP | ASSIGNMENT T | STATUS | PRIORITY | DUE DATE | CREATED |
|---|---|---|---|---|---|---|---|---|---|
| | Verification Review | PD 17.102463 | PD 17.102463 - Parks Development - 7/24/2017 8:24:31 AM | Project Coordinator | FirstInGroup | Pending | Medium | | 7/24/2017 4:15:25 PM |
| | Review Complete Task - Staff Review | SPC 17.102590 | SPC 17.102590 - Site Plan - 8/9/2017 8:50:18 AM | Project Coordinator | FirstInGroup | Pending | Medium | | 8/9/2017 11:52:26 AM |

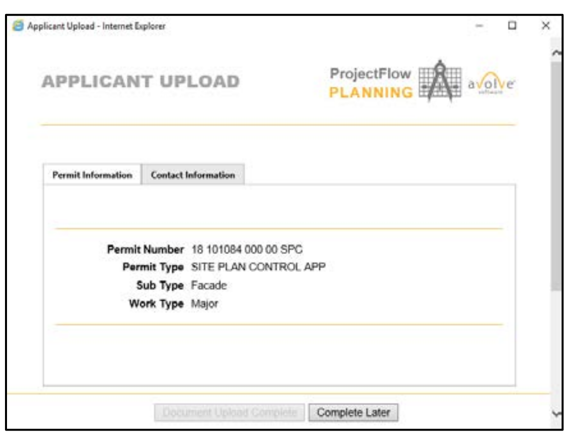
Alternatively, from inside the project, you can select **Workflow Portals/Tasks** which will show your tasks for the particular project only.




Once you have clicked on the Task you will asked whether you want to Accept it, click OK.




Next, an eForm will appear outlining the details of the task.

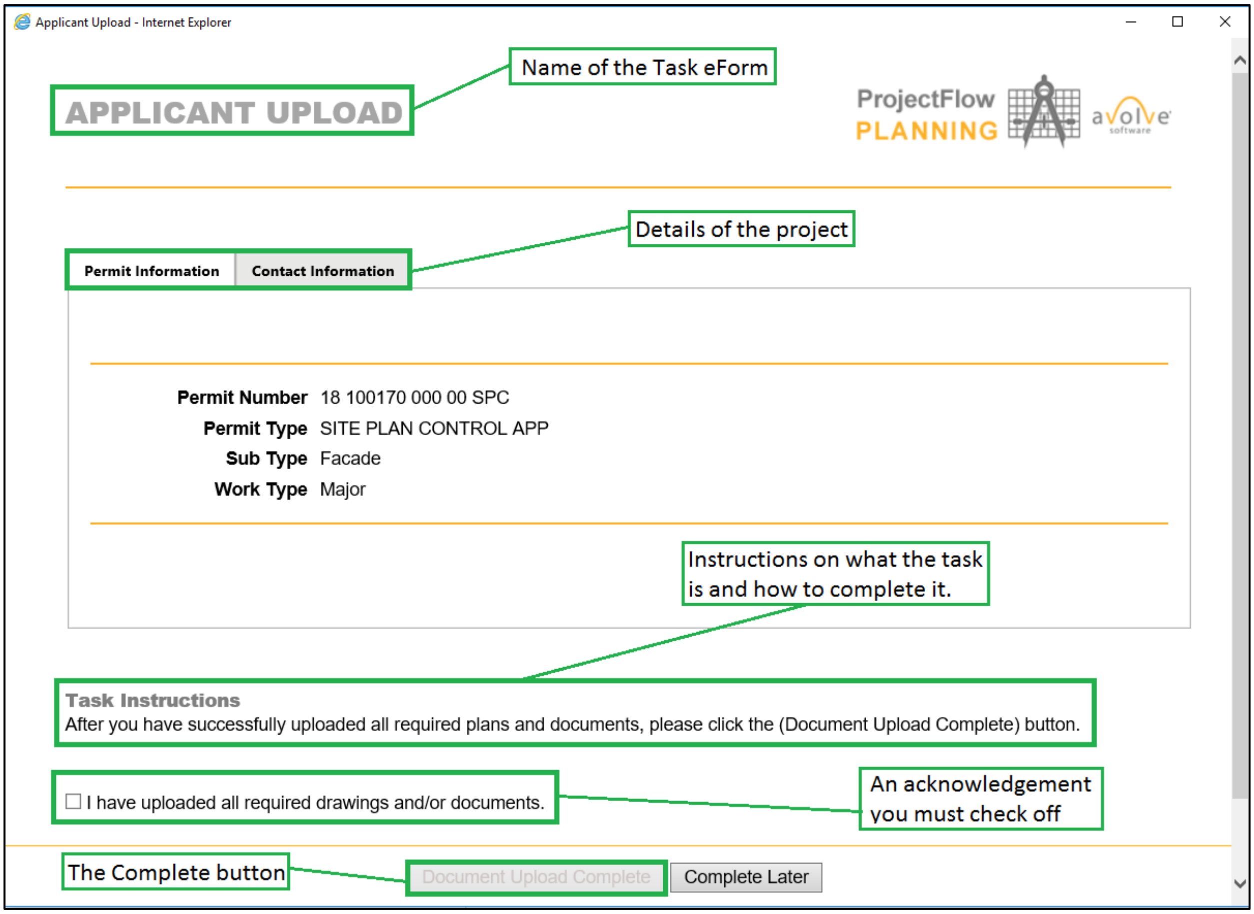


### 7.3.2 eForms

Back to Contents

eForms are dialogue boxes that open when you accept a task assigned to you. They are how users communicate with one another and ePLAN system to advance the workflow.

This is an example of an eForm:




***Notes:***

- Tasks that have not been accepted yet will have a status of “Pending”. Tasks that have been accepted but not yet completed will have a status of “Accepted”.
- If you are not going to perform the task immediately upon accepting it (eg. uploading files) you may close the eForm and re-open it again later.

