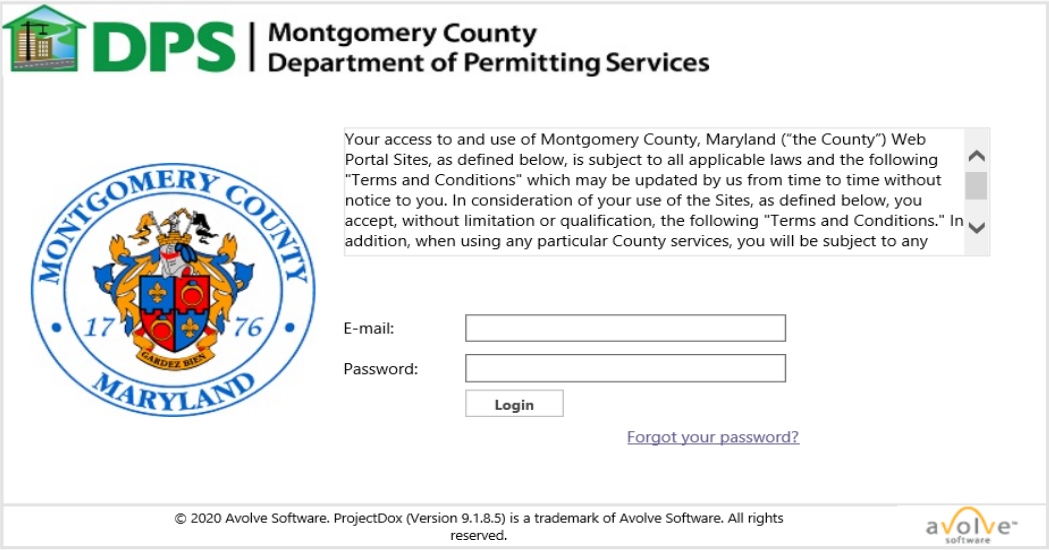


ePlan Review (ProjectDox 9.1) Quick Reference Guide

New Version of ePlan Review (ProjectDox 9.1) Effective 3/7/2020



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ProjectDox

To install ProjectDox components [Click here](#)

To create a desktop shortcut drag & drop icon on your desktop

To add ProjectDox to your favorites [Click here](#)

This version of ePlan Review (**ProjectDox 9.1**) incorporates *ProjectFlow (PF)* and *ProjectDox (PD)* components (which are essentially two separate types of workflows). We currently only use only *ProjectDox (PD)* but, will be working towards moving our projects toward *ProjectFlow (PF)*.

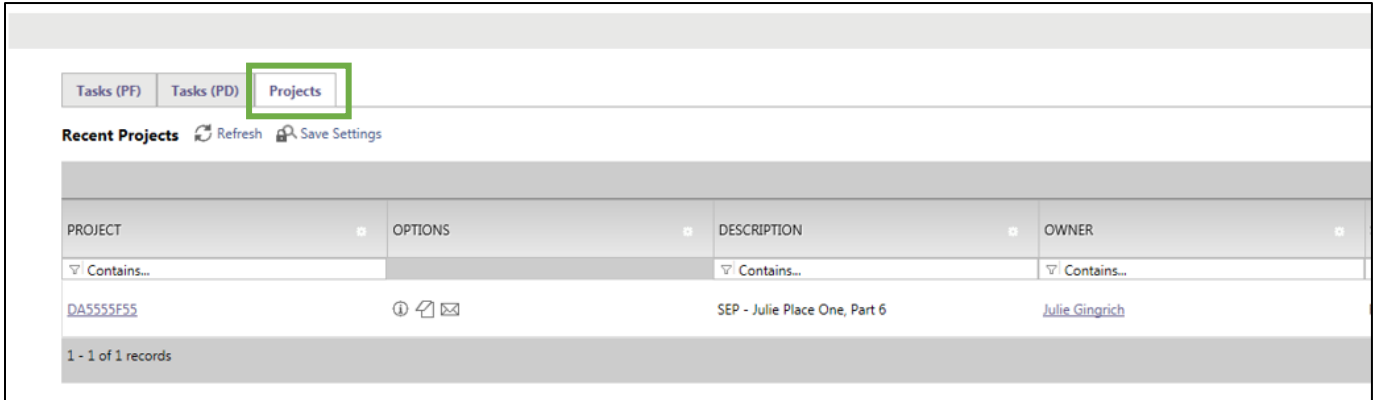
After you have successfully logged into ePlan Review (**ProjectDox 9.1**) you will see the **Home** screen displayed. The **Home** screen contains three tabs: "**Tasks (PF)**", "**Tasks (PD)**" and "**Projects**".

- **Tasks (PF)** – we currently do not use this portion of the application.
- **Tasks (PD)** – this tab is where you are able to search for and access all of your projects.
- **Projects** – this tab is to access all records (new and old) through the project link.

