

ePLANS

Project Status and Markups



City of Ormond Beach, Florida

Version 2 - September 22, 2016

Checking Project Status and Markups

After logging into the ePlan/ProjectDox system with Internet Explorer, you will first be brought to a screen very similar to the one shown below. There is a menu bar on the top right, as well as two sections below containing vital information on your projects. The top section is a list of your projects with the City of Ormond Beach. The bottom section is a task list for actions expected from you for your ongoing projects.

The screenshot shows the ProjectDox interface. At the top, there is a navigation bar with buttons for Back, Forward, Projects, Site-Wide Reports, Profile, Logout, and Admin. Below this is the 'Active Projects List' section, which contains a table with columns for Project, Options, Description, Owner, Status, and Create date. A red arrow points to the project name '2015-37 New Britain Ave. Improvements'. Below the projects list is the 'Active Task List' section, which contains a table with columns for Project Name, Task, Attached To, Status, Priority, Due date, Created On, Updated On, and Updated By.

Project	Options	Description	Owner	Status	Create date
2015-37 New Britain Ave. Improvements		Roadway and drainage improvements	Melanie Nagel	In Review	6/4/2015 3:08:09 PM

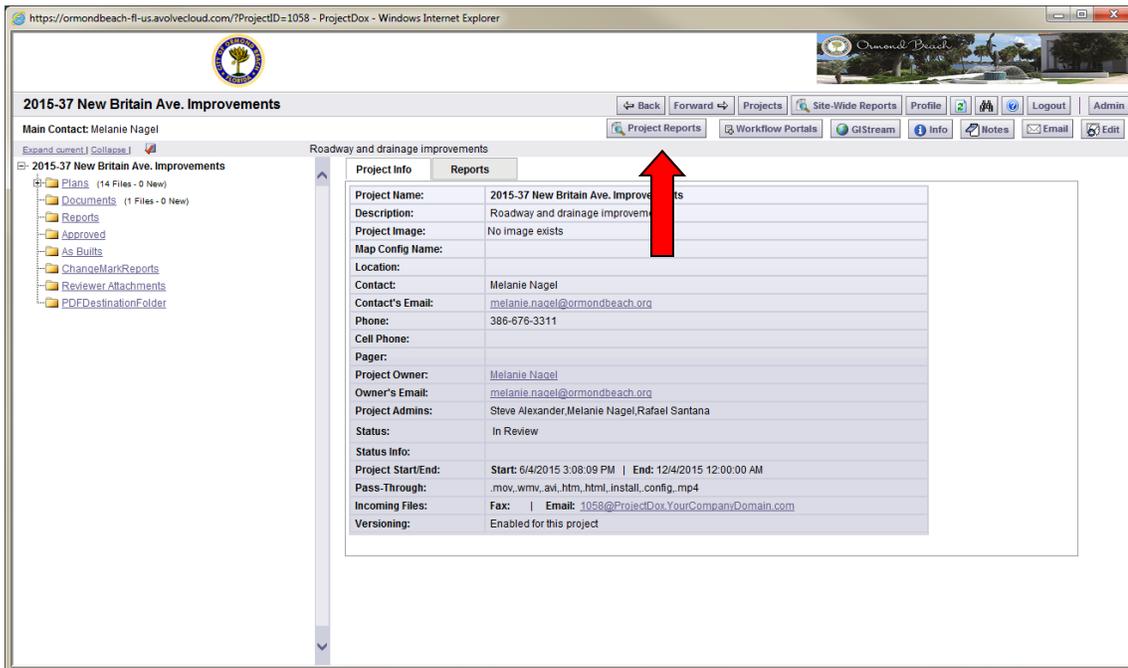
Project Name	Task	Attached To	Status	Priority	Due date	Created On	Updated On	Updated By
2015-37 New Britain Ave. Improvements	PreScreenReview	SPRC	Pending			5/20/2015 10:30:46 AM	5/20/2015 10:30:46 AM	
2015-37 New Britain Ave. Improvements	PreScreenReview	SPRC	Pending			5/20/2015 9:39:54 AM	5/20/2015 9:39:54 AM	

To lookup a project status, click on the project name in the top or bottom section. This should bring you to the projects page similar to the one below.