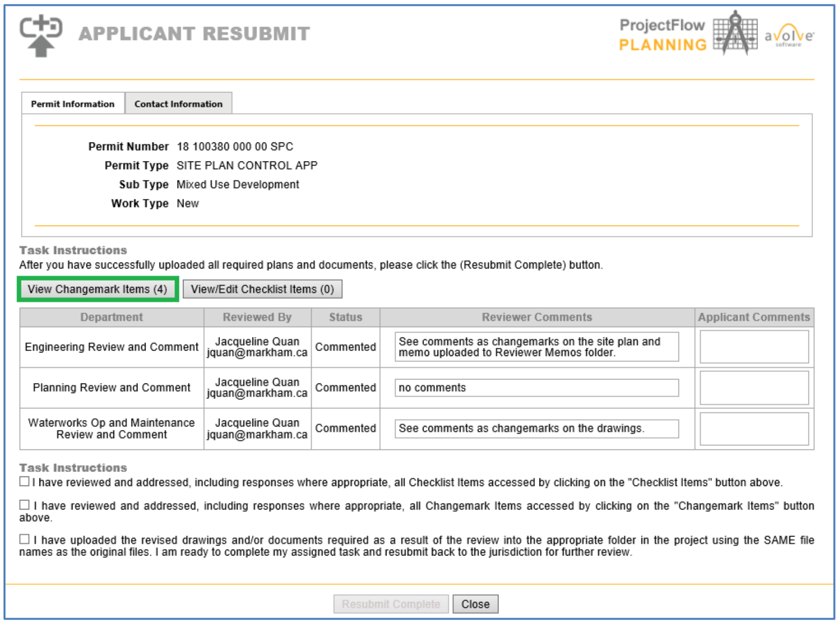
### 7.3.3 Completing a Task

Once you have done work required in the task instructions, you MUST return to the eForm to complete the task by selecting one of the button options at the bottom. If your task is not completed the project workflow cannot move on. You can view the eForm again in the same way you did when you accepted it, by clicking on it from your Task List.

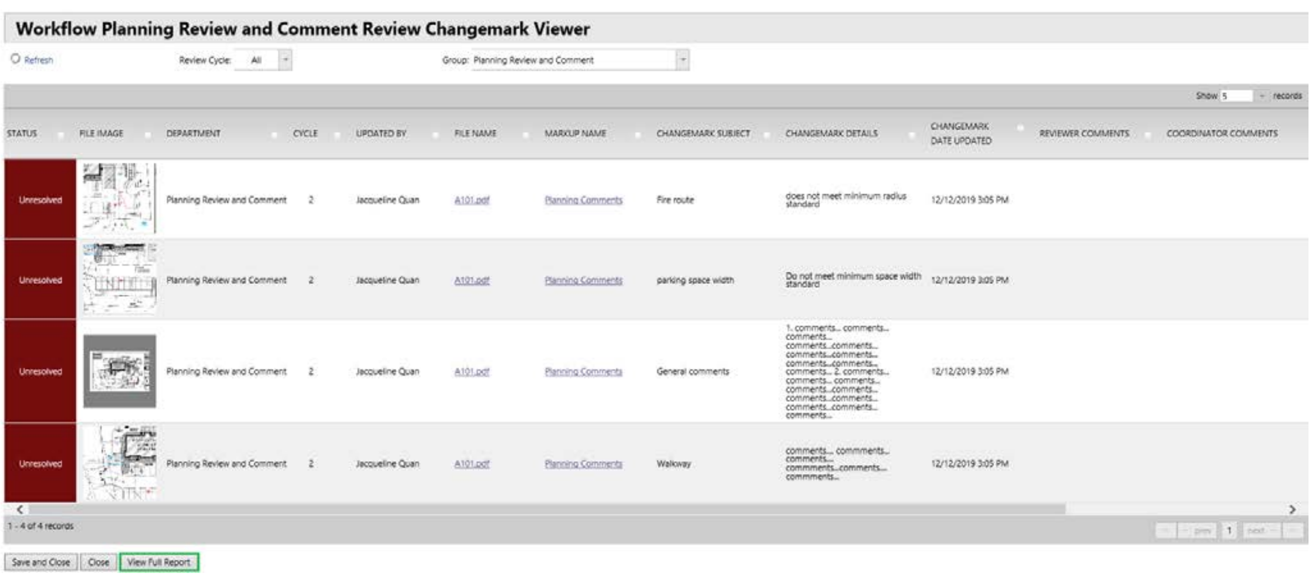
## 7.3.4 Viewing the Changemark Report

*Back to Contents*

You can view the changemark report from your Applicant Resubmit eForm by clicking the View Changemark Items button.

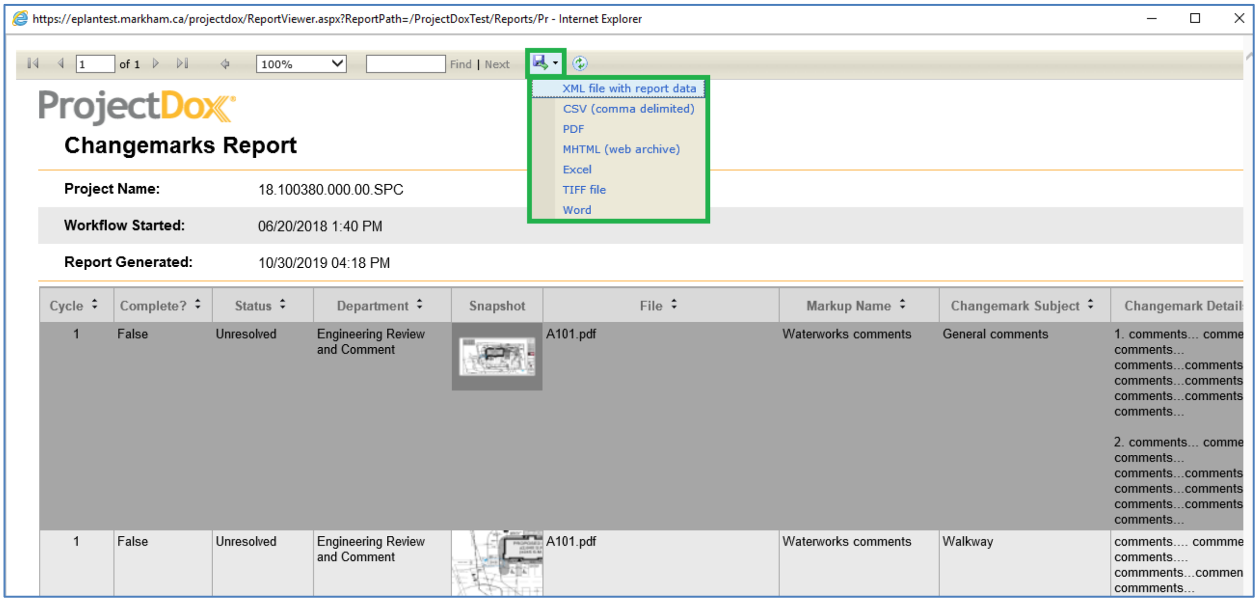



The report is interactive. Clicking the Markup Name will launch the file viewing window, displaying the markups/changemarks contained on that layer.




You may download this report by clicking View Full Report.

A new window will launch and you will be able to select a file format to export/save the report.

