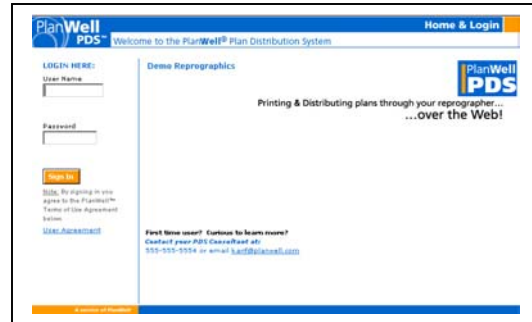


PDS Detailed User Guide

The Planwell PDS login page can be accessed from a link provided on your Reprographer's website. Enter in the username and password created for your account.



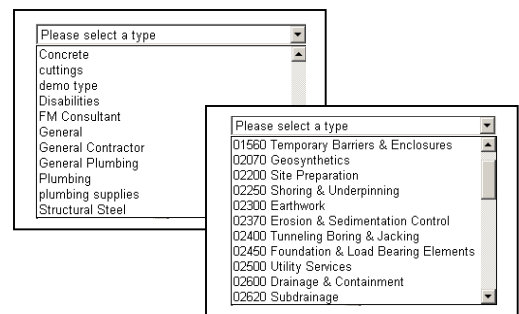
MY PROJECTS:	
PROJECT NAME	PROJECT NUMBER
Abbott	56465
E Airport	East Airport Buildings
Econolot	Econolot Building
Hammand	65465
Hammond Center	5466
Hopkins Art Institute	4763
main street	829451
Northwestern	90878
Star Building	8547545
W DCW Building	2500
W Airport	West Airport Buildings

PDS HOME	ADD CONSULTANT	MANAGE CONSULTANTS	ORDER HISTORY	CONTACT PLANWELL PDS ADMINISTRATOR
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The PDS homepage will list all projects currently added into PDS. It will also list your information and offer four options along the top bar. This document will begin by discussing the four top options and next move into the project management and ordering process

Add Consultant Option

Consultants are added to projects by being selected from a master address book. Consultants can be added to this address book through an import process at your Reprographer's location or you can add users to this address book yourself online by clicking on the "Add Consultants" option. . PDS categorizes all consultants by Type. These types are personalized for your company and can be based on CSI codes or any general terminology you use. Your Reprographer can populate these types for you, or you may add these types yourself by clicking on "Add Type", entering in the new type and selecting "Save Changes." This new type will now be added to the drop down list of types.



Add A New CONSULTANT Type:

Type Name:

Save Changes

Once you have selected an appropriate consultant type, enter in all remaining information regarding this new consultant including name, address, phone number, fax number and email address. You will next determine the online access setting for this consultant. By selecting “Yes” to “Consultant may view plans and create document packages”, you will be allowing this consultant to log into PDS, view documents, view packages, create packages, and place orders. For consultants with the approval for online access, you will next need to specify if this consultant will be able to bill orders to your account with your Reprographer. Finally choose a username and password for this consultant and specify if you would like this consultant to receive an email notification when added to a project. This email notification will include the project name, the link to access PDS and will remind the consultant of the username and password you created. By clicking on “Add Consultant”, this consultant will be added to your master address book. Please note, although this consultant is in your address book, this consultant will not be able to view any projects until added into a specific project. This process will be outlined later in this document.

CONSULTANT TYPE: [Clicking here](#)
If you do not see an appropriate type, please add the type that you desire by [Clicking here](#)

Company:
[Click here](#) - If you want to select a company name from a list of already existing companies.

First Name:
Last Name:
Address:
City:
State:
Zip:
Country:
Phone:
Fax:
Email:
Account Number:

ACCESS RIGHTS:
 Yes | No - CONSULTANT may view plans and create document packages.
 Yes | No - CONSULTANT may bill orders to your Demo Reprographics Account.

Username:
Password:
 Send Email Notification When Added To A Project

ACCESS RIGHTS:
 Yes | No - CONSULTANT may view plans and create document packages.
 Yes | No - CONSULTANT may bill orders to your Demo Reprographics Account.