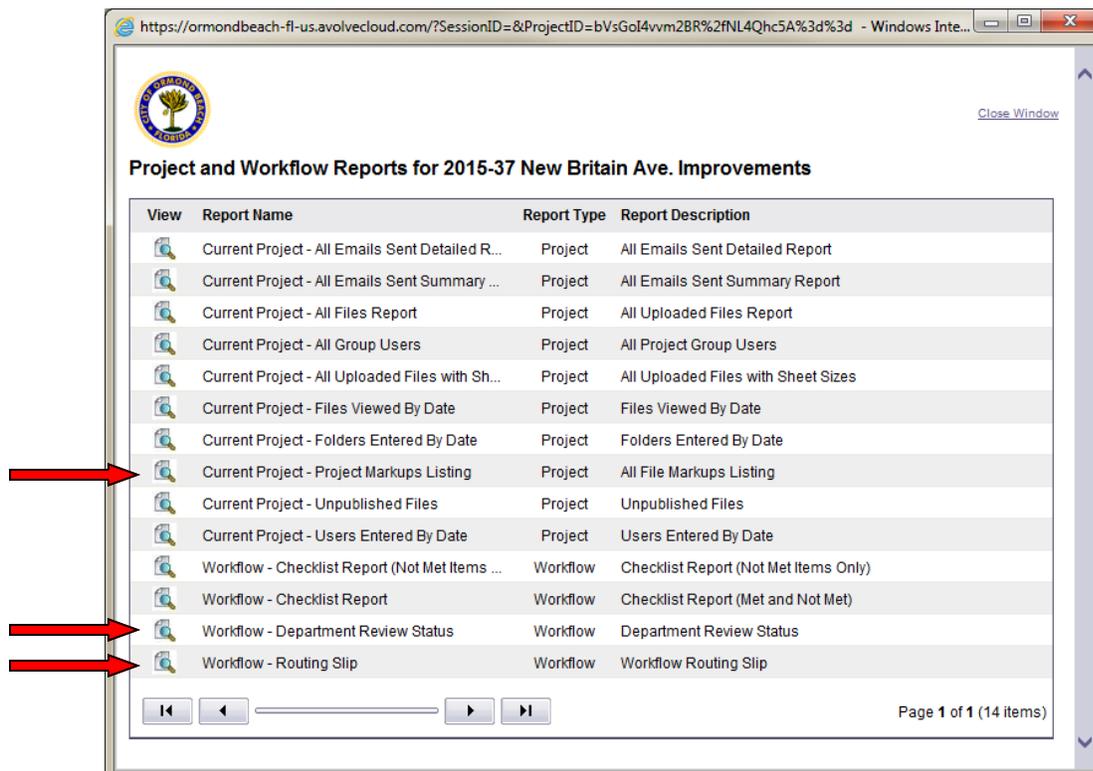
The screenshot shows the detailed view for the project '2015-37 New Britain Ave. Improvements'. The page includes a navigation bar with buttons for Back, Forward, Projects, Site-Wide Reports, Profile, Logout, and Admin. Below this is the 'Main Contact: Melanie Nagel' section. The project name is '2015-37 New Britain Ave. Improvements' and the description is 'Roadway and drainage improvements'. The project information section includes fields for Project Name, Description, Project Image, Map Config Name, Location, Contact, Contact's Email, Phone, Cell Phone, Pager, Project Owner, Owner's Email, Project Admins, Status, Status Info, Project Start/End, Pass-Through, Incoming Files, and Versioning.

