OnBase®

Foundation 22.1

Electronic Plan Review

User Guide - Submitter

Foundation 22.1

Getting Started

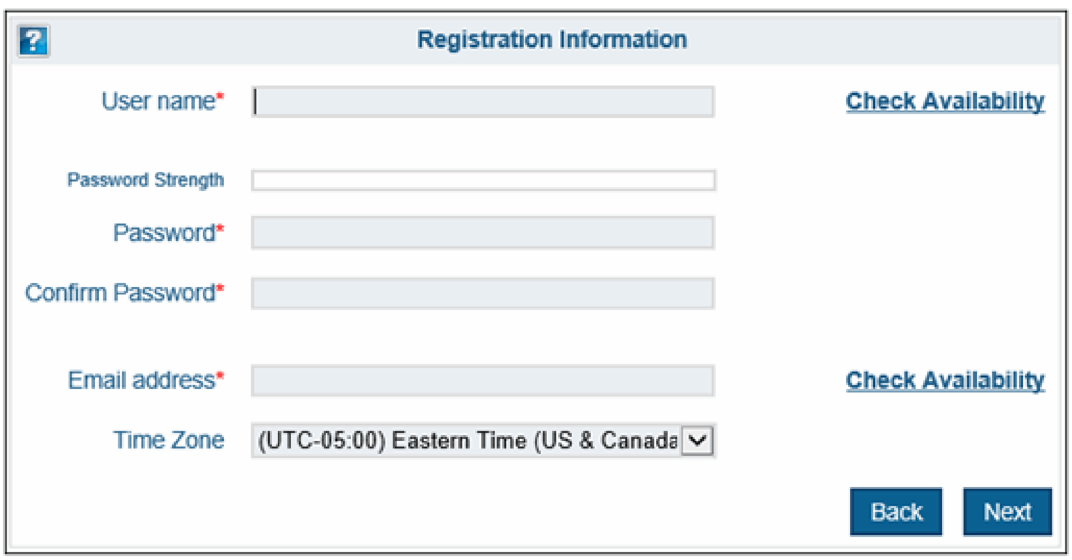
All Plan Review **Submitter** users can use the Plan Review website to register users, add contacts and project groups, and submit plan documents for review.

Registering an Account

To upload plan documents for review, you must first create a Plan Review account.

To register an account for Plan Review:

1. Navigate to the address of your Plan Review website.
2. Select the **Register** hyperlink. The **New User Registration** window is displayed.
3. Read the disclaimer and select the **I agree to the above terms and conditions** option.
4. Click **Next**. The **Registration Information** window is displayed.

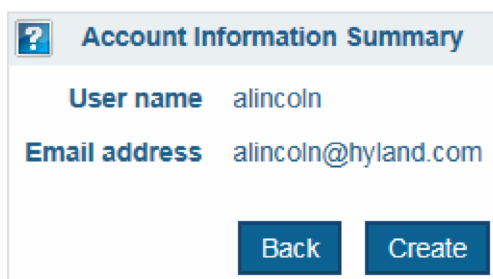


5. Enter your user information into the appropriate fields:

Registration Option	Description
User name	Enter your unique user name in the **User name** field. This is a required field. Your user name is not case-sensitive. **Note:** You cannot use a user name that is already in use. Click **Check Availability** to see if your chosen user name is available.

Registration Option	Description
Password	Enter your password for your Plan Review website account. This is a required field. Your password is case-sensitive. **Note:** The **Password Strength** indicator displays the strength of your password by color with red indicating a weak password, yellow indicating a medium strength password, and green indicating a strong password.
Confirm Password	Enter your password again for confirmation of the password entered in the **Password** field. This is a required field. Your password is case-sensitive.
Email address	Enter your email address to use for Plan Review projects. This is a required field. **Note:** You cannot use an email address that is already in use. Click **Check Availability** to see if your chosen email address is available.
Time Zone	Select the time zone in which you reside from the drop-down list.

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



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

   Note: Depending on your system configuration, you may also have to answer a CAPTCHA before proceeding with your registration.

8. After your information is verified and any required CAPTCHAs are answered, click **Create**. Your Plan Review account is created.

Logging On

Log on to your Plan Review account to start submitting projects and creating contacts for the project.

To log on to your Plan Review account:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.

3. Enter your user name and password in the **User name** and **Password** fields.

   Note: If you forgot your password, you can select the **Forgot Name/Password** hyperlink to reset your password. See Resetting or Retrieving Your User Name and Password on page 85 for more information.

4. Click the **Sign In** button.

Resetting or Retrieving Your User Name and Password

If you forgot 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

You can reset or retrieve your password for your Plan Review account.

To retrieve or reset your password:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.
3. Select the **Forgot Name/Password** hyperlink. The **Account Recovery** window is displayed.

4. Type your user name in the **User name** field.
5. Click **Reset Password**. An email message that contains a hyperlink to reset your password is sent to your email account. After you reset your password, log on 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

You can recover your user name for your Plan Review account.

To retrieve your user name:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.
3. Select the **Forgot Name/Password** hyperlink. The **Account Recovery** window is displayed.

4. Type your email address associated with your Plan Review account in the **Email address** field.
5. Click **Find**. An email message that contains your user name is sent to your email account.

Using the Plan Review Website

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

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 87.
2. Create a project within Plan Review that is used to store all documents and information related to your project. For more information, see Creating A New Project on page 93.
3. Assign the contacts you added in step 1 to the roles they perform for your project (for example, Architect or Subcontractor). For more information, see Assigning Someone to a Project Role on page 100.
4. Enter the locations at which the project is taking place. For more information, see Adding a New Location Parcel on page 108.
5. Upload plan documents associated with the project. For more information, see Adding Documents to a Project on page 110.
6. Submit your project for review. For more information, see Submitting A Project on page 117.

   Once your project is reviewed, the reviewed documents are displayed in the **Review Documents** or **Approved Documents** views.

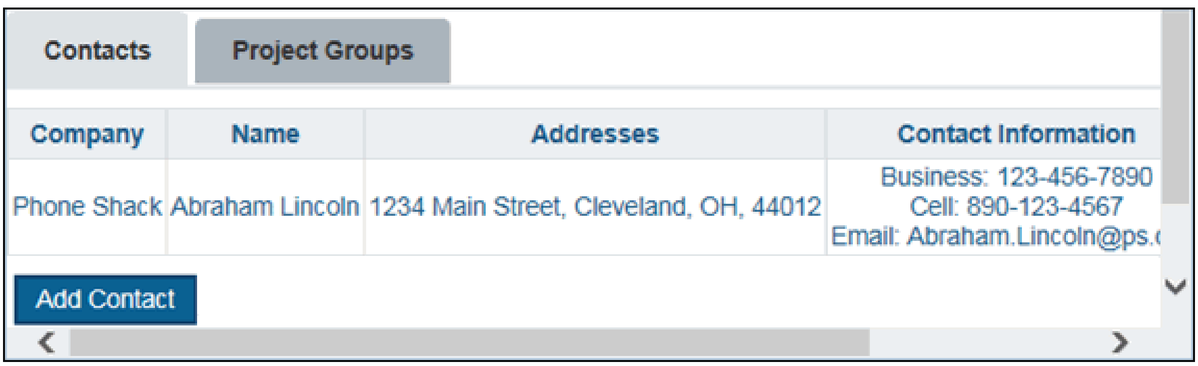
7. Review any documents added to the **Review Documents** view, and modify the documents per the reviewers comments. Once all required modifications are made, re-upload your revised plan documents. For more information, see Viewing Reviewed Documents on page 128.
8. Resubmit your project for review. For more information, see Submitting A Project on page 117.

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, or a subcontractor. Any contact in your contact list can be assigned to one or more projects before it is submitted for review.

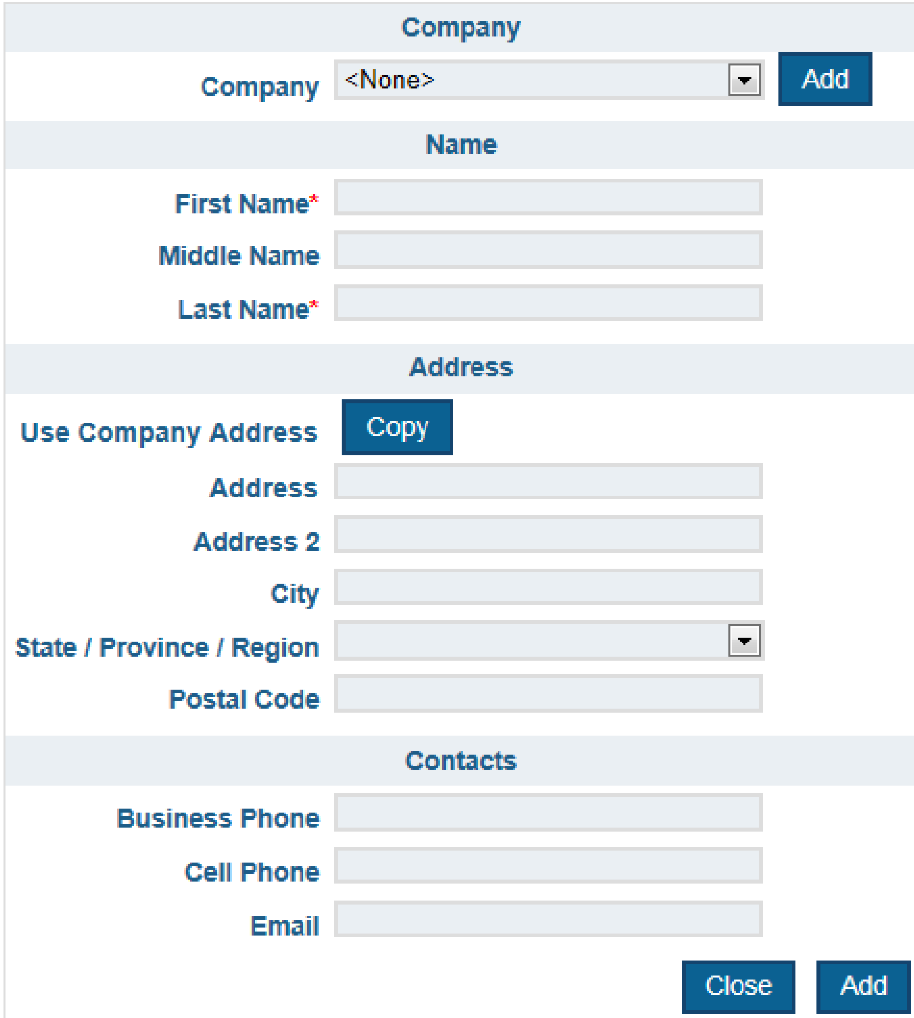
To add a new contact to your Plan Review account:

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



2. Click 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 contact is affiliated with from the drop-down list. If the contact's company does not yet exist, see Adding Company Information on page 90.
First Name	Enter the contact's first name. This is a required field.
Middle Name	Enter the contact's middle name.
Last Name	Enter the contact's last name. This is a required field.
Use Company Address	Select the **Copy** button to copy the selected company's address to the contact address fields.
Address	Enter the contact's address.

Option	Description
Address 2	Enter the contact's address.
City	Enter the contact's city.
State / Province / Region	Enter the contact's state, province, or region.
Postal Code	Enter the contact's ZIP or Postal Code.
Business Phone	Enter the contact's business phone number.
Cell Phone	Enter the contact's cell phone number.
Email	Enter the contact's email address.

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

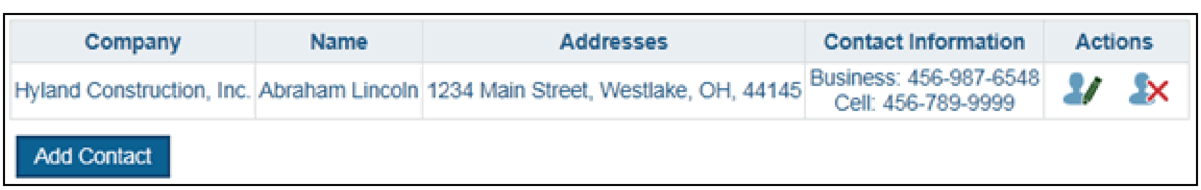
Note: Contacts in your **Contact** list must be manually assigned to the projects they are associated with. For more information on assigning a contact to a project, see Assigning Someone to a Project Role on page 100.

Modifying An Existing Contact

You can remove or modify an existing contact's information in the **Contacts** tab

To modify an existing contact:

1. Click the **Settings** tab. The **Settings** windows is displayed.
2. Click the **Contacts** tab. The list of existing contacts is displayed.

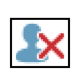


Company	Name	Addresses	Contact Information	Actions
Hyland Construction, Inc.	Abraham Lincoln	1234 Main Street, Westlake, OH, 44145	Business: 456-987-6548 Cell: 456-789-9999	

Add Contact

3. Select one of the following actions from the **Actions** column:
   - Click the **Edit** button to modify an existing contact's information.

   - Click the **Delete** button to remove a contact from your **Contacts** list.

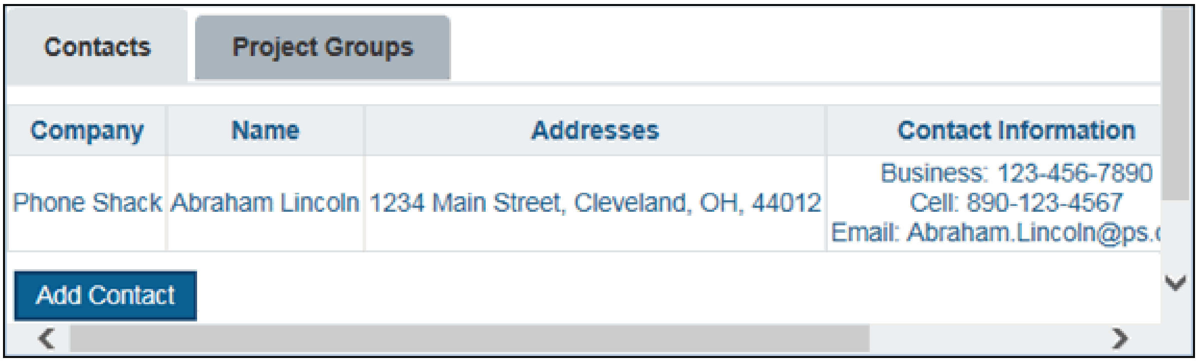


Adding Company Information

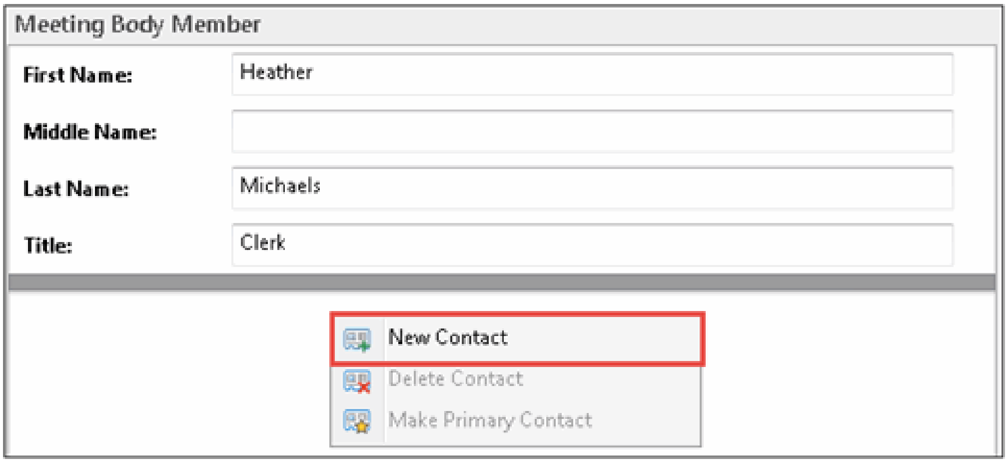
Each contact you create must be assigned to a company.