Username:
Password:
 Send Email Notification When Added To A Project

Manage Consultants Option

Occasionally you will need to complete maintenance on the consultants within your address book. By clicking on the “Manage Consultants” option you will be able to modify the consultant’s information and/or delete this consultant from your master address book. You may search for a specific consultant by specifying trade, company, first name or last name or you may view all consultants by leaving this field blank and clicking the “Search” button. All consultants meeting the criteria specified will be listed in order of type. You may click on “Modify” to modify this consultant’s information, or you may also choose to delete this consultant from your address book by selecting “Delete.”

Order History Option

All orders placed can be viewed by selecting “Order History.” You may sort these orders by consultant, project or date by clicking on any of these options. For all orders listed, you are able to review the date the order was placed, the order number, the Status of this order (this information will be maintained by your Reprographer) and you will also have the ability to review the details of the order by clicking on “Review Order.” Please note, as the project owner, you will be able to see all orders placed by yourself, your employees and also your consultants. Consultants will only be able to see orders placed by them.

SORT BY CONSULTANT - SORT BY PROJECT - SORT BY DATE

CDW			
- 5/23/2003 - #41	Review Order - Status: Pending		
- 5/13/2003 - #41	REVIEW_ORDER - Status: Pending		
- 5/13/2003 - #38	REVIEW_ORDER - Status: Modified		
- 4/26/2003 - #37	REVIEW_ORDER - Status: Waiting For Appro		
- 4/26/2003 - #34	REVIEW_ORDER - Status: In Production		
- 4/24/2003 - #29	REVIEW_ORDER - Status: Pending		
- 4/24/2003 - #28	REVIEW_ORDER - Status: On Hold		
- 4/24/2003 - #27	REVIEW_ORDER - Status: Pending		
Concrete Banners			
Star Building - 5/23/2003 - #47	REVIEW_ORDER - Status: Waiting For Appro		
Star Building - 5/13/2003 - #42	REVIEW_ORDER - Status: Open		
Star Building - 4/25/2003 - #33	REVIEW_ORDER - Status: Modified		
Star Building - 4/25/2003 - #22	REVIEW_ORDER - Status: In Production		
Star Building - 4/25/2003 - #21	REVIEW_ORDER - Status: Modified		

Work Order: 65

Order Date: 4/19/2003 Project: 0610 Demo

Ordered By: Lee Erickson ARCHITECT: Digital Steel

Address: 2005 Randolph Lane Plymouth, Minnesota 55555 Phone/Fax: 5555555

Delivery Notes:

Special Instructions to Demo Reprographer:

CONSULTANT: Digital Steel Bill To: ARCHITECT's Demo Reprographic Account

Message From ARCHITECT:

CONSULTANT Contact: Lee Erickson Date Time Sent: 4/19/2003 7:00:00 PM

Deliver To: Digital Steel Deliver Via: Demo Reprographic Driver

Deliver Attn: Lee Erickson

Address: 2005 Randolph Lane

City: Plymouth

State: Minnesota Zip: 55555

Phone: 5555555 Fax:

Order Package	QC	Description	Size	Media Type	Quantity
1		architectural	FULL SIZE	White Bond	Staple
		A-102, A-103			
		mechanical			
		M-112			

Contact Planwell PDS Administrator Option

Contact PlanWell PDS Administrator

Use this form to send a message to the PlanWell PDS Administrator.

Your Name:

Messages:

OR

Contact PlanWell PDS Administrative Office directly:

If you find you need to contact your PDS Administrator at your Reprographer’s location, you may click on the “Contact PDS Administrator” option. Based on your login information, your name will pre-populate. You may then type in a message that will be sent via email to the PDS Administrator. You may also scroll down to view the administrator’s name and phone number if you would prefer to call the Administrator.

Project Management and Order Placement

For each project added into PDS, a specific project consultant list must be created and document packages must be built for ordering. Begin this process by first entering a specific project by selecting either the project name or number. The Project Team Members and Documents List page will allow you to add consultants, view documents and create packages.