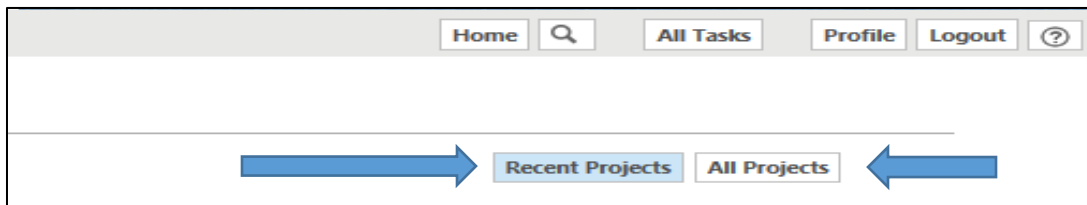
1. Any outstanding tasks that require your action using *ProjectDox (PD)* workflow will be located under the **Tasks (PD)** tab.

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

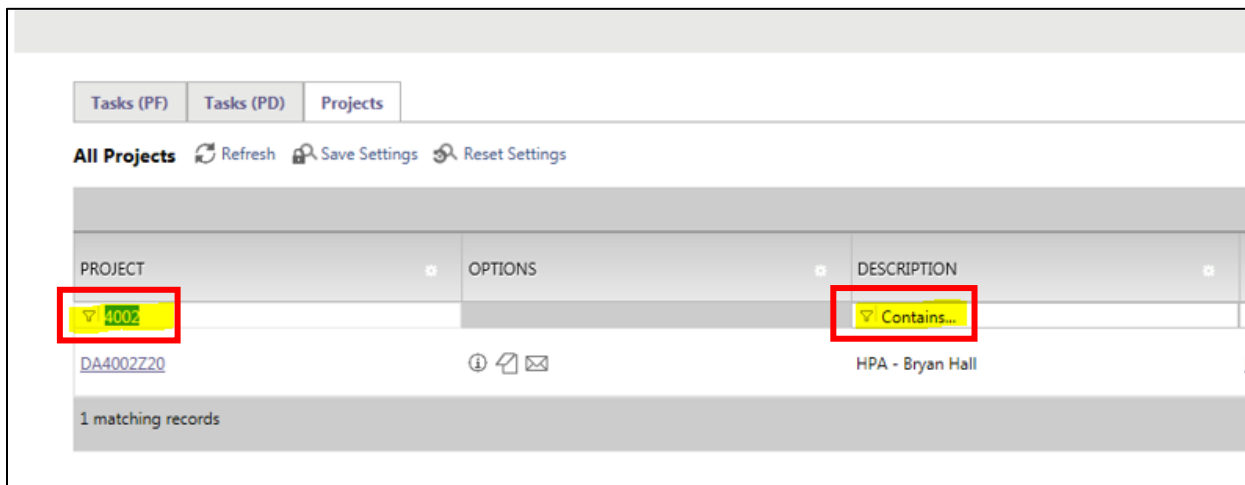
2. Any projects for which you have access (new and old) will display under the **Projects** tab.



- 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.



3. 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.



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

DA5555G55

Main Contact: SEP - Julie's Test 5-8-18 WF (Batch Stamp Folder)

DA5555G55

- Drawings (4 Files - 0 New)
- Documents
- Signed

Task List

Refresh Save Settings

OPTIONS	TASK	PROJECT	INSTANCE	GROUP
	Contains...	Contains...	Contains...	Contains...
	Applicant Resubmit Task	DA5555G55	DA5555G55 - DSD Plan Review - 5/8/2018 3:17:20 PM	Applicant

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP
DA5555G55 - DSD Plan Review - 5/8/2018 3:17:20 PM	DSD - Project Manager

1 - 1 of 1 records

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

DA5555G55

Main Contact: SEP - Julie's Test 5-8-18 WF (Batch Stamp Folder)

DA5555G55

- Drawings (4 Files - 4 New)
- Documents
- Signed

Task List

Refresh Save Settings

Home All Tasks Profile Logout

Project Reports Project Tasks

Options Task Project Instance Group Assignment T... Status Priority Due Date Created Description

- 5b. Click on the View icon for **Workflow_ - Consolidated_ Routing_ Slip** report to view the project log.

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report Expanded	Project	Discussion Board Report
	Current Project - Discussion Board Report	Project	Discussion Board Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	Workflow - Checklist Report (Not Met Items Only)	Workflow	Checklist Report (Not Met Items Only)
	Workflow - Checklist Report	Workflow	Checklist Report (Met and Not Met)
	Workflow - Department Review Status	Workflow	Department Review Status
	Workflow - Routing Slip	Workflow	Workflow Routing Slip
	Workflow_ - Consolidated_ Routing_ Slip	Workflow	Workflow Routing Slip

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.

Browser Compatibility

The DPS ePlans 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 DPS 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:

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