To add a new company to your **Company** list:

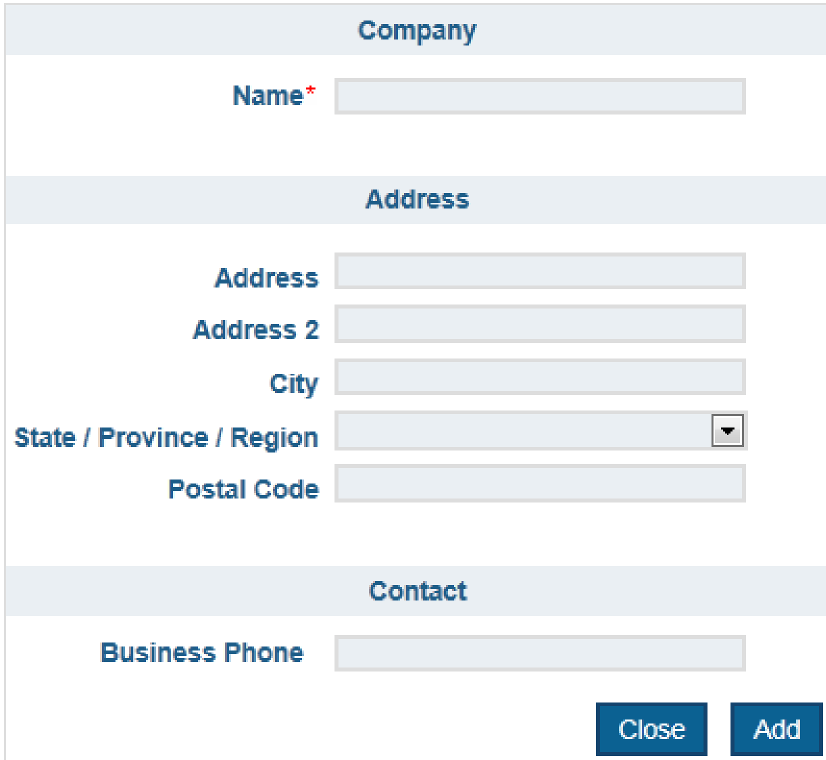
1. Click the **Settings** tab. The **Settings** window is displayed.



2. Click the **Contacts** tab.
3. Click **Add Contact**. The **New Contact** window is displayed.



4. Click the **Add** button to the right of the **Company** drop-down list. The **Company** window is displayed.



5. Enter the following 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 second line of a 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.

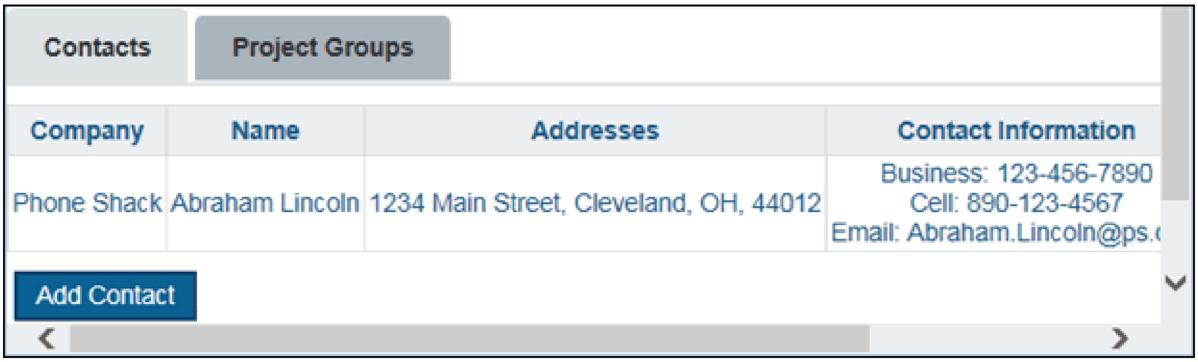
6. Click **Add**. Your new company is added to your **Company** list.

Adding Project Groups

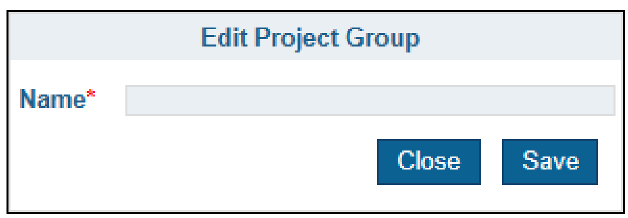
Your Plan Review project group list is used to store project group names that can then be assigned to any new or existing projects to help organize the submitted project.

To create a new project group:

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



2. Click 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 **Name** field.
5. Click **Save**. The new project group is added to the **Project Group** list.

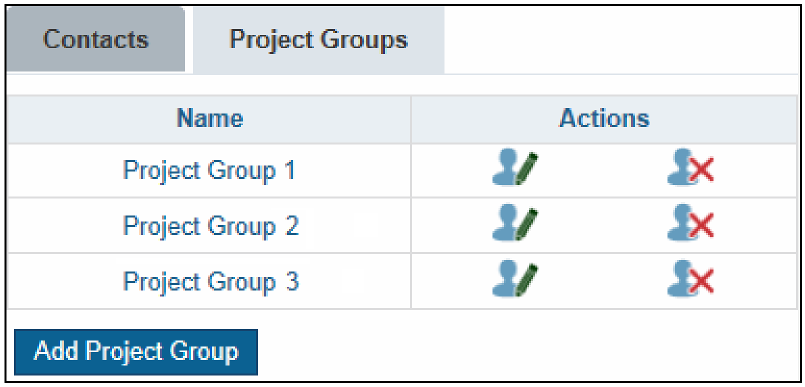
Modifying An Existing Project Group

You can remove or modify an existing project group from the **Project Groups** tab.

To modify existing project groups:

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

2. Click the **Project Groups** tab. The **Project Groups** window is displayed.



3. Select one of the following actions from the **Actions** column:
   - Click the **Edit** button to modify the name of an existing project group.

   - Click the **Delete** button to remove a project group from the **Project Groups** list.

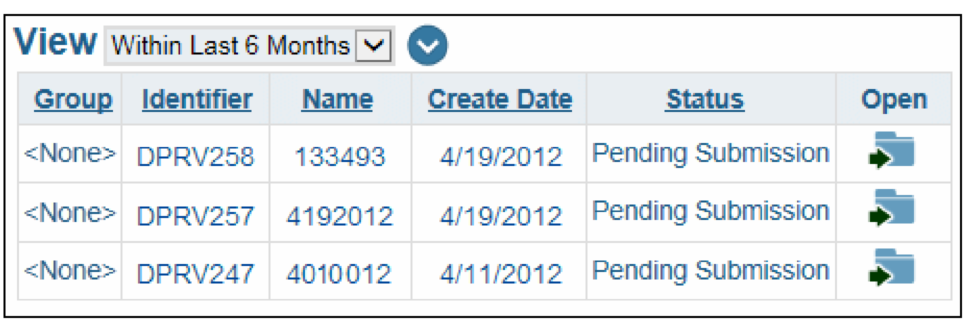
Note: You cannot delete a group from your **Project Groups** list if it is already assigned to an existing project.

Creating A New Project

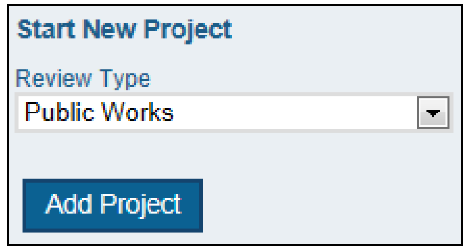
You can create a new project to submit for review.

To create a new project:

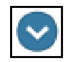
1. Click the **Projects** tab. The **Projects** window is displayed.



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 list in the **Start New Project** pane and click **Add Project**.



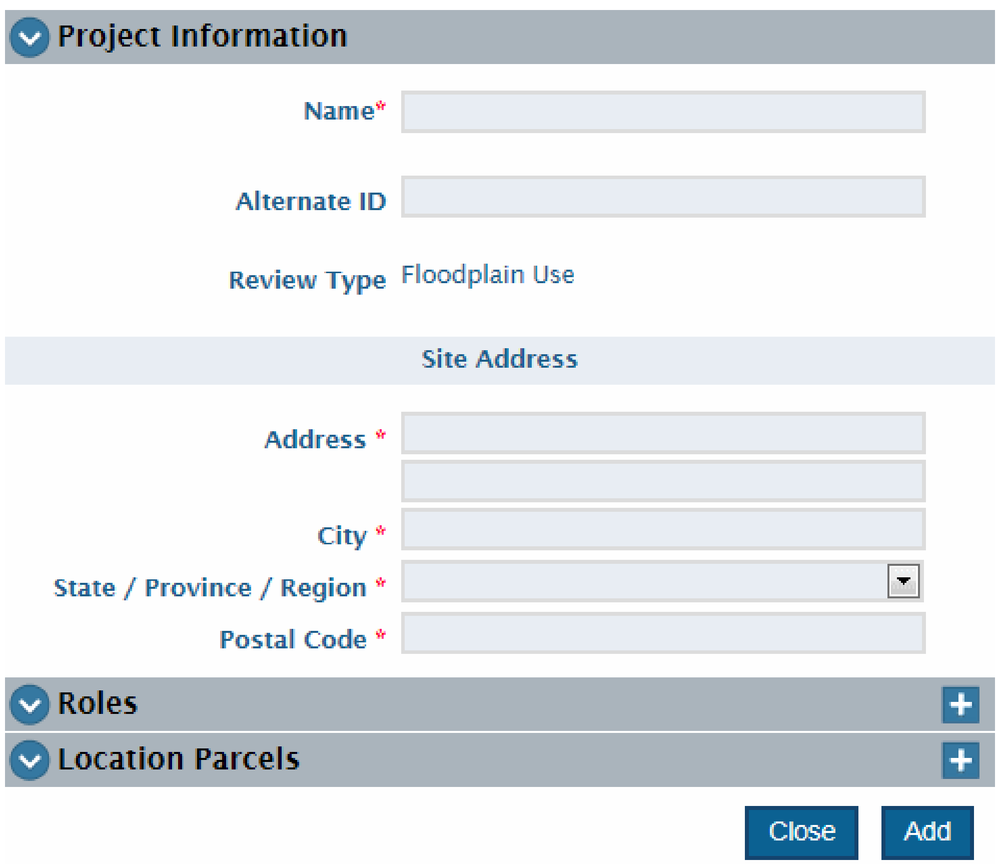
- From an existing project, select the blue arrow icon next to the **New Project** section.



  The **Review Type** drop-down 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.

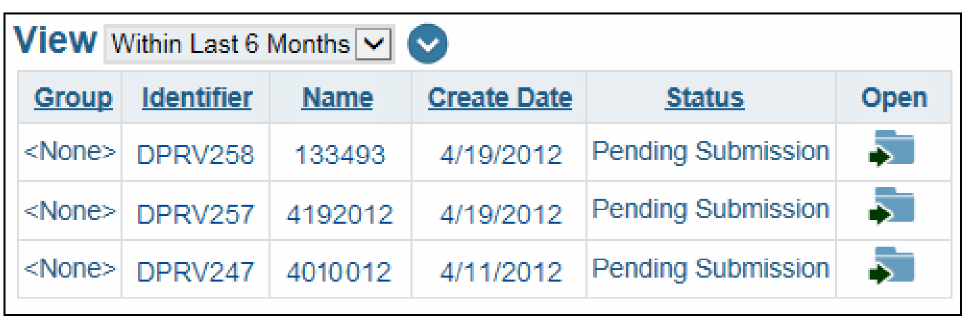
4. If desired, add one or more **Roles** to your project. For more information on adding roles, see Assigning Someone to a Project Role on page 100.
5. If desired, add one or more **Parcels** to your project. For more information on adding location parcels, see Adding a New Location Parcel on page 108.
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.

