PDX ePlans Guide for View Only Users

As a Design Professional or Sub Contractor working with an electronic set of plans, you may need access to ProjectDox. The 'View Only' group feature within ProjectDox will allow you to view drawings and files, see markups (Changemarks) on the drawings, and run reports. Your Project Coordinator or a member of the ePlans team can invite users to ProjectDox as an 'Applicant Associate' with 'View Only' access using a tool called 'Group Management'. The Group Management feature only appears on eForms in projects created after the ProjectDox 9.2 upgrade. Information needed to add 'View Only Applicant Associates' are a first name, last name, and email address.

*Note: Are you using Internet Explorer as your browser? If you are using IE for your browser, you will need to download the ActiveX component to view drawings. **Please refer tothe installation instructions on Page 2.***

LOGGING IN FOR THE FIRST TIME

1. An invite to ProjectDox will be sent to the email address provided to the ePlans project team, or your Project Coordinator.

2. If you are a new ProjectDox user, you will receive a temporary password to log in. If you are an existing user, you will receive a direct link to log in and open the project.

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Invitation

Hello Chris Customer:

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

Login:	Chris.Customer20@gmail.com
Temporary Password:	95A76C7
Project:	Training Team Project
Group:	Applicant
Project Owner:	Angie Tomlinson
Owner's Email:	Angie.Tomlinson@portlandoregon.gov
	Login to ProjectDox

Contact the Project Owner or a Project Administrator if you have questions regarding this pr...

Example 1 Invitation for new user.

ProjectDox@portlandoregon.gov
to me ▾

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*e*PLANS **Test Site**

PROJECT INVITE

Hello Chris,

You have been invited to the participate in the plan review for project: **ACME 9 - Webinar**, as a member of the **Applicant Associates** group.

Your login is: chriscustomer20@gmail.com

To access this project, please click on "Open Project" below.

Open Project   To access this project

Example 2 Invitation for existing user.

3. If you are using IE, you will need to download the ActiveX components from the login page.

INSTALLING PROJECTDOX COMPONENTS

ProjectDox requires the installation of ActiveX controls to be able to perform certain actions: uploading files, downloading files, viewing files, and viewing help information. There are two ways users can install the controls:

    a. The link to an MSI file for installing the ActiveX controls is available from the login screen.

- If the user's network requires administrative access to download ActiveX controls, the user will NOT be prompted, nor will the MSI on the login screen install. The user will need to contact their network administrator to get access to download these controls.
- If using the MSI from the login page, the user can accept the defaults to run the MSI and install the controls.

    b. If not using the MSI, then after logging in to the site, the user will be prompted by the browser to install the ActiveX control (yellow bar at top of the screen or at the bottom of the screen, depending on system version) when attempting to view help information, or uploading, downloading or viewing files.

4. The Login Page for ProjectDox will display, allowing you to enter your login email and your temporary password.

5. Once you successfully log in, you will be taken to your user profile, where you will need to reset your password, create a security question and answer, and enter some additional information.

   • Your password must be between 8-12 characters with at least 1 upper case letter, 1 lower case letter, and 1 number. Special characters are not allowed.