To add consultants, simply click on "Add Consultants To This Project." Consultants may be added by searching for a specific consultant(s) from the master address book and also by pulling the consultant list from another project. To select by specific consultant, begin by specifying a trade, company, first or last name. You may also list all consultants by leaving these fields blank and clicking on "Search." The consultants meeting the criteria you specified will be listed. You may add these users by selecting an individual or by selecting all consultants within a consultant type.

ADD CONSULTANTS TO PROJECT:

FIND CONSULTANT:

Search Criteria: *(Leave Blank to Search All)*

Trade Company First Name Last Name

Search

OR

ADD CONSULTANTS FROM ANOTHER PROJECT

Select a project.....

Add from project

ADD CONSULTANTS TO PROJECT [Back](#)

Select CONSULTANT S to add to project and click the "Add to Project" button below.

Add to Project **Reset**

	COMPANY NAME	CONSULTANT NAME	CITY
<input checked="" type="checkbox"/>	SELECT ALL FROM 01560 Temporary Barriers & Enclosures		
<input checked="" type="checkbox"/>	QRTS	Bruce Erickson	Plymouth
<input checked="" type="checkbox"/>	SELECT ALL FROM 02200 Site Preparation		
<input checked="" type="checkbox"/>	Moskie	Arthur Baker	Plymouth
<input checked="" type="checkbox"/>	QRTS	Paul Erickson	Plymouth
<input checked="" type="checkbox"/>	SELECT ALL FROM Barriers		
<input checked="" type="checkbox"/>	Joes Concrete	Blair Dogworth	Minnetonka
<input checked="" type="checkbox"/>	SELECT ALL FROM Concrete		
<input checked="" type="checkbox"/>	Joes Concrete	Joe Swanson	Burnsville
<input checked="" type="checkbox"/>	Joes Concrete	Henry Jones	Plymouth

Adding consultants from another project can be accomplished by selecting the project you wish to add consultants from and clicking on "Add From Project" button. All consultants from that project will be listed and, by default, selected. You may unselect any of these consultants by individual or type. When the list is correct, click the "Add To Project" button. All consultants selected will now be listed under the Project Consultants field.

To view the information on any of these consultants, select the consultant's name. You will be given the opportunity to modify this consultant's information and also remove this consultant from the project. Please note, this will simply remove the consultant from the project, not the master address book. Additional consultants can be added and removed from the project through the life of the project by follow these same methods.

CONSULTANT INFO:

Bakers Concrete

Contact: Richard Carlson
Address: 3005 Ranchview Lane,
 Plymouth, Minnesota , 54555.
Phone: 5555555
Fax:
Email: karif@planwell.com
[Modify](#) [Remove from project](#)

Viewing Thumbnail Images and Creating Project Packages

All documents added into a project may be viewed by selecting "View Project Documents." This option will create a listing of all documents, which can be viewed by selecting "Preview."

MASTER REVISIONS: 1 0		Rev. Displayed: 1 ▲	
Architectural		Rev. Displayed: 0 ▲	
DRAWING #	DRAWING NAME	REV.#	Delta Description REV. DATE
A-101		0	4/2/2003 Preview
A-102		0	4/2/2003 Preview
A-103		0	4/2/2003 Preview
A-104		0	4/2/2003 Preview
A-105		0	4/2/2003 Preview
Structural		Rev. Displayed: 0 ▲	
DRAWING #	DRAWING NAME	REV.#	Delta Description REV. DATE
S-101		0	4/2/2003 Preview
S-102		0	4/2/2003 Preview
S-103		0	4/2/2003 Preview
S-104		0	4/2/2003 Preview
Plumbing		Rev. Displayed: 0 ▲	
DRAWING #	DRAWING NAME	REV.#	Delta Description REV. DATE

PROJECT: Abbott [Link To Project](#)

Original Scan Date: 6/24/2003
PlanWell PDS uses Imaging for Windows to preview the drawings.