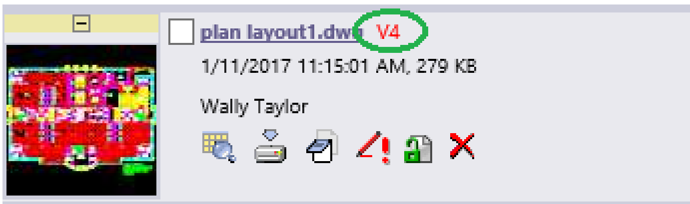


# 8 FILE VIEWING FEATURES

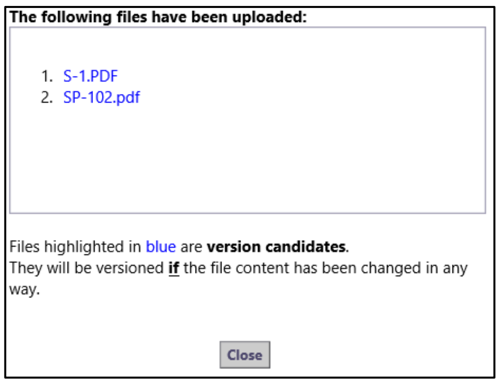
## 8.1 Versioning and File History

*Back to Contents*

ePLAN recognizes and organizes iteration of files and automatically assigns version numbers. It does by checking for files with the same name as existing files in a folder. You can tell a file has multiple versions as it will have a red "V" followed by the version number.




When uploading a new file iteration, if the file is identified as candidates for versioning they will be identified in blue lettering:

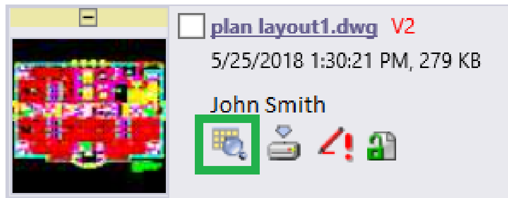



***Note:***

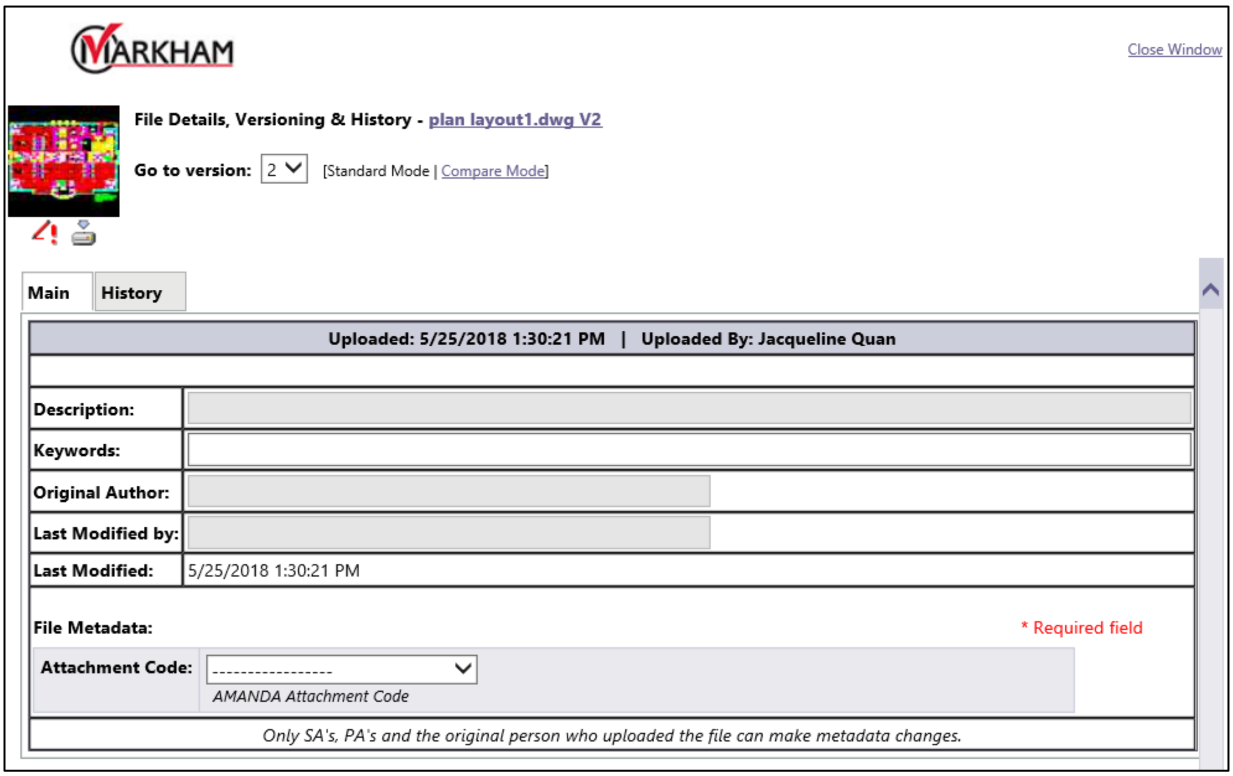
- Despite a 'new' file having the same name as an existing file in the folder, a new version will not be uploaded unless there is a difference between the content of the two files. That is, if the 'new' file is exactly as the same as the 'old' version it will not be uploaded, and thus, a new version will not exist.
- If differences between the files are identified, the file version will be updated.
- If multiple versions exist for the file, the File History window will turn a yellow like this  By clicking on the icon you will be able to select which version you wish to view. For more details on this see section 8.2 (View File History).

