OnBase® 17

Electronic Plan Review

Version 17

Copyright

Document Name .... Electronic Plan Review

Department/Group .... Documentation

Revision Number 17

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Using the Module Reference Guide (MRG)

If you are unfamiliar with module reference guides (MRGs), please review the content below so that you can more quickly and efficiently locate the information you need.

The MRG is a PDF document containing all available instructions for a module. The content in this MRG is considered module-specific. You may be referred to another MRG if a referenced function is not specific to this module.

Each MRG typically includes the following chapters:

- **Exposure** - Provides introductory information and license requirements.
- **Usage** - Provides procedures for user-facing functionality.
- **Configuration** - Provides procedures for configuration and system administration.
- **Installation** - Provides system requirements and installation procedures.

You can open any chapter or section in the MRG by clicking its entry in the Table of Contents.

It is considered a best practice to read through an entire procedure before attempting to complete any of its steps. Pay close attention to notes, tips, and cautions, which can help you better understand the entire process and discover any prerequisites you may not have completed.

The MRGs use notes, tips, and cautions to draw your attention to additional information.

Note: A note provides supplemental information or highlights behavior you might not expect.

Tip: A tip describes extra, non-crucial information, such as a shortcut, reminder, or use for a feature you might not think of.

Caution: Cautions are designed to help protect the system from data loss or severe issues that may arise when an instruction is not followed properly.

Cross-references are links to related information or additional instructions you may need to complete a task. Click a cross-reference to navigate to the referenced section. To return to the page you were viewing before following a cross-reference, press **Alt + Left Arrow** until the desired page is displayed.

Searching: The following search instructions pertain to viewing an MRG in Adobe Reader or Adobe Acrobat. Some information may not apply to other PDF readers.

- **Basic search:** Press **Ctrl + F**. Enter the word or phrase you are looking for in the search box and press **Enter** to locate each instance.
- **Advanced search:** Press **Ctrl + Shift + F** to find all instances of a phrase in an MRG or folder. In the **Search** dialog box, enter the word or phrase you are looking for, and then select one of the following options:
  - **In the current document** - Searches the document you are viewing.
  - **All PDF Documents in** - Searches a selected folder or directory. If you are unsure of which MRG to search, try searching the folder where your MRGs are located to display all results for the word or phrase.

Overview

The Electronic Plan Review module allows public users to conveniently and securely upload electronic plan documents into OnBase. The uploaded plan documents can then be routed through OnBase and reviewed by multiple plan reviewers to ensure their completeness and compliance with all necessary regulations. If any of the uploaded documents need to be modified, a reviewer can note the problem by adding a comment onto the relevant plan document(s) or the entire project file. After all plan reviewers finish reviewing the project documents, all project documents and related comments will be compiled together and published onto the Plan Review Web site. The submitter can then download the document and view all of the reviewer comments. After the submitter has modified the plans as required, he or she can resubmit the plans to begin another review cycle.

Licensing

A properly functioning OnBase Application Server must be installed and configured prior to installing Plan Review.

A **Plan Review Named User** or **Plan Review Concurrent Client** license is required to use the OnBase Plan Review solution. In addition, the following licenses are required to use Plan Review:

- Workflow
- Unity Client Server
- Conversion Framework for Aspose
- PDF Framework
- EDM Services
- Signature Pad Interface (TWAIN)

A **Reporting Dashboards** license is required to use Reporting Dashboards in conjunction with Plan Review.

Check your current licensing status by selecting **Utils | Product Licenses** from the Configuration module.

Usage - Submitter

The Plan Review Web site is a web-based interface that allows you to submit electronic plan documents for review and approval.

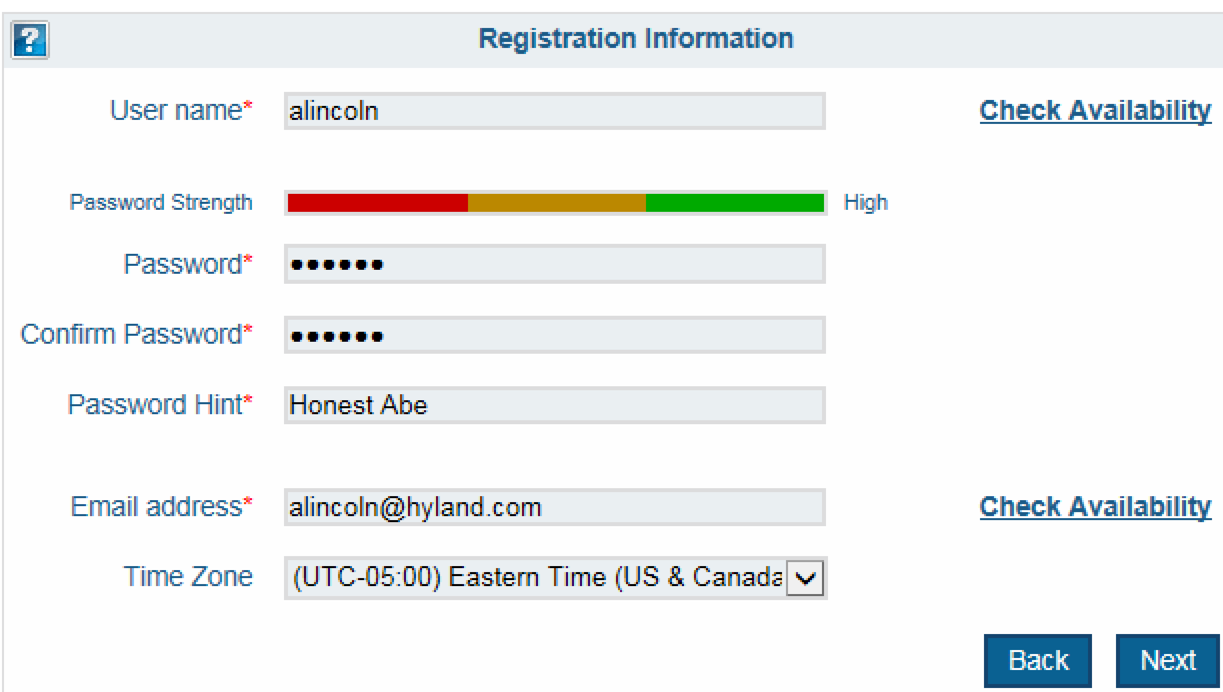
If you are using a web browser that is not compatible with Plan Review, you will still be able to access the site, but all functionality may not be available and/or the site may not function or be displayed as expected. Contact your solution provider for a list of web browsers compatible with the Plan Review web site.

Getting Started

Registering an Account

In order to upload plan documents to be reviewed, you must first create a Plan Review account. To register an account for Plan Review, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Register**. The **New User Registration** window is displayed.
3. Read the disclaimer, and then select the **I agree to the above terms and conditions** check box and click **Next**. The **Registration Information** window is displayed.

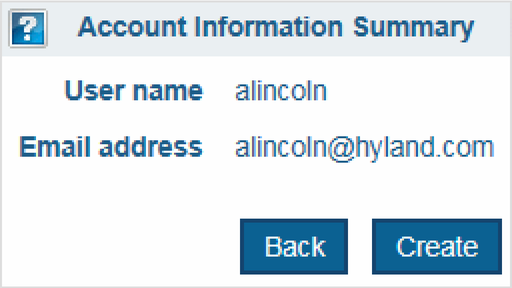


4. Enter your user information into the appropriate text fields.

Note: Your password is case-sensitive, but your user name is not.

Note: You cannot use a user name or e-mail address that is already in use. Click **Check Availability** to see if your chosen user name or e-mail address is available.

5. Click **Next**. The **Account Information Summary** window is displayed.



6. Review your account information for accuracy. If any information is incorrect, click the **Back** button and revise your information as needed.

   Depending on your system configuration, you may also have to answer a CAPTCHA before proceeding with your registration.
7. After your information has been verified and any required CAPTCHAs have been answered, click **Create**. Your Plan Review account is created.

Logging On

To logon to your Plan Review account, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Login**.
3. Enter your user name and password in the **User** and **Password** fields, then click **Sign In**.

Note: If you have forgotten your password, you can select the **Forgot Name/Password** option to reset your password. See Resetting or Retrieving Your User Name and Password on page 3 for more information.

Resetting or Retrieving Your User Name and Password

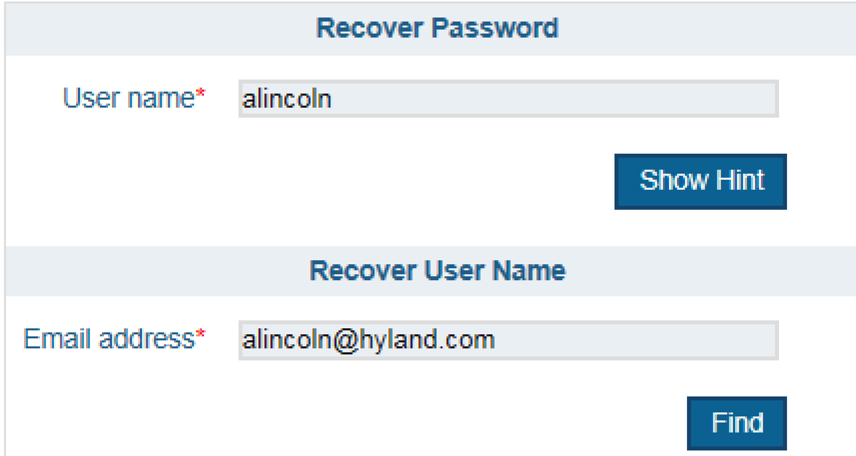
If you have forgotten your user name or password, you can use the **Forgot Name/Password** feature to reset or retrieve your user name or password.

Resetting or Retrieving Your Password

To retrieve or reset your password, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Sign In**.

3. Select the **Forgot Name/Password** option. The **Account Recovery** window is displayed.



4. Type your user name in the **User name** field and click **Show Hint**. Your security hint is displayed.
    - If the security hint was sufficient to remind you of your password, you can click the **Return to Login** button and log in to Plan Review.
    - If you still do not remember your password, click the **Reset Password** button. An e-mail message that contains a hyperlink to reset your password will be sent to your e-mail account. After you reset your password, you can log in to Plan Review with your user name and new password.

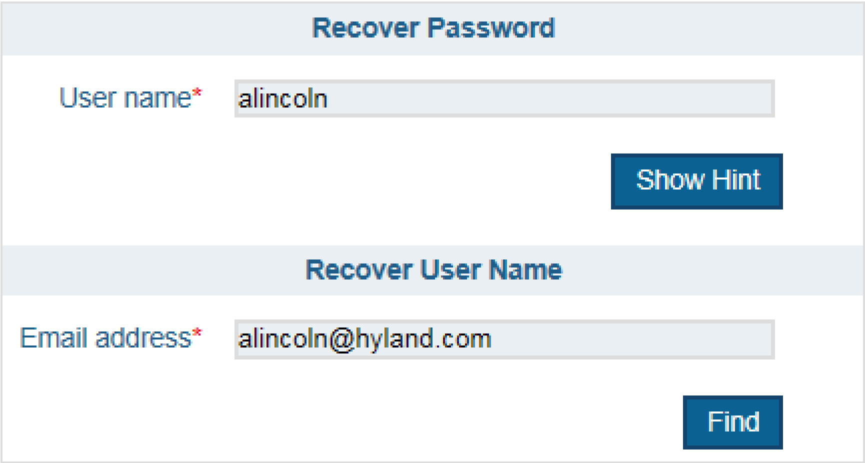
Note: Depending on your system's configuration, the hyperlink that resets your password may expire after a specified time. If your hyperlink has expired, you need to click the **Reset Password** button again to receive a new hyperlink.