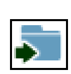
To edit the information of a project:

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

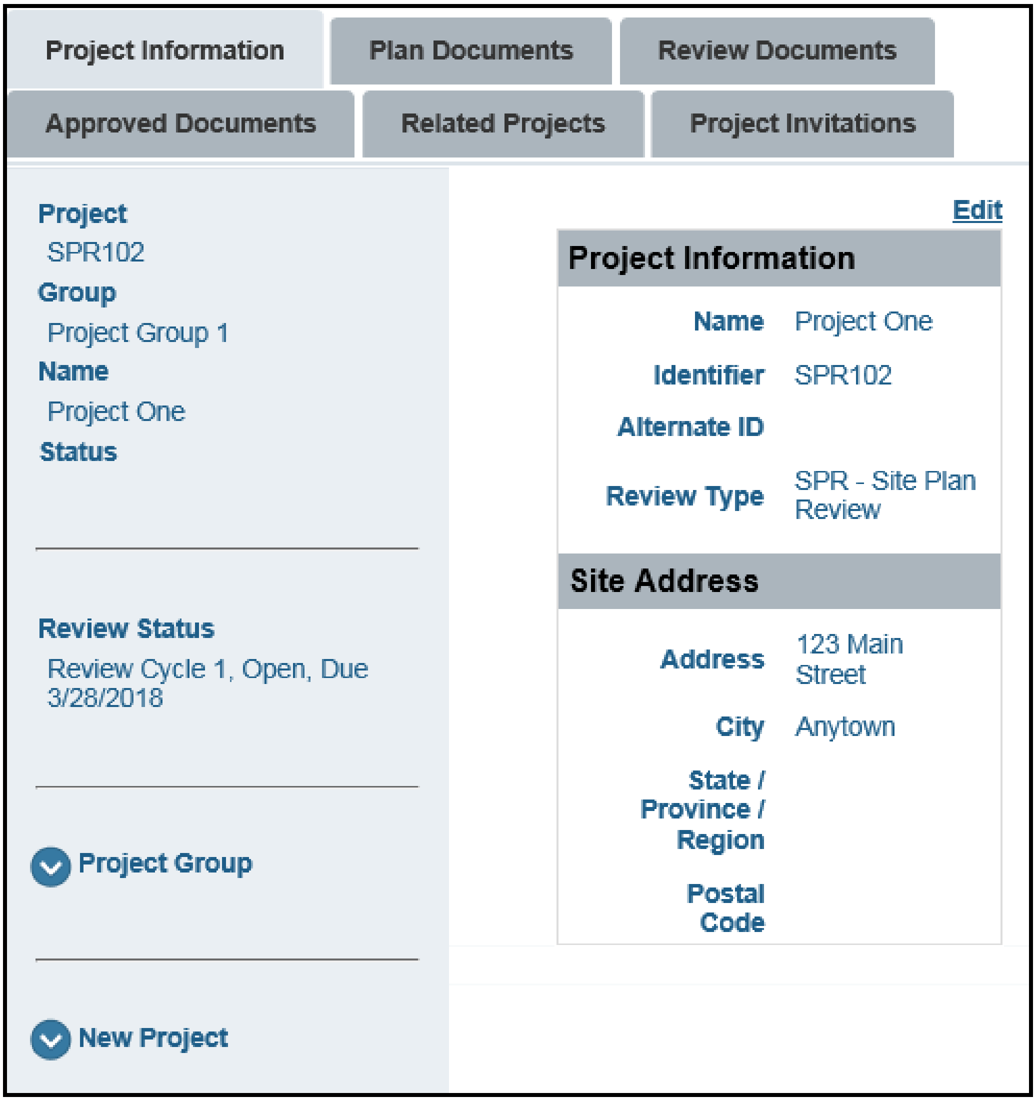


Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

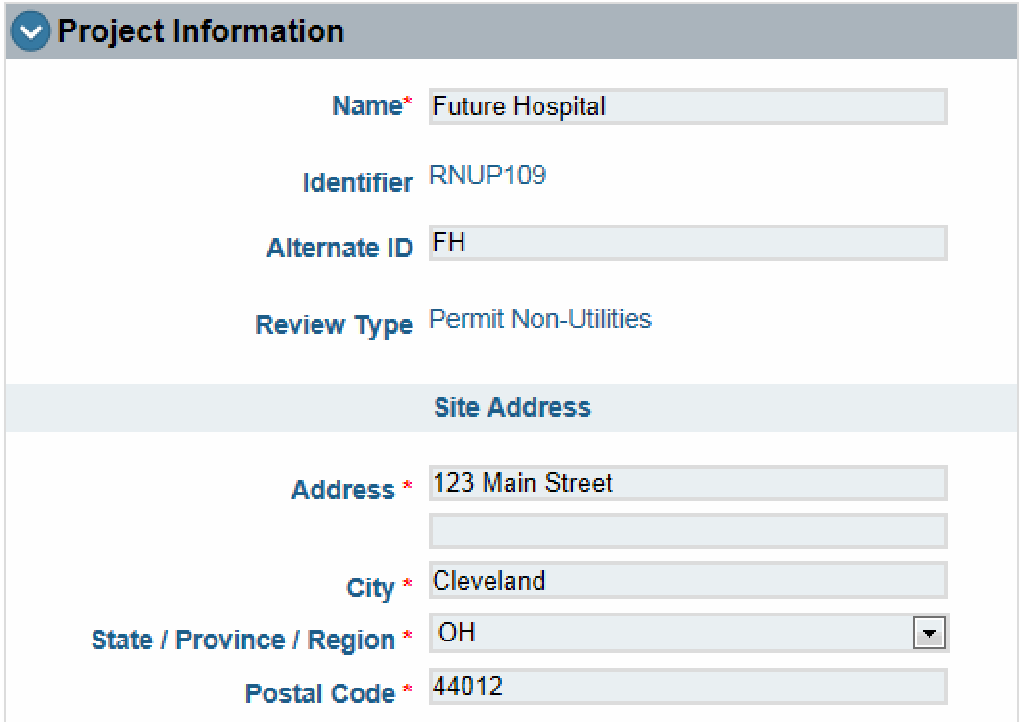
2. Click the **Select** button for the project you want to add a contact to.



The **Project Information** window is displayed.



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



4. 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.

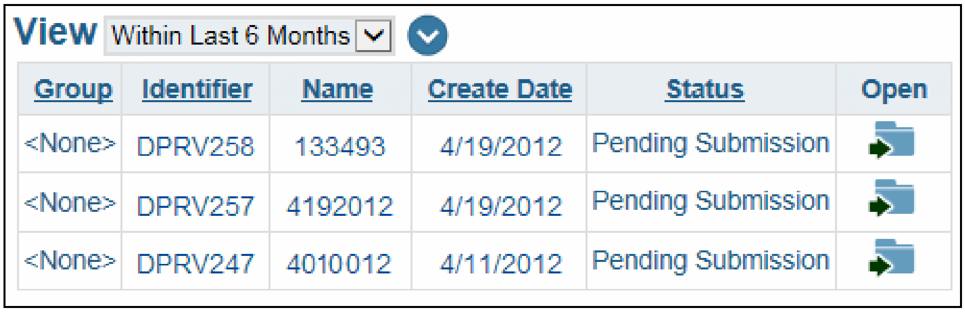
5. Click **Save**.

Assigning a Project Group to a Project

You can assign project groups to any selected project.

To assign a project group to a Plan Review project:

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

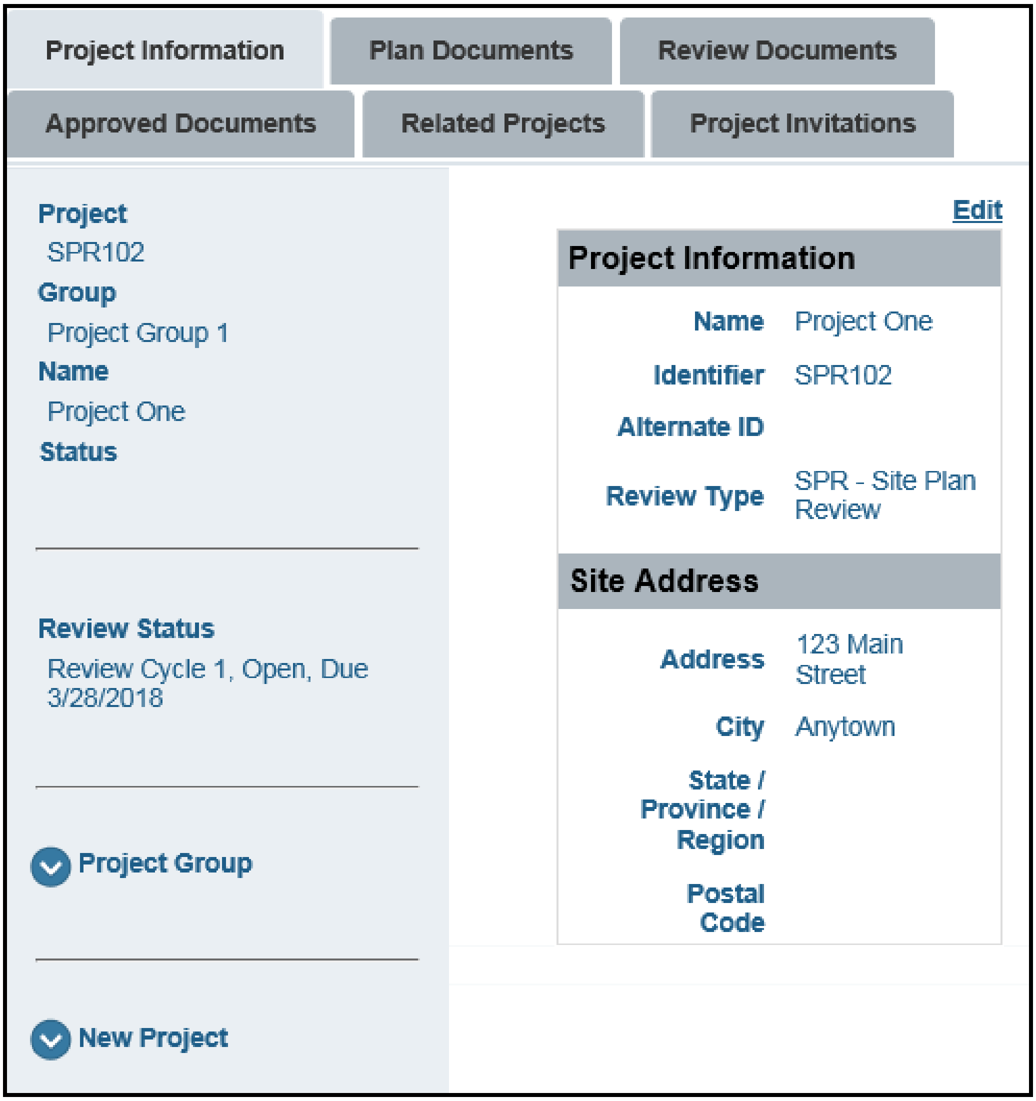


View: Within Last 6 Months

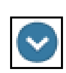
Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

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

The **Project Information** layout is displayed.



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



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

4. From the **Project Group** drop-down list, select the project group you want to assign to the project.

   Tip: You can remove a project group assigned to a project by selecting **<None>** from the **Project Group** drop-down list.

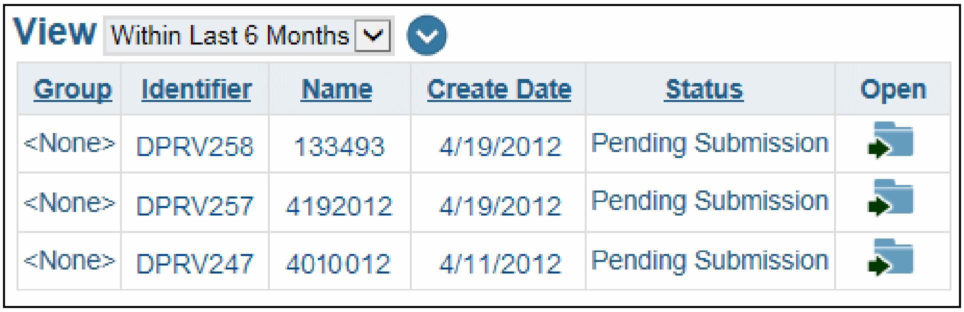
5. Click **Set**.

Assigning Someone to a Project Role

A project role can be assigned to a person involved with the project. This person can be an existing contact or a new person that is not an existing contact. For more information about adding a contact, see Adding People to Your Contacts List on page 87.

To assign someone to a role for your Plan Review project:

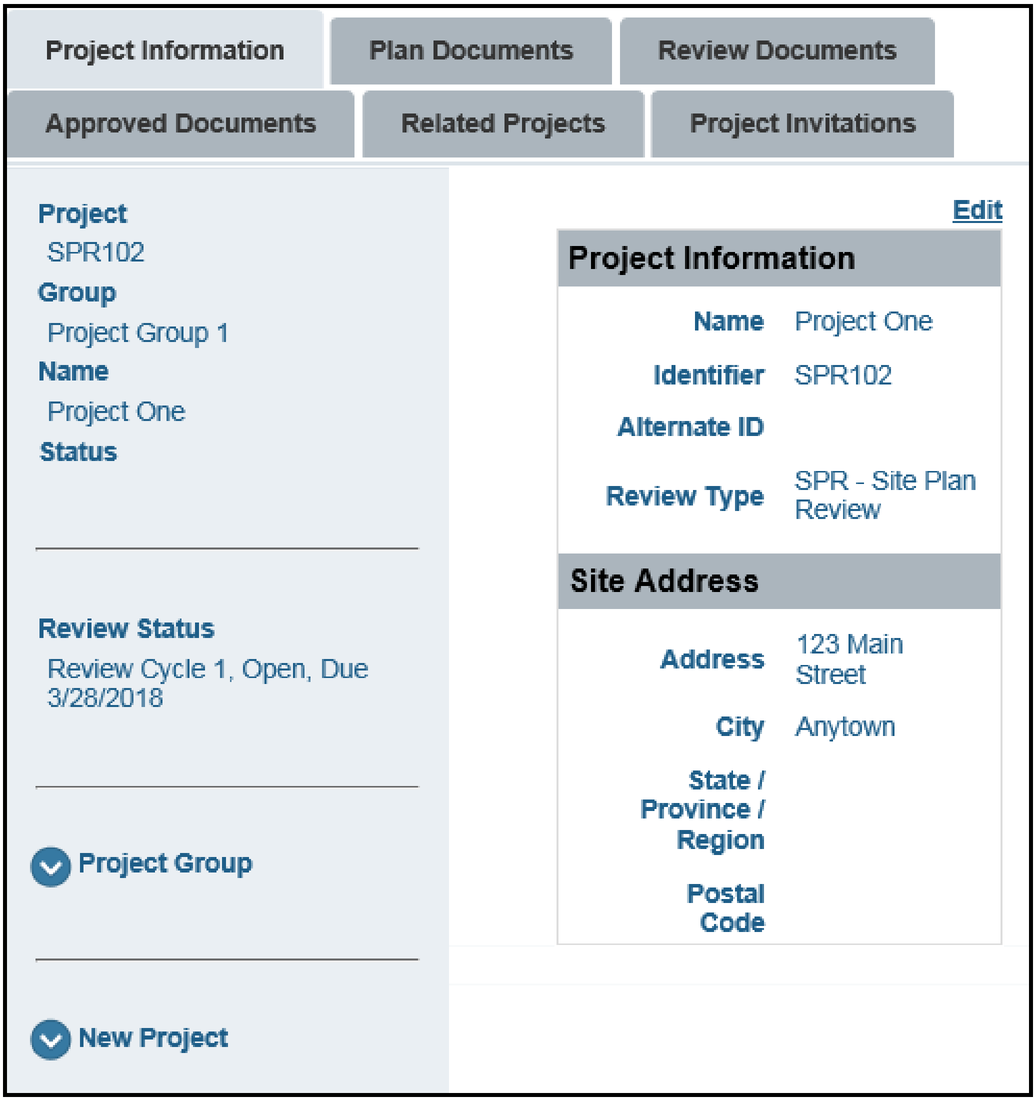
1. Click the **Projects** tab. The **Projects** layout is displayed.