## 8.2 View File History

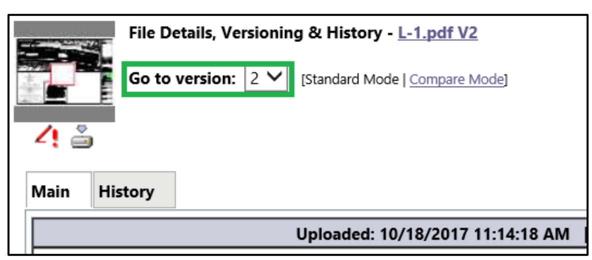
Back to Contents




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

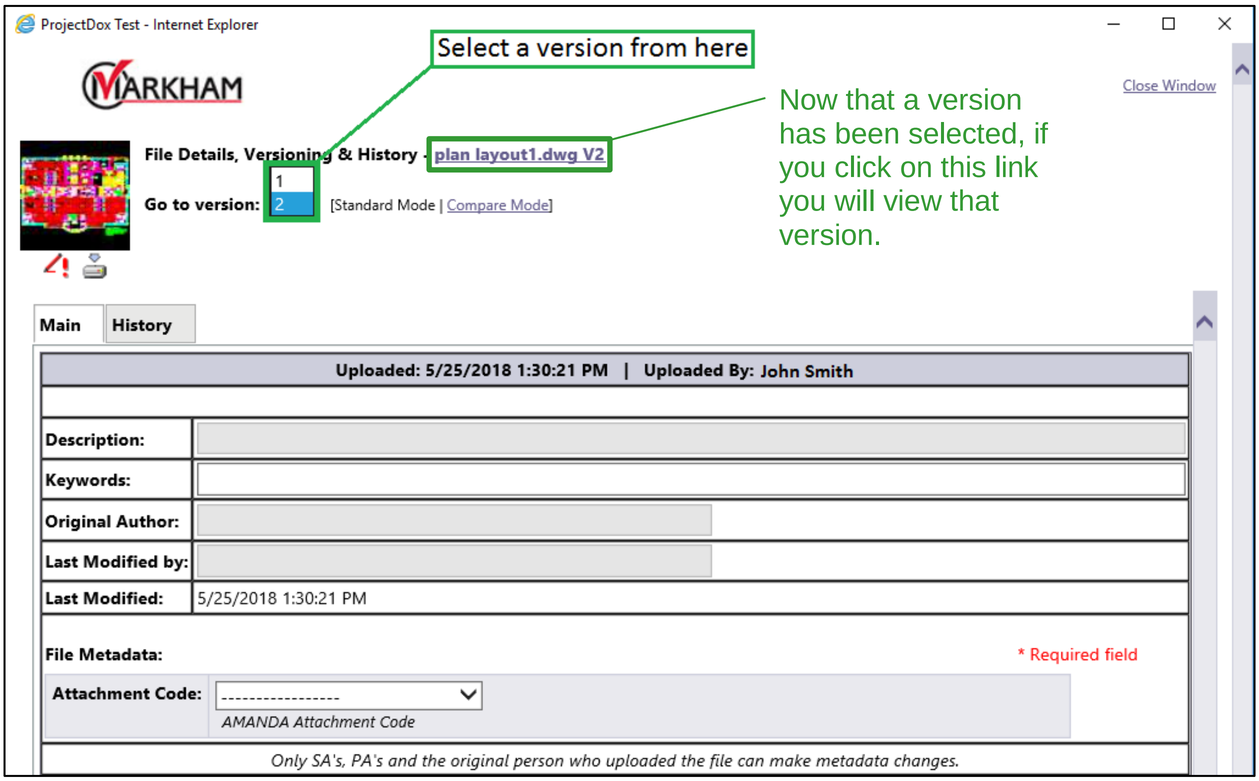



The **Go to version** dropdown menu allows you to select a version of the file (by default, the most recent version is selected). Once you have selected a version, all the information displayed in the Main and History tabs below will be relevant to that version.



To view a file's details or history:

1) Click the icon.
2) The Main and History tabs show information about the selected file.
3) When more than one version of a file exists, click on the version number from the Go to Version selections.




4) The Main tab lists the file's details, which are editable by the user who uploaded the file and Administrators only.
5) The History tab lists activity history for the file. Information for each event (such as viewed, downloaded, markup up, etc.), includes the name of the user who performed the action, and date and time it occurred.
6) To open the file in the Viewer, click the thumbnail image contained in the upper left corner of the view history screen (or click the file name link in the Main or History tab). If markups are associated with the file, the markups present icon will display above the thumbnail image. You can also download the file to your computer if the download icon is present.

***Note:***

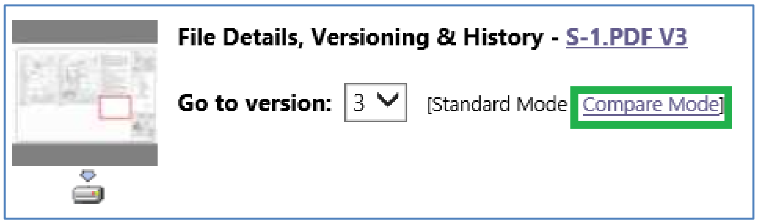
- Events such as copying, moving, versioning, and batch stamping can result in a file's history being split between the earlier and later copies or versions of the file.

## 8.3 Compare File Versions

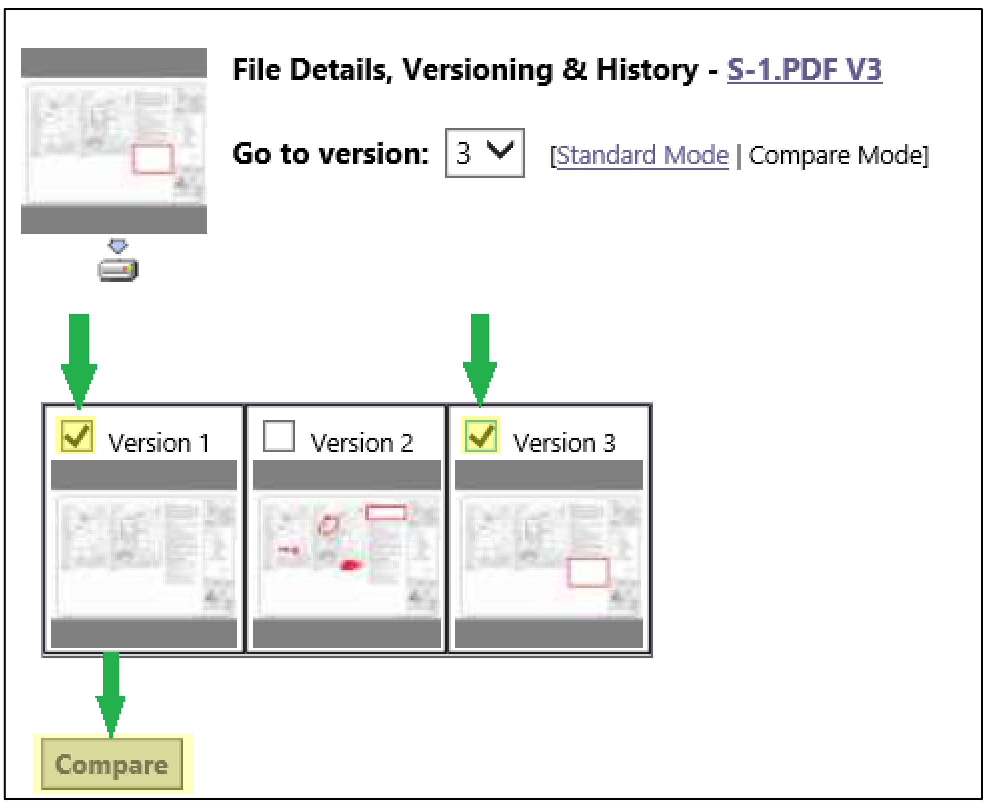
***Back to Contents***

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

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

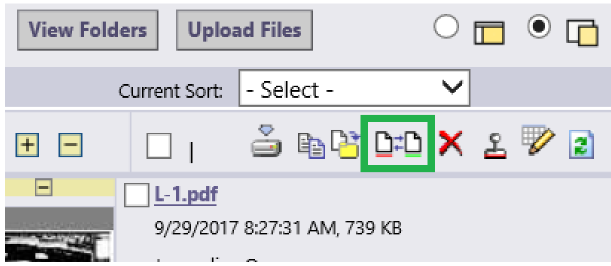



2) Click to select the check boxes for the two versions you would like to compare; then click Compare to view the two files in Compare mode in the Viewer:



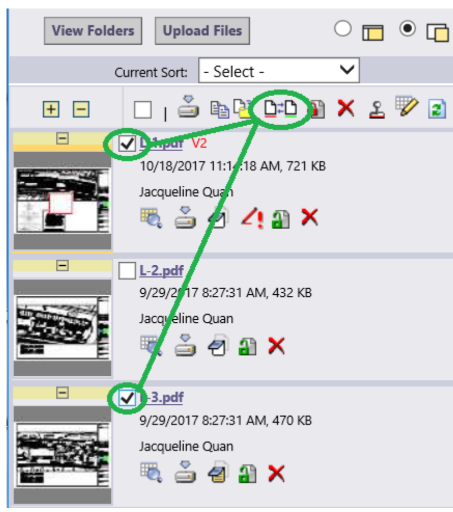
## 8.4 Compare Two Files in Same Folder

*Back to Contents*

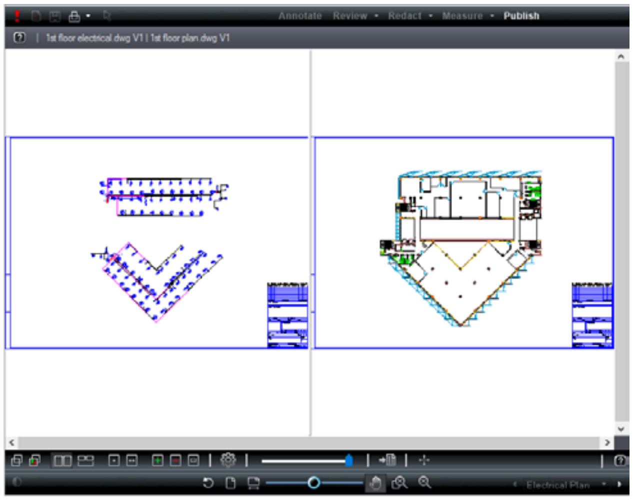



You can select two files listed in a folder and open them for comparison:

1) Select the two files and click the *Compare Two Checked Files* icon.

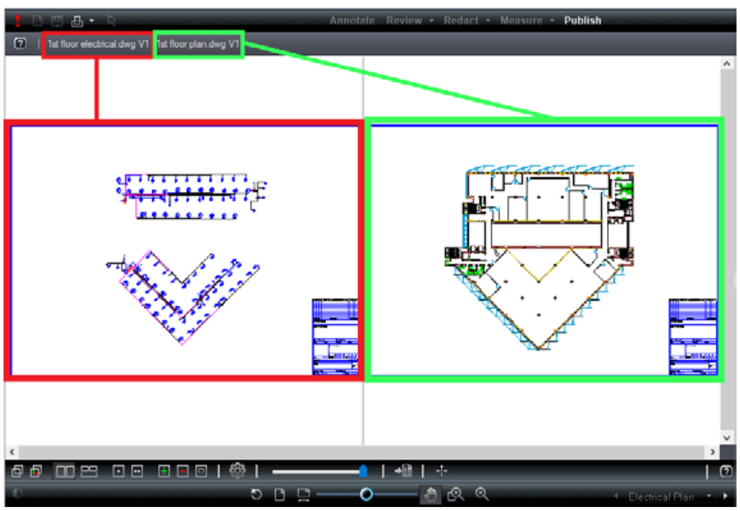


2) The Viewer launches in Compare mode, with side-by-side as the default view.

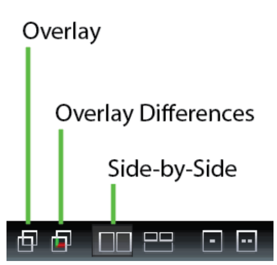



***Notes:***

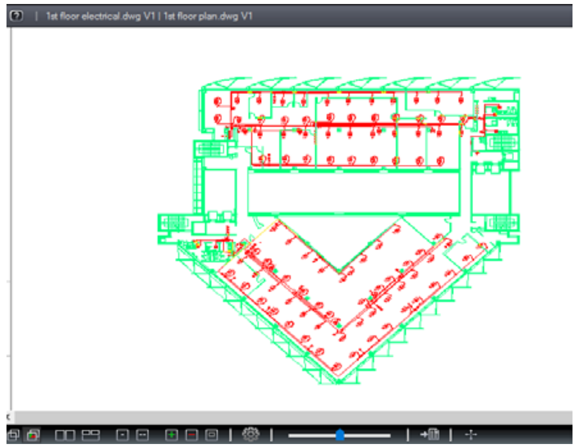
- The sort order in effect for the folder when you selected the two files will determine their position in the Viewer – the higher file in the list will display to the left.




- The files can be compared in the following modes: overlay, overlay differences, side-by-side, added or deleted information only, and others.



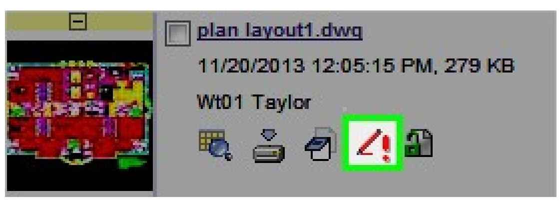
- In overlay view, elements unique to the left file display in red, those unique to the right file display in green. Unchanged areas display in gray.



## 8.5 File Markups Icon

[Back to Contents](#)

The highlighted area is a Markups icon.

