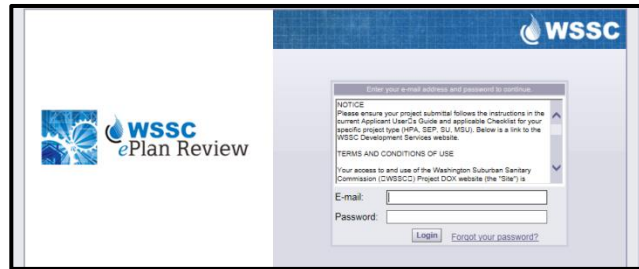


ePlan Review (ProjectDox 9.1) Quick Reference Guide

New Version of ePlan Review (ProjectDox 9.1) Effective 6/18/2018



This version of ePlan Review (**ProjectDox 9.1**) incorporates *ProjectFlow (PF)* and *ProjectDox (PD)* components (which are essentially two separate types of workflows). All projects created *prior to 6/18/2018* were created in the *ProjectDox (PD)* workflow. All projects created *on or after 6/18/2018* will be created in the *ProjectFlow (PF)* workflow.

After you have successfully logged into ePlan Review (**ProjectDox 9.1**) you will see the **Home** screen displayed. The **Home** screen contains three tabs: “**Tasks (PF)**”, “**Tasks (PD)**” and “**Projects**”. Default is to **Tasks (PF)** tab.

- **Tasks (PF)** – this tab is where all tasks associated with new projects created *on or after 6/18/2018* using *ProjectFlow (PF)* workflow will be located;
- **Tasks (PD)** – this tab is where all tasks associated with existing projects created *prior to 6/18/2018* using *ProjectDox (PD)* workflow will be located;
- **Projects** – this tab is to access all records (new and old) through the project link.

1. Any outstanding tasks that require your action **associated with new projects created on or after 6/18/2018** using *ProjectFlow (PF)* workflow will be located under the **Tasks (PF)** tab.

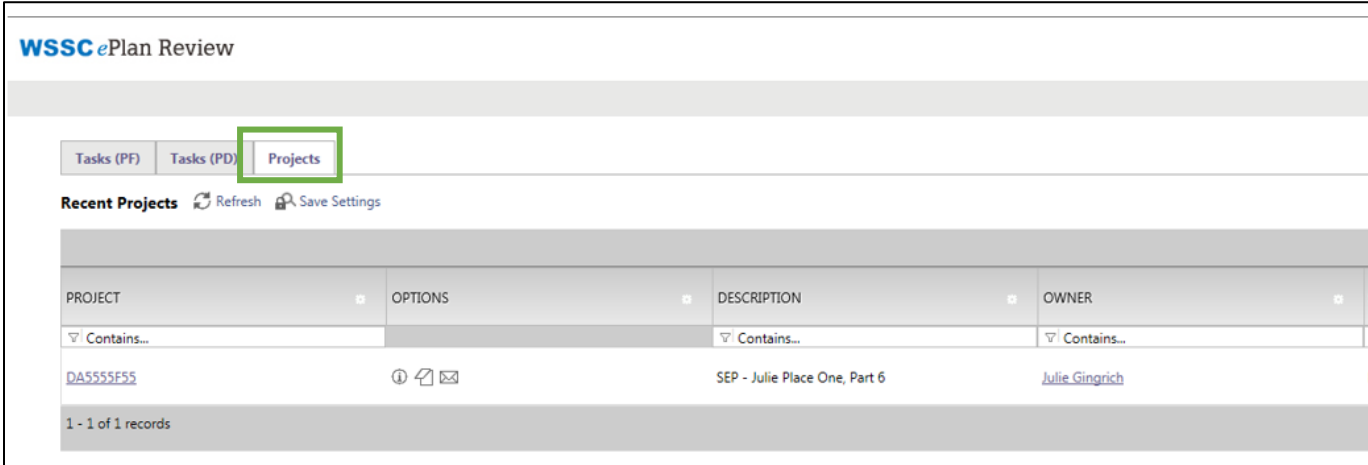
OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS
	Applicant Upload Task	DA5555G55	DA5555G55 - DSD Plan Review - 5/8/2018 3:17:20 PM	Applicant	FirstInGroup	Pending