Project Name:	2015-37 New Britain Ave. Improvements
Description:	Roadway and drainage improvements
Project Image:	No image exists
Map Config Name:	
Location:	
Contact:	Melanie Nagel
Contact's Email:	melanie.nagel@ormondbeach.org
Phone:	386-676-3311
Cell Phone:	
Pager:	
Project Owner:	Melanie Nagel
Owner's Email:	melanie.nagel@ormondbeach.org
Project Admins:	Steve Alexander, Melanie Nagel, Rafael Santana
Status:	In Review
Status Info:	
Project Start/End:	Start: 6/4/2015 3:08:09 PM End: 12/4/2015 12:00:00 AM
Pass-Through:	.mov, wmv, avi, htm, html, install, config, mp4
Incoming Files:	Fax: Email: 1058@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project

From the project's page you can run project reports to get status information on your project. Click on the button titled "Project Reports" in the upper right corner of the page. The arrow below shows its exact location.



Clicking the button will open up the "Project and Workflow Reports" page, from which you will be able to access the Project Markups, Department Review Status and Workflow Routing reports. Those links are marked by the arrows on the screen shot below. You may access the other reports, but these three are the most commonly used ones.



First, we can look at the project’s complete list of markups. This can be found by simply going to the Project and Workflow Reports screen (which should stay open while you are viewing each report) and clicking on the magnifying glass icon next to the “Current Project—Project Markups Listing.” This should open up the following page: On this page, listed from left to right, is the File Name, the Markup Name, the text for each markup, the date it was created, and who created it.

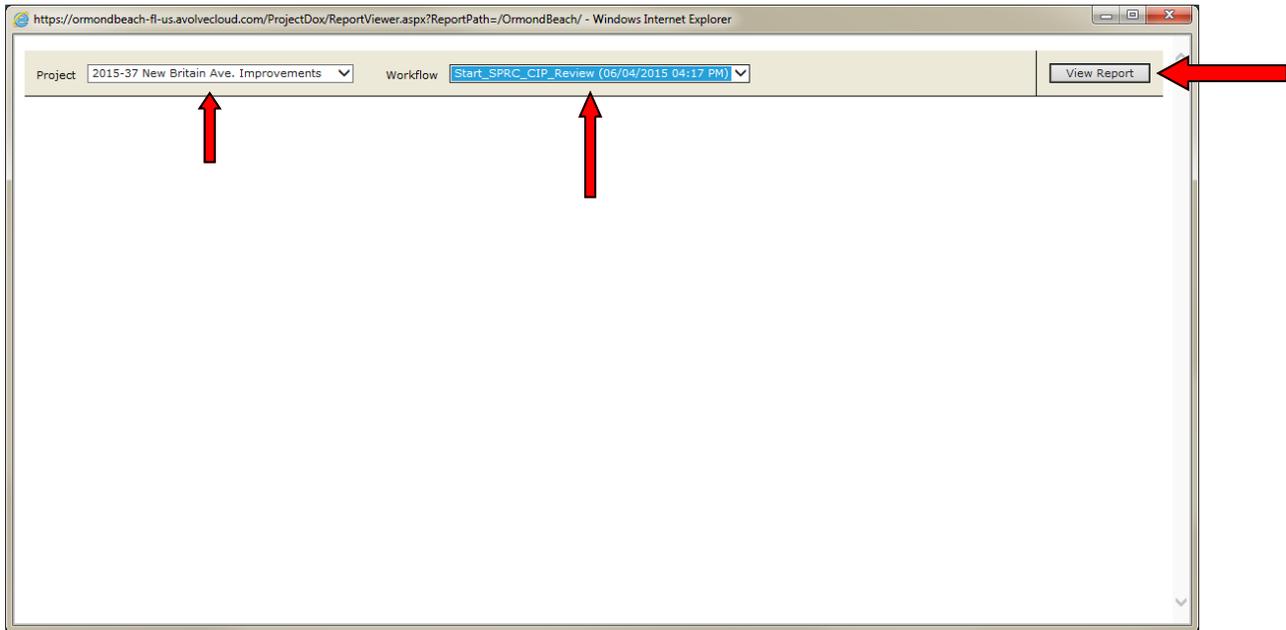
ProjectDox
Current Project - Project Markups Listing
2015-37 New Britain Ave. Improvements