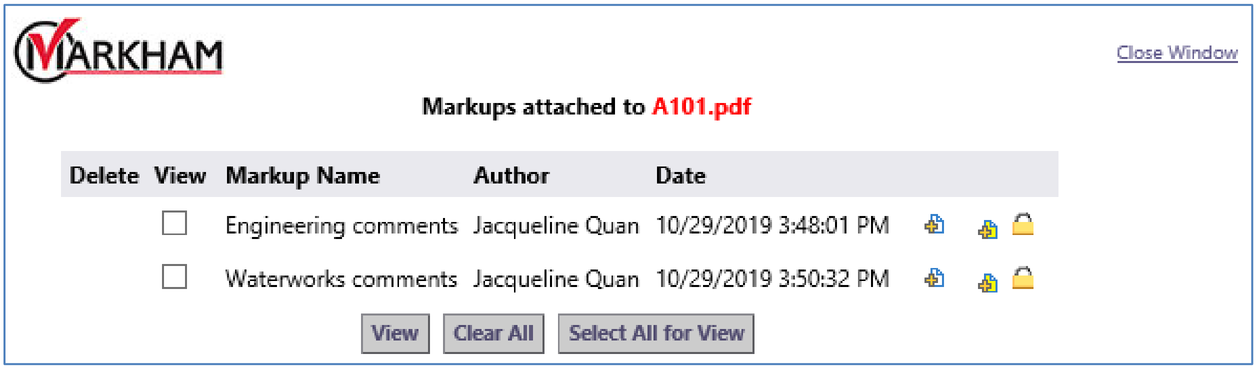



The presence of this icon means that there are markups and/or changemarks associated with the file.

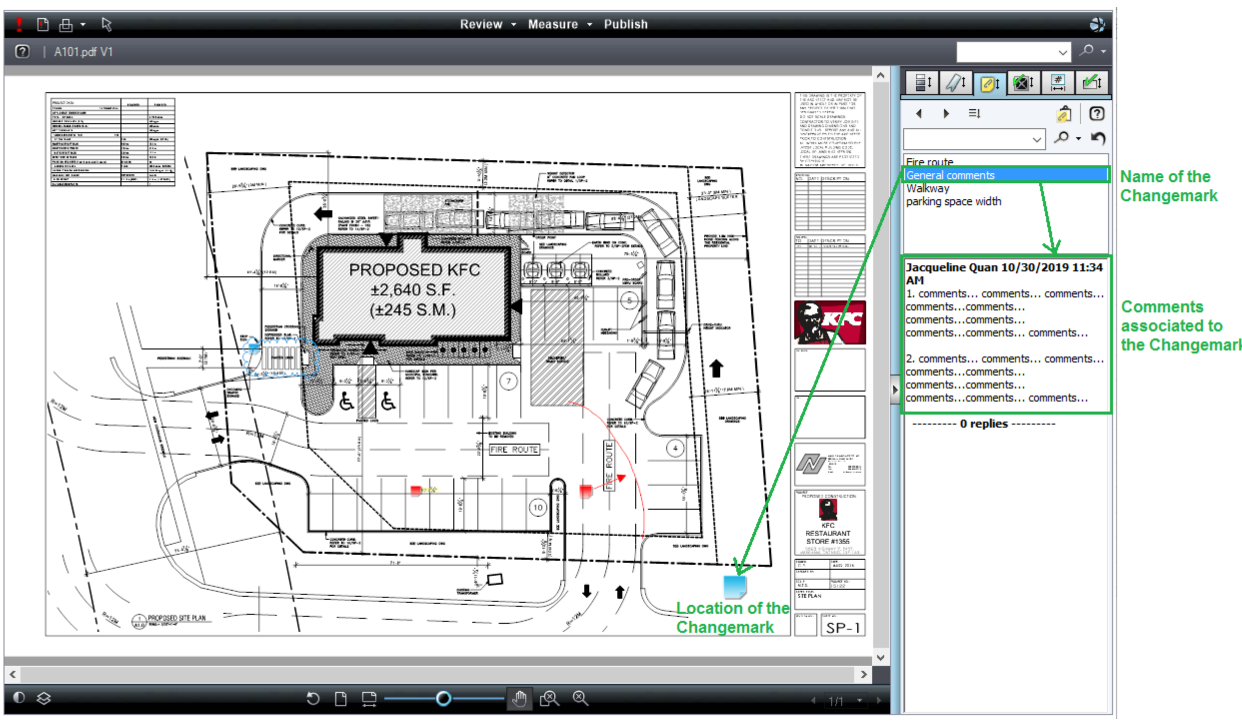
### 8.5.1 Viewing Markups/Changemarks

1) Click on the Markaup icon beside of beside the file for which you want view the /markups/changemarks.

2) A window will open. Put a check in the box of each layer you want to view. Click View.



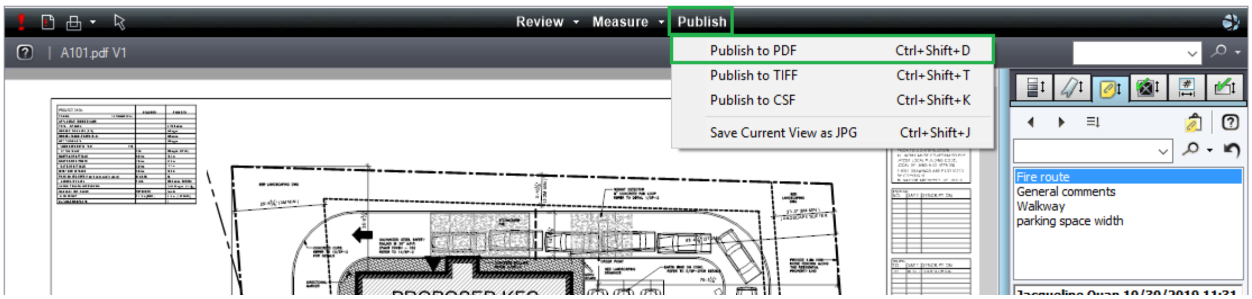

3) The file viewer will launch. A list of the changemarks will appear on the right side of the screen. Clicking on the name of the changemark will display the comment associated with it and show you graphically where the changemark is located on the file. The changemark icon will 'pulse' to draw your attention to its location.



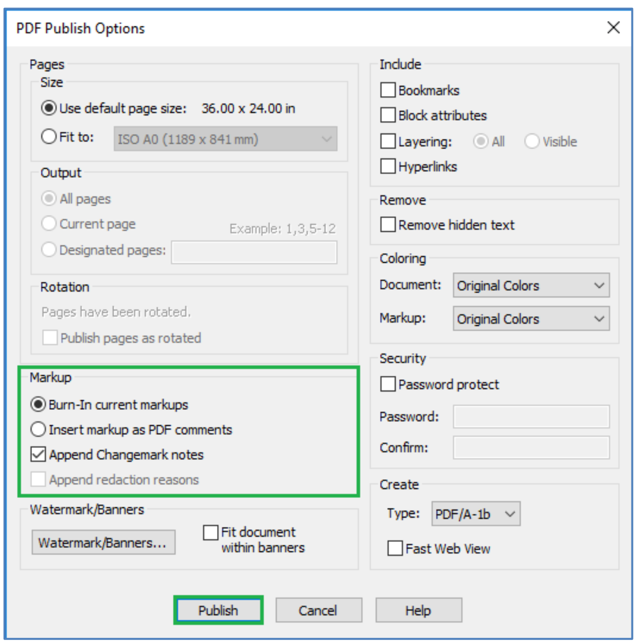
### 8.5.2 Downloading Markups/Changemarks

You can download a file with the markup/changemark layers as they appear graphically on the file. To do this, first you must be viewing the file with the markup/changemarks displayed (see section 8.5.1).