1 - 1 of 1 records

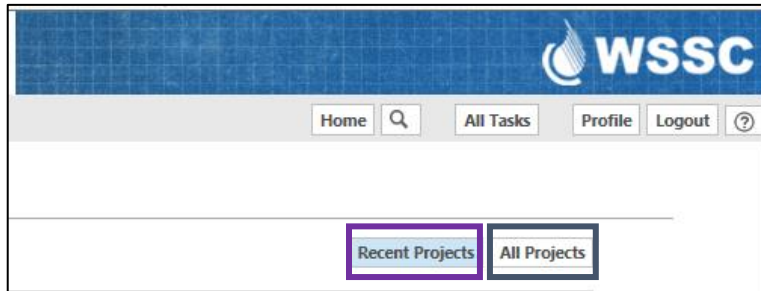
2. Any outstanding tasks that require your action **associated with existing projects created prior to 6/18/2018** using *ProjectDox (PD)* workflow will be located under the **Tasks (PD)** tab.

Project Name	Task	Attached To	Status	Priority	Due date	Assigned On
DA4002Z20	ApplicantUpload	Applicant	Pending			5/3/2018 4:54:41 PM

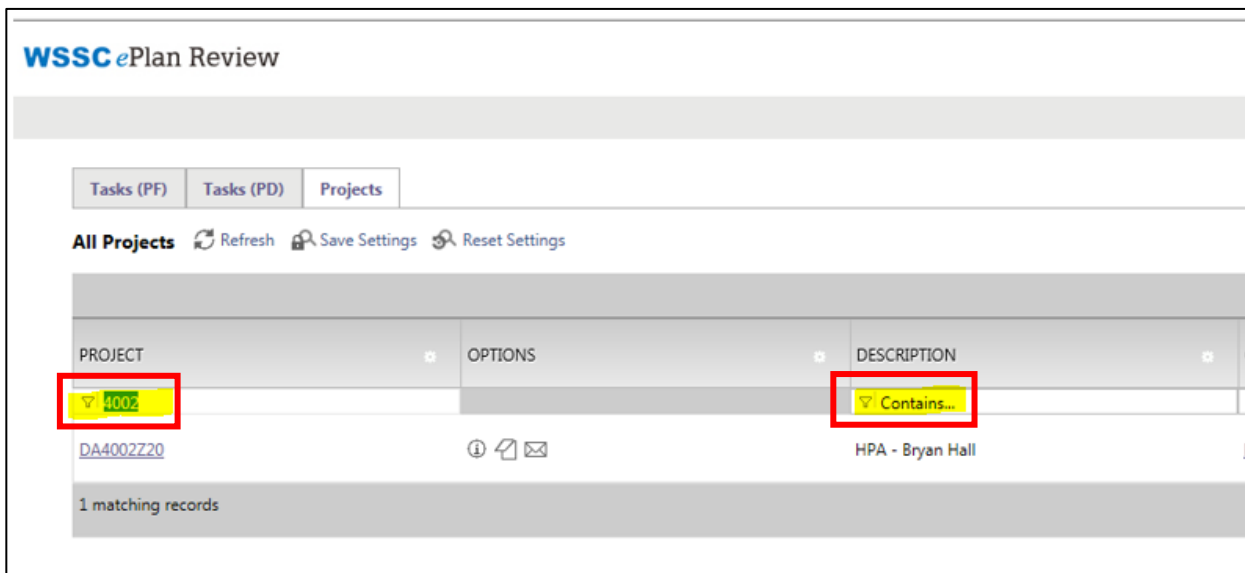
3. Any projects for which you have access (new and old) will display under the **Projects** tab.