Retrieving Your User Name

To retrieve your user name, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Login**.

3. Select the **Forgot Name/Password** option. The **Account Recovery** window is displayed.



4. Type your e-mail address in the **Email address** field and click **Find**. An e-mail message that contains your user name will be sent to your e-mail account.

Using the Plan Review Web Site

The following list contains a brief overview of the steps you will need to perform in order to create and submit a project for review using the Plan Review site.

1. Enter contact information for people that are associated with your project (including information for the company at which they are employed). For more information, see Adding People to Your Contacts List on page 6.
2. Create a Project within Plan Review that will be used to store all documents and information related to your project. For more information, see Creating A New Project on page 12.
3. Assign the contacts you added in step 1 to the roles they perform for your project (i.e., Architect, Subcontractor, etc). For more information, see Assigning Someone to a Project Role on page 19.
4. Enter the Location(s) at which the project is taking place. For more information, see Adding a New Location Parcel on page 22.
5. Upload plan documents associated with the project. For more information, see Adding Documents to a Project on page 24.
6. Submit your project for review. For more information, see Submitting A Project on page 31.

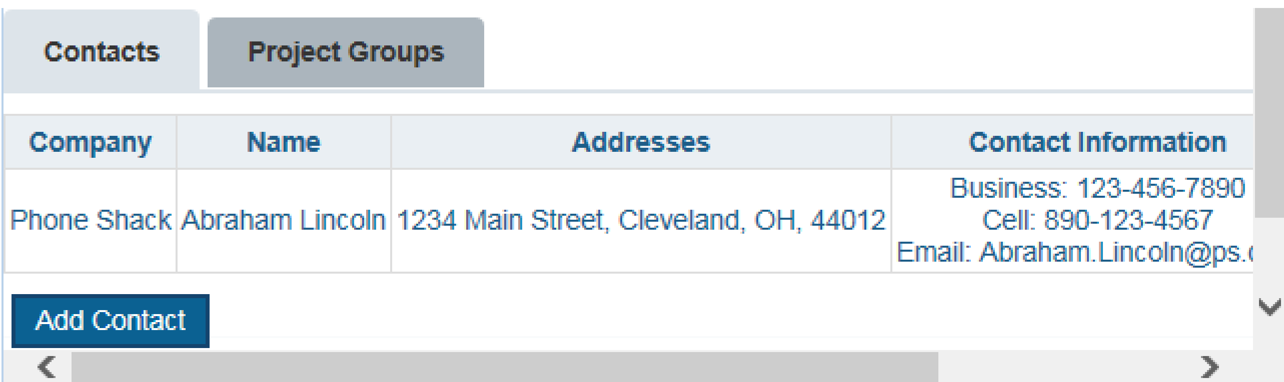
   Once your project has been reviewed, the reviewed documents will be displayed in your Review Documents or Approved Documents window.
7. Review any documents that have been added to your Review Documents window, and modify the documents per the reviewer's comments. Once all required modifications have been made, re-upload your revised plan documents. For more information, see Viewing Reviewed Documents on page 41.
8. Resubmit your project for review. For more information, see Submitting A Project on page 31.

Adding People to Your Contacts List

Your Plan Review contact list is used to store contact information for every person that has a significant level of involvement with any of your projects - this could include a project's architect, an engineer, a subcontractor, etc. Any contact in your Contact list can then be assigned to one or more projects before it is submitted for review.

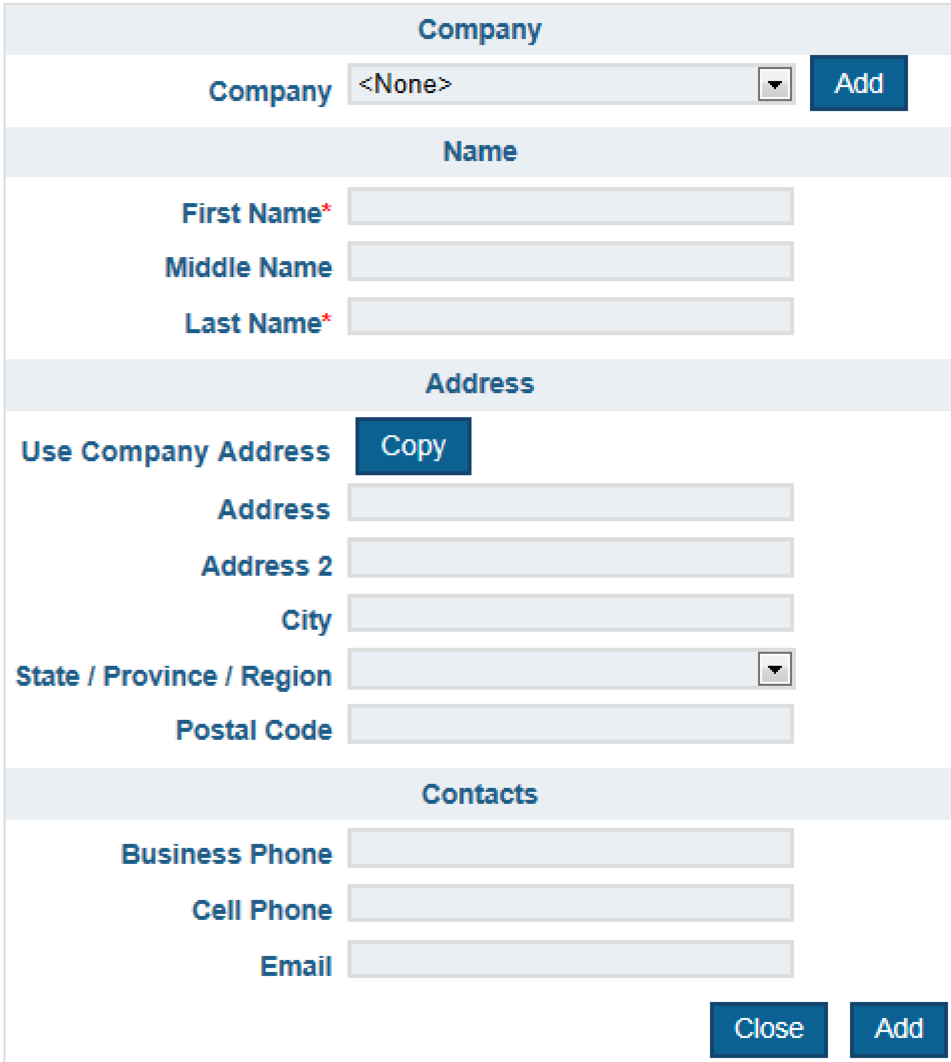
To add a new contact to your Plan Review account, follow these steps:

1. Select the **Settings** tab. The **Settings** window is displayed.



2. Select the **Contacts** tab.

3. Click **Add Contact**. The **New Contact** window is displayed.



4. Enter the information for your new contact.

Option	Description
Company	Select the company the selected contact is affiliated with from this drop-down select list. If the contact's company does not yet exist, see Adding Company Information on page 9.
First Name	The contact's first name. This is a required field.
Middle Name	The contact's middle name.
Last Name	The contact's last name. This is a required field.

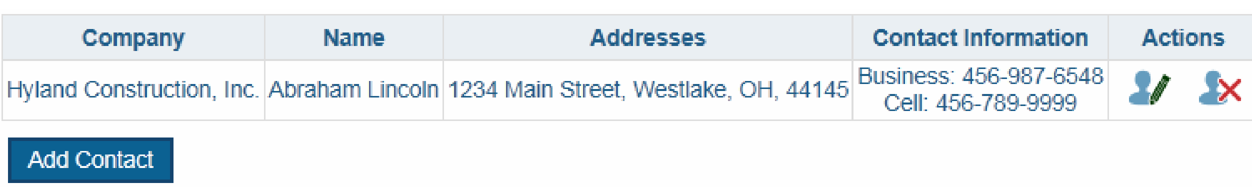
Option	Description
Use Company Address	Select the **Copy** button to copy the selected company's address to the contact address fields.
Address	The contact's address.
Address 2	The contact's address.
City	The contact's city.
State / Province / Region	The contact's state, province, or region.
Postal Code	The contact's ZIP or Postal Code.
Business Phone	The contact's business phone number.
Cell Phone	The contact's cell phone number.
Email	The contact's e-mail address.

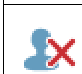
5. Click **Add**. The contact's information is added to your **Contact** list.

Note: Contacts in your **Contact** list must be manually assigned to the project(s) they are associated with. For more information on assigning a contact to a project, see Assigning Someone to a Project Role on page 19.

Modifying An Existing Contact

You can remove or modify an existing contact's information at any time by selecting the **Contacts** tab (located in the **Settings** tab).

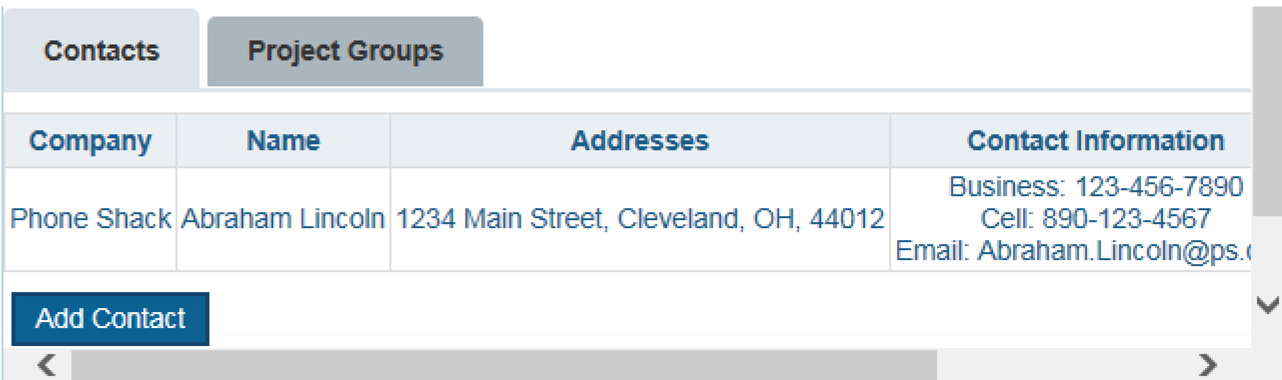


Option	Description
	Select this button to modify an existing contact's information. Once you have finished modifying your contact's information, select **Save Contact** to save your changes.
	Select this button to remove a contact from your **Contacts** list.
Add Contact	Select this button to add a new contact to your **Contacts** list. For more information, see Adding People to Your Contacts List on page 6.