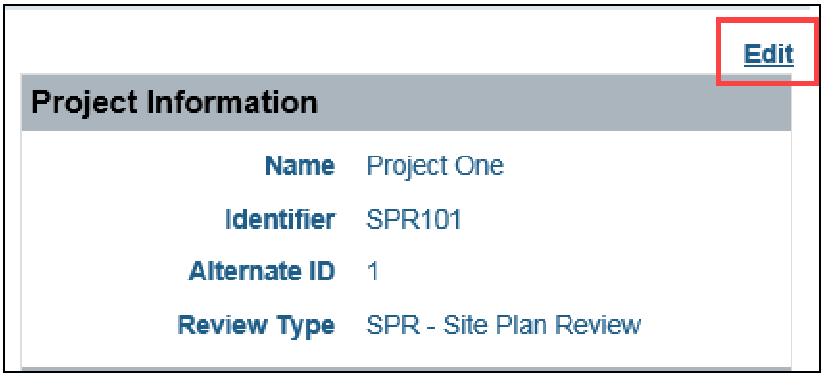
Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

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

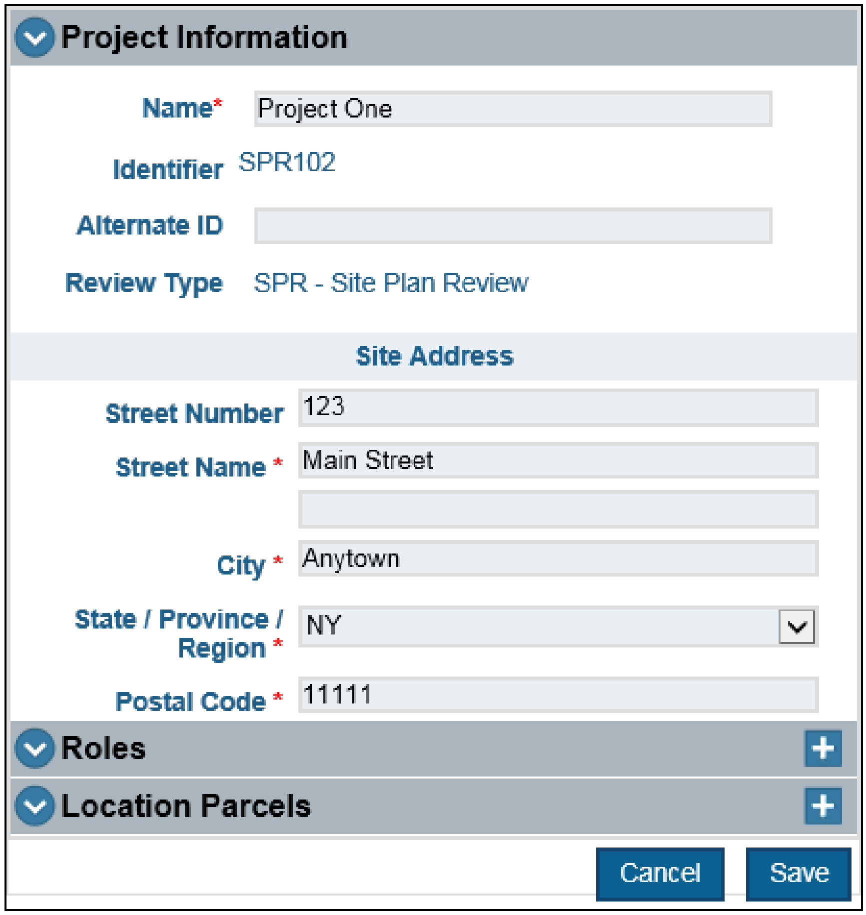
The **Project Information** layout is displayed.



3. Above the **Project Information** heading, click **Edit**.

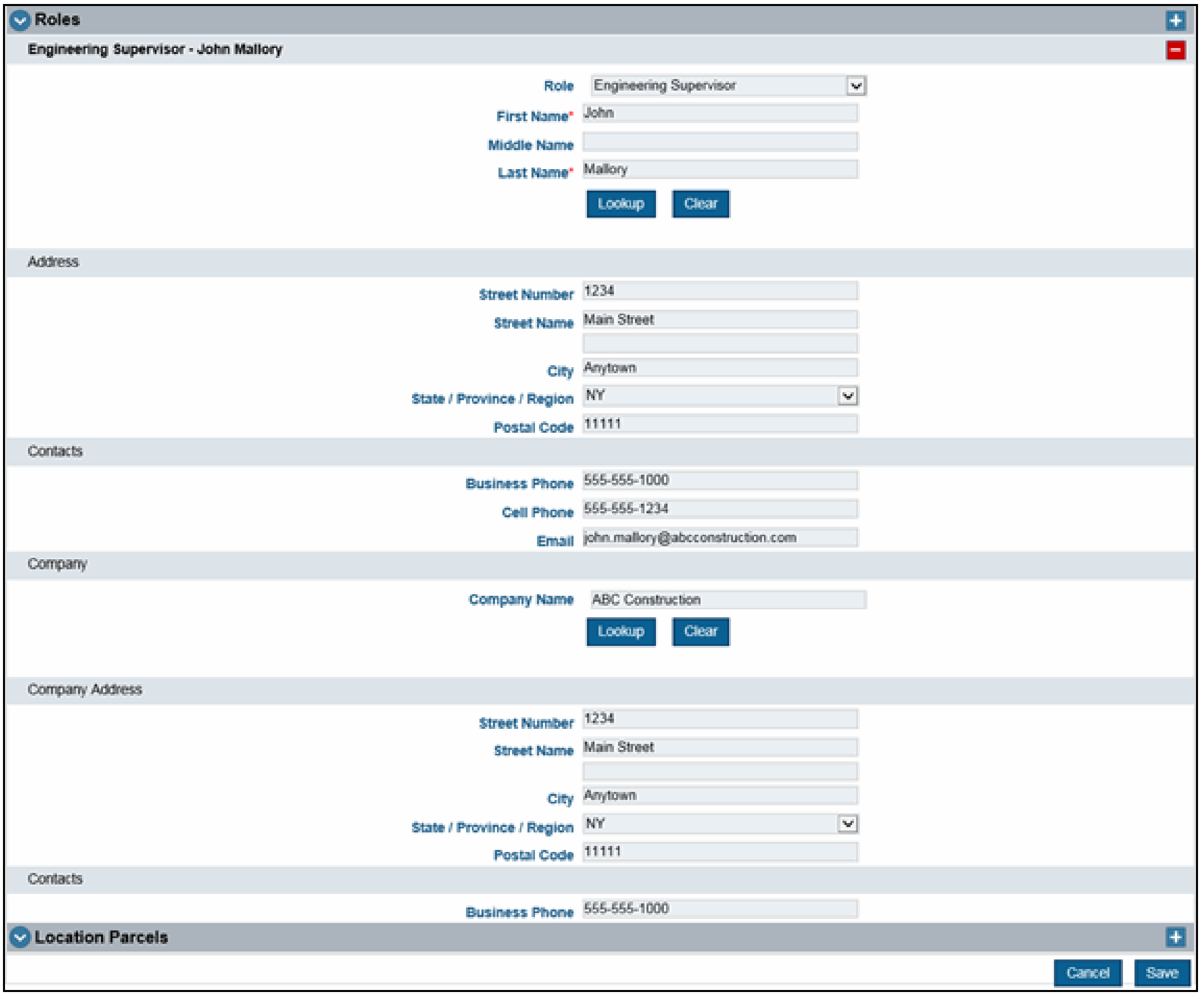


The edit project information layout is displayed.

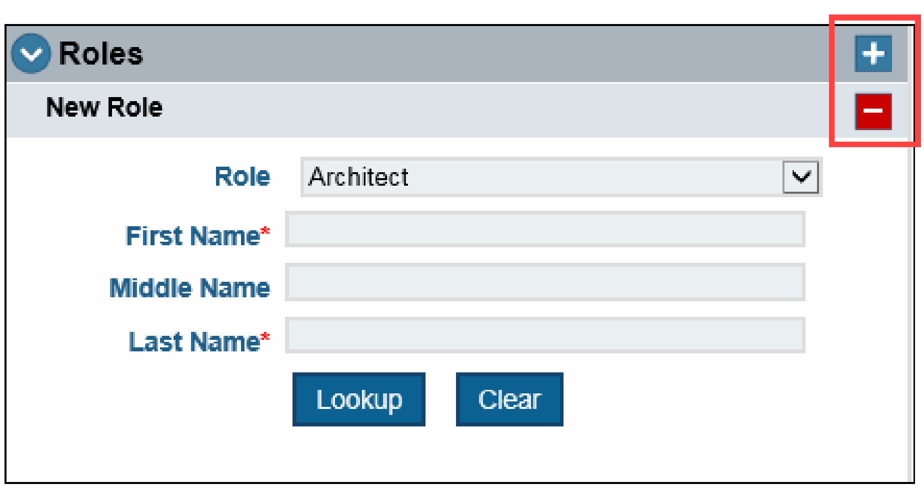


4. From the **Roles** section, click the blue arrow icon to expand it.

The **Roles** section is expanded and its fields are displayed.



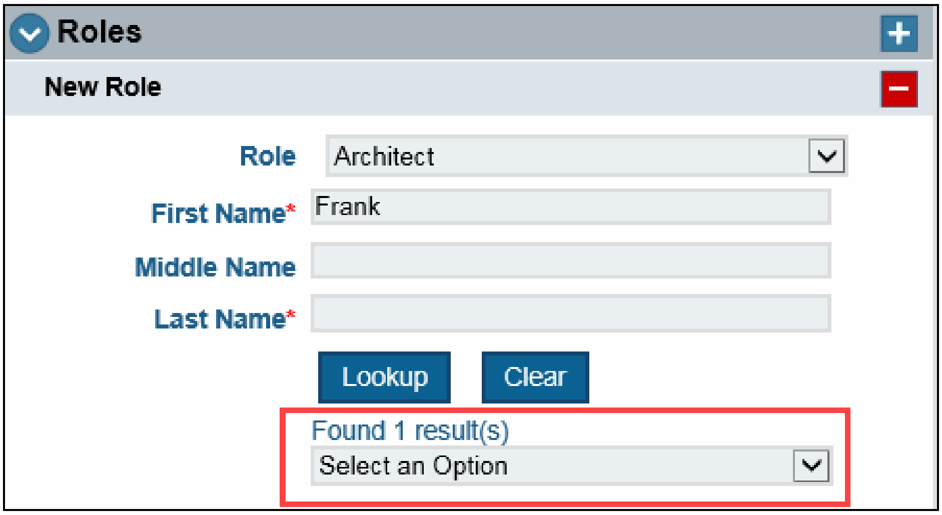
5. Click the + (plus) button. A new role is added within the **Roles** section. Click the - (minus) button to remove that role from the list.



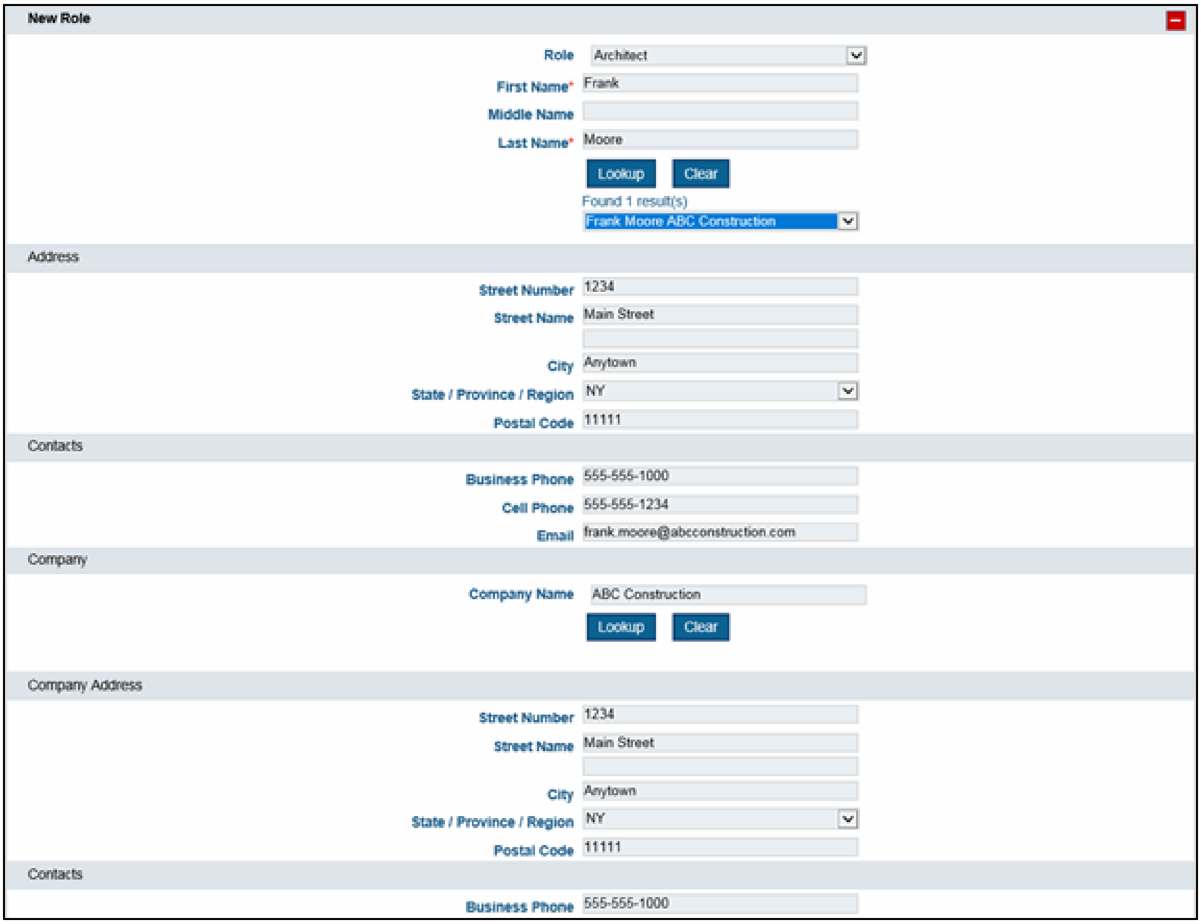
6. Select a role from the **Role** drop-down list.
7. Enter the first name of the person assigned to the new role in the **First Name** field.
8. Enter the middle name of the person assigned to the new role in the **Middle Name** field.
9. Enter the last name of the person assigned to the new role in the **Last Name** field.

