

PlanWell Enterprise Spring 2009 Release Notes



About the PlanWell Enterprise Release Notes

The Spring 2009 PlanWellSM Release Notes are a guide for users of the latest release of PlanWell EnterpriseSM, PlanWell BidCasterSM and the PlanWell family of software, web-based products and add-on modules. This document will give you a quick start on how to use the new features and enhancements of PlanWell Enterprise and related products from American Reprographics Company.

Questions about this release or any other PlanWell product? Call 925.658.0200

PlanWell Works Like You Do!

New features and powerful enhancements make PlanWell more intuitive, more convenient and easier to use for all your document management needs.

The latest PlanWell feature improvements include:

- 1. More Powerful and Easier-to-Use Address Book**
- 2. Automatic Matching of Bidders to Your Trade Packages**
- 3. More Intuitive User Interface and Simpler Navigation**
- 4. Enhanced BidCaster Capabilities**
- 5. Estimating Integration, and**
- 6. Customizable Contact Field Creation Capabilities**

1. Feature: More Powerful and Easier-to-Use Address Book

Now create custom fields to efficiently organize and track your contacts. Build your PlanWell address book according to your unique needs. Easily create groups, add to a project invitation, or send emails based on customized fields. Searches become simpler and faster.

New PlanWell customizable views include view by 'Company', by 'CSI trade', and 'Classic View' by individual.

You can now automatically select contacts when their trades match the packages selected for a broadcast. Make the selection of contacts for a bid simple and fast. You reach the maximum qualified number of bidders in record time.

A view of the enhanced PlanWell Address Book:

The screenshot displays the PlanWell Address Book interface. At the top, there is a navigation bar with tabs for PlanWell, Repro Services, Supplies, Address Book (selected), My Account, and Order History. Below this is a search bar with filters for Company name, User Type, and User Status. The main content area shows a list of contacts organized into CSI trade groups. The left sidebar lists various divisions from 0 to 17. The main table lists contacts with columns for Company Name, Contact Name, Email, Fax, Phone, License Number, Birthday List, Member number, and All Trade(s).

No Trade	Company Name	Contact Name	Email	Fax	Phone	License Number	Birthday List	Member number	All Trade(s)
Division-06	CSI-06415-Countertops								
	Caulkrite	Cheryl Devenney	ddavis@blairqfx.com	(215) 947-5174	(215) 947-5106				All Trades
	Centex Environments	Curt Quaintance	ddavis@blairqfx.com	(610) 832-0644	(610) 832-0300				All Trades
	Fessenden Hall Inc.	Joanne DePhillips	ddavis@blairqfx.com	866-267-4261	888-487-5569				All Trades
	George W. Jones Co.	Alan Hart		804-276-4854 804-276	804-276-7535				All Trades
	Hutchinson Cabinets	Mr. Hutchinson	ddavis@blairqfx.com		856-468-5500				All Trades
	CSI-06420-Paneling								
	George W. Jones Co.	Alan Hart		804-276-4854 804-276	804-276-7535				All Trades
	CSI-06430-Wood Stairs and Railings								
	Adams Stair Works and Carpentry	Douglas Adams	ddavis@blairqfx.com	(847) 223-1188	(847) 223-1177				All Trades
	AI Stairs Inc.	Stephen Hasse	ddavis@blairqfx.com	(732) 905-8550	(732) 905-8500				All Trades

PlanWell Address Book enhancements include:

Set the number of contacts per page

You can choose between 10 and 150 contacts per page to match your internet connection speed. This will make reviewing and selecting broadcast recipients much faster and easier.

Customize your views

Now create multiple views such as View by 'Contacts By Company', 'Contacts by CSI' or our 'Classic View'. You can navigate our new CSI-based view by scrolling through the contacts. Or simply jump to a particular CSI division by using the right side navigation links.

Customize your columns

From the new Options menu, select the option to 'Customize This Page'. Turn the columns on or off to ensure that you can quickly view or print the relevant information. Define your personal preferences for a default view, so that contacts are arranged in the style you require.

Fast searches with advanced filtering options

PlanWell offers you 'Expandable Filter Views' to quickly reduce a large, uncategorized contact list down to the required contact list. You don't need to wade through all of those options every time you open the address book, so the expandable filter view allows you to easily toggle between basic and advanced filter options as needed.

Improved print and export capability

Now print or export your list just as you see it on the page. Quickly whittle down your list, then print or export these results for your records. Or send out to others for final review before you launch the broadcast.