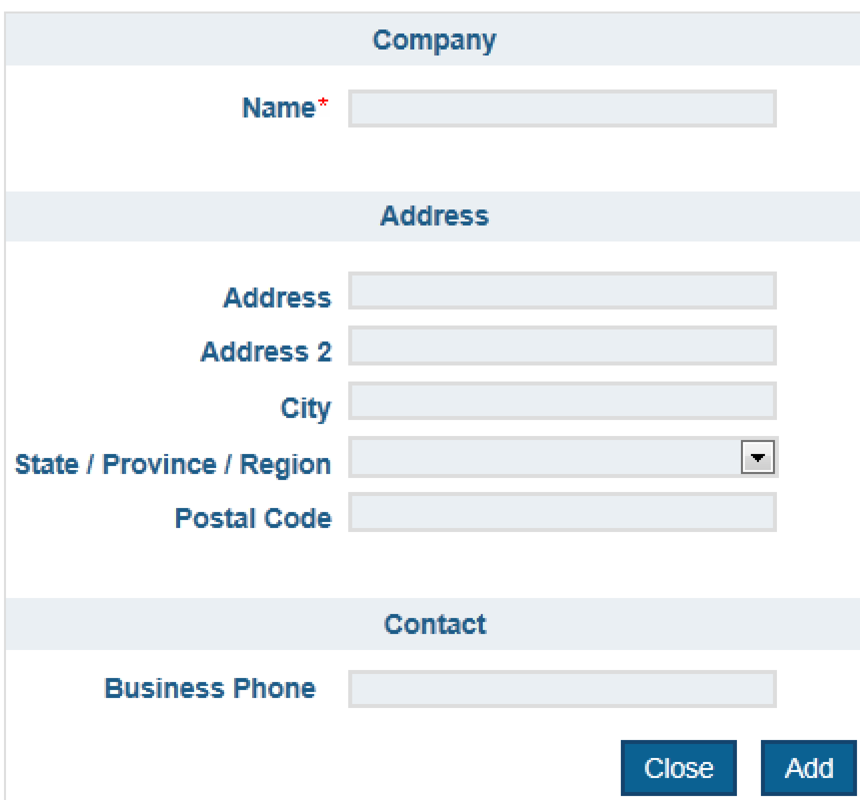
Adding Company Information

Each contact you create must be assigned to a **Company**. To add a new company to your **Company** list, follow these steps:

1. Select the **Settings** tab. The **Settings** window is displayed.



2. Select the **Contacts** tab.
3. Click **Add Contact**. The **New Contact** window is displayed.
4. Click the **Add** button next to the **Company** field. The **New Company** window is displayed.



5. Enter the information for your new company.

Option	Description
Name	The name of the company. This is a required field.
Address	The company's address.
Address 2	The company's address.
City	The company's city.
State / Province / Region	The company's state, province, or region.
Postal Code	The company's ZIP or Postal Code.
Business Phone	The company's phone number.

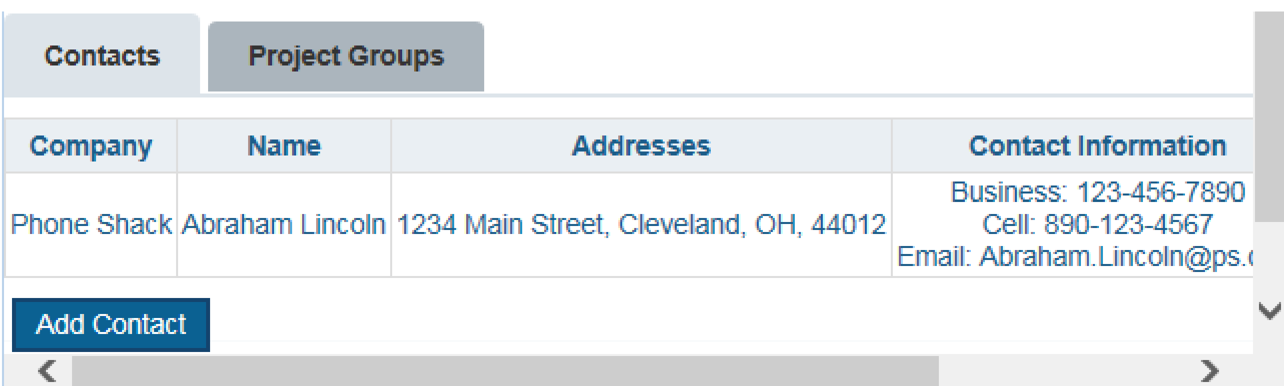
6. Click **Add**. Your new company will be added to your **Company** list.

Adding Project Groups

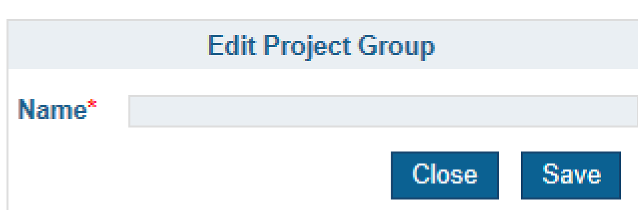
Your Plan Review Project Group list is used to store Project Group names that can then be assigned to any new or existing projects in order to help organize the submitted project.

To create a new project group, follow these steps:

1. Select the **Settings** tab. The **Settings** window is displayed.



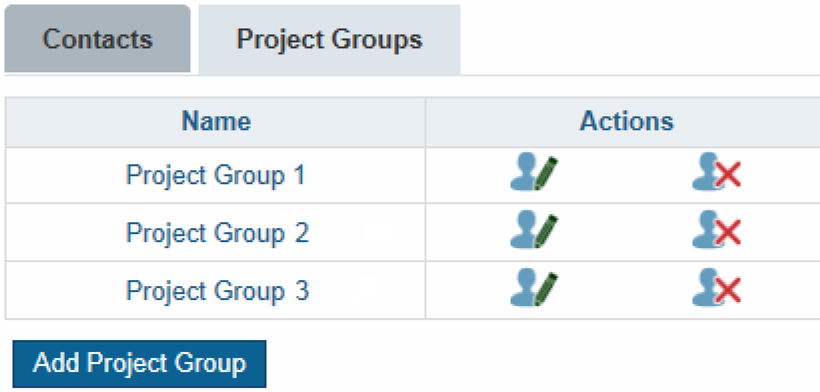
2. Select the **Project Groups** tab.
3. Click **Add Project Group**. The **Edit Project Group** window is displayed.



4. Enter the name of the new project group in the available text field.
5. Click **Save**. The new project group is added to the Project Group list.

Modifying An Existing Project Group

You can remove or modify an existing project group at any time by selecting the **Project Groups** tab (located in the **Settings** tab).

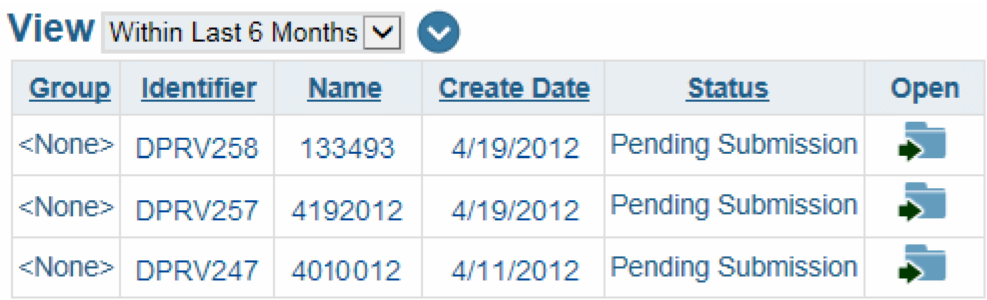


Option	Description
	Select this button to modify the name of an existing Project Group. Once you have finished modifying the Project Group's name, select **Save** to save your changes.
	Select this button to remove a group from your **Project Groups** list. **Note:** You can't delete a group from your **Project Groups** list if it's assigned to any existing projects.
Add Project Group	Select this button to add a new group to your **Project Groups** list. For more information, see Adding Project Groups on page 10.

Creating A New Project

To create a new project, follow these steps:

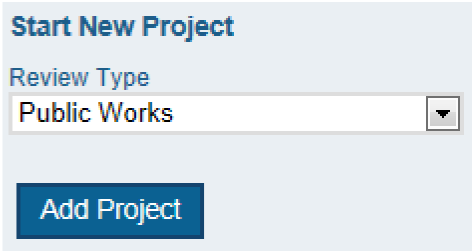
1. Select the **Projects** tab. The **Projects** window is displayed.



View: Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Perform one of the following actions to create a project:
   - Select a Review Type for your new project from the **Review Type** drop-down select list in the **Start New Project** pane and click **Add Project.**



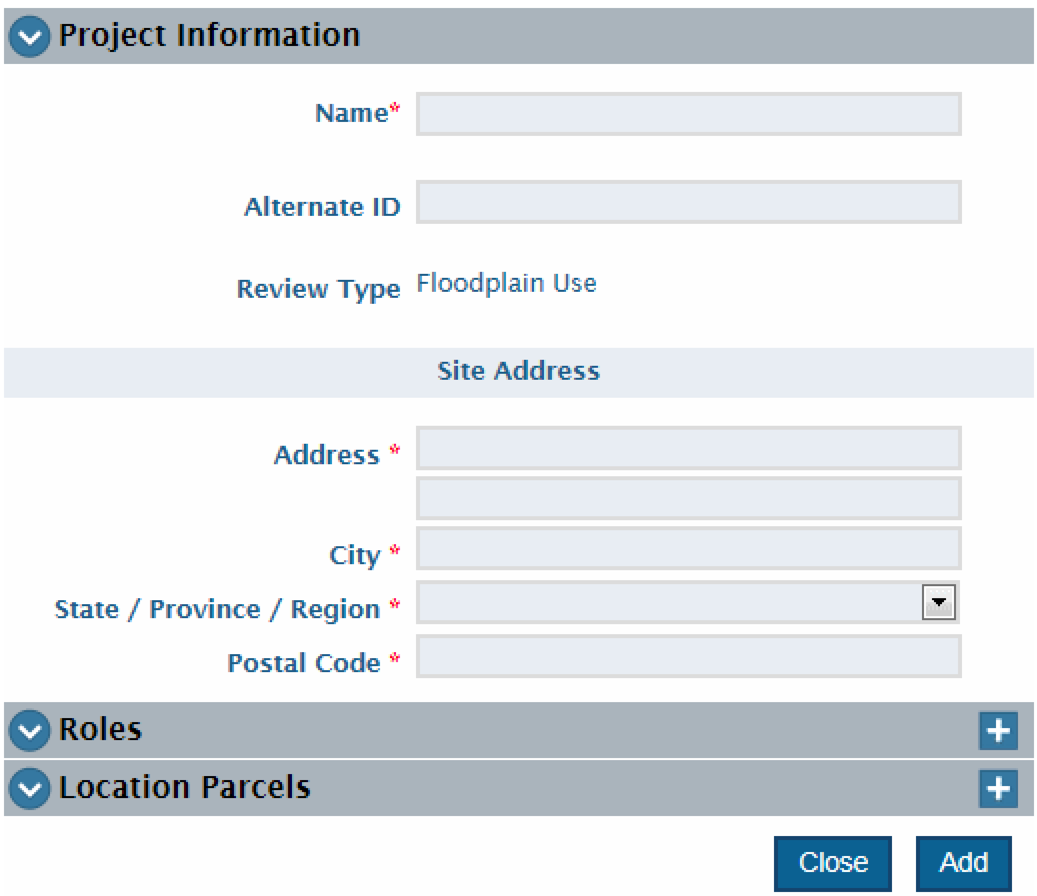
- Or, from an existing project, select the blue arrow icon next to the **New Project** section.

The **Review Type** drop-down select list is displayed.

- Select the **Review Type** you want to assign to the new project and click **Add**.
- Select the **Copy** button to copy the selected project’s information into the new project.

Note: Project documents are not copied into the new project.

The **New Project** window is displayed.