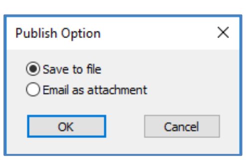
1) Click Publish. Select Publish to PDF.




2) Select "Burn-In current markups" and "Append Changemark notes". Click Publish.




3) Select "Save to file". Click OK.




4) A window will open and you can name the file you will be saving and browse for a location save the file.

### 8.6 Delete Files

If you have Delete privileges, you will see the *Delete* icon for each file. Click the to delete the file, and then click “**Yes”** in the confirmation dialog box. To delete a group of files, select the check box for each file you want to delete and click the *Delete Checked Files* icon located at the top of the thumbnails panel.

***Note:***

- The applicant may only delete files during the initial Applicant Upload task.
- Files that contain markups cannot be deleted.

## 9 SEARCH FEATURES

[Back to Contents]

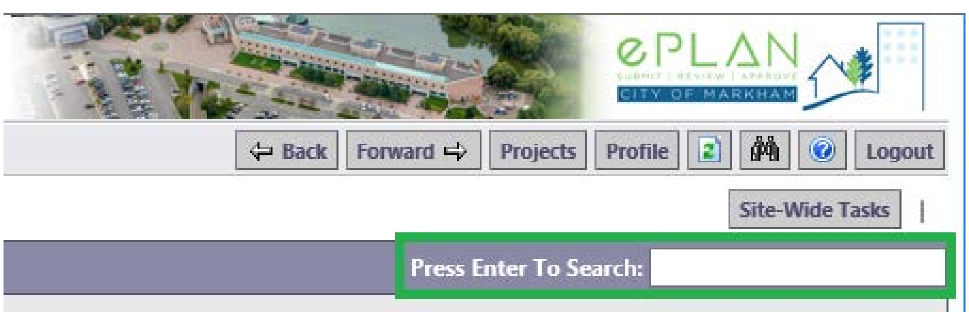
There are two search tools. One is a simple tool used to search for a project from the Home Page. The more advanced tool can be used to find instances in file names and even within file contents.

***Note:***

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

### 9.1 Simple Search

The Home page has a Simple Search text box as shown below:

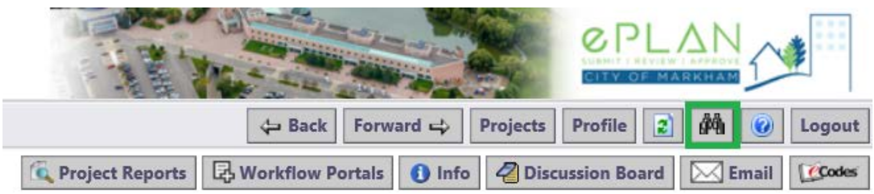



To use the Simple Search, type the word or phrase you want to match and press <Enter> on your keyboard. This will search the Project Names and Project Descriptions and return the list of matches.

## 9.2 Advanced Search

[Back to Contents](#)

This Search tool makes it easier to find information, especially in large sites with many users, projects, and topics. The search engine has the ability to search for objects in the database and return all matches in various fields and properties including metadata, markup text, topics and notes, file, folder, and project names, addresses, and more. All versions of a file can be searched.



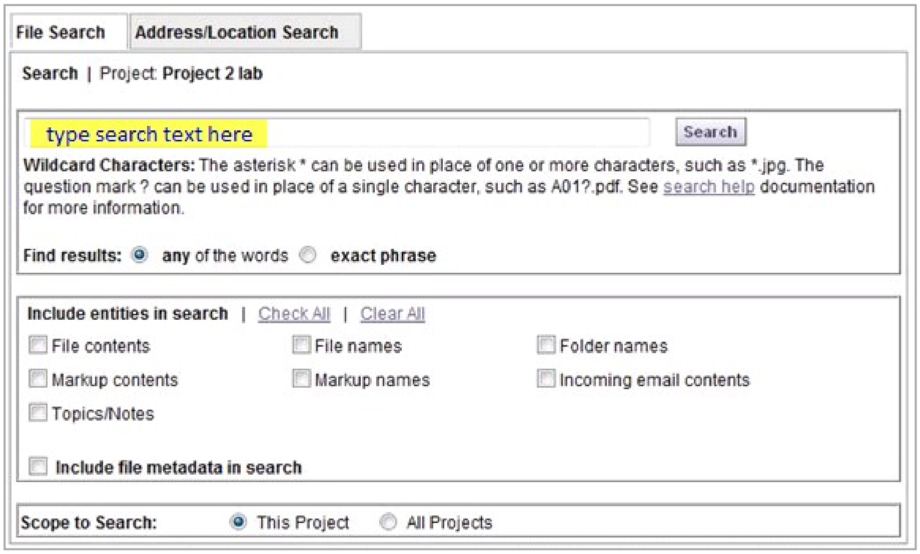

***Note:***

- File Author and File Description will be retrieved only for Office 2003 and earlier files due to change in the internal format for storing that particular information.

[Back to Contents](#)

To use the Advanced Search tool:

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




3) Type the string of words you want to search for:

- Search allows full, exact, and partial word searches. To search a full word, select "any of the words" and type the word and the search engine will return all results where that word is found in its entirety. To search exact terms, select the "exact phrase" check box and type in the exact term you want matched. To search for partial words and phrases, use wildcard characters.
- If you are searching "**any of the words**", and enter `wind road`, you will only get results with the whole word "wind" or the whole word "road". The search will not find "winding roads" because the whole words "wind" or "road" do not exist in either of those terms in their entirety. If you wanted to return the result "windy roadside", you would use wildcards such as `wind* road*`. The words DO NOT need to be next to or near each other, just contained in their entirety somewhere in the item being searched. If you don't want to search for the entire word, use a partial search with a wildcard * or ?
- If you search with "**exact phrase**" selected, the words must be in the exact order and be an exact match. For example, if you search for `Admin User`, the results will contain "admin user", but not "admin users". There is no need to add double quotes to each end of the search term(s).
- Search is NOT case sensitive.
- Wildcards characters do not work when using "exact phrase"; they should only be used with the "any of the words" option.