6. All highlighted yellow fields are required.

1. The Home page will display with all projects you have access to loaded in main view.

2. Select the **Projects tab** to see your projects. Select **All** to see all projects. *Note – you will only have access to view projects you have been invited to.* Select the **Project Name** to open the project.
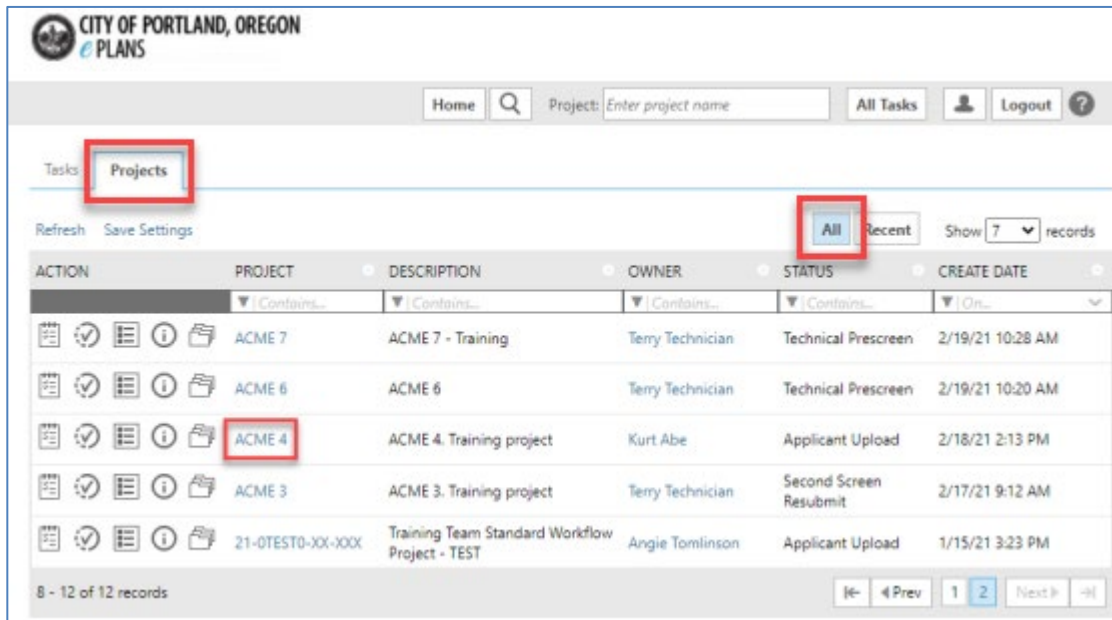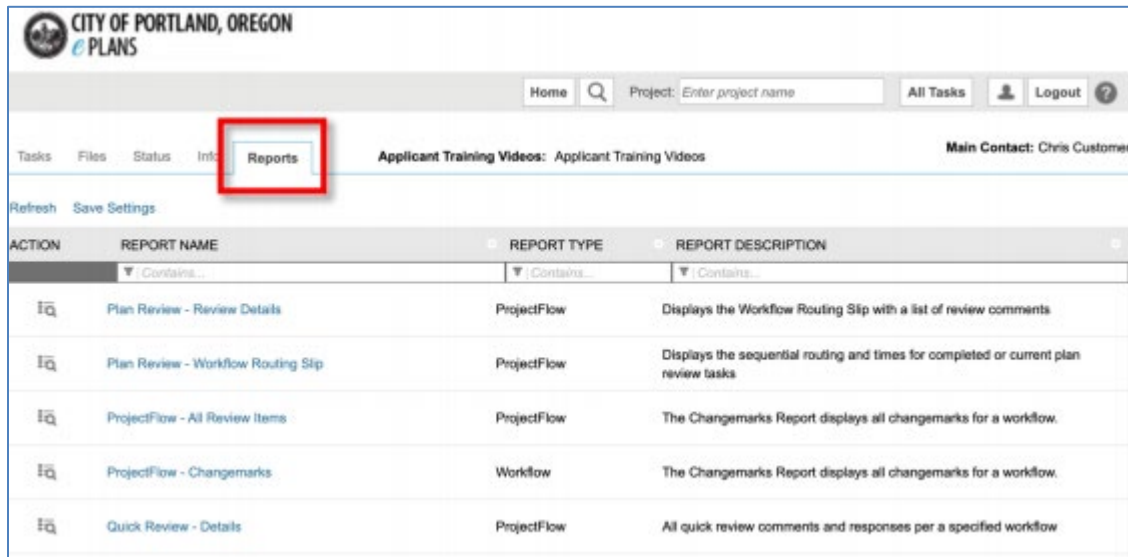