3. Enter the information for your new project.

Option	Description
Name	The name of your project.
Alternate ID	An alternate ID number for your project.
Address	The address where the project will be built.
City	The name of the city where the project will be built.
State / Province / Region	The name of the state or province where the project will be built.
Postal Code	The ZIP or Postal Code where the project will be built.

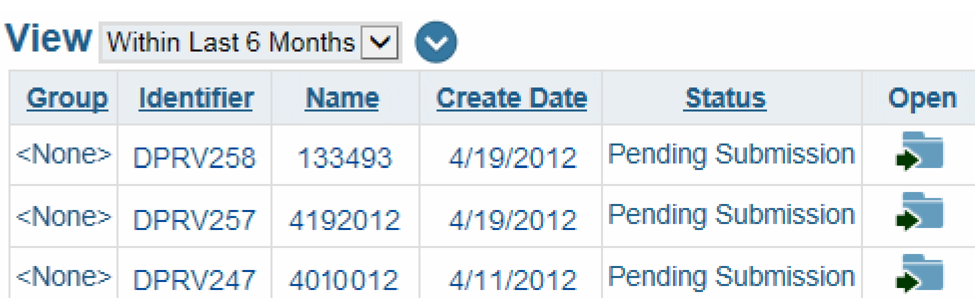
Note: Depending on your system's configuration, additional fields may be displayed. Fill out all available fields with the required information before submitting your project.

4. If desired, add one or more **Roles** to your project. For more information on adding roles, see Assigning Someone to a Project Role on page 19.
5. If desired, add one or more **Parcels** to your project. For more information on adding location parcels, see Adding a New Location Parcel on page 22.
6. Click **Add**. Your project is added to your **Projects** list, and the **Project Information** page is displayed.

Editing Project Information

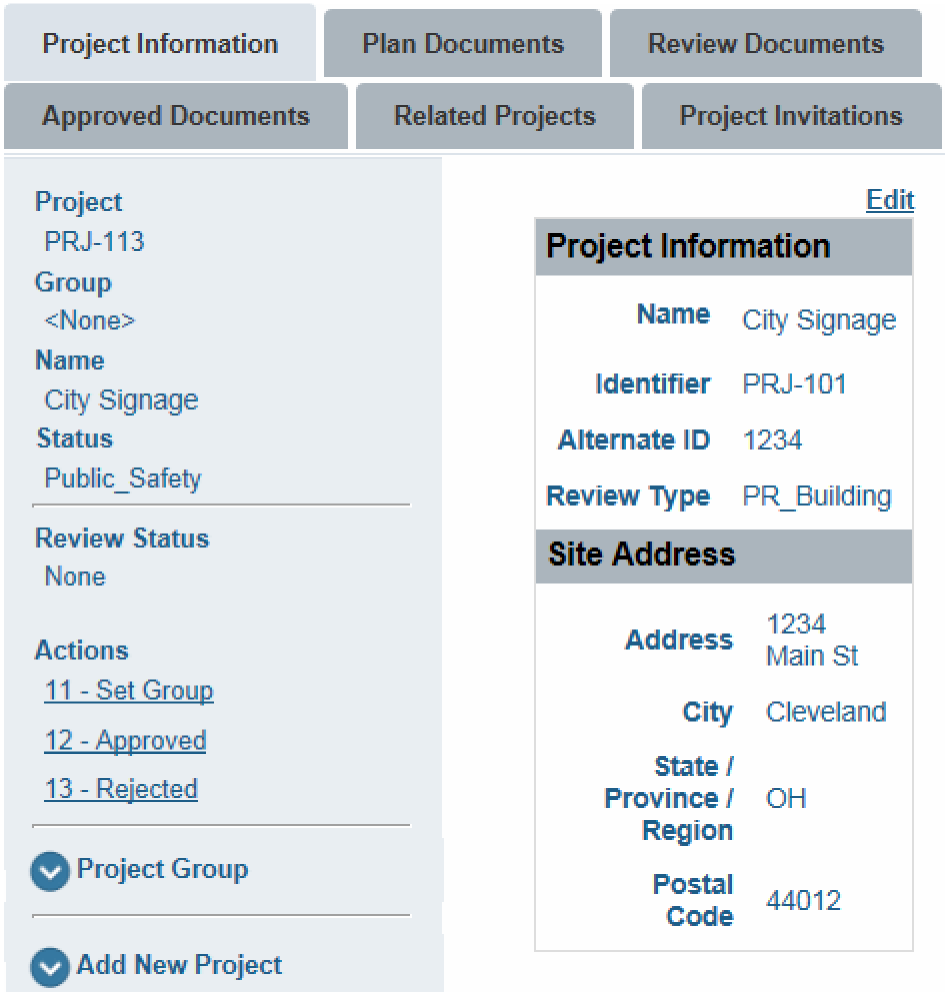
Once you have created a project, you can edit that project's information. To do so, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

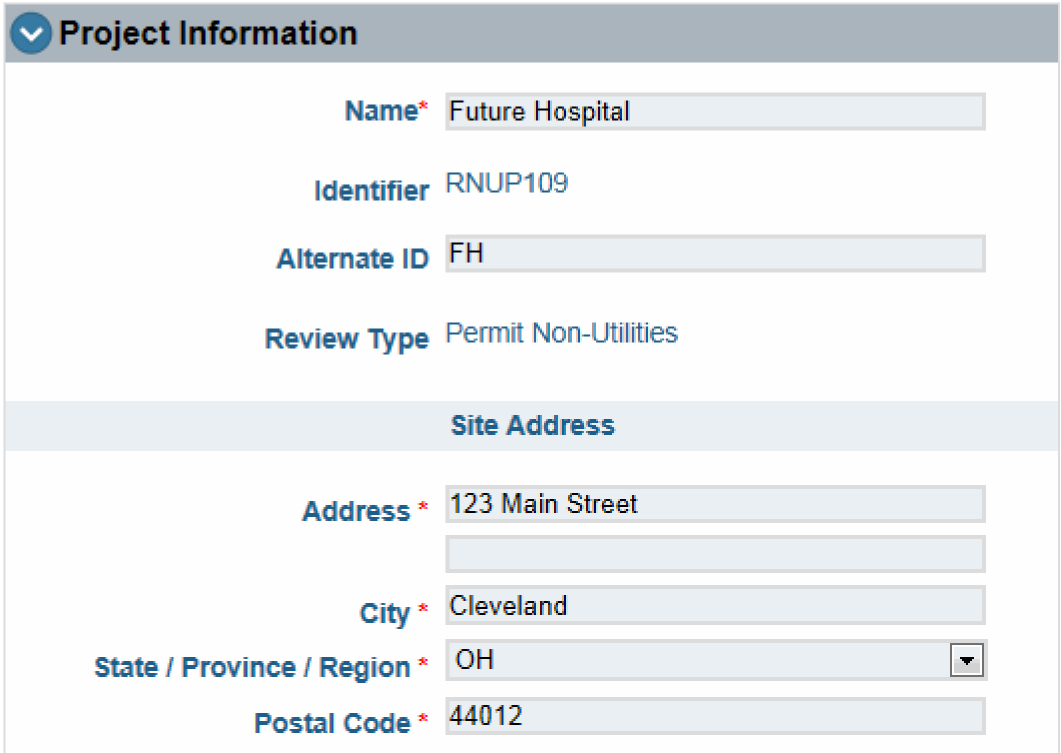


2. Select the folder button for the project you want to add a contact to.

The **Project Information** window is displayed.


Project Information
Plan Documents
Review Documents
Approved Documents
Related Projects
Project Invitations
Project
PRJ-113
Group
<None>
Name
City Signage
Status
Public_Safety
Review Status
None
Actions
11 - Set Group
12 - Approved
13 - Rejected
Project Group
Add New Project
Edit
Project Information
Name
City Signage
Identifier
PRJ-101
Alternate ID
1234
Review Type
PR_Building
Site Address
Address
1234 Main St
City
Cleveland
State / Province / Region
OH
Postal Code
44012

3. Select the **Edit** hyperlink. The **Edit Project Information** window is displayed.



4. Edit the following fields as desired.

Option	Description
Name	The name of your project.
Alternate ID	An alternate ID number for your project.
Address	The address where the project will be built.
City	The name of the city where the project will be built.
State / Province / Region	The name of the state or province where the project will be built.
Postal Code	The ZIP or Postal Code where the project will be built.

Note: Depending on your system's configuration, additional fields may be displayed. Fill out all available fields with the required information before submitting your project.

5. Click **Save**.

Assigning a Project Group to a Project

To assign a project group to a Plan Review project, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

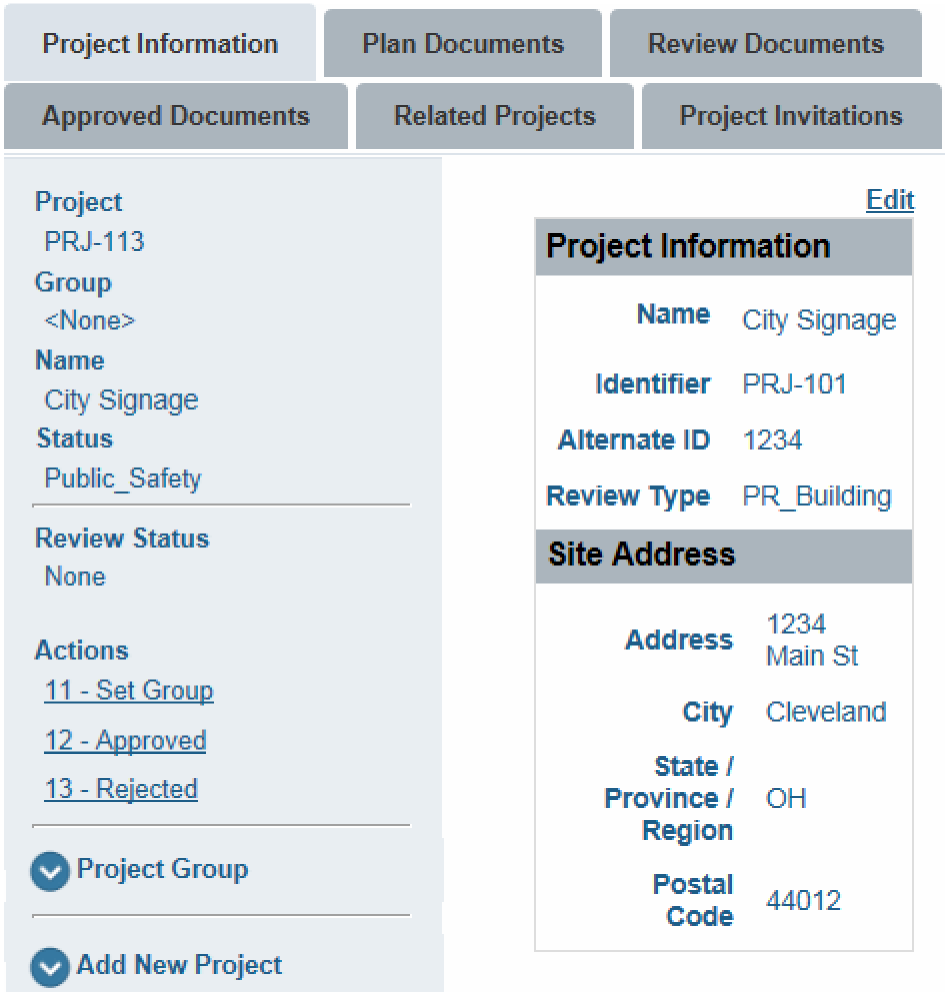
   View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the folder button for the project you want to add a contact to.