Note: If you are looking up an existing contact, you can search by either the first name, middle name, or last name. If you are entering a person that is not an existing contact, you must enter information into the **First Name** and **Last Name** fields to save the role.

10. Click **Lookup**. A drop-down list is displayed with the results of existing contacts who match the information entered in the name fields.

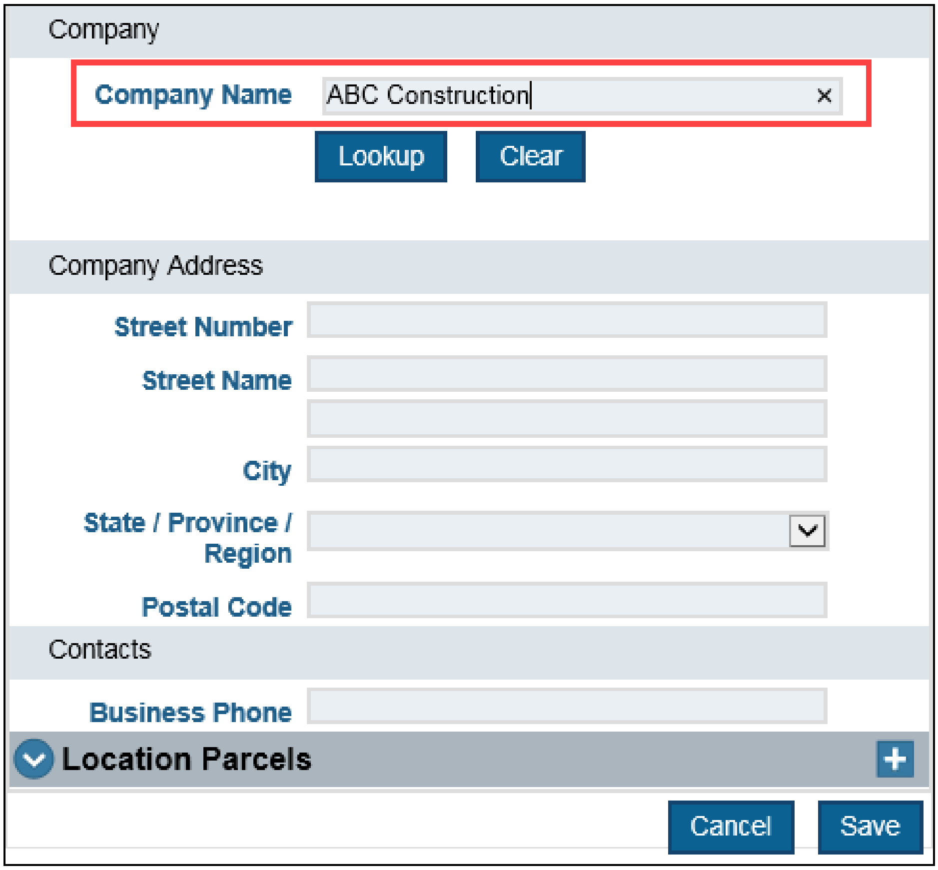


11. From the drop-down list, select the name of the contact you want to assign to the project. The **Address**, **Contacts**, and **Company** sections for the new role are automatically populated with the contact's available information.

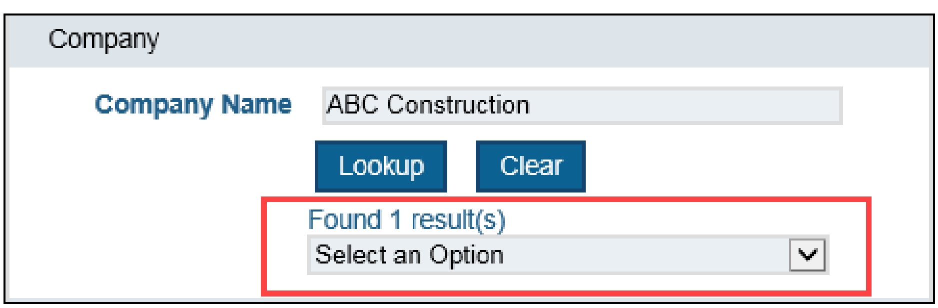


12. Click the **Clear** button in the **New Role** section to clear the contact's name, address, and contact information in the data fields. Click the **Clear** button in the **Company** section to clear the company name, address, and contact information in the data fields.

13. If the contact information does not include company information, enter the name of the company in the **Company Name** field.



14. 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 list.



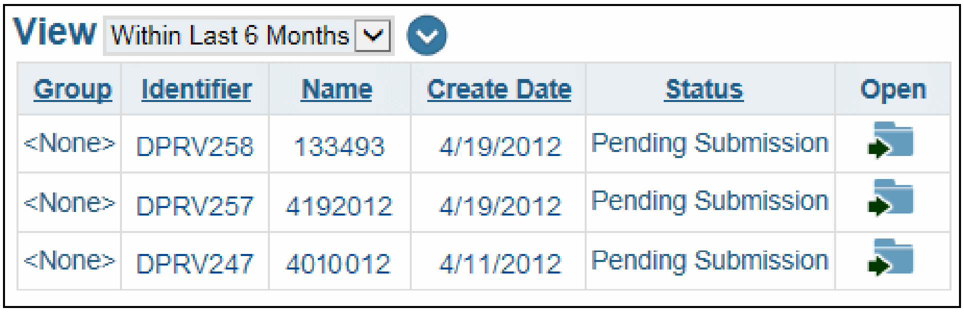
15. From the drop-down list, select the name of the company you want to assign to the project. The **Company Address** and **Contacts** sections are automatically populated in the available data fields.

16. Modify any of the populated fields as required.
17. Click **Save**. The new role is displayed in the project's **Roles** list.

Adding a New Location Parcel

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

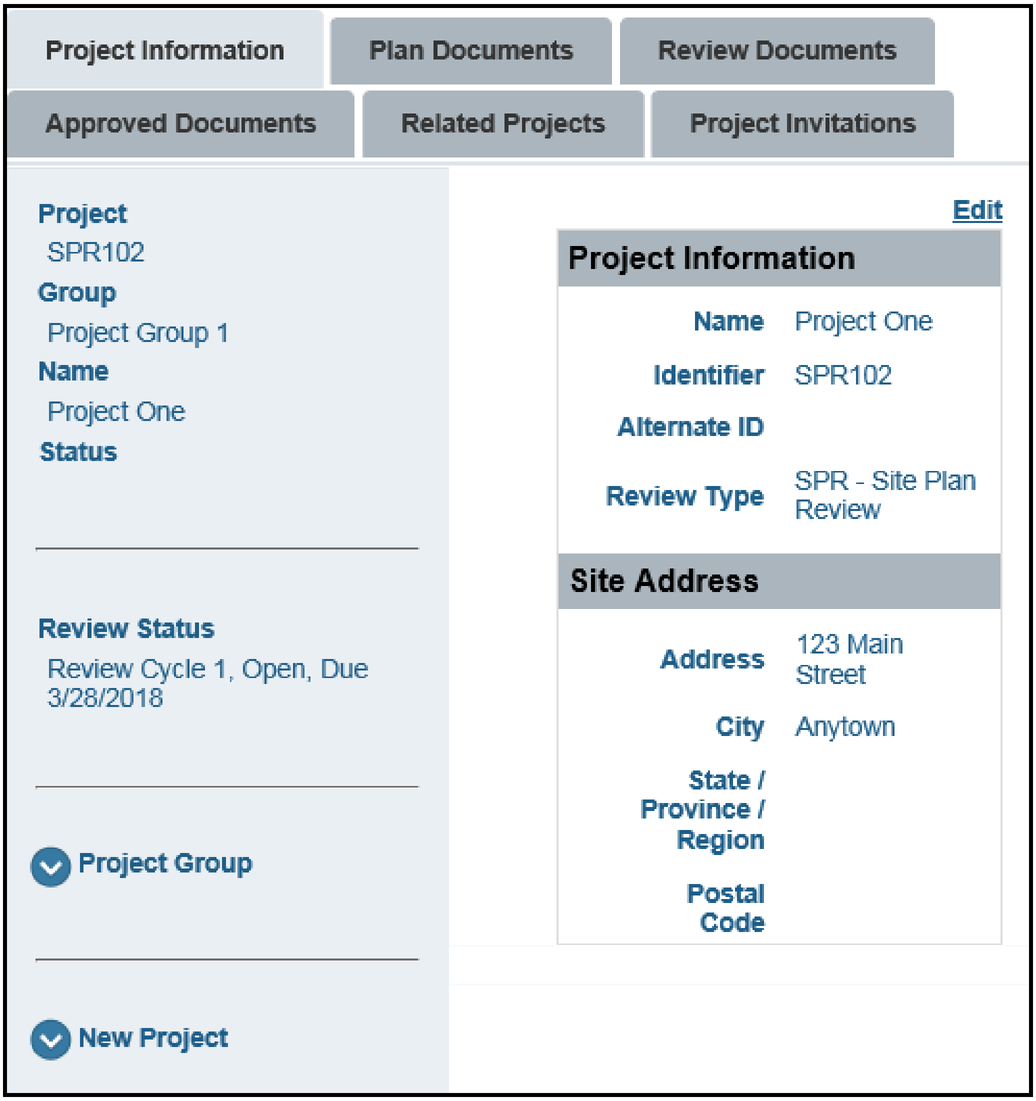
1. Select the **Projects** tab. The **Projects** window is displayed.



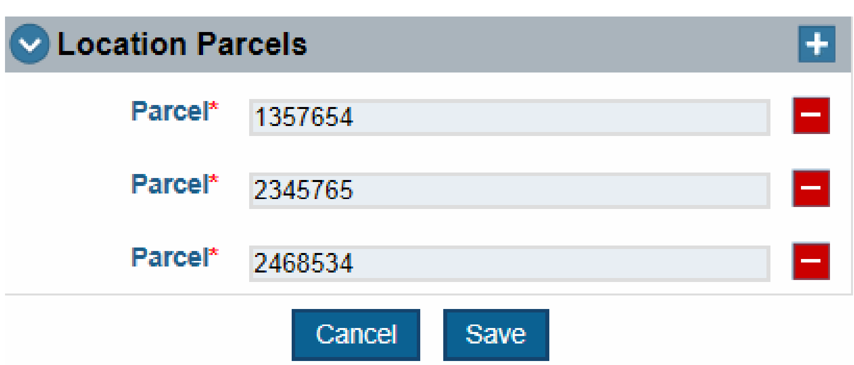
Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

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) button. A new **Parcel** field is added within the **Location Parcels** section.
6. Type the value of your new parcel in the **Parcel** field.

   Tip: You can click the - (minus) button next to a **Parcel** field to remove that parcel from the list.

7. Click **Save**.
8. 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 on page 110.

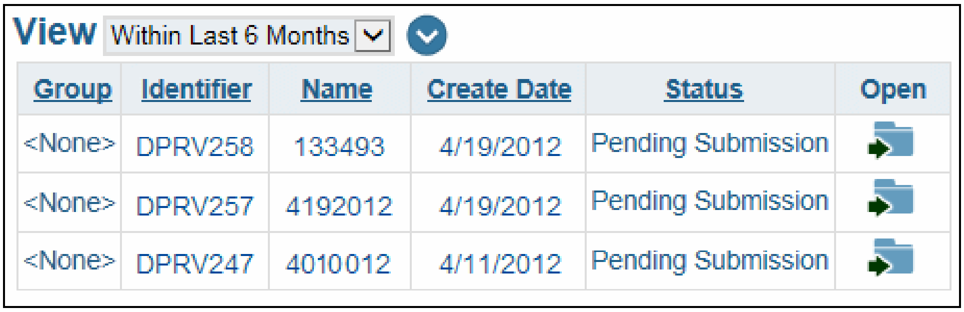
Adding Documents to a Project

You can add plan documents to your Plan Review project for review.

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

To add documents to a project:

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

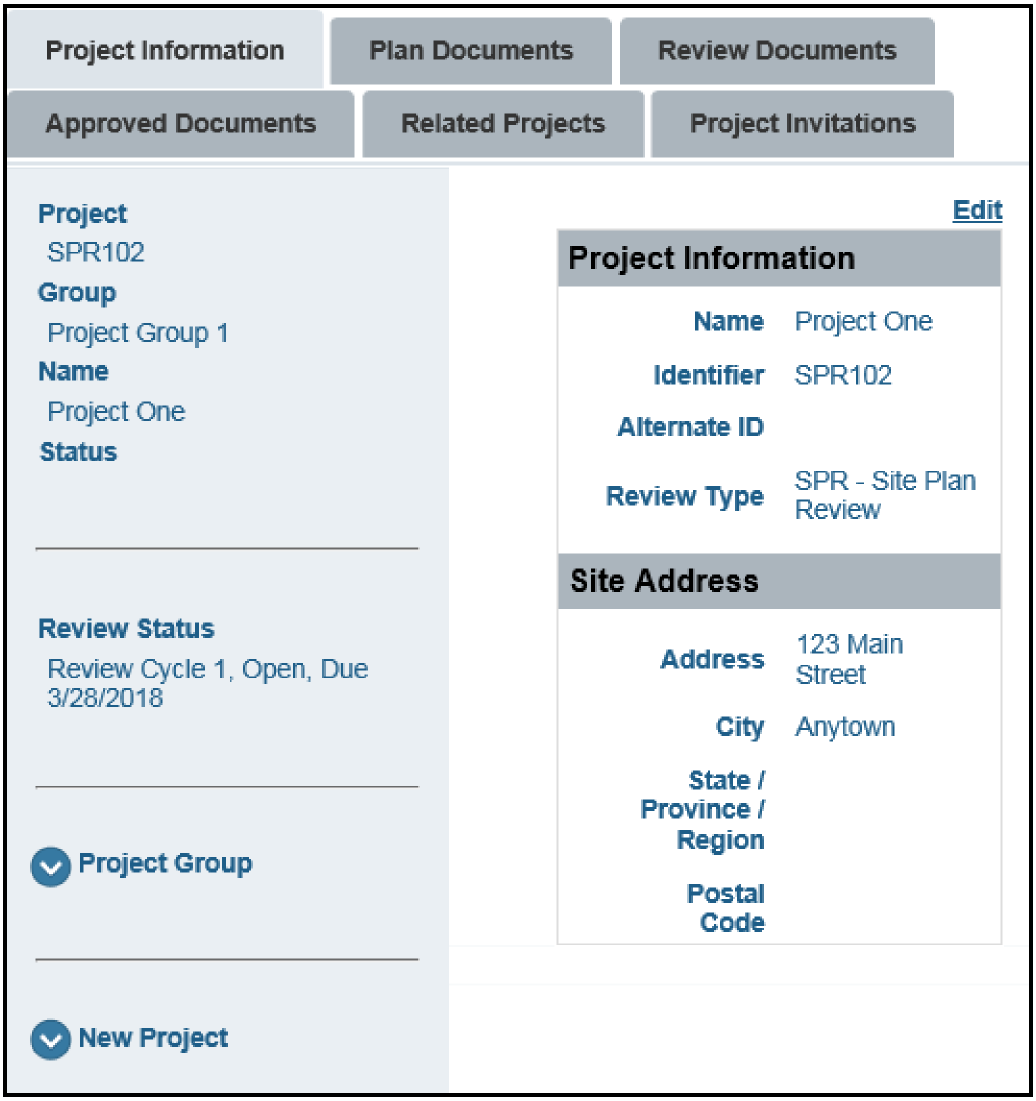


View Within Last 6 Months

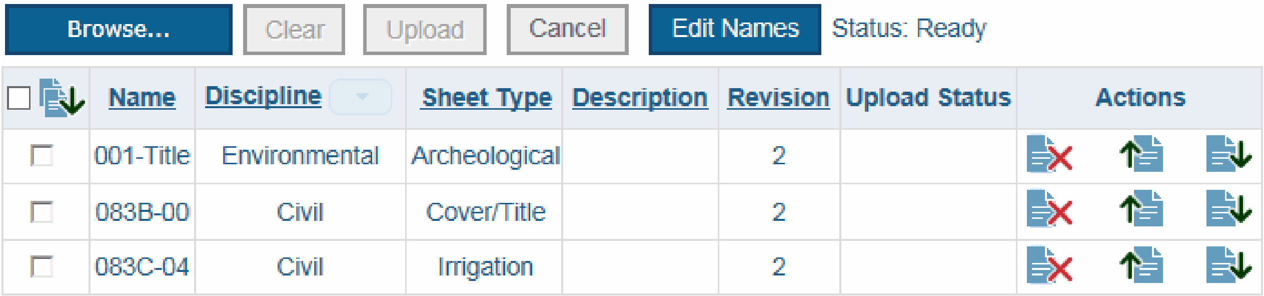
Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

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

The **Project Information** window is displayed.



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



4. Click the **Browse** button. The **Choose File to Upload** window is displayed.

   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. Navigate to the documents you want to upload.

   Note: Document file names must not exceed 100 characters and should not contain double spaces.

6. Click **Open**. The selected documents for upload are displayed in the **Plan Documents** list.

   Tip: Click the **Clear** button to remove all documents that are not yet uploaded from the **Plan Documents** list. Or, click the **Remove** button located in the **Actions** column.

7. Select the Discipline for the document from the **Discipline** drop-down list 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 list.

8. Select the Sheet Type for the document from the **Sheet Type** drop-down list for all selected documents.
9. Type a description of the document in the **Description** field.
10. Click **Upload**. A confirmation decision notification is displayed.
11. Click **Yes**. The documents are added to your project file.

    Note: You can click **Cancel** while documents are uploaded to halt the upload process. Halting the upload process does not affect any documents that were already uploaded from your current **Plan Documents** list, but any documents that are not yet uploaded are removed from the **Plan Documents** list and are not uploaded.

12. 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 on page 117.

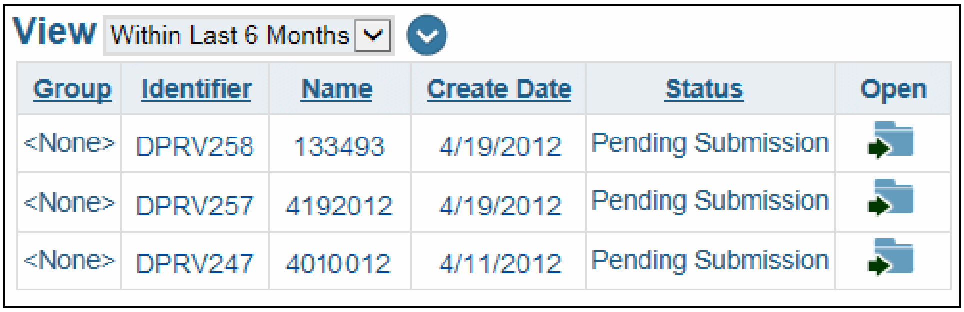
Uploading a Revision of a Document

You can upload a revision of a document that is already uploaded to the Plan Review project.

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

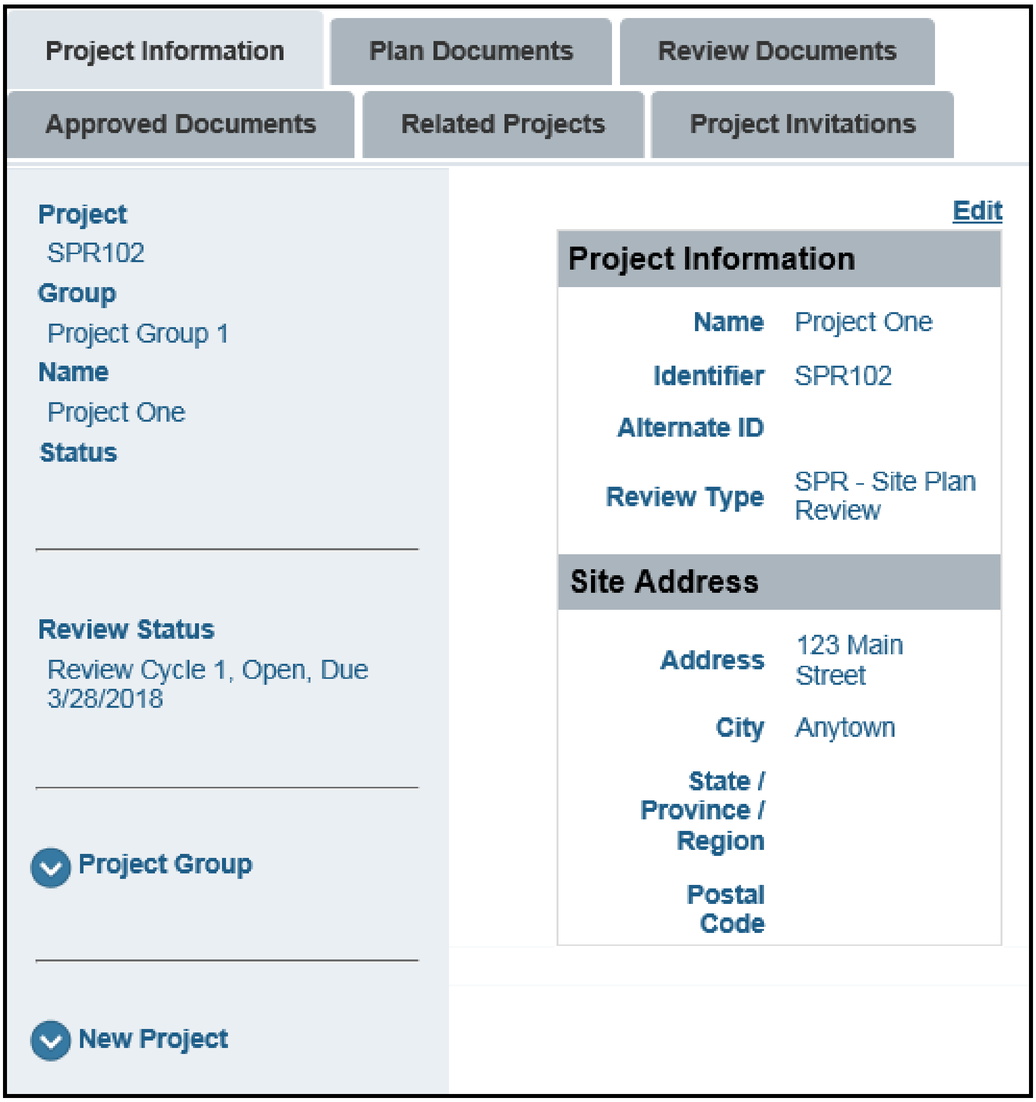
To upload a revision of a document:

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

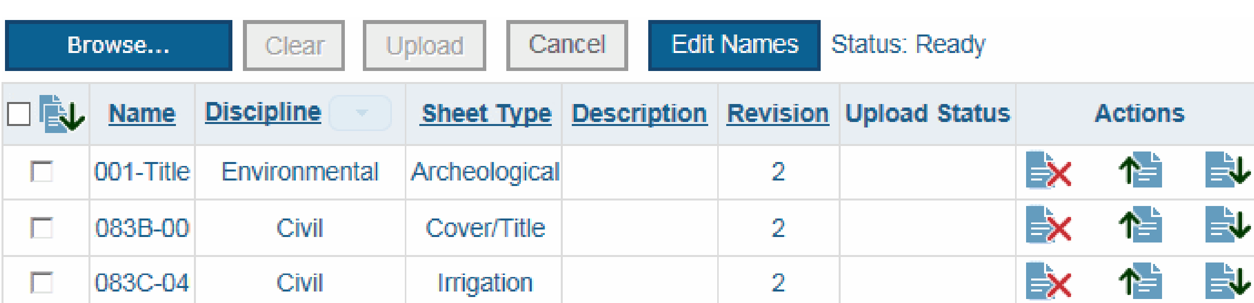


2. Click the **Select** button for the project that contains the document you want to modify.

The **Project Information** window is displayed.



3. Click 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**.

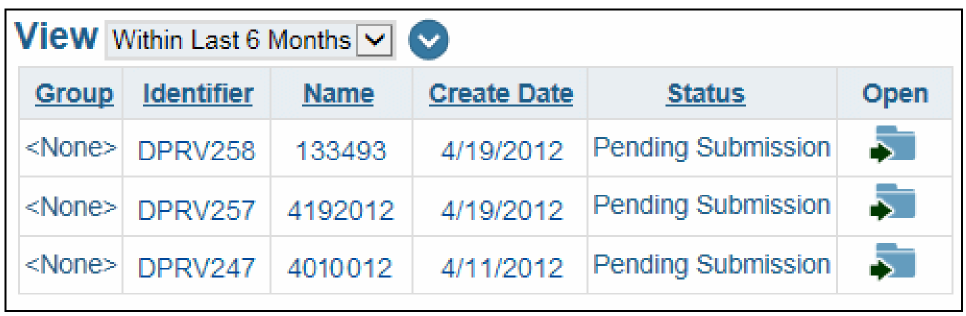
   Note: PDF documents created with security options are not supported for use with Plan Review. Do not upload secured PDF documents into your Plan Review solution.

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:

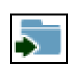
1. Select the **Projects** tab. The **Projects** window is displayed.



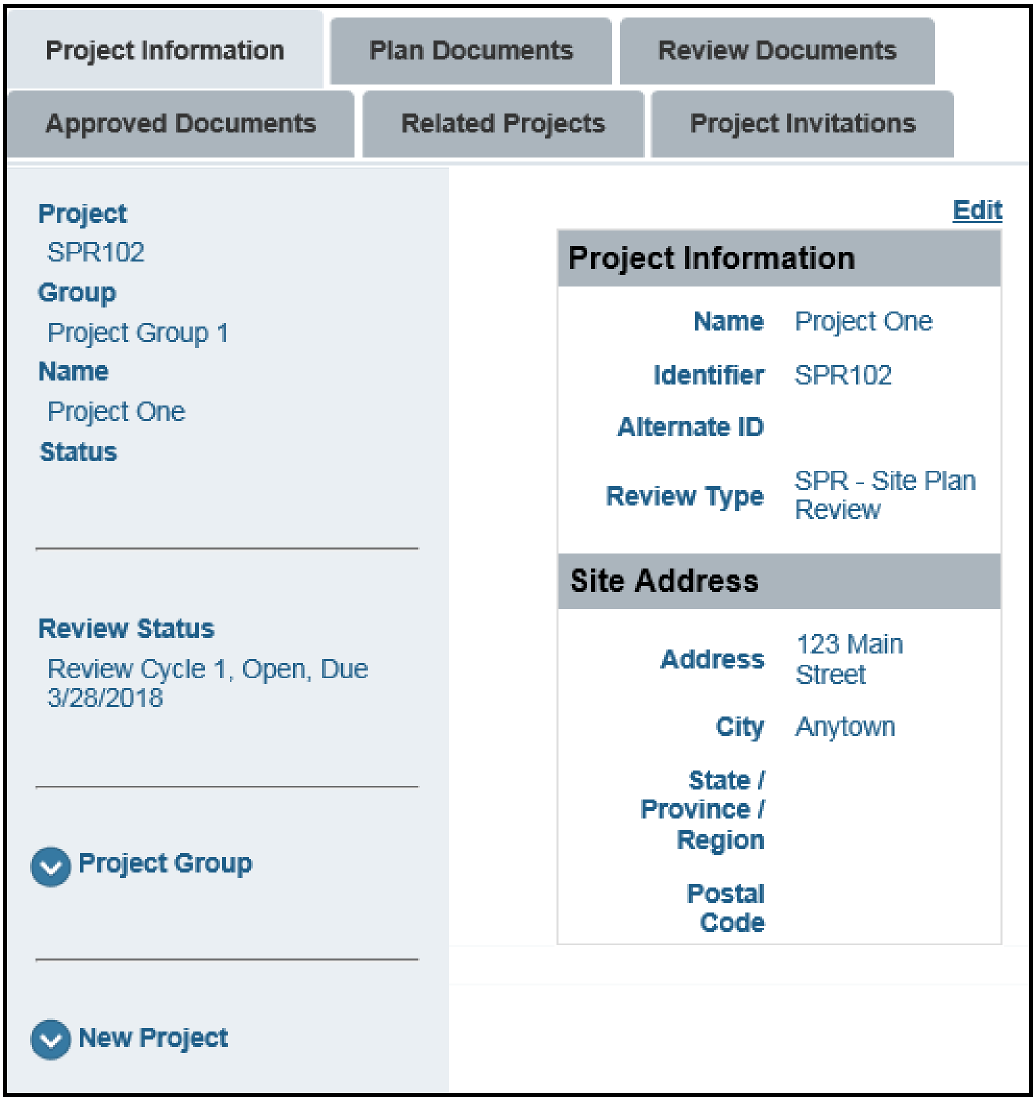
View Within Last 6 Months

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	

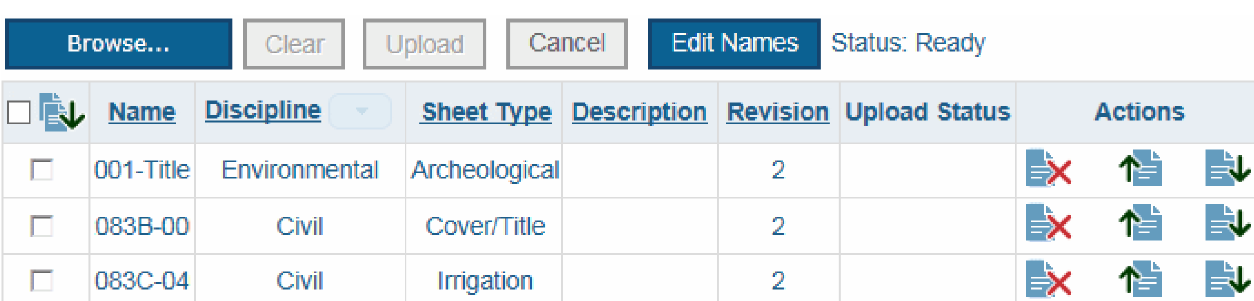
2. Select the folder button for the project from which you want to remove documents.



