

EPLANS NAVIGATION GUIDE

Projects Page
(Main Page)

1. After you have successfully logged into ePlans the Projects Screen will display.
 - a. Any projects that you have access to will display in the Active Projects List area.
 - b. Any outstanding tasks that required an action from you will display in the ProjectFlow Task List area.

The screenshot shows the ePlans interface with several callout boxes:

- Projects the user has access to.** (Points to the Active Projects List table)
- Recent Projects button shows projects that you have recently been in. All Projects button shows all projects you are associated with.** (Points to the 'Recent Projects' and 'All Projects' buttons)
- Projects button will bring you back to the Projects (main) page.** (Points to the 'Projects' button in the top navigation bar)
- Click on the project number to go to the Project Information Page.** (Points to the project ID 'CHM17-0001' in the table)
- Short description of Project.** (Points to the 'Description' column 'TEST Project')
- Shows which task the project is currently on.** (Points to the 'Status' column 'Prescreen Corrections')
- Profile button allows you to change your profile information, including password and security question/answer.** (Points to the 'Profile' button in the top navigation bar)
- List of current tasks for the user.** (Points to the ProjectFlow Task List table)
- Click on Project number to go to the Project Information Page.** (Points to the project ID 'CHM17-0001' in the task list)
- Click on Task name to accept and/or complete the task. See the ePlans Task Guide for more information on tasks.** (Points to the task name 'Prescreen Corrections Task')

Project Information Page (Specific Project Page)

1. Click on the project number under Active Projects List or the project name under ProjectFlow Task List to go to that specific project's Project Information Page.
 - a. On this page you can see the basic project information, see which drawings and/or documents have been uploaded, and run reports.
 - i.

CHM17-0001

Main Contact: ePlans Test Permit

Expand current | Collapse |

CHM17-0001

- Drawings (2 Files - 2 New)
- Documents (2 Files - 2 New)
- Approved

Project Info	Reports
Project Name:	CHM17-0001
Description:	ePlans Test Permit
Project Image:	No image exists
Map Config Name:	
Location:	400 2nd St S
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Owner CityEmail
Owner's Email:	projectdox@ci.stcloud.mn.us
Project Admins:	Administrator Temp, Preeti Schatzman, Katie Vollbrecht, Lee Gladitsch, Owner CityEmail
Status:	In Review
Status Info:	
Project Start/End:	Start: 1/31/2017 9:05:24 AM End: 7/31/2017 9:05:20 AM
Pass-Through:	.mov,.wmv,.avi,.htm,.html,.install,.config,.mp4
Incoming Files:	Fax: Email: 110@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project

Workflow Portals Page

1. Click on the Workflow Portals Button.
 - a. Here you can see the ProjectFlow Building Workflow. This is a graphic that shows the steps that have been completed for the project, which step the project is currently at, and the future steps for the project.

Projects button will bring you back to the Projects (main) page.

Any outstanding tasks you have will show up here

Click on this symbol to see what the task entails.

Click on the Task to bring up the Task Page. See the ePlans Task Guide for more information on tasks.

Will show if the task has been accepted yet.

Click on this symbol to see the ProjectFlow Building Workflow.

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TY	STATUS	PRIORITY	DUE DATE	CREATED
Applicant Resubmit Task	CHM17-0001	Test 2	Applicant	FirstInGroup	Accepted	Medium	10/13/2017 10:39:27 AM	2/3/2017 10:39:27 AM

NAME	COORDINATOR GROUP	STATE	VERSION	STARTED	COMPLETED
Test 2	Review Coordinator	Active	1	1/31/2017 11:18:15 AM	

ProjectFlow Building Workflow

1. If you click on the symbol to see the ProjectFlow Building Workflow a new screen will pop up.

Tools to zoom in/out and pan.

You can blue box around, and make it larger and smaller to zoom in/out and pan.

Green highlighted box is the task the project is currently at.

```

    graph TD
        subgraph Prescreen_Review [Prescreen Review]
            A[Applicant Upload] --> B[Revoke Applicant Upload Permission]
            B --> C[Set Project Status to Prescreen]
            C --> D[Prescreen Review]
            D --> E{Are Corrections Required for Upload?}
            E -- Yes --> F[Add Applicant Upload Permission]
            F --> G[Set Project Status to Prescreen]
            G --> H[Prescreen Corrections]
            H --> I[Set Project Status to Prescreen Corrections]
            I --> J[Add Applicant Upload Permission]
        end

        subgraph Department_Review [Department Review]
            K[Review Complete] --> L[Department Review]
            L --> M{Are All Reviews Complete and Approved?}
            M -- Approved --> N[Batch Stamp]
            M -- Reviewer Corrections Required --> O[Set Project Status to Review]
            O --> P[Assign Reviewers]
            P --> Q[Set Project Status to Review]
            Q --> R{Are Corrections Required for Resubmit?}
            R --> S[Resubmit Received]
            S --> T[Revoke Applicant Upload Permission]
            T --> U[Applicant Resubmit]
            U --> V[Set Project Status to Applicant Corrections]
            V --> W[Add Applicant Upload Permission]
            W --> X[Applicant Corrections Required]
            X --> R
        end

        E -- No --> M
        R --> M
    
```

Reports

1. From the Projects Information Page you can either click on the Reports tab (will open reports page on same screen) or click on the Project Reports button (will open reports page on new screen).
 - a. You can go into any of the reports, but the five with the arrows are the ones an applicant would use most often.
 - b. These reports will update during the plan review process so you can see items that need changes prior to plan review being complete. BUT these will not be the final version of the changes required, and may change during the plan review process. Please wait for the final changes required during the Applicant Resubmit Task prior to asking any questions to the plan reviewer.

[Close Window](#)

ePlans ST.CLOUD

Project and Workflow Reports for CMLT17-0003

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Rep...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Re...	Project	All Emails Sent Summary Report
	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 Shee...	Project	All Uploaded Files with Sheet Sizes
	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
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist items for a workflow.
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displays the status of all r...
	ProjectFlow - Workflow Routing Slip	Workflow	The Workflow Routing Slip Report displays the sequential route...

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2. Click on the magnifying glass symbol to the left of the report you want to run.
 - a. Some reports require a date span to be entered.

- i. Click on the calendar to the right of the BeginDate and EndDate fields to pick the date range.
- ii. Click on the View Report button.

<https://plans.stcloudcity.com/ProjectDox/ReportViewer.aspx?ReportPath=/PDOXReports/Current Project - Files Viewed By Date8>

ProjectID BeginDate | || EndDate | | |

- b. Some reports require a Workflow Instance to be entered.
 - i. Click on the down arrow to the left of the Workflow Instance Field.
 - ii. Select the Workflow Instance (typically there will only be one) from the drop down menu.
 - iii. Click on the View Report button.

<https://plans.stcloudcity.com/ProjectDox/ReportViewer.aspx?ReportPath=/PDOXReports/ProjectFlow ->

<https://plans.stcloudcity.com/ProjectDox/ReportViewer.aspx?ReportPath=/PDOXReports/ProjectFlow - C>

Workflow Instance |

- c. Projects that have multiple review cycles will require a specific review cycle be entered.
 - i. Click on the plus symbol to the left of the cycle number to see the specifics for that review.

Workflow Instance CBLD16-0007 - COMMERCIAL - 10/31/2016 8:15:40 AM

1 of 1 Find | Next

ProjectDox

Department Review Status Report

Project Name: CBLD16-0007

Workflow Started: 10/31/2016 8:15 AM

Report Generated: 02/27/2017 01:23 PM

Cycle	Department	Reviewer	En
1			
2			