File Name	Markup Name	Markup Text	Markup Date	Created by
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608		06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608		06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608		06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608		06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608	Could we add 2± rows of exfiltration pipe here?	06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608		06/09/2015	Shawn Finley
C-006 2015-37 New Britain Ave Roadway and Drainage Improv Ph 1.pdf	SF-150608	Compare exfiltration layout on all views, review for inlet / cleanout locations. I am concerned based upon the schedule of items on the ADS plan that we have 10" inlet going near where 24" inlets are called for. We should try our best to eliminate extraneous structures and keep as much OUT of park sidewalk as possible.	06/09/2015	Shawn Finley

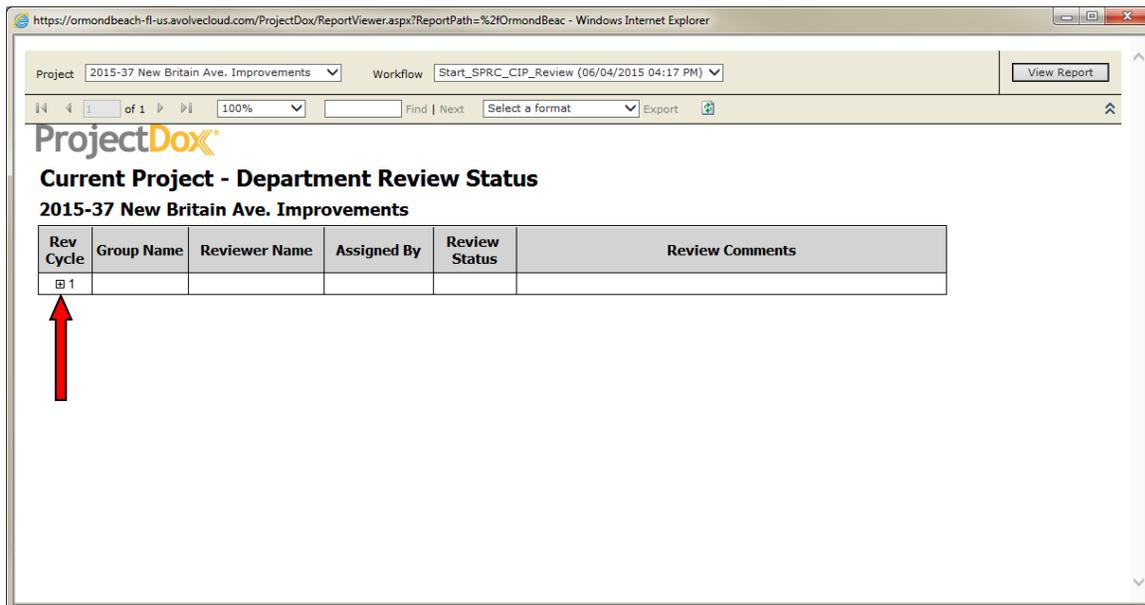
Exporting Reports

Every report has the ability to be exported to a PDF, an Excel spreadsheet, or several other file formats. In the top section of the report, click on the drop-down menu that says “Select a Format”. Choose the type of file you would like to create. Then click on the “Export” button right next to the drop-down arrow. You will then have the option to “Open” or “Save” the file. If you save it, it will be saved to your “Downloads” folder. You can then email the reports to your contractors, engineers, etc.

