



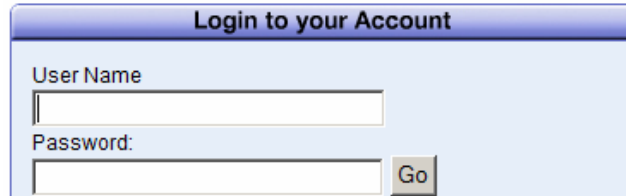
PlanWell EWO

User Manual

PlanWell EWO User Guide

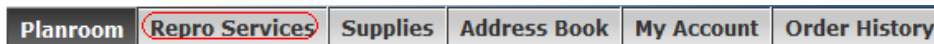
The PlanWell EWO service is simple to use, and its e-commerce functions are likely to be familiar, especially if you use PlanWell. You don't need any special tools or software to use it; just make sure your Web browser is current (Microsoft Internet Explorer v.5.5 or higher; or Netscape v.6.0 or higher).

You can access PlanWell EWO by entering your username and password in the "Login to Your Account" option. This is the same username and password as you use for PlanWell Enterprise or PlanWell BidCaster activity.



It is important to note that although ordering through PlanWell Enterprise can be completed by a non-registered user, EWO activity can only be completed by a registered user. Please contact your reprographer if you do not yet have an account.

After successfully logging in, you must begin the EWO process by choosing the "Repro Services" tab.



Ordering Through EWO

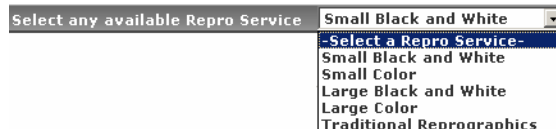
The order process is a four step process. Step 1 begins after selecting "Repro Services"

Note: Throughout the order process you will find "breadcrumbs" showing where you currently are and providing you with both a step forward and a step backward.



Step 1: Print Options

Begin your ordering process by selecting which service you are ordering from the dropdown menu at the top of the page. Please note that the services list may vary from that which is shown in the below example.



Service Selection Example

In the Order Pane below the service, you have two ways to add files to your order. If you would like to upload digital files with this order, please browse to the location of the digital file. It is important to note that you may only add one file or one .zip

bundle at a time. We will discuss how to upload multiple files in the “Uploading multiple Files” section below.

The second method for adding a document to the order is to simply type in the name or description of your hard copy originals.

Browse to attach file	No. of Originals	Type of Originals	Page Size	Orientation	Duplex	
<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>	Digital	8.5X11	no change	No	<input type="button" value="Add to Cart"/>
OR Type in Orig. description	Text Stock	Cover Stock	Cover Options	Binding		
<input type="text"/>	20# Bond	Acco Covers	None	Staple		

Adding Items to Cart Example

Next, specify the production options for this item. Based on your login information, default printing options may have populated; these default options can be accepted or changed.

Choose [Add to Cart] to add the item to your order.

You may now continue on by choosing another document and/or service to add to your order. You may add as many documents and services to an order as you wish. For example, in the below sample we have added both small format black and white and large format black and white items to our cart.

As you complete the document selection process, the shopping cart will clearly list all items currently in your cart.

Step 1: Print Options		Step 2: Delivery Options		Step 3: Review		Step 4: Submit		<input type="button" value="Empty Cart"/>		<input type="button" value="Next"/>	
Small Black & White	# of Orig.	Type of Orig.	Orientation	Binding	Page Size	Duplex	CoverStock	Text Stock	Cover Options	Edit Del.	
1 01000.pdf	50	Digital	no change	Staple	8.5X11	No	None	20# Bond	None		
Large Black & White	# of Orig.	Process Media		Output Size		Binding	Reverse Read	Edit Del.			
1 00000001.tif	1	Digital/Bond		30X42		None	No				
2 00000002.tif	1	Digital/Bond		30X42		None	No				
3 247.tif	1	Digital/Bond		30X42		None	No				

Shopping Cart View

Throughout the order process you may edit or remove items from your order by selecting either the edit icon or the remove from cart icon . You may also choose to completely empty your cart by selecting the [Empty Cart] button.

When the cart contains all items you wish to include in this order, choose [Next] to continue the order process.

Note: If you have indicated that you require a Job Name, Job Number or PO Number on orders, you will need to indicate this information before continuing.

Step 2: Delivery Options

EWO allows you to set the quantities and distribution of your order through the same processes listed in the PlanWell Enterprise section of this document.