   The **Project Information** window is displayed.



3. Select the blue arrow icon next to the **Project Group** section.

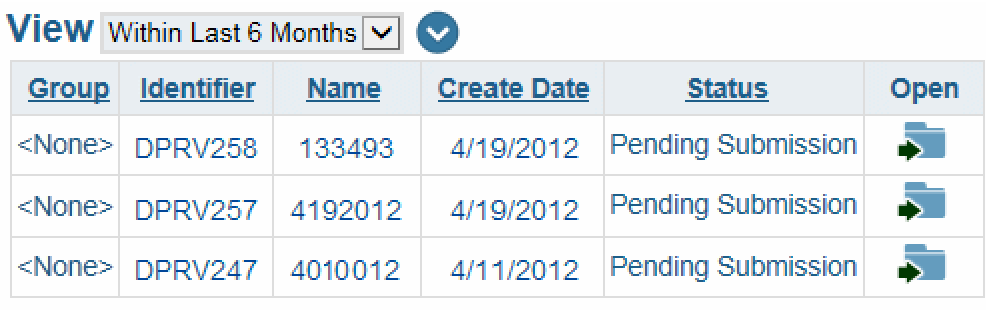
The **Project Group** drop-down select list is displayed.

4. Select the **Project Group** you want to assign to the selected project.
5. Click **Set**.

Assigning Someone to a Project Role

To assign someone to a **Role** for your Plan Review project, follow these steps:

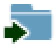
1. Select the **Projects** tab. The **Projects** window is displayed.



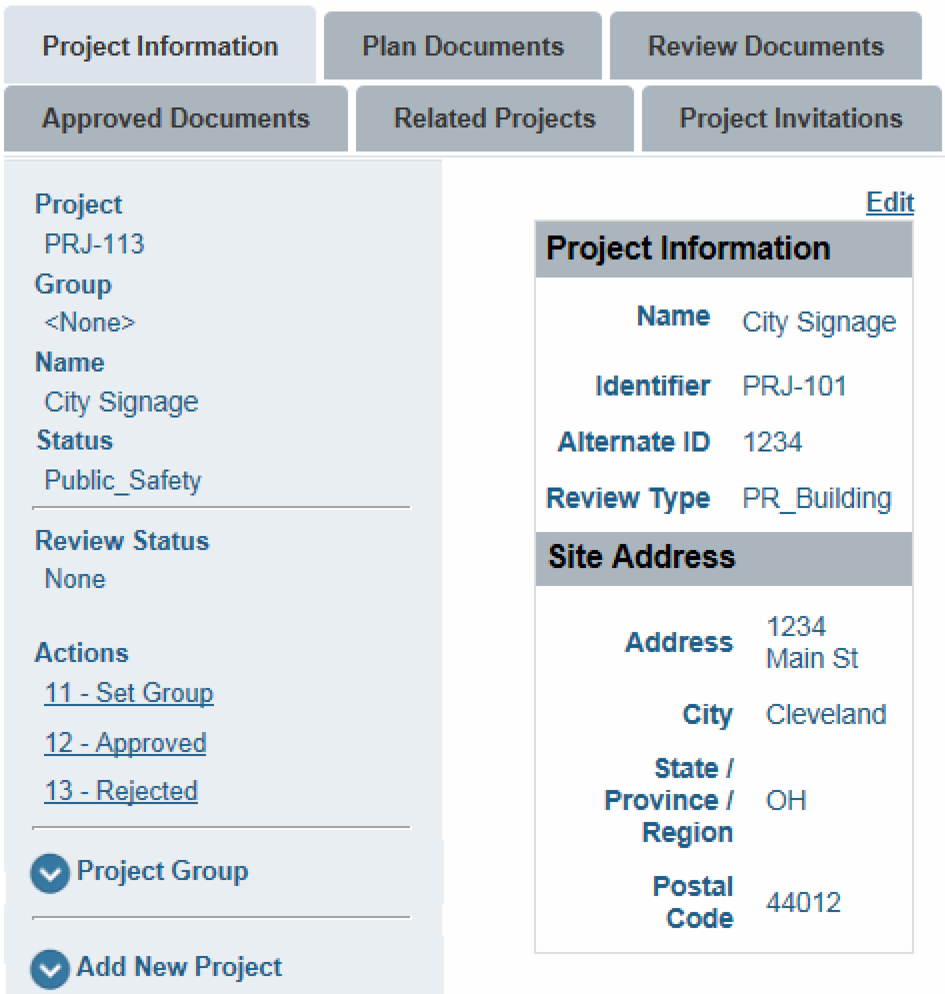
View: Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

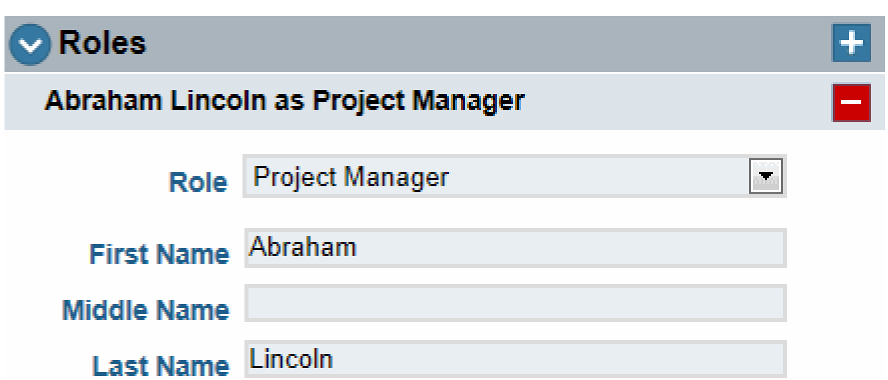
2. Select the folder button for the project you want to add a contact to.



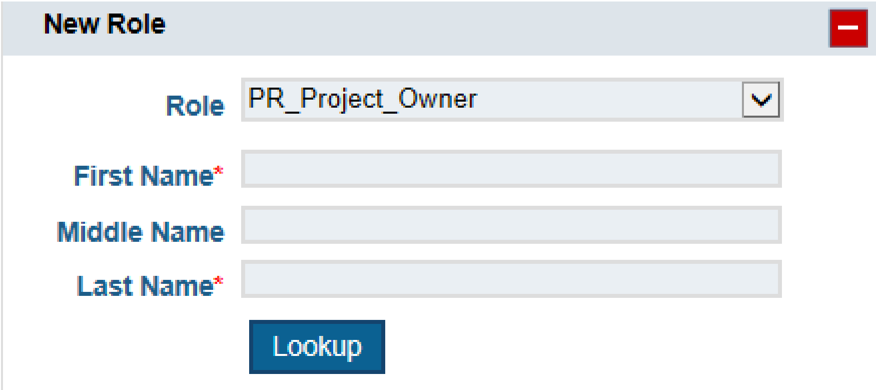
The **Project Information** window is displayed.



3. Select the **Edit** hyperlink. The **Edit Project Information** window is displayed.
4. Expand the **Roles** section.



5. Click the **Plus** icon. A **New Role** is added within the **Roles** section.



6. Select a role from the **Roles** list.
7. Enter the first name of the person assigned to the new role in the **First Name** field.
8. Enter the middle name of the person assigned to the new role in the **Middle Name** field.
9. Enter the last name of the person assigned to the new role in the **Last Name** field.
10. Click **Lookup**. Existing contacts who match the information entered in the name fields are now available for selection from a drop-down select list.
11. Select the name of the contact you want to assign to the project. That contact's information will be automatically populated in the available data fields.
12. If the **Company** field was not automatically populated, enter the name of the company in the **Company Name** field.
13. Click **Lookup**. Existing companies whose name matches the information you entered in the **Company Name** field are now available for selection from a drop-down select list.
14. Modify any of the populated fields as required.
15. Click **Save**. The new role will be displayed in the project's **Roles** list.

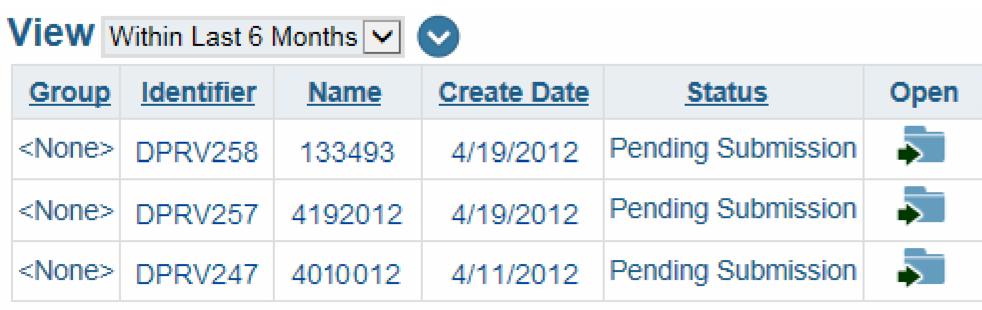
Tip: You can click the **Minus** icon next to a role to remove that role from the list.

16. Repeat this process as many times as needed to assign all required contacts to your project. Once you have finished assigning contacts to your project, you should continue on to Adding a New Location Parcel.

Adding a New Location Parcel

To add a new location parcel to a Plan Review project, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



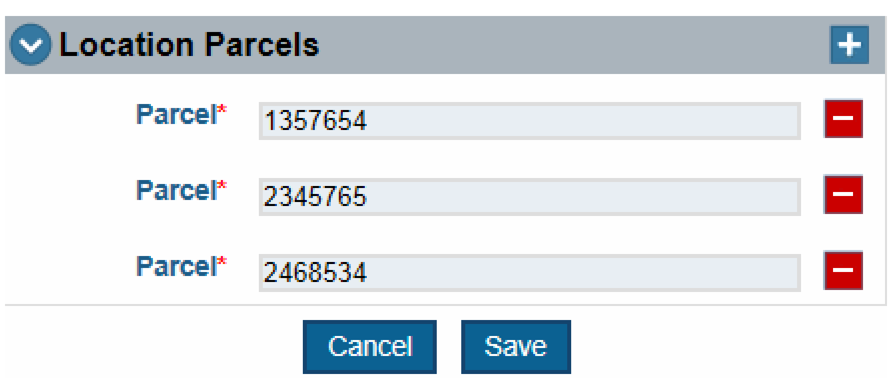
View: Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the folder button for the project you want to add a location to.

The **Project Information** window is displayed.

3. Select the **Edit** hyperlink. The **Edit Project Information** window is displayed.
4. Expand the **Location Parcels** section.



5. Click the **Plus** icon. A new **Parcel** line is added within the **Location Parcels** section.

6. Type the value of your new parcel in the available field, then click **Save**.

Tip: You can click the **Minus** icon next to a parcel to remove that parcel from the list.

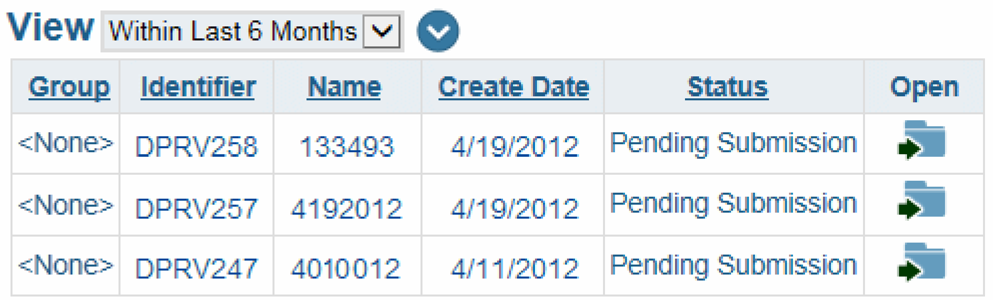
7. Repeat this process as many times as needed to assign all required locations to your project. Once you have finished assigning locations to your project, you should continue on to Adding Documents to a Project.