To see the review results, you will need to run the “Workflow—Department Review Status” report. Go to the Projects and Workflow Reports page and click on the magnifying glass icon to the left of this report. This will open up a window like the one below. The default project selected on this report will be the one you were already looking at in the system, but it can be changed to any of your other projects in the system by clicking on the dropdown arrow for “Projects.” Click the dropdown box for “Workflow” and select the appropriate workflow (most times there will only be one workflow listed). Click on the “View Report” button at the top right, bringing up the screen shown at the lower half of the page:



This page will list the different review cycles the project has been through. In order to see the information contained on this page, you must click on the “+” button next to the Review Cycle number. This will then display information about this review cycle, as shown on the next page. If several review cycles have been done, there will be Cycle 2 with a “+” sign next to it, or Cycle 3 with a “+” sign. You can expand each cycle to see the review status for each one.



In this project, under Cycle 1, we can see which Groups have done reviews, the Reviewer Name, the email of the person who assigned them the project, and then the review status for each person.

Project: 2015-37 New Britain Ave. Improvements | Workflow: Start_SPRC_CIP_Review (06/04/2015 04:17 PM) | View Report

ProjectDox
Current Project - Department Review Status
2015-37 New Britain Ave. Improvements

Rev Cycle	Group Name	Reviewer Name	Assigned By	Review Status	Review Comments
1					
	Planning	Steven Spraker Steven.Spraker@ormondbeach.org	melanie.nagel@ormondbeach.org	InReview	
	Sewer	Mike Dunn mike.dunn@ormondbeach.org	melanie.nagel@ormondbeach.org	OnHold	
	City Engineer		melanie.nagel@ormondbeach.org	Assigned	
	Civil Engineer		melanie.nagel@ormondbeach.org	Assigned	
	Building Plans Examiner		melanie.nagel@ormondbeach.org	Assigned	
	Landscape Architect		melanie.nagel@ormondbeach.org	Assigned	
	Water	Mike Dunn mike.dunn@ormondbeach.org	melanie.nagel@ormondbeach.org	OnHold	
	Engineering Technician		melanie.nagel@ormondbeach.org	Assigned	

Next we will go to the “Workflow—Routing Slip” report, by clicking on the magnifying glass next to that Report Name. Once again you will need to click on the Workflow drop-down menu, choose the workflow, and click on the “View Report” button. This page will allow you to see if workflow tasks have been completed, but not the result of a task. Each workflow will be listed separately on the page. Each workflow will show a task, its status, when it was created, last updated, the group and User ID of the individual updating it, how many review cycles the project has gone through so far, when it was completed, and the total days, hours, minutes and seconds required to complete it.

Project: 2015-37 New Britain Ave. Improvements | Workflow: Start_SPRC_CIP_Review (06/04/2015 04:17 PM) | View Report

ProjectDox
Current Project - Workflow Routing Slip
2015-37 New Britain Ave. Improvements

Task Name	Status	Created	Updated	Group	User	Cycle	Completed				
							Date	Days	Hours	Min	Sec
ApplicantUpload	Complete	6/4/2015 4:17:02 PM	6/5/2015 6:31:27 AM	Applicant	Melanie Nagel	0	6/5/2015 6:31:27 AM	0	14	14	25
PreScreenReview	Complete	6/5/2015 9:31:28 AM	6/5/2015 6:57:45 AM	CIP PM	Melanie Nagel	0	6/5/2015 6:57:45 AM	0	0	0	0
BeginReview	Complete	6/5/2015 9:57:45 AM	6/5/2015 7:02:48 AM	CIP PM	Melanie Nagel	0	6/5/2015 7:02:48 AM	0	0	0	0
DepartmentReview	Accepted	6/5/2015 10:02:49 AM	6/5/2015 7:06:16 AM	Planning	Steven Spraker	1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	Building Plans Examiner		1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	City Engineer		1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	Civil Engineer		1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	Sewer		1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	Engineering Technician		1		0	0	0	0
DepartmentReview	Pending	6/5/2015 10:02:49 AM	6/5/2015 10:02:49 AM	Landscape Architect		1		0	0	0	0
DepartmentReview	Accepted	6/5/2015 10:02:49 AM	6/8/2015 12:21:51 PM	Water	Mike Dunn	1		0	0	0	0