Package Name:

Automatically update this package when new drawing revisions become available? Yes No

Do you want this project package to be viewable to the CONSULTANT? Yes No

[Create Package](#)

CURRENT SET AS OF REVISION NUMBER: 3

Select All Documents from the Abbott Project in Revision 3

Select All Architectural Documents [Revision Displayed: 1](#)

DRAWING #	DRAWING NAME	REV.#	Delta Description	REV. DATE
<input type="checkbox"/>	A-101	2		6/24/2003 Preview
<input type="checkbox"/>	A-102	2		6/24/2003 Preview
<input type="checkbox"/>	A-103	1		6/24/2003 Preview
<input type="checkbox"/>	A-104	0		6/24/2003 Preview
<input type="checkbox"/>	A-105	0		6/24/2003 Preview
<input type="checkbox"/>	A-106	0		6/24/2003 Preview

Select All Structural Documents [Revision Displayed: 0](#)

DRAWING #	DRAWING NAME	REV.#	Delta Description	REV. DATE
<input type="checkbox"/>	M-111	0		6/24/2003 Preview
<input type="checkbox"/>	M-112	0		6/24/2003 Preview
<input type="checkbox"/>	M-113	0		6/24/2003 Preview
<input type="checkbox"/>	M-114	0		6/24/2003 Preview
<input type="checkbox"/>	M-115	0		6/24/2003 Preview

Ordering these documents is completed by first creating document packages. Packages may be created by first selecting "Create New Package." Specify a Package name, automatic update option, and if this package is to be viewable by consultants online. By selecting to have a package automatically update, all documents include in the package will be kept updated as additional revisions are created. Packages selected to be viewable online will be listed in the package lists that the consultant is able to place orders on. Documents can be added to this package by selecting individual sheets, selecting entire disciplines, or selecting "Master" to add all documents. Once packages are created, you may view the details of these packages by selecting the package name. This will list all documents included in the package and allow these documents to be previewed. You may also edit and delete any existing packages.

PlanWell PDS uses Imaging for Windows to preview the drawings.
This Project Package is Not Updated Automatically.
Package Create Date: 6/24/2003

Descriptions:

Drawing #	Drawing Name	Rev. #	Delta Description	Revision Date	Description Name	Discipline
A-102		8		4/30/2003	architectural	Preview
A-103		9		5/27/2003	architectural	Preview
A-104		6		4/25/2003	architectural	Preview
A-105		4		4/2/2003	architectural	Preview
M-111		2		4/1/2003	mechanical	Preview
M-112		4		4/2/2003	mechanical	Preview
M-114		2		4/1/2003	mechanical	Preview
P-112		1		4/1/2003	plumbing	Preview
P-113		1		4/1/2003	plumbing	Preview

[Close This Window](#)

ARCHITECT PACKAGES:

Current Architectural	EDIT REMOVE
Current Plumbing	EDIT REMOVE
Current Set	EDIT REMOVE
Current Structural	EDIT REMOVE

Order Placement

PROJECT: main_street - 829451
Address: 1200 Block, Orono, MN, 55555 **Phone:** 763-694-5913 **Fax:** 763-694-5913
[View Project Documents - QTRs 28](#) | [Order History](#) | [Place Order](#)

PROJECT CONSULTANTS
[Add CONSULTANTS To This Project](#)

- 01560 Temporary Barriers & Enclosures
 - [QRTS](#)
- 02200 Site Preparation
 - [Moskie](#)
 - [QRTS](#)
- Barriers
 - [Joos Concrete](#)
- Concrete
 - [Joos Concrete](#)
 - [Joos Concrete](#)
- demo type
 - [Northwestern Builders](#)
- FM Consultant
 - [CDW](#)

PROJECT PACKAGES
[Create New PACKAGE](#)

ARCHITECT PACKAGES:

- 0402 Plumbing [EDIT](#) | [REMOVE](#)
- 0501 Current Set [EDIT](#) | [REMOVE](#)
- 0617 Demo [EDIT](#) | [REMOVE](#)
- 0618demo [EDIT](#) | [REMOVE](#)
- 0619 Demo [EDIT](#) | [REMOVE](#)
- architectural [EDIT](#) | [REMOVE](#)
- Brucor Package [EDIT](#) | [REMOVE](#)

CONSULTANT PACKAGES:

The “Project Team Members and Document Lists” page will provide a listing of all previously added consultants and project packages available for ordering. Begin the ordering process by clicking on the “Place Order” button in the upper right corner.