Adding Documents to a Project

To add documents to a project, follow these steps:

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

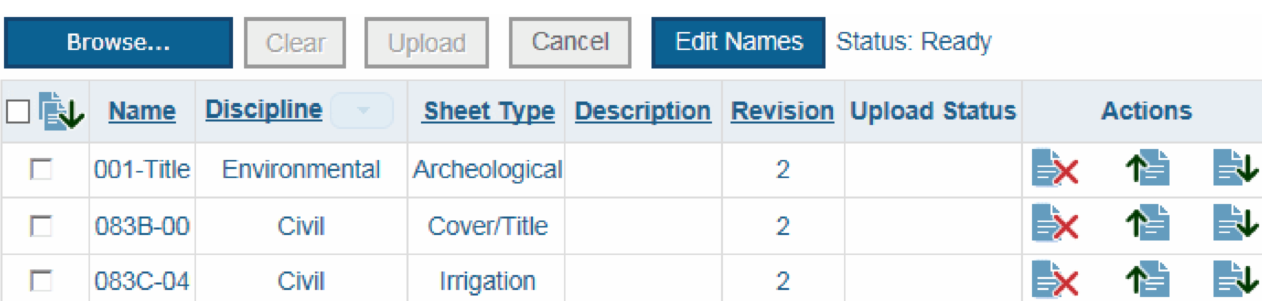
1. Select the **Projects** tab. The **Projects** window is displayed.



2. Select the folder button for the project you want to add documents to.

The **Project Information** window is displayed.

3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. Select **Browse** and navigate to the document(s) you want to upload. All selected documents will be displayed in the **Plan Documents** list.

Note: Document file names must not exceed 100 characters.

You can select **Clear** to remove all documents that have not yet been uploaded from the **Plan Documents** list, or select a single document's remove icon to remove it from the list.

Note: PDF documents created with security options are not supported for use with Plan Review. Do not upload secured PDF documents into your Plan Review solution.

5. Select the **Discipline** and **Sheet Type** for all selected documents.

Tip: You can apply a single **Discipline** to all documents available for upload by selecting the button next to the **Discipline** header and selecting a discipline from the drop-down select list.

6. Type a description of the document to the **Description** field.
7. Click **Upload**. You will be prompted to confirm your decision.
8. Click **Yes**. The documents are added to your project file.

Note: You can select **Cancel** while documents are being uploaded to halt the upload process. Halting the upload process will not affect any documents that have already been uploaded from your current **Plan Documents** list, but any documents that have not yet been uploaded will be removed from the **Plan Documents** list and will not be uploaded.

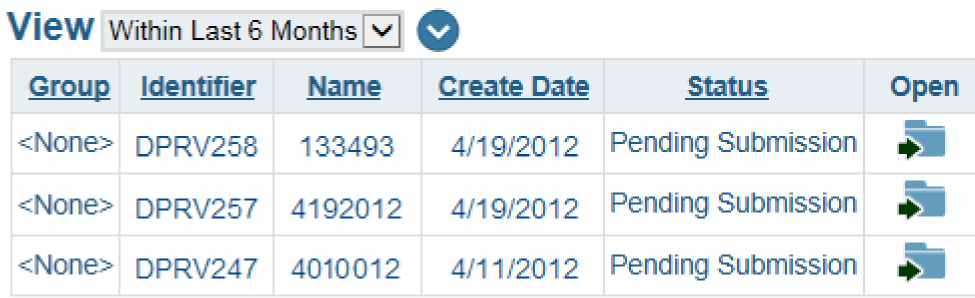
9. Repeat this process as many times as needed to upload all documents for your project. Once you are ready to upload your project for review, continue on to Submitting A Project.

Uploading a Revision of a Document

To upload a revision of a document that has already been uploaded, follow these steps:

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

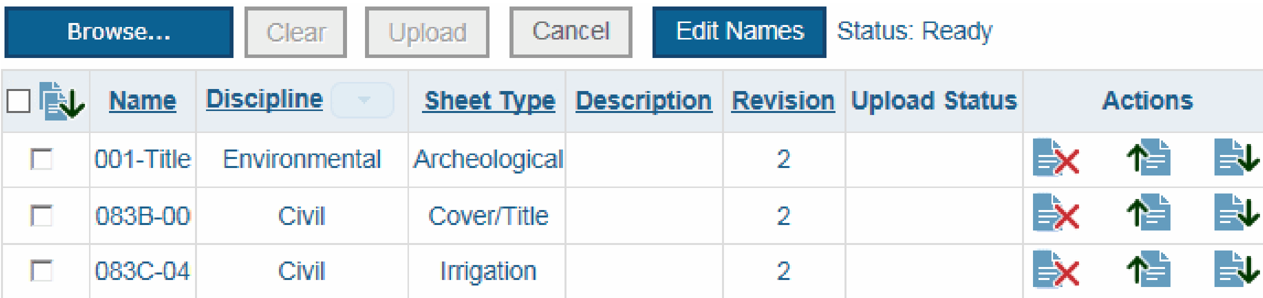
1. Select the **Projects** tab. The **Projects** window is displayed.



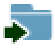
2. Select the folder button for the project that contains the document you want to modify.

The **Project Information** window is displayed.

3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. For the document you want to update, click the document's **Browse** button.



5. Navigate to the document you want to upload and click **Open**.

Note: PDF documents created with security options are not supported for use with Plan Review. Do not upload secured PDF documents into your Plan Review solution.

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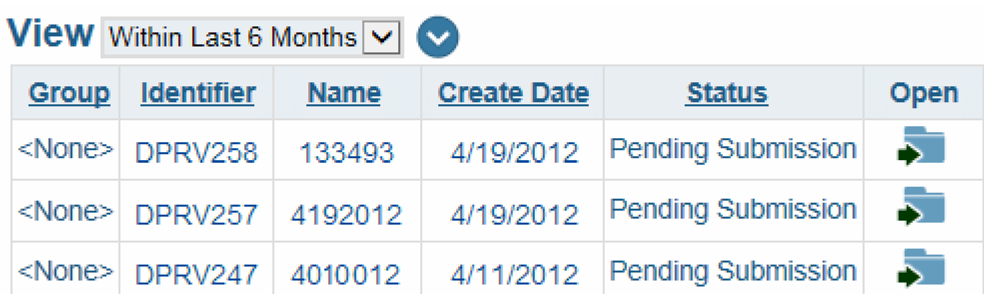
6. Click **Upload**. You will be prompted to confirm your decision.
7. Click **Yes**. The selected revision replaces the existing document.

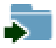
Removing Documents from a Project

To remove documents from a project, follow these steps:

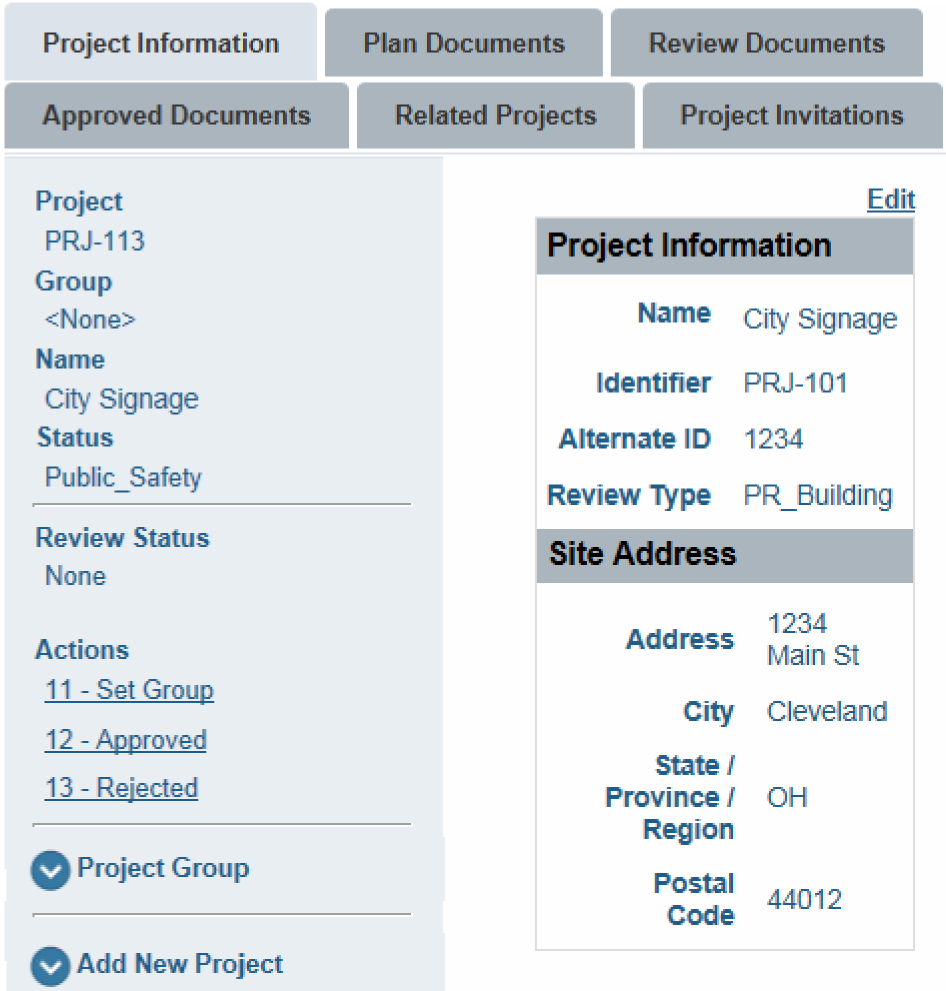
1. Select the **Projects** tab. The **Projects** window is displayed.



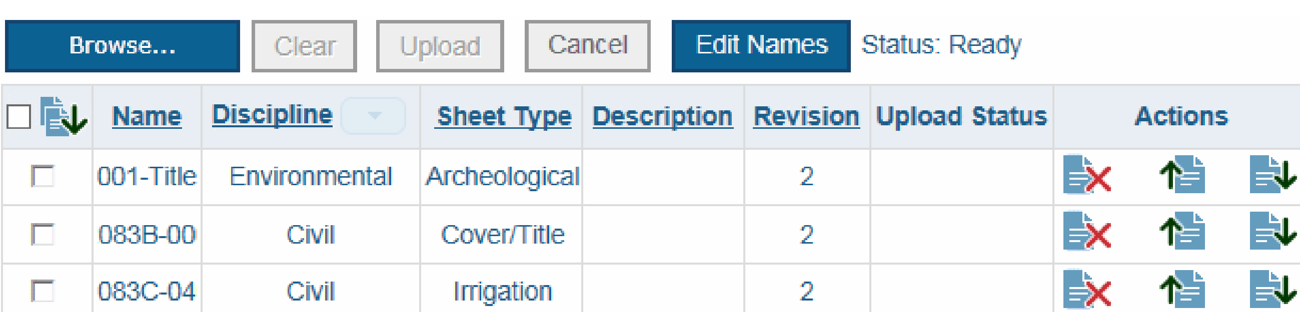
2. Select the folder button for the project from which you want to remove documents.