Step 1: Print Options Step 2: Delivery Options Step 3: Review Step 4: Submit

Add Recipient(s) Remove Recipient(s) Customize Shipping Address Special Delivery Notes

Note: Select an item no. in Cart for details

Current Set 5/15/2004 14:16:00 [del]

Items in Shopping Cart

	1	2	3	4	5	
	▼	▼	▼	▼	▼	
	0	0	0	0	0	

Recipient(s) name & shipping address

Jerry Jacobs [Solomon Frisk Demo]

3005 Ranchview Lane,
Plymouth, Minnesota 55442

Delivery Options

Delivery Truck
5/15/2004
Select Time

Item Quantity Totals: 0 0 0 0 0

Delivery Options Window

Recipients will be listed down the left column, shopping cart items along the center and delivery options along the right. Transmittal information may be determined from options listed at the bottom of the window (not shown in illustration).

Recipient Information

EWO allows for easy distribution of documents to additional recipients. Four options are available for the management of this process.

Add Recipients – This option will bring you into an address book window where you may begin the process of selecting recipients.

Order > Delivery Options > Select Recipients

Please select existing user(s) to add recipient(s) to current order.

Master Address Book Users Master Address Book Groups

add selected user(s) as current order recipients create new employee create new contact

<input type="checkbox"/>	Contact	CDW	Tom Hagerty	-
<input type="checkbox"/>	Contact	Concrete Barriers	Ben Lind	01000 - GENERAL REQUIREMENTS
<input type="checkbox"/>	Contact	Concrete Barriers	Joe Jackson	01020 - ALLOWANCES
<input type="checkbox"/>	Contact	Concrete Barriers	Mark Cline	01080 - IDENTIFICATION SYSTEMS
<input type="checkbox"/>	Contact	Concrete Barriers	Steve Johnson	-
<input type="checkbox"/>	Contact	Cutting Edge	Dominic Roads	01000 - GENERAL REQUIREMENTS
<input type="checkbox"/>	Contact	Cutting Edge	karitest_	01010 - SUMMARY OF WORK
<input type="checkbox"/>	Contact	Cutting Edge	karitest_	01050 - FIELD ENGINEERING
<input type="checkbox"/>	Contact	Digital Steel	Dave Digital	00110 - Marketing

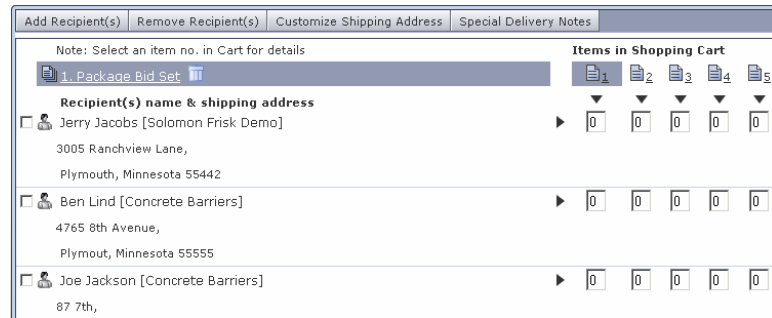
Add Recipients Example

Using the tabs along the top of this window, you may select recipients from the four address book options. You may also use the search features along the left column to find a specific user more quickly.

Master Address Book Users – This list will contain all employees and contacts in your address book. In addition to their name and company name, you will also be able to view any trade information assigned to them.

Master Address Book Groups – Groups are logical organizations of users from the master address book. For example, you may choose to create a group of all users in a specific trade or within a specific company.

After locating your desired recipient(s), choose [add selected user(s) as current order recipients]. All recipients will now be listed in the main Delivery Options window.



Recipients in the Main Delivery Options Window Example

Remove Recipients – Selected recipients may be removed from the order distribution by first selecting the box next to their name, then selecting [Remove Recipients].

Customize Shipping Address – If the order delivery address needs to be edited, select the box next to the recipient's name and select [Customize Shipping Address].

Once you have edited the information, select [Save Changes]. It is important to note that changes made are temporary only.

The screenshot shows a form titled 'Solomon Frisk Demo [Jerry Jacobs]'. The form contains the following fields: *First Name (Jerry), *Company Name (Solomon Frisk Demo), *Address 1 (3005 Ranchview Lane), *City (Plymouth), *Country (USA), MI-Last Name (- Jacobs), *Phone / Fax (7636945913), Address 2 (empty), *State (Minnesota), and *Zip Code (55442). At the bottom right of the form, there are two buttons: 'Save Changes' and 'Close'.