Faster uploads

Uploading your contact list is up to ten times faster than before, allowing you to be more productive in less time.

Tabbed views

Now choose to navigate your contact list with:

- Master Address Book: All the contacts maintained by your company
- Project Address Book: All current project participants
- Plan Holders List: All contacts who previously received project plans
- Groups: Quickly build and view company contacts by group

- Selected Contacts: As you make selections from the other tabs, you can quickly review your selections in this tab

2. Automatic Matching of Bidders to Your Trade Packages

Easily assign trades to packages to automatically assign packages to a recipient during the Automatic Print Order (APO) creation.



Assign Trades to Packages-Packages with trades will be available for APO distribution in a broadcast

In the 'Manage Packages' window, choose an option called 'Assign Trades to Packages'. This allows you to link one or more trades to a package. This will then indicate the trades which need to receive the package for a bid or addenda during the project life cycle.

The process is easy: Just select the package you wish to configure. From your company trade list, select the trades which correspond to the package. When you are finished, simply select the [>>] button to link the trades to the package. You may modify this trade list at any later date if your distribution needs change in the future.

3. Feature: More Intuitive User Interface and Simpler Interface

Organize your interface the way you want to, and find important and “most used” features quickly.

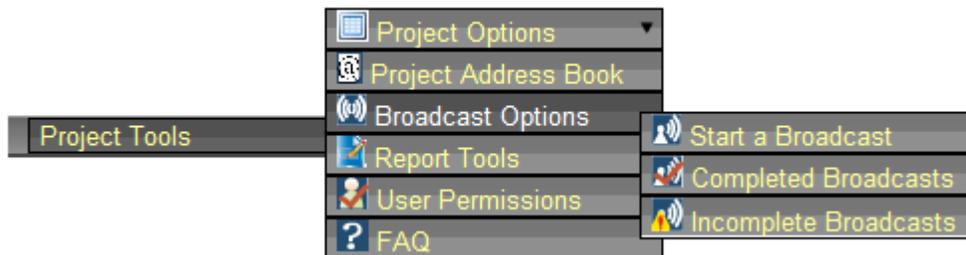
New pop-up menu navigation replaces the old toolbar in PlanWell. New “mouse over” expanded menu selections makes your ability to find information that much easier.

Convenient enhancements like drop down menus, page view customizations, contextual help, and a cleaner design makes PlanWell easier to use, and eliminates steep learning curves. Customize your screens to match your most challenging project workflow. Organize and quickly access the tools that you use the most.

New Option Menus

Within PlanWell, there are several pages which provide links to other activities in the system.

So many in fact that we have moved them to a standard position at the upper left hand corner of the page to make them available as a simple pop-up menu.



Optional tools are arranged by function, which will provide you instant access to the tools that you use the most.

4. Enhanced PlanWell BidCaster Capabilities

PlanWell BidCaster, an add-on module for PlanWell Enterprise, is one of the most convenient and easy-to-use online tools for facilitating the ITB (invitation-to-bid) process. PlanWell BidCaster allows you to send hundreds of ITBs via email or fax, right from your computer. Plus bidders can preview plans and specs and indicate their interest in your projects, from a single bid invitation. It's the key to ensuring your ITBs are as complete as they can be.

New Feature: Address Book by CSI

Need the ability to quickly select subcontractors for a broadcast by CSI? Now you can display or print contacts by CSI.

With our latest address book upgrades, you may set your address book to 'By CSI' and then easily scroll through the list of contacts for each trade or subtrade you have defined. You can quickly jump to a specific division by using the navigational links at the left of the list.