ACCESSING YOUR PROJECT REPORTS

1. Select your project link in the Project column to access the Project reports, drawings, and files.
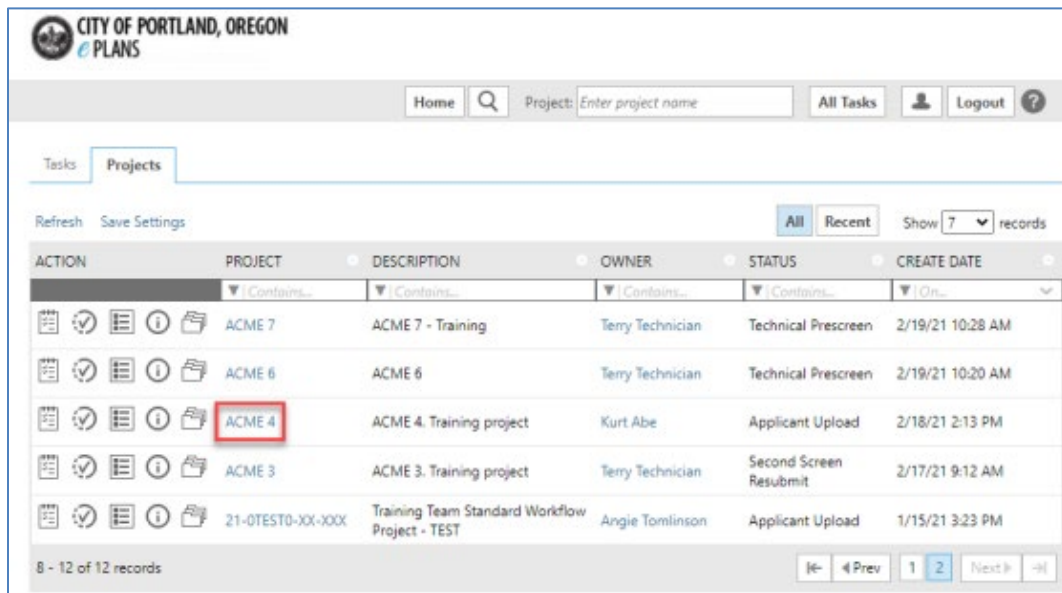
2. Select the **Reports** tab.

3. The report page will load and display all the available reports for your project.

4. Select the **report icon** to open a report. Helpful reports include:

- Plan Review – Workflow Routing Slip: Displays the sequential route of all tasks for the workflow.
- Plan Review – All Unresolved Comments: Lists the review comments, Checklist and Changemark details for a workflow instance review cycle.
- Plan Review – Changemarks Report: Displays all Changemark corrections comments from each review group.
- Plan Review – Department Review Status Report: Displays the status of all reviews for a workflow.
- Current Project – All Uploaded Files with Sheet Sizes: All uploaded files with sheet sizes within this project. Make sure sheet sizes are the same size to assist with the batch stamp process.

5. To export reports to Excel or other file formats, select the **file icon** and select the file format.
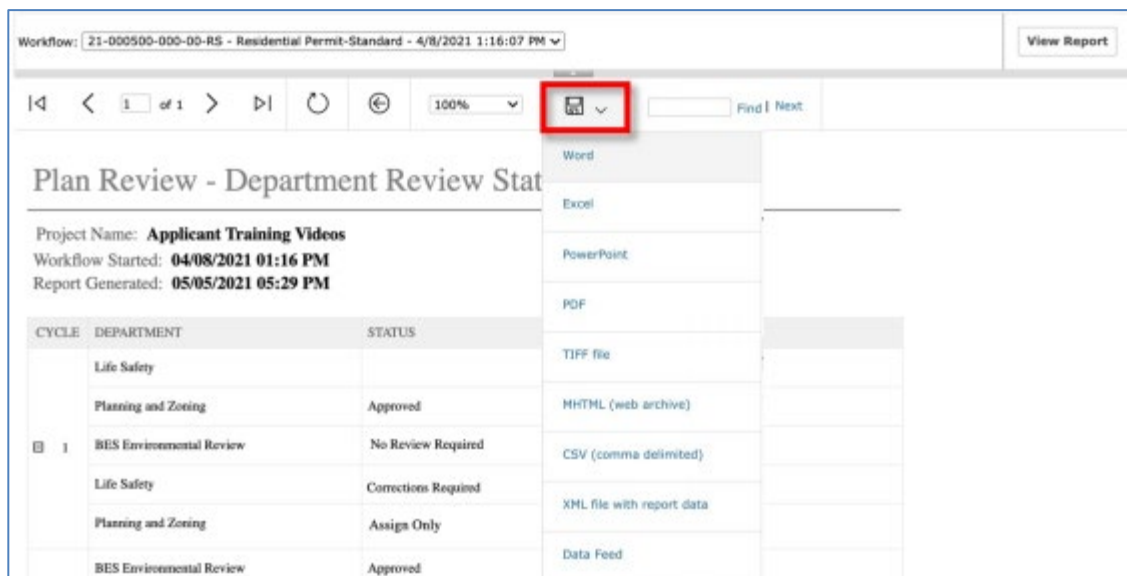
DRAWINGS AND FILES

Drawings and documents can be found in the **files tab** of your project home page.