Select the due date, due time, delivery via option and deliver to option. Select yourself in the “Deliver To” option (“Architect” in our example) if you would like this order to be sent back to you, allowing you to handle any distribution. Select “Consultant” if you would like your Reprographer to handle all distribution. You may also add Delivery Notes, Messages and/or Special Instructions.

Deliver To:

Please select a Delivery Option

Please select a Delivery Option

ARCHITECT

CONSULTANT

Orders are built by matching up consultants to packages.

Consultants may be selected by clicking on an individual, a consultant type or the “Select All Consultants” button. After selecting the consultant(s), select the package(s) you would like that consultant to receive. Indicate all printing options and click on Add to Order. The current order window will expand to reflect this portion of the order.

Continue to match up users to packages until the entire order is completed then click on Review Order.

CONSULTANTS

SELECT ALL CONSULTANTS

01560 Temporary Barriers & Enclosures

QRTS

02200 Site Preparation

Moskie

QRTS

Barriers

Joos Concrete

PROJECT PACKAGES

Current Architectural

Current Plumbing

Current Set

Current Structural

Coffee Spill (Bakers Concrete)

PRINTING OPTIONS

Quantity:

Media type:

Bindery:

Size:

[ADD TO ORDER](#)

CONSULTANTS

SELECT ALL CONSULTANTS

01560 Temporary Barriers & Enclosures

QRTS

02200 Site Preparation

Moskie

QRTS

Barriers

Joos Concrete

CURRENT ORDER

Qty	Package	Consultant
1	0618demo	QRTS
1	0618demo	Moskie
1	0618demo	QRTS
1	0618demo	Joos Concrete
1	0618demo	Joos Concrete
1	0618demo	Joos Concrete
1	0618demo	Northwestern Builders
1	0618demo	CDW
1	0619 Demo	QRTS
1	0619 Demo	Moskie
1	0619 Demo	QRTS
1	0619 Demo	Joos Concrete
1	0619 Demo	Joos Concrete
1	0619 Demo	Joos Concrete
1	0619 Demo	Northwestern Builders
1	0619 Demo	CDW

Delivery Notes:
Special Instructions to Demo Reprographics:

CONSULTANT: QRTS **Bill Tes ARCHITECT'S Demo Reprographics Account**
 Message from ARCHITECT:
 CONSULTANT Contact: Bruce Erickson **Date Time Done: 4/27/2003 9:50:00 PM**
 Deliver To: QRTS **Deliver Via: Courier**
 Deliver Attn: Bruce Erickson
 Address: 3005 Randolph Lane
 City: Plymouth
 State: MN Zip: 55555
 Phone: 5555555 Fax: 5555554

Order Page	CITY	Drawings	Size	Media Type	Delivery	Remove
011 Demo	1	architectural A-101, A-101A, A-102, A-102A, A-103, A-104 A-105, A-106 mechanical M-111, M-111A, M-112A, M-112B, M-113, M-114 M-115, M-116 plumbing P-111, P-111A, P-112, P-113, P-114, P-115 structural S-101, S-102, S-103	FULL SIZE	White Bond	Staple	Remove
012 Demo	1	architectural A-101, A-101A, A-102, A-102A, A-103, A-104 A-105, A-106	FULL SIZE	White Bond	Staple	Remove

Review all details of the order. You may remove specific details by clicking on "Remove." This will remove that portion of the order while leaving the rest of the order intact. After verifying the order is correct, click the "Submit Order" Button.

An order confirmation will appear on both the next screen and also via email. Notification of this order will also go to your Reprographer who will then begin the printing process.

Thank you for your Order. Your Work Order is: 80
You will be sent an email confirmation shortly.