The **Project Information** window is displayed.



3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. Click the **Delete** action for the document(s) you want to remove from your Plan Review project.

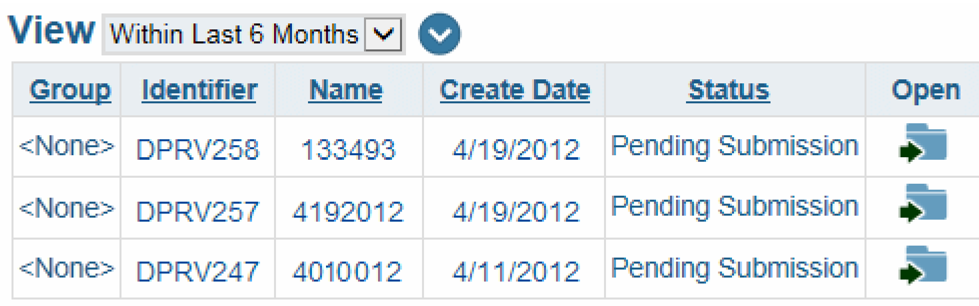
You will be prompted to confirm your decision.

5. Click **Yes**. The selected document is removed from your **Plan Documents** list.

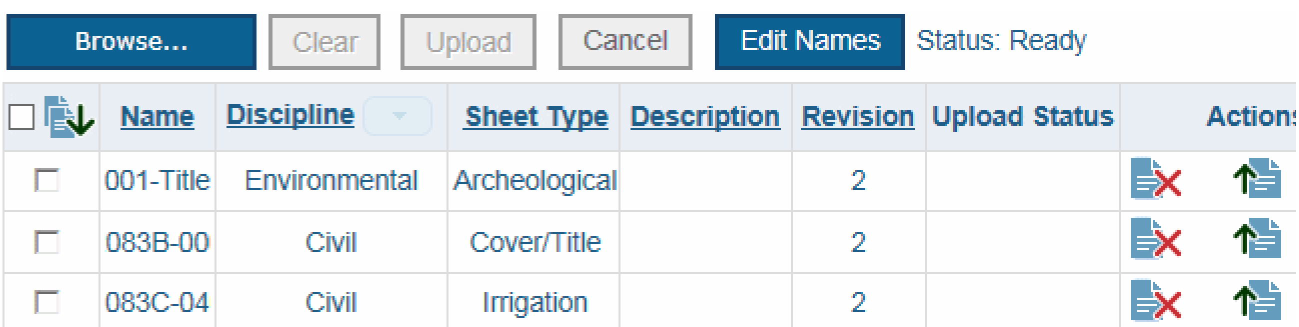
Editing Document Names

To edit the name of the document you have submitted, follow these steps:

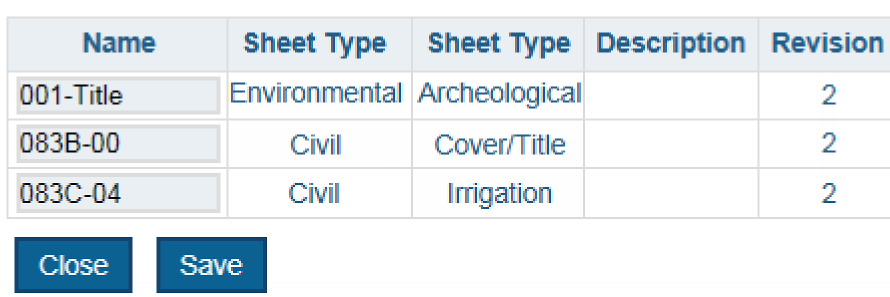
1. Select the **Projects** tab. The **Projects** window is displayed.



2. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



3. Click **Edit Names**. The **Edit Names** dialog is displayed.

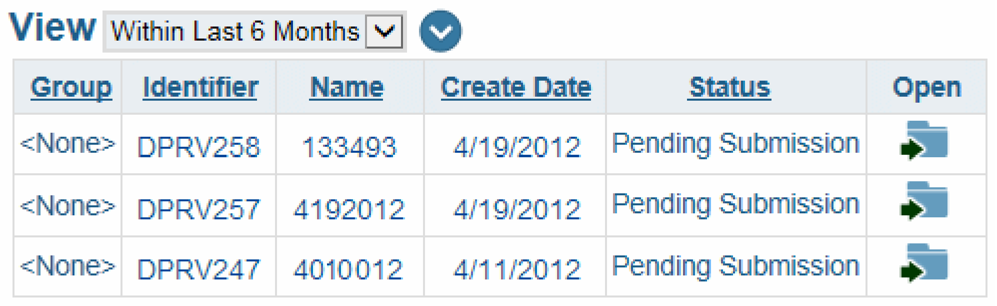


4. Type the desired value in the **Name** field for any documents whose name you want to change.
5. Click **Save**.

Submitting A Project

To submit a project for review, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Click the folder button for the project you want to add documents to.

The **Project Information** window is displayed.

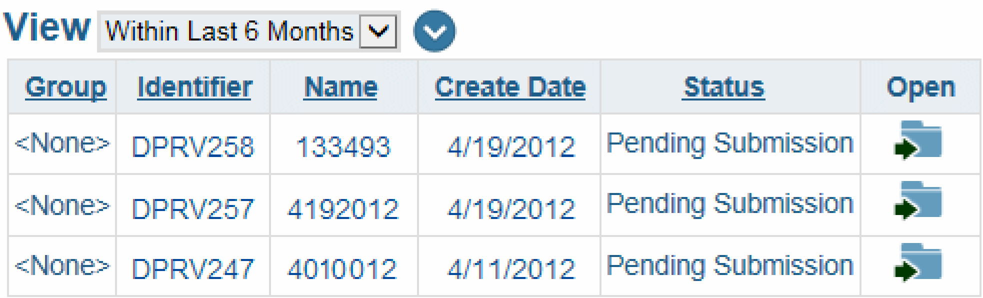
3. Select the appropriate **Action** hyperlink. Your project is uploaded for review.

Note: Depending on your system's configuration, you may have multiple actions to choose from. Contact your system administrator if you are unsure which action you should select to upload your project.

Searching for Projects

You can filter your project list using a variety of date criteria, as well as several advanced search options. The Plan Review site will only display projects that meet the criteria you have selected. To specify criteria to filter your project list, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

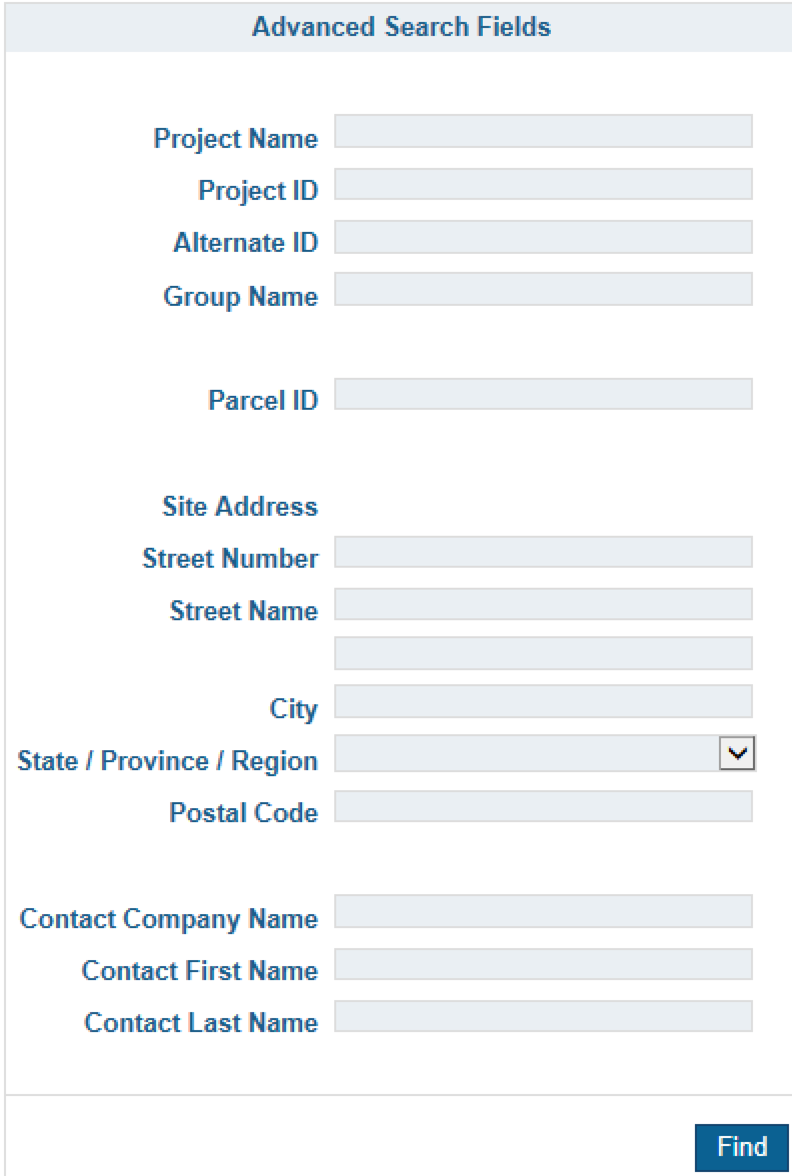


View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Use the **View** drop-down select list to specify a date or range of dates.
3. Select the blue arrow icon to display the **Advanced Search Fields** window.

4. Enter values in the available fields as desired.



Note: By default, searches will only locate values at the beginning of a field. For example, if you search for Main in the **Street Name** field, the search will not return any projects with a **Street Name** of North Main Street. In order to locate values in the middle of a field, you must begin your search with a wildcard character: *

5. Select **Find**. The project list will be updated to only display projects that match your specified criteria.

Inviting Other Users

You can grant access to a project that you have created to another person by sending them an invitation to your project. To send someone an invitation, follow these steps:

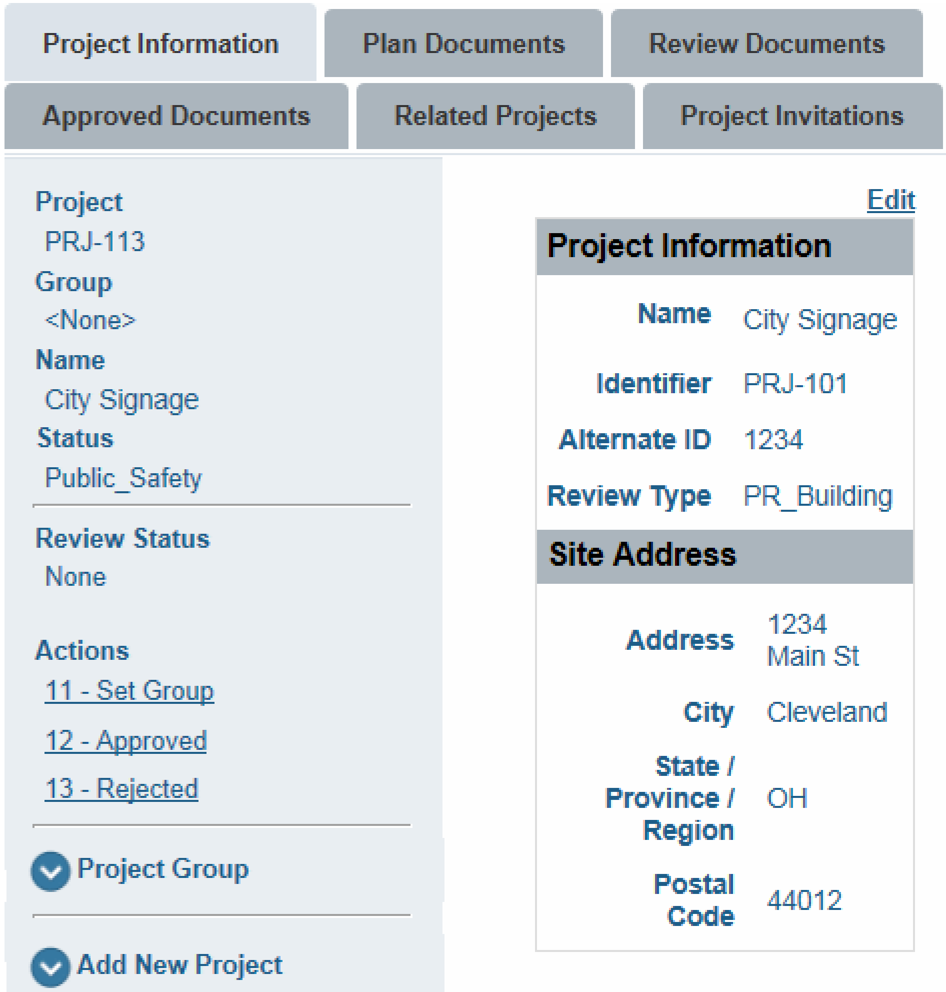
1. Select the **Projects** tab. The **Projects** window is displayed.