No Trade	<input type="checkbox"/>	Company Name	Contact Name	Email	Fax	Phone	License Number	Birthday List	Member number	All Trade(s)
DIVISION 0	<input type="checkbox"/>	Division-06								
DIVISION 1	<input type="checkbox"/>	CSI-06415-Countertops								
DIVISION 2	<input type="checkbox"/>	Caulkrite	Cheryl Devenev	ddavis@blairqfx.com	(215) 947-5174	(215) 947-5106				All Trades
DIVISION 3	<input type="checkbox"/>	Centex Environments	Curt Quaintance	ddavis@blairqfx.com	(610) 832-0644	(610) 832-0300				All Trades
DIVISION 4	<input type="checkbox"/>	Fessenden Hall Inc.	Jeanne DePhillips	ddavis@blairqfx.com	866-267-4261	888-487-5569				All Trades
DIVISION 5	<input type="checkbox"/>	George W. Jones Co.	Alan Hart		804-276-4854 804-276	804-276-7535				All Trades
DIVISION 6	<input type="checkbox"/>	Hutchinson Cabinets	Mr. Hutchinson	ddavis@blairqfx.com		856-468-5500				All Trades
DIVISION 7	<input type="checkbox"/>	CSI-06420-Paneling								
DIVISION 8	<input type="checkbox"/>	George W. Jones Co.	Alan Hart		804-276-4854 804-276	804-276-7535				All Trades
DIVISION 9	<input type="checkbox"/>	CSI-06430-Wood Stairs and Railings								
DIVISION 10	<input type="checkbox"/>	Adams Stair Works and Carpentry	Douglas Adams	ddavis@blairqfx.com	(847) 223-1188	(847) 223-1177				All Trades
DIVISION 11										
DIVISION 12										
DIVISION 13										
DIVISION 14										
DIVISION 15										
DIVISION 16										
DIVISION 17										

Contacts with no defined trade will appear at the top of the list under the heading 'No Trade'. You can easily access and edit contact information by clicking on their name, send them an email by clicking on their email address or view other trades in which they participate by clicking on the 'All Trades' link.

New Feature: Automated Contact Selection

Select the right set of contacts for your bid, or quickly add specific bidders to your Automatic Print Order (APO) or Prints Provided list.

New Feature: Package Trade Assignments

Create new packages and assign CSI codes to those packages. This makes Subcontractor selection and Automatic Print Ordering quick and painless.

Setting your project up for Automated contact selection starts with the assignment of trades to your project packages:



Assign Trades to Packages

Assign Trades to Packages-Packages with trades will be available for APO distribution in a broadcast

In the 'Manage Packages' window, choose an option called 'Assign Trades to Packages'. This allows you to link one or more trades to a package. This will then indicate the trades which need to receive the package for a bid or addenda during the project life cycle.

The process is easy: Just select the package you wish to configure. From your company trade list, select the trades which correspond to the package. When you are finished, simply select the [>>] button to link the trades to the package. You may modify this trade list at any later date if your distribution needs change in the future.

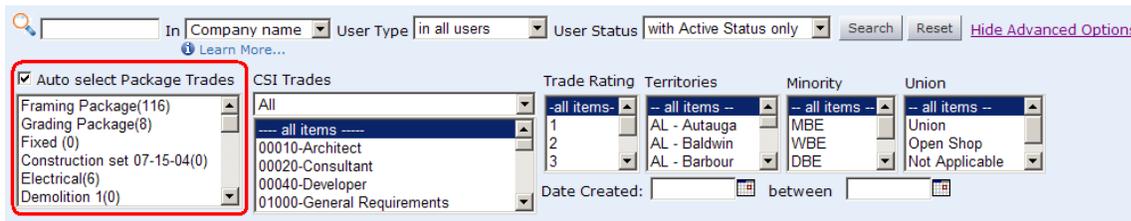
New Feature: Auto-Select Contacts by Package Trade

You can now quickly auto select contacts for a Broadcast by using a new filter tool in the Advanced filter options.

Select the 'More Options' link in your filter bar:



Then choose 'Auto Select' Package Trades.



As you select the packages involved in the current bid or addenda, the system will automatically select the trades which you have previously assigned to the packages. Once you set your other filter criteria and click search, your bid list should accurately represent all of the bidders for your broadcast. It's as easy as point and click!

New Feature: Auto-Select your Automatic Print Order recipients

PlanWell is the only application to offer the APO "Automatic Print Order" process allowing you to choose preferred subs who will receive pre-paid plans for your project.

To Auto-Select recipients of an APO order, simply indicate that they will be bidding on the project. This time-saving feature can now be automated when you use our new Automated APO process.



After you select the contacts for your broadcast, you can choose which bidders are included in the APO. Do this by selecting a minimum trade rating for the APO, and then click on the 'Check All APO' link. The system will then automatically select every contact who has the minimum rating you specified.

With just two clicks, you have selected added all of your preferred contacts to the APO process!

Of course you always have the opportunity to review, add or remove contacts from the broadcast, or APO prior to launching the broadcast.

New Feature: Automated Print Order Package Assignments

If you have previously assigned trades to your project packages, PlanWell will automatically configure your APO recipient list to receive one set of each package which matches one of their trades.