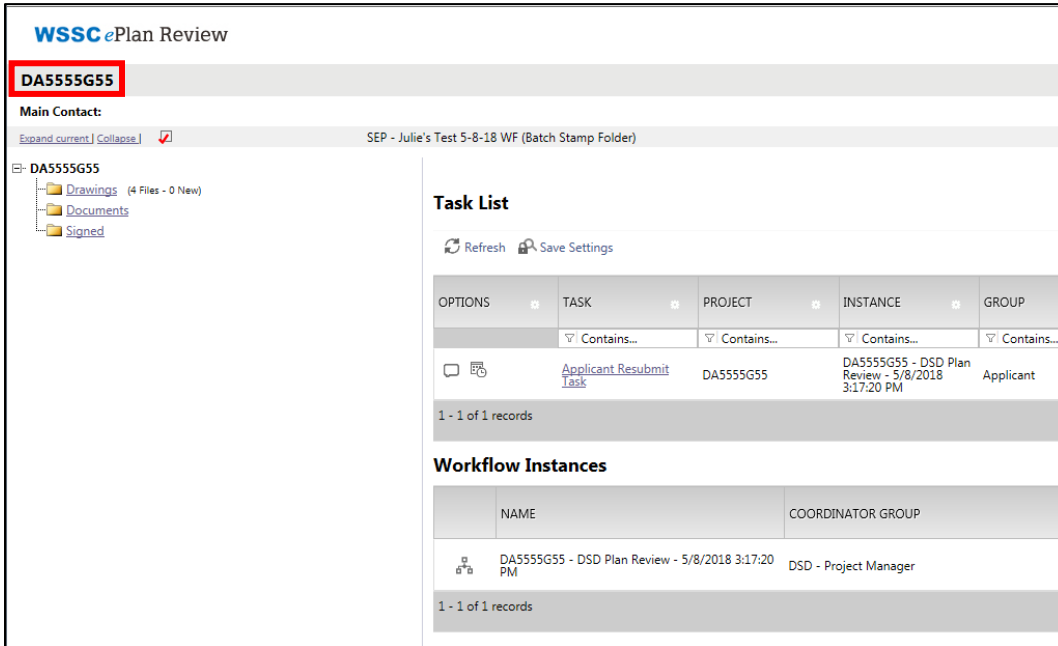
- The Projects tab defaults to **Recent Projects**. The **Recent Projects** button will list the last 15 projects you have entered. Click on the **All Projects** button and all projects for which you have access will display.
- The buttons '**Recent Projects**' or '**All Projects**' will display blue as indicator of the project list displayed.



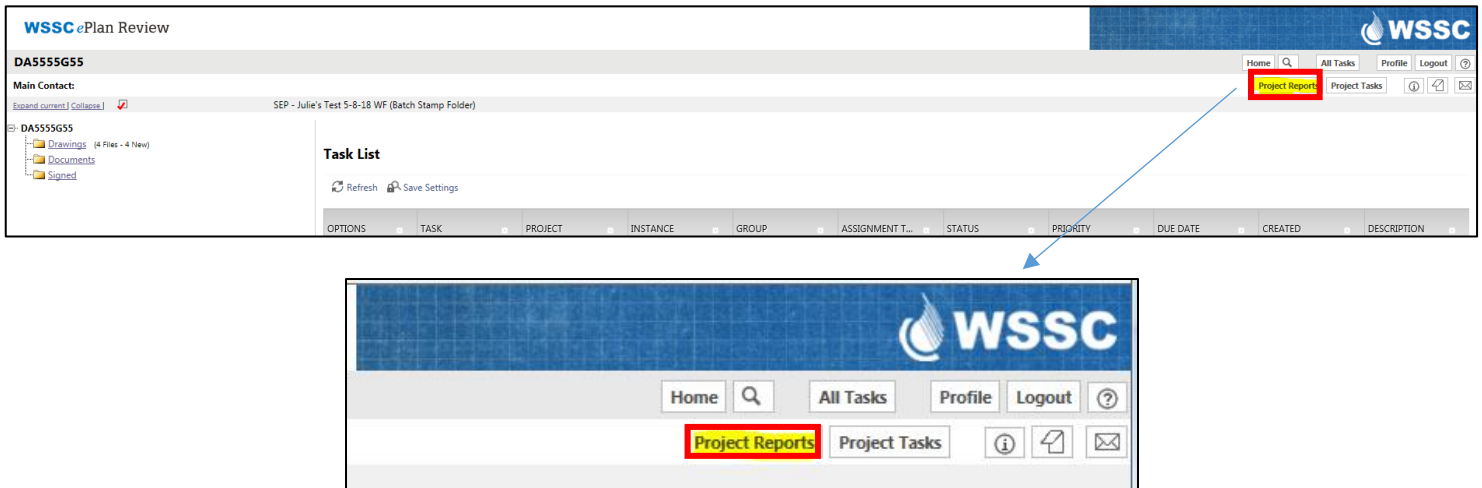
4. Search is available on each column. Enter your search criteria (partial or full) in the '*Contains...*' field located immediately under the column header name. **Sort** is available on each column. The column data can be sorted ascending or descending order by toggling your clicks on the column header.