View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

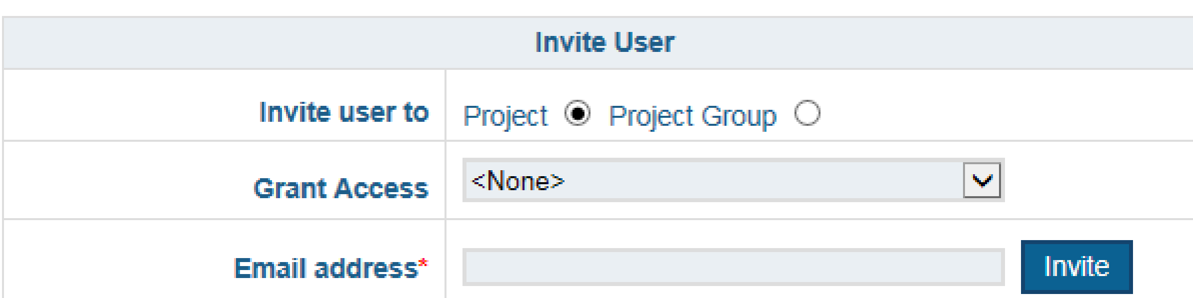
2. Click the folder button for the desired project.

The **Project Information** window is displayed.



3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.

4. Click **Invite User**. The **Invite User** window is displayed.



5. Select one of the following options:

- **Project** - select this option to invite the specified person to the selected project.
- **Project Group** - select this option to invite the specified person to the project group assigned to the selected project. The invited user will be able to access all projects assigned to the project group of the selected project.

Note: These options are only displayed if the selected project has been assigned to a project group.

6. To change the access level to be granted to the user, select the desired access level from the **Grant Access** drop-down select list. The following selections are available:

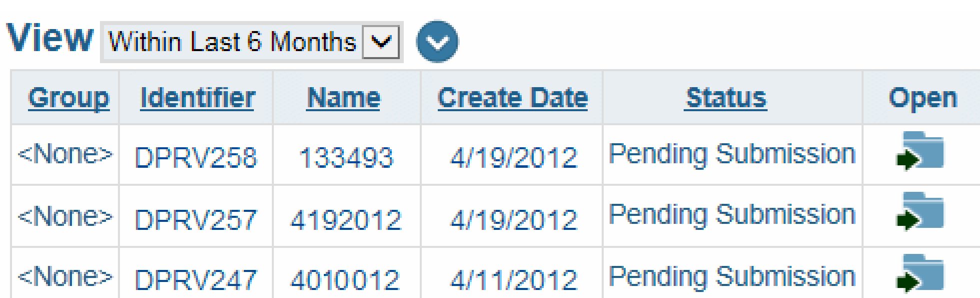
Option	Description
View Only	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

7. Enter the e-mail address of the person you want to invite to view your project or project group into the **Email address** field.
8. Click **Invite**. The invitation will be sent to the specified address.

Managing Invitations

Once another user has accepted your invitation, you can manage the level of access that you are allowing them to have for this project. To manage the level of access your invitees have, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

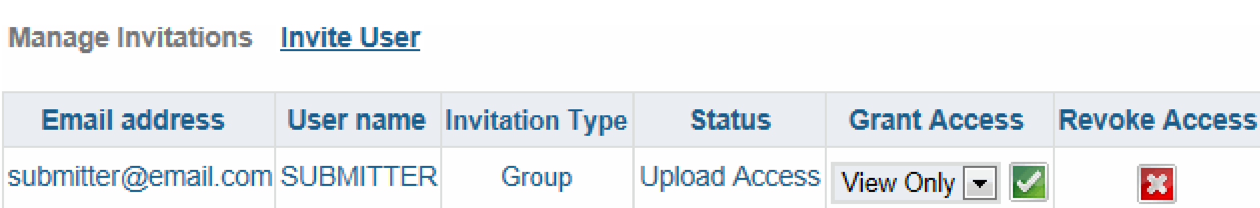


Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Click the folder button for the desired project.

The **Project Information** window is displayed.

3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.
4. Click **Manage Invitations**. The **Manage Invitations** window is displayed.



5. To change a user's access level, select the desired access level from the user's **Grant Access** drop-down select list. The following selections are available:

Option	Description
View Only	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

Click the **Check** icon to save your changes.

You can also select the **X** icon to revoke a user's access to the project entirely.

Viewing Related Projects

You can view a list of all projects related to the currently selected project by the assigned Project Group. To do so, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the folder button for the project you want to add documents to.

The **Project Information** window is displayed.

3. Select the **Related Projects** tab. The **Related Projects** window is displayed.

Group	Identifier	Name	Create Date	Status	Open
Project Group 1	RT117	133492	5/11/2017		
Project Group 1	RT115	International Road	2/15/2017		

4. For more details on a specific project, you can click on the folder button for the project you want to open.

Viewing Reviewed Documents

Project reviewers will review your submitted plans and add comments or markups to any sheets that require modification. These updated documents will then be posted onto your Plan Review site, under the **Review Documents** tab. When you see a document in this tab, you should review the document to determine the issue, modify your document so that the issue is resolved, then re-submit your document for another review cycle.

Downloading Documents

To download a document that has been reviewed, follow these steps:

1. Select the **Review Documents** tab. All available documents will be listed in the **Review Documents** window.

☐	Name	Document Date	Download
☐	Plan - 2/15/2017	2/15/2017	

2. Select a review cycle from the **Review Cycle** drop-down select list to filter the list of available documents.
3. Click on the document download button to download the document.

Tip: You can also download multiple documents as a compiled ZIP file. To do so, select the check box next to every document you want to include in the ZIP file, then click the zip download button.

4. Review all comments and markups that have been made by your plan reviewer(s).
5. Revise your plan document(s) as noted by the reviewers and save the revised documents using the same file name as the original document.

Note: When re-uploading a document, the document must use the exact file name that the original document initially used so that the modified document is correctly uploaded as a revision of the original document.

6. Re-upload the document. For more information on uploading documents, see Adding Documents to a Project on page 24.

Downloading Approved Documents

Submitted documents that have been approved and require no modifications are displayed in the **Approved Documents** tab. The **Approved Plan Sets** option allows you to download a set of approved documents and any comment letters, while the **Approved Plan Sheets** option allows you to download one or more approved plan sheets by themselves.

Approved Plan Sets

To download a set of documents that have been approved, follow these steps:

1. Select the **Approved Documents** tab.
2. Select the **Plan Set and Reference Documents** option from the drop-down select list.
3. All available plan sets and comment letters will be listed in the **Approved Documents** window.

Plan Set and Reference Documents

	Name	Document Date	Download
	Plan - 5/11/2017	5/11/2017	
	Plan - 5/11/2017	5/11/2017	
	Plan - 2/15/2017	2/15/2017	

4. Click on the document download button to download the document or plan set.

Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.

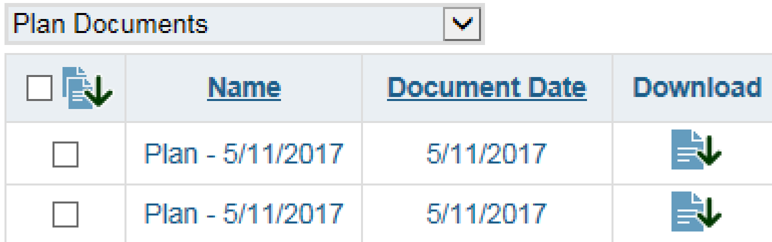
Approved Plan Sheets

Documents or plans that have been approved and require no modifications will appear in your **Approved Documents** tab.

To download a document that has been approved, follow these steps:

1. Select the **Approved Documents** tab. All available documents will be listed in the **Approved Documents** window.
2. Select the **Plan Documents** option from the drop-down select list.

3. All available documents will be listed in the **Approved Documents** window.

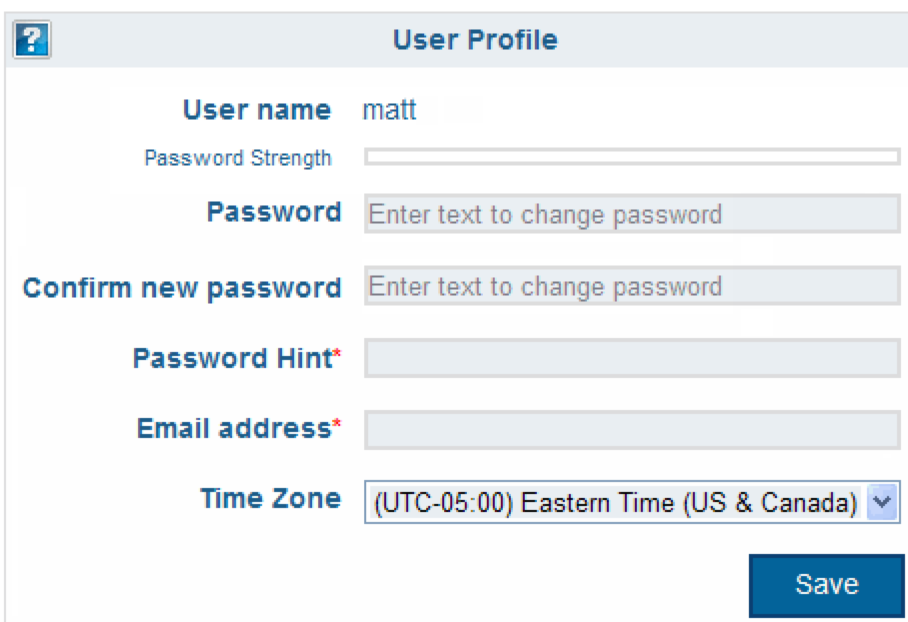


4. Click on the document download button to download the document or plan set.

Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.

Modifying Your Account Information

You can modify your user information at any time by selecting the **Profile** tab.



Make sure you select **Save** after making your changes.

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.