If you have not assigned package trades, or wish to link a particular package for an APO recipient, you can add the package to the APO. Then manually set the number of copies that a recipient is allowed.

New Feature: Automatic Print Ordering Package Options

Now you can easily provide APO packages in exactly the form you wish recipients to receive them:

- paper plans
- CD
- Instant Download

You can set output options for a broadcast via a menu link in the APO setup page. You can also enable or deny additional options on a recipient-by-recipient basis in the form.

You can also set a default output option on an individual basis, or use the convenient 'Copy Down' controls to update your entire list with a single click.

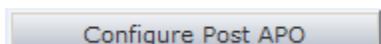
New Feature: Post Broadcast Automatic Print Order Assignments

Since not all subs have email, broadcasts can be sent by fax. When they respond via phone to your invitation, you may easily add them to the APO directly from your Broadcast Status report.

Simply select the bidder or bidders from your list:

<input checked="" type="checkbox"/>	Acoustical Resources	 Burt Cullum	555-1212	0105 0205 0208 0222
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Then choose:



You can then set the packages that the bidder should receive and hit 'save'. This will initiate an automated print order with your reprographer who will deliver it straight to your bidder.

The Broadcast Status report lists the order details for the bidder as well. You immediately get accurate reporting and tracking of all activities related to your bid.

▶ **Select Bid Packages** [[Add More..](#)]

Items #	Package Name	Media	Bindery	OutPut Size	Description	
1	Concrete42	Bond	Edge Bind	Full Size		
2	Historical	Bond	Edge Bind	Full Size		
3	Concrete	Bond	Edge Bind	Full Size		

▶ **Select Recipients** [[Add More..](#)]

Available services for APO : [Add/Edit Services](#) Remove from APO

	Company Name	CSICodes	PlaceOption				Delivery	Shipping Acc#	Service
<input type="checkbox"/>	Acoustic Ceilings Inc. 1212 Jackie Short	View CSI Trades	Place Now	0	0	0	Cal Overnight	2345678-1	<input type="checkbox"/>
<input type="checkbox"/>	Acoustical Resources Burt Cullum	View CSI Trades	Place Now	0	0	0	Cal Overnight	2345678-1	<input type="checkbox"/>

5. eTakeoff Plan Viewer Integration

PlanWell now features integration with a popular estimating package available – eTakeoff Plan Viewer™.

Subcontractors who view your project may choose to view the drawings with the free eTakeoff tool, eTakeoff Plan Viewer Basic. This tool will allow them to accurately measure:

- Areas
- Lengths
- Item Counts
- Perimeters

eTakeoff enables users to perform five takeoff calculations in the same amount of time it would take to manually perform one.

The measurement tools allow users to get precise measurements of up to 1/1000 of an inch. It easily increases quantity takeoff items and costing accuracy, and shortens bid response times.

e-takeoff functionality within PlanWell can also be increased by upgrading to the Pro or Premier editions.

eTakeoff **Pro** version adds the ability to save measurements and annotations, display them in various colors, list the measurements and easily transfer them to other applications.

eTakeoff **Premier** does everything the Pro version does and adds the ability to organize measurements and annotations in layers, calculate quantities based on multiple measurements and compare drawing versions.

6. Feature: Customizable Field Creation Capabilities

Five new custom fields have been added for contact records. You can customize your records any way you need to.

Enter Region specific Minority codes, License info, Bonding Info, or any other custom information your project requires.

Custom Contact Fields

Now you have the ability to create custom fields which will not only increase the effectiveness and speed of your searches but will also help you organize your Address Book the way you need to. Finding contacts is even quicker.

Locate the 'My Account' tab and the sub tab named 'Manage Custom Fields'.

Use these five custom fields to define your contacts.

Custom Field Name		
License Number	<input checked="" type="checkbox"/>	Save
Birthday List	<input checked="" type="checkbox"/>	Save
Member number	<input checked="" type="checkbox"/>	Save
	<input type="checkbox"/>	Save
	<input type="checkbox"/>	Save

For example, you might need to organize customers according to your company's territories. So you can create a new territory field, and then assign a value to this field for each customer in your Address Book.

Best of all, these fields are searchable too!

Once you create your custom fields you can easily create groups, add to a project invitation, or even send emails based on your new custom tag.

The Address Book also allows you to customize the columns displays of your contacts. You can show, print or export column views in your Address Book or BidCaster recipient lists.

Questions about this release or any other PlanWell product? Call 925.658.0200

End.