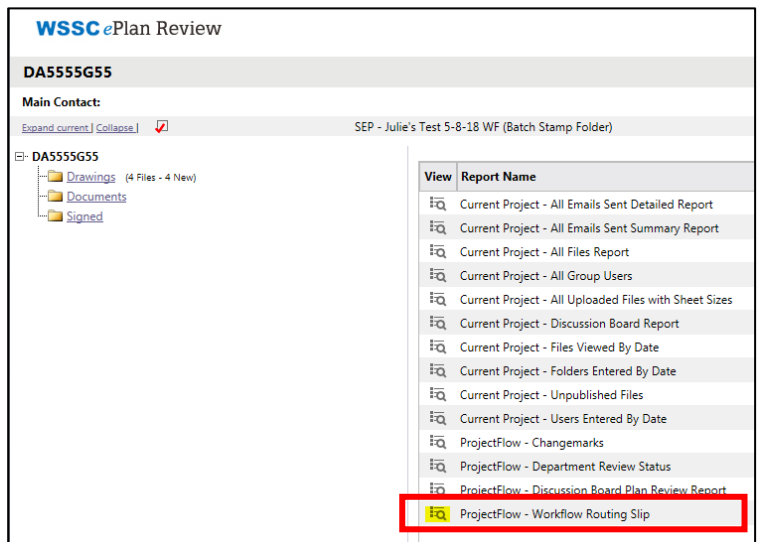
5. Click on the *Project Number* to enter the project information. The specific project screen will display.



5a. Click on the *Project Reports* button towards the top right of the screen.



5b. Click on the View icon for *ProjectFlow - Workflow Routing Slip* report to view the project log.



5c. The report provides the task name, the task status, the review cycle, when the task was assigned, accepted and completed, created, the group name (who has responsibility for the task - applicant or WSSC), who the user was who completed the task, and how much time the task user has spent on the task. The Review Cycle indicates how many formal reviews were performed on the project.

Workflow Routing Slip Report						
Project Name: DA5555G55						
Workflow Started: 05/08/2018 3:17 PM						
Report Generated: 05/10/2018 12:01 PM						
Task Name	Status	Cycle	Date Assigned	Date Accepted	Date Completed	Group Name
Applicant Upload Task	Completed		05/08/2018 3:17 PM	05/08/2018 3:31 PM	05/10/2018 9:07 AM	Applicant
Prescreen Review Task	Completed		05/10/2018 9:07 AM	05/10/2018 9:09 AM	05/10/2018 9:11 AM	Intake
Prescreen Corrections Task	Accepted		05/10/2018 9:11 AM	05/10/2018 10:15 AM		Applicant
						Total Wo

Browser Compatibility

The WSSC ePlan Review system (9.1 version ProjectDox) is compatible with all browsers:

Internet Explorer 11 (**must turn off 'Compatibility Mode'**), Edge, Chrome, Firefox, Safari.

External users (engineers/stakeholders) can use all browser types. Internal WSSC reviewers are advised to use Internet Explorer 11 (with Compatibility Mode turned off) which offers more robust markup/changemark capabilities (i.e., measurement tool, edit of existing markup/changemark comments) for reviewers.

Using Internet Explorer 11:

- If using Internet Explorer 11 browser, you must install ProjectDox Components for v. 9.1. This installation will only need to be done once; if you utilize a different computer it will require another installation for each unique computer.

NOTE: Other browsers do not need ProjectDox Components installed.

- You must turn off 'Compatibility Mode' with Internet Explorer v11.

Using **ALL** browsers:

Prior to logging into the ePlan Review (ProjectDox) application, the following actions must be completed:

- If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the ePlan Review (ProjectDox) web address (<https://planreview.wsscwater.com/ProjectDox/>). The indicator that this has not been done will occur when you type in your login and password,

then hit the Login button and the page immediately disappears. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc). Once the ePlan Review (ProjectDox) site is allowed, you will be able to utilize the application.

- The login page also provides a shortcut that you can drag and drop onto your desk top as well as a link to save the ePlan Review (ProjectDox) web address to your favorites.
- To sign in, enter your email address and temporary password (first time user) and click the Login button.

NOTE: A temporary password will be provided to you in the initial ePlan Review email invitation. The ePlan Review system will automatically require you to create a permanent password.