4) Select the desired items from the *Include entities in search* area. ProjectDox will search all the selected entities. You must select at least one entity, or your search will return no matches.

5) You may select **include file metadata in your search**. Choosing this option displays

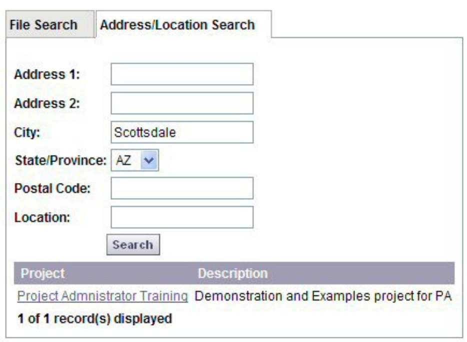
the metadata information to search by when searching within a project that has metadata associated with it.

6) In the *Scope to Search* area, select your desired scope. When searching at the File level, your scope can be as narrow as searching a single folder or as wide as searching all projects contained in a ProjectDox site.

7) Click Search (or press <Enter> on your keyboard). The results display in the View Search Results window with the keyword or phrase highlighted. Term hit highlighting is supported in ProjectDox so that when you perform a search, all files where this word or phrase exists will display. When you click on a file, you are quickly taken to the page where the first occurrence of the item exists (zoomed and highlighted).

8) When you check the **Include file metadata in search** checkbox, project specific metadata will be available for selection and searching.

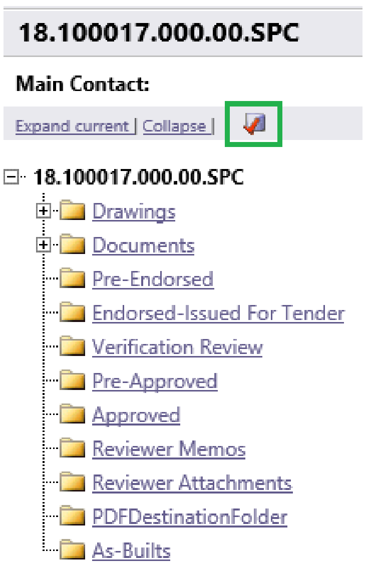
You can use the *Address/Location Search* tab to quickly locate address information from the Project Information screens. The results appear on the bottom portion of the tab once you enter the criteria and click Search.



# 10 SUBSCRIPTION MANAGER

*Back to Contents*

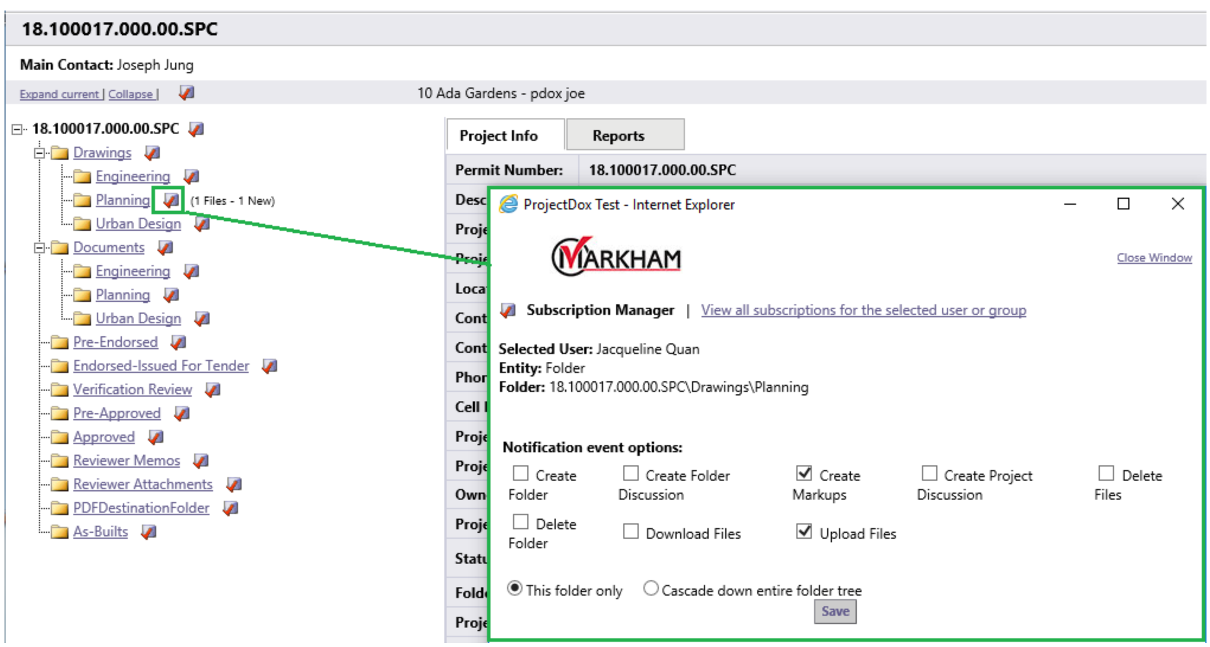
The Subscription Manager allows you subscribe to notification emails whenever one of the selected events occurs within the subscribed folder or directory tree (with the exception of your own activity). Click the Notification Icon to access the Subscription Manager, and view the notification icon for each folder:




You are not subscribed to the folder

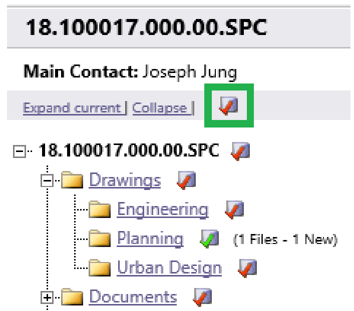
You are subscribed to the folder

To subscribe to a folder, click on the icon to launch the Subscription Manager window. Put a check in the boxes of the activities occurring in that folder that you wish to be notified of. Save and close.



***Note:***

- Select the *Cascade down entire folder tree* radio button to subscribe to all subfolders of the current folder.
- To receive notification emails for the entire project, select the Notification icon for the top folder and check the option to Cascade down entire folder tree from the Subscription Manager window.




- To unsubscribe from all notification events, click Unsubscribe All within the Subscription Manager window. This will unsubscribe you from the selected folder and the subscription icon will again appear red.

***[Back to Contents](#)***

# 11 HELP

**[Back to Contents](#)**

For general help topics to navigate in ePLAN you can click the button at the top of the screen.


For help on the using the file viewer and tools contained within the viewer click the once you have launched the viewer.