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.

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 **Plan Documents** tab. The **Plan Documents** window is displayed.

Browse... Clear Upload Cancel Edit Names Status: Ready

	Name	Discipline	Sheet Type	Description	Revision	Upload Status	Actions
	001-Title	Environmental	Archeological		2		
	083B-00	Civil	Cover/Title		2		
	083C-04	Civil	Irrigation		2		

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

Name	Sheet Type	Sheet Type	Description	Revision
001-Title	Environmental	Archeological		2
083B-00	Civil	Cover/Title		2
083C-04	Civil	Irrigation		2

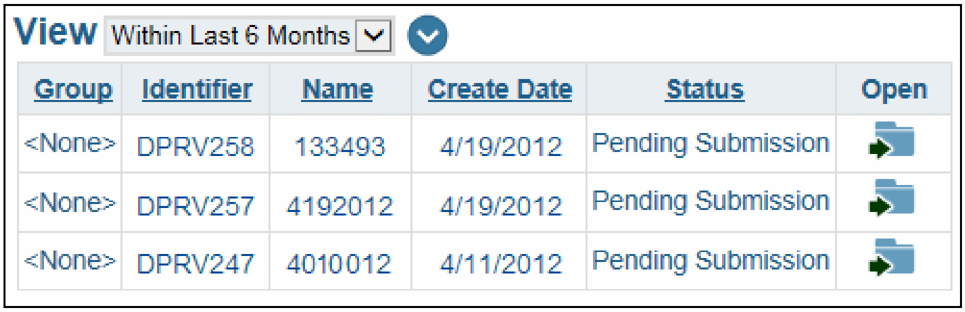
Close Save

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.

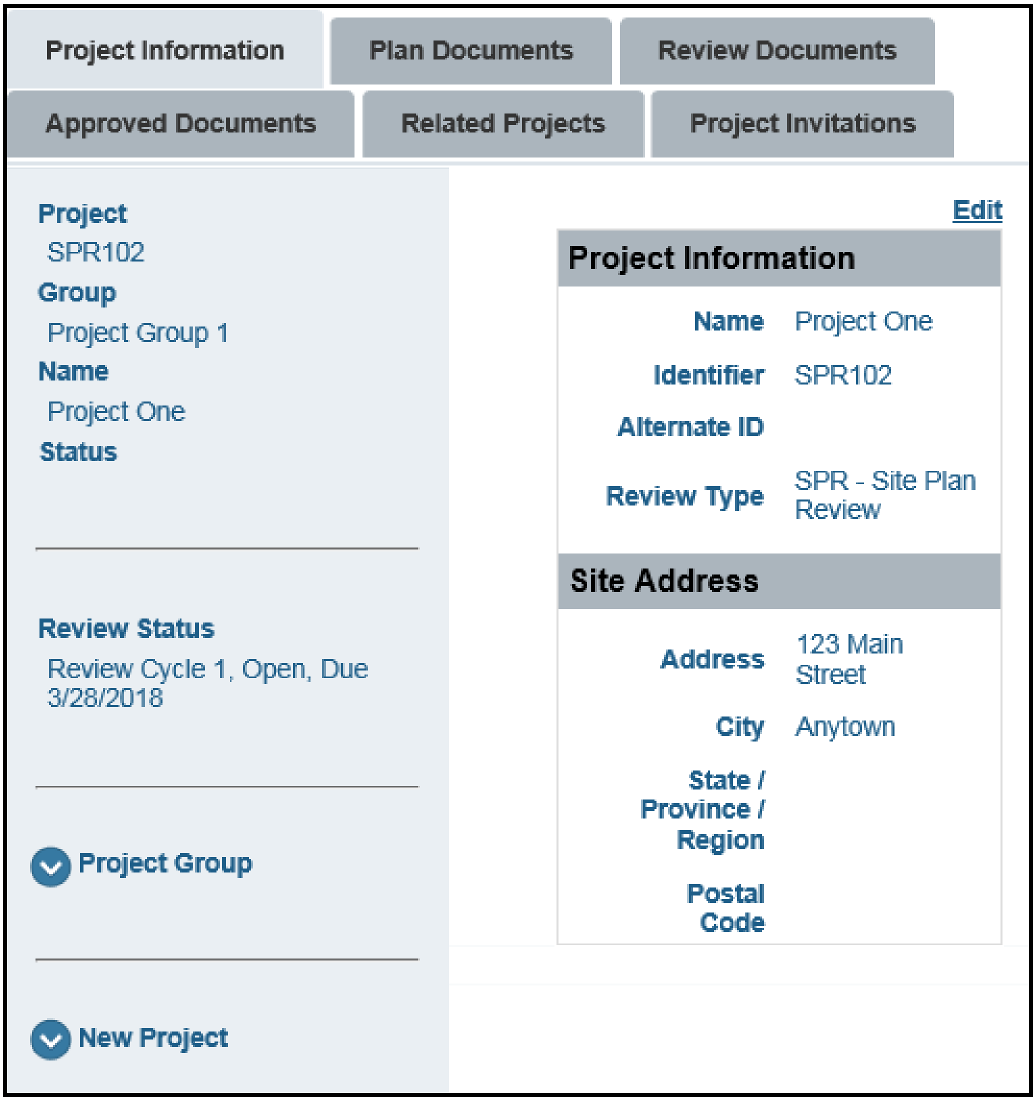


View Within Last 6 Months

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.



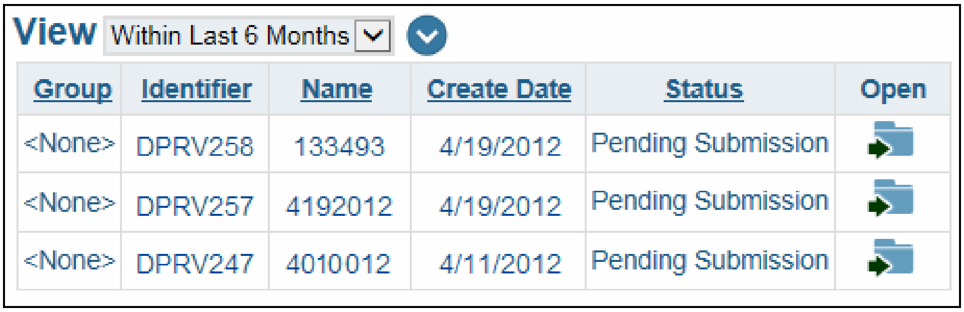
3. Select the appropriate **Action** hyperlink. Your project is uploaded for review.

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:

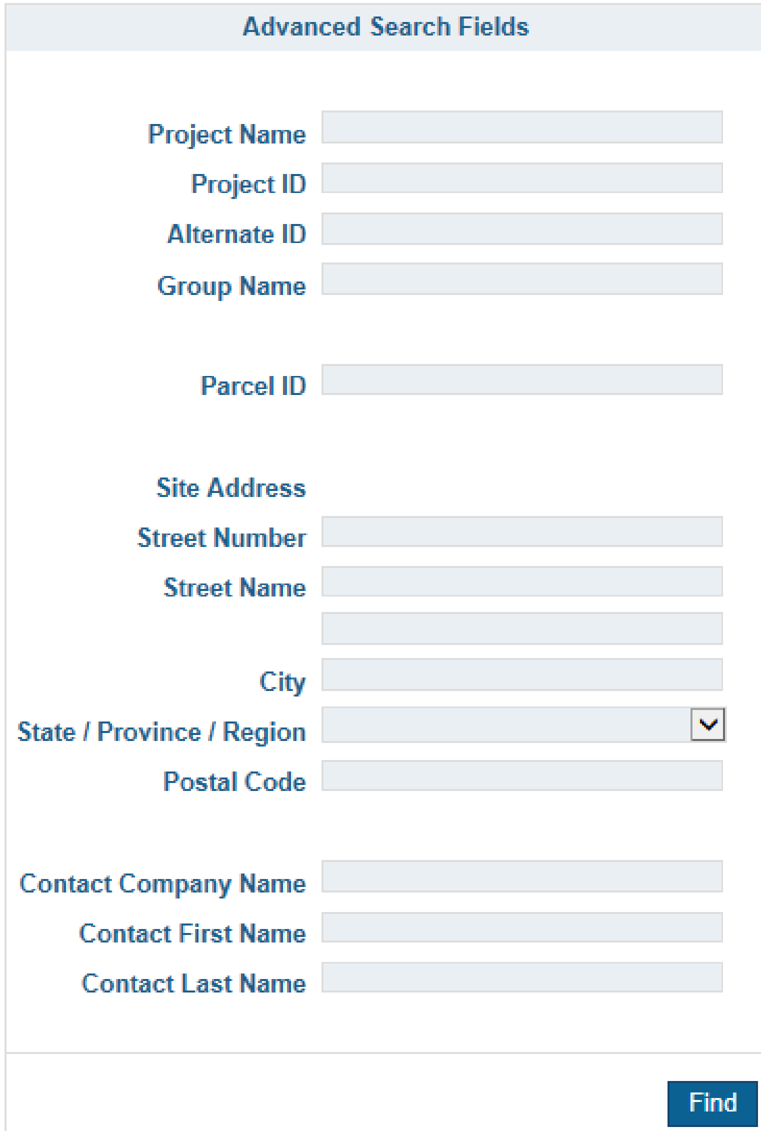
1. Select the **Projects** tab. The **Projects** window is displayed.


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 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.



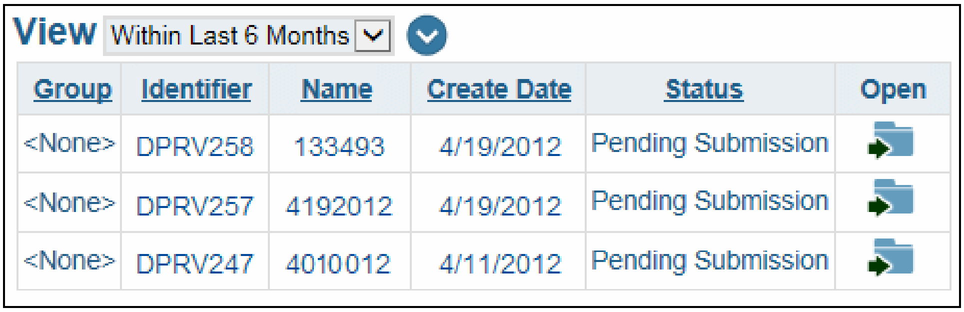
Note: By default, searches will only locate values at the beginning of a field. For example, if you search for Main in the **Street Name** field, the search will not return any projects with a **Street Name** of North Main Street. In order to locate values in the middle of a field, you must begin your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

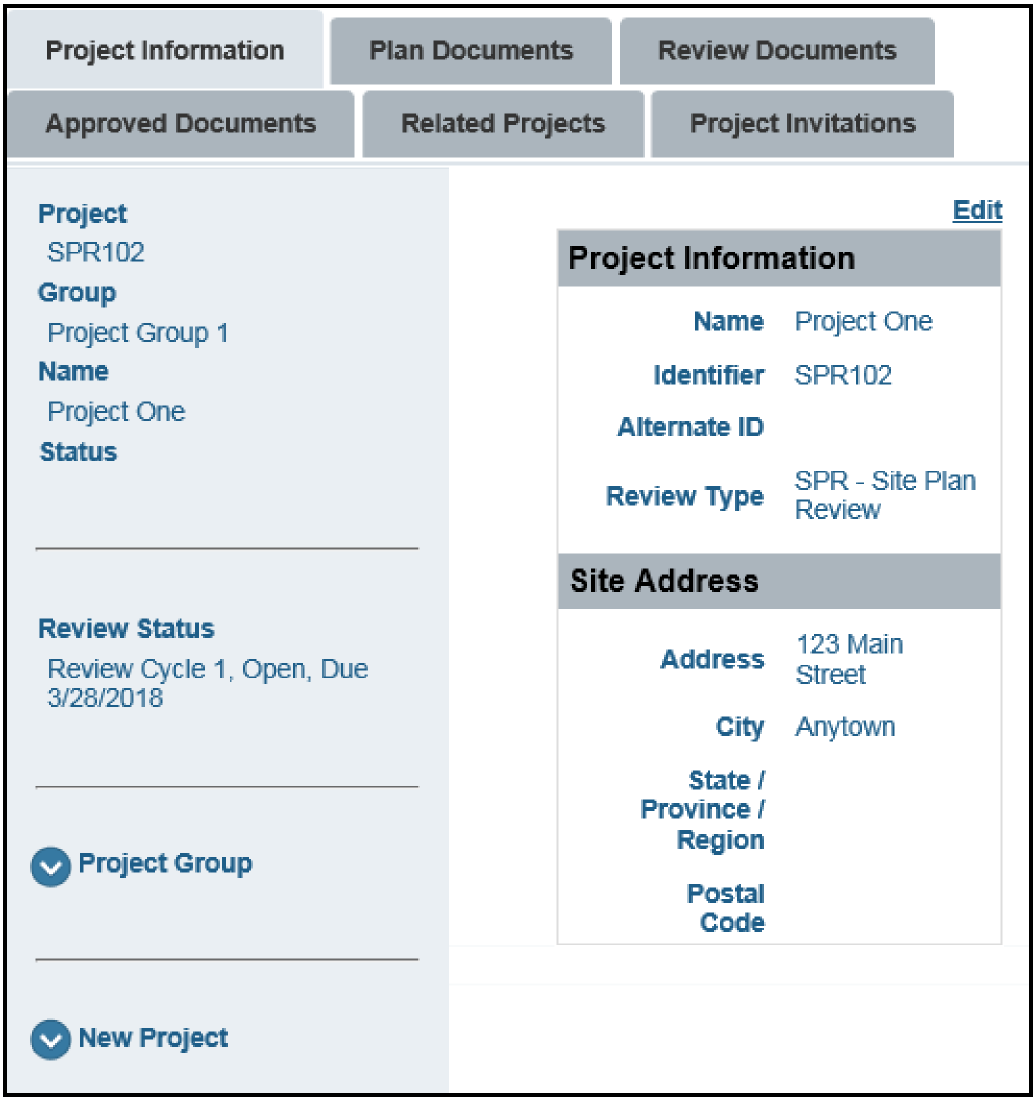
1. Select the **Projects** tab. The **Projects** window is displayed.