- Select the **Drawings** or **Documents** folder to see files uploaded by your team members.

VIEWING MARKUPS

Drawings with markups (known as Changemarks) left by reviewers will have a red exclamation

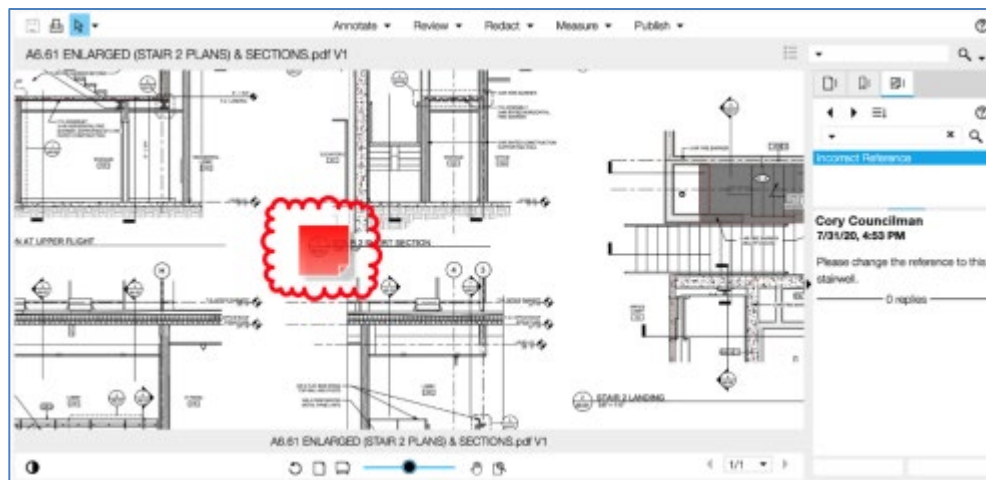point icon in the reviewed tab.

To view the markup:

1. Select **the icon**.
2. Select the markups you want to see.
3. Select **View/Edit.**
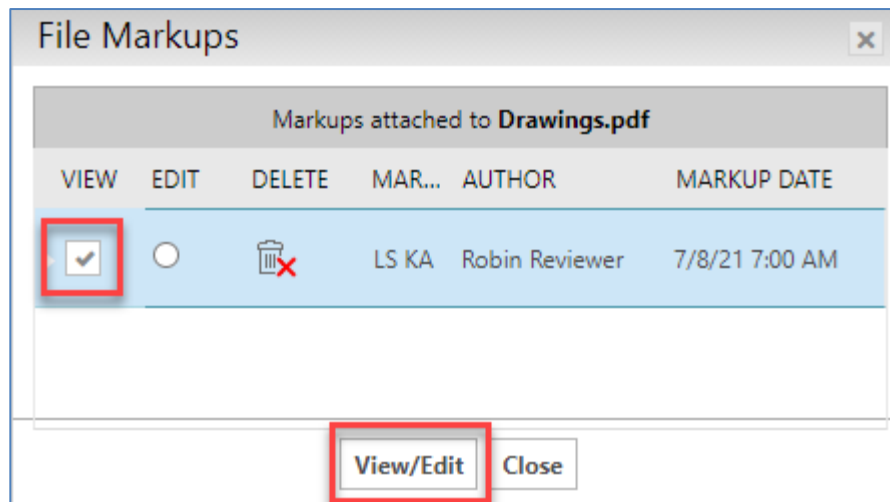
The drawing will load, with the markups located directly on the area for correction. Read the markup text from the panel on the right.

Questions? Please email us. We are here to support and help with ProjectDox!

ePlans Team Email:
TCIePlans@portlandoregon.gov