View Within Last 6 Months

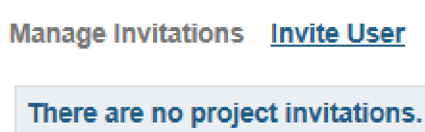
Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Click the folder button for the desired project.

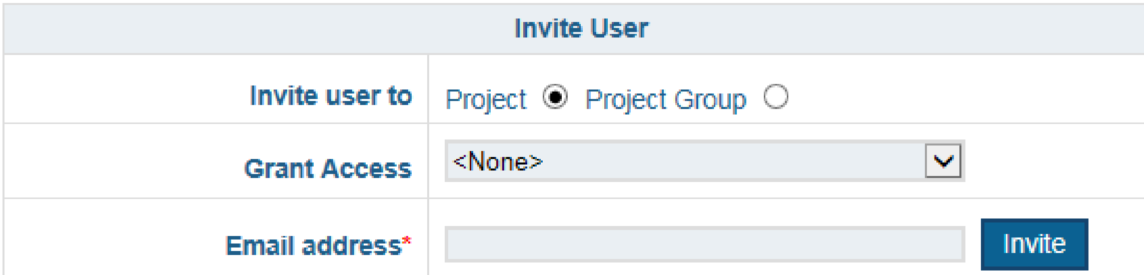
The **Project Information** window is displayed.



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 list. The following selections are available:

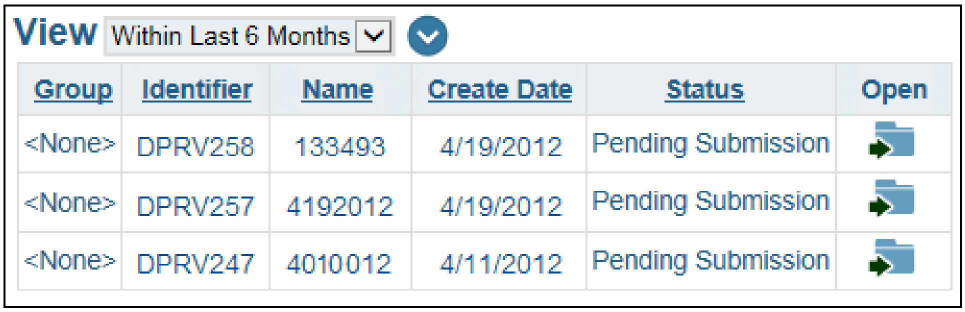
Option	Description
View Only	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

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

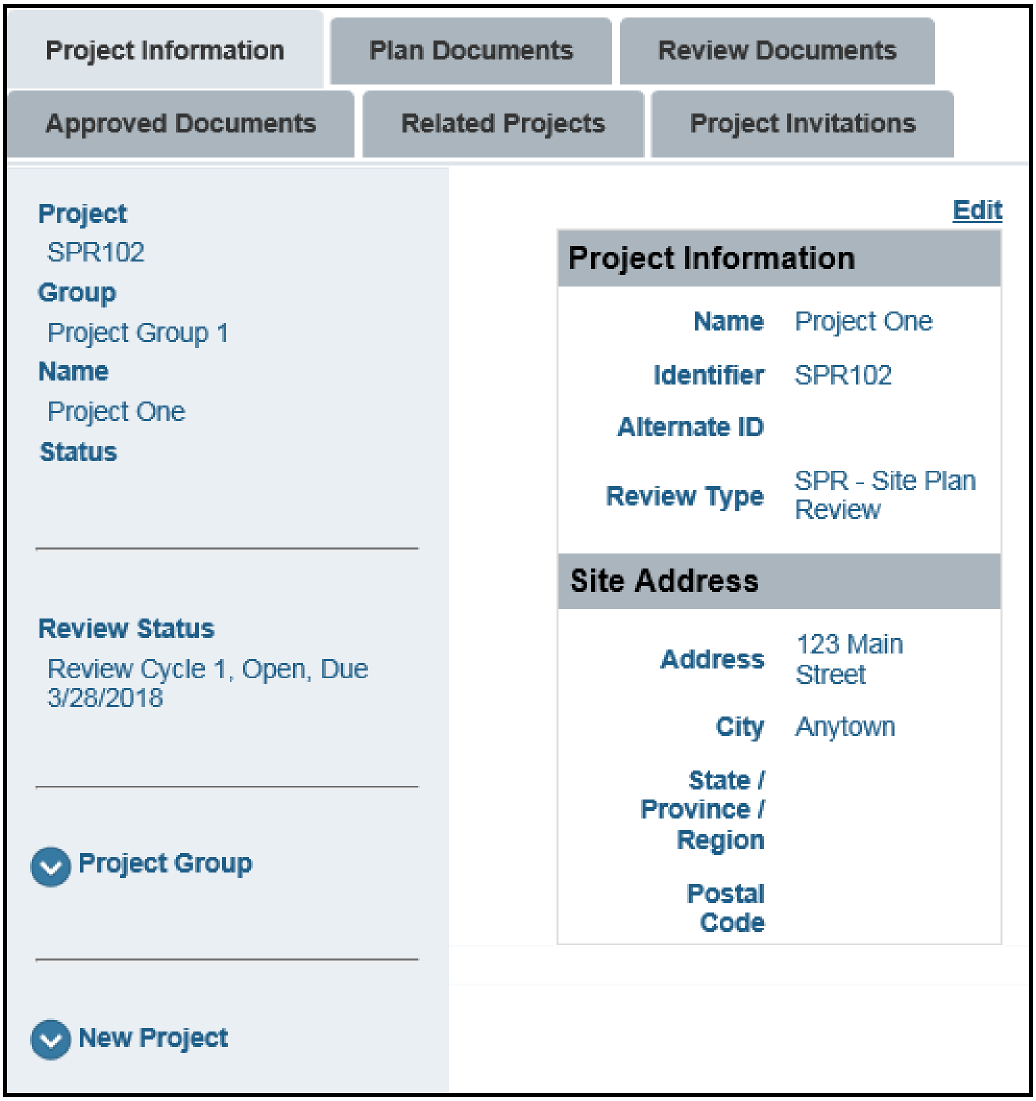
Once another user has accepted your invitation, you can manage the level of access that you are allowing them to have for this project. To manage the level of access your invitees have, follow these steps:

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

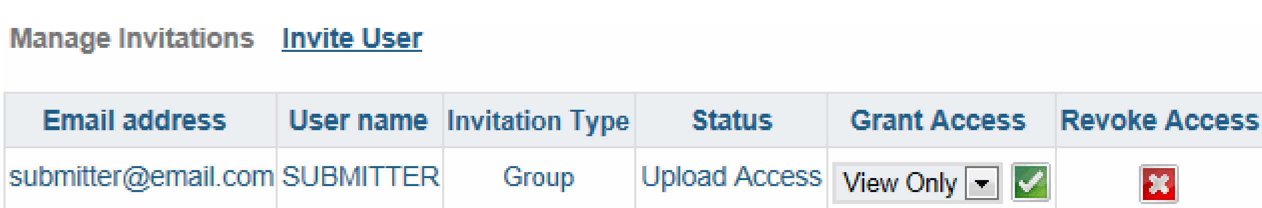


2. Click the folder button for the desired project.

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 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.

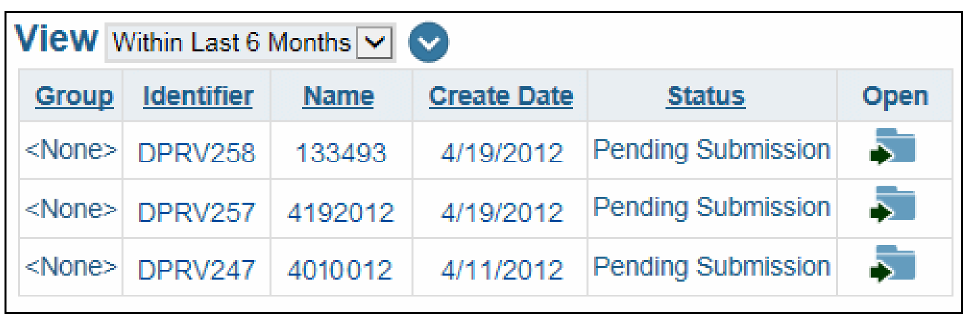
Click the **Check** icon to save your changes.

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:

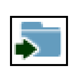
1. Select the **Projects** tab. The **Projects** window is displayed.



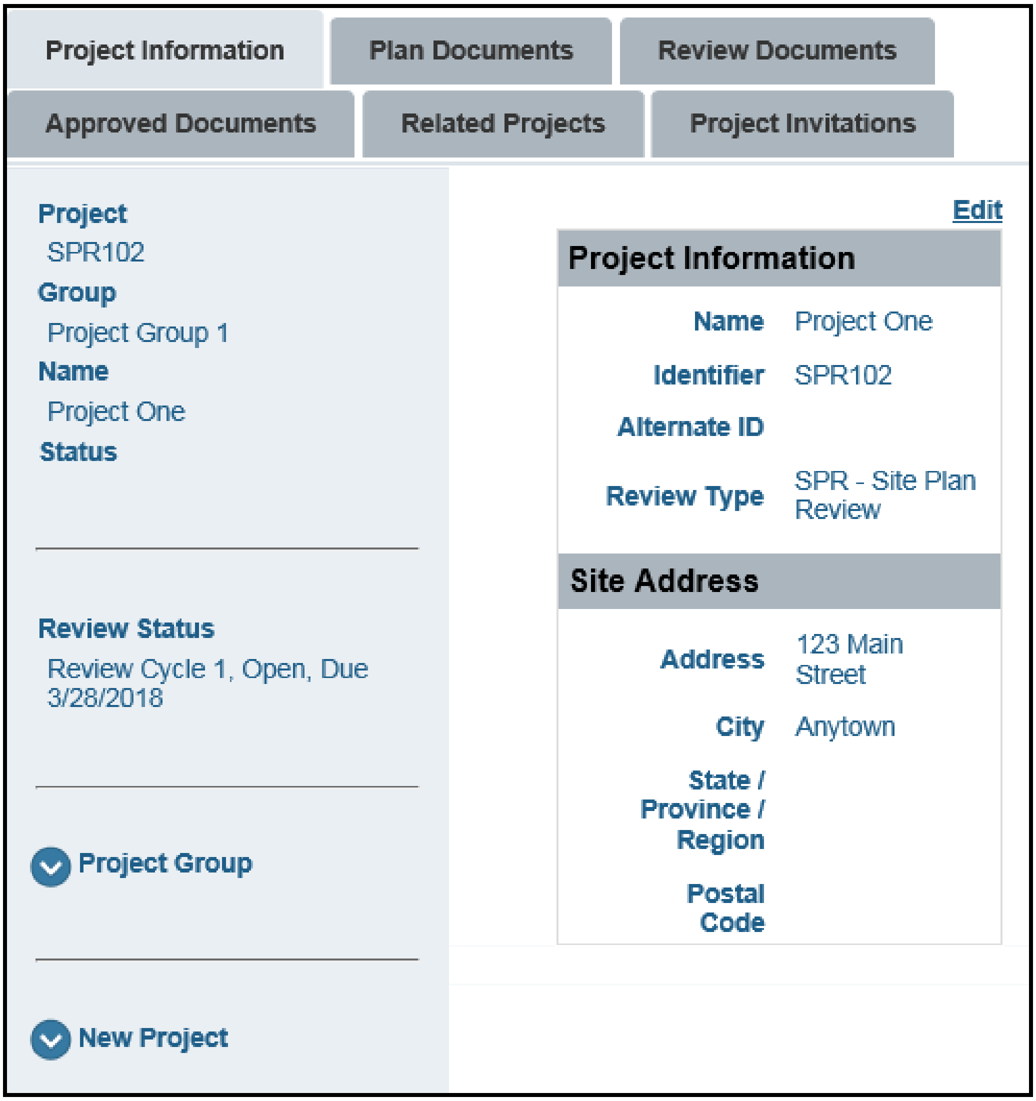
View Within Last 6 Months

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 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 110.

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

Plan Documents

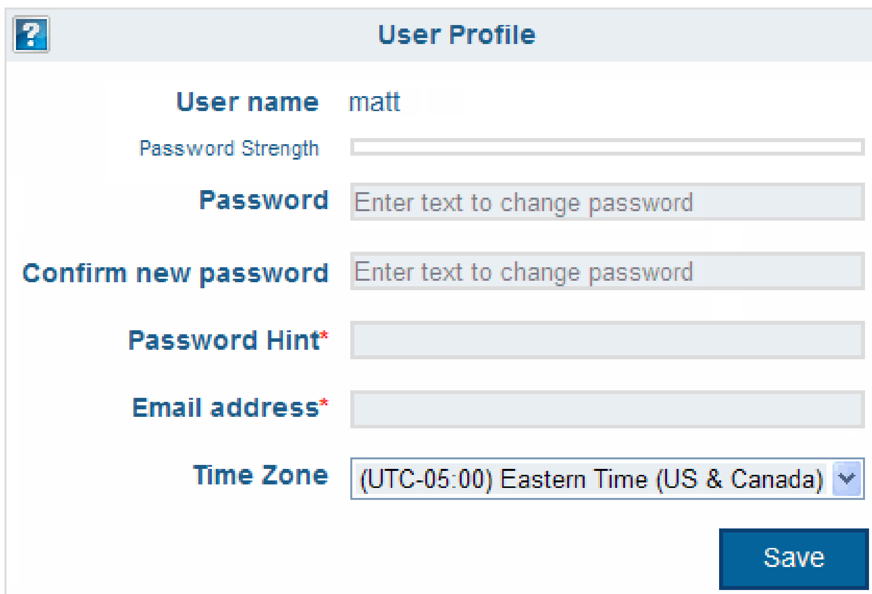
	Name	Document Date	Download
☐	Plan - 5/11/2017	5/11/2017	
☐	Plan - 5/11/2017	5/11/2017	

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.

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.