Customized Shipping Address Example

Special Delivery Notes – For each recipient, customized information may be added by first selecting the box next to the recipient(s) and choosing [Special Delivery Notes]. Custom text may be entered and saved for that specific recipient.

Items in Shopping Cart

Once all recipient information has been entered, you may select the desired quantities of each item for each recipient.

Each item in the shopping cart has been assigned a number. To view the details you may either hover over the item number or you may click on the item number. After clicking on the number, you will find the details regarding it listed to the left.



You may remove items from the order by selecting the remove from cart icon in the item description.

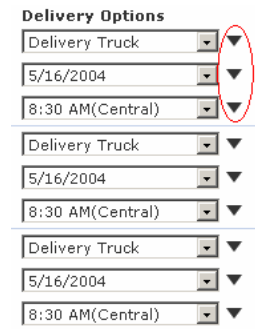
Quantities for each item may be assigned either universally (such as one set of “Current Set” for each recipient), individually or through a combination of both methods. To set a universal quantity, type in the number in the quantity box and use the ‘apply over’ arrow or ‘apply down’ arrow to assign to all users.



Individual quantities may be assigned by simply typing in the quantity in the appropriate box. Although you may have utilized the universal quantity tools, you may override any of these settings by simply typing in the correct amount.

Delivery Options

As with items in the shopping cart, delivery options may be assigned universally, individually or a combination of both. Select a delivery method, due date and due time. You may apply this information universally by utilizing the ‘apply down’ arrows.



Note: Each field has its own drop down arrow therefore applying information universally requires 3 different ‘apply down’ arrow clicks.

Sending the Originals Options

You will need to specify the appropriate method for your reprographer to receive the documents you are ordering. You may choose to send the originals through the following four options: “I require a pick up”, “I will drop them off”, “I will upload with the order”, or “Already on file”. If in step one you browsed to the location of your file, by default “I will upload with the order” will be selected.

Options to Send Originals:

- I require a Pick up
- I will drop them off
- I will upload with the order
- Already On File

Return Originals to:

- Sender's Address
- Different Address
- Keep On File

Returning the Originals Options

You will need to specify what you would like the reprographer to do with your original files. You may choose to have the originals returned to the following three options: “Sender’s Address”, “Different Address” or “Keep on file”.

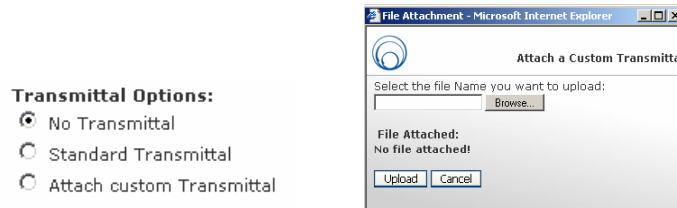
Note: If you select “Different Address”, you will be prompted for the address.

Transmittal Options

The final step on the Delivery Options window is to specify transmittal options. You may select "No Transmittal", "Standard Transmittal" or "Attach Custom Transmittal".

By selecting "Standard Transmittal", you will have additional options to customize text in the transmittal. This may be done by selecting the desired recipients, typing in the customized text and choosing [Save]

By selecting to attach a custom transmittal, you will be brought to a dialog box which will allow you to browse to the location of the desired transmittal.



Finally, you will need to specify which location you would like to place this order to. Note: This is only necessary if your reprographer has multiple locations.

When all required information has been completed, you may proceed with your order by selecting [Next].

Step 3: Review

The review window will allow you to see all details of the order. Where available, you may also see a price quote for all items ordered.

Once you have carefully reviewed the order, you may finish the order process by selecting [Submit Order]

Step 4: Submit

You will be informed of your successful order submission on this final order processing window. You will be provided with an order number and will have the opportunity to print the distribution, print the complete order or return to the project home.

Uploading Files

If you specified that you would upload your files with the order, the upload window will now automatically appear. All files indicated will be listed in the window and you may send these files via FTP by choosing [Upload Now].

You may watch the progress of your upload in the lower window. After all files have uploaded, you will see an "Upload Successful" message in the progress window.

Uploading Multiple Files

At the beginning of the EWO section of this manual, it was discussed that when attaching digital files, it must be done by selecting one file or one .zip bundle at a time. Within the upload applet, you have the option to add multiple files at one time. Any changes to the four step ordering process necessary to complete this process are outlined below.

Step 1: Print Options

Follow the steps outline above for step 1 however type in a description of your file rather than attempting to browse to a file. It is important that you accurately indicate the number of files you will be uploading.

Step 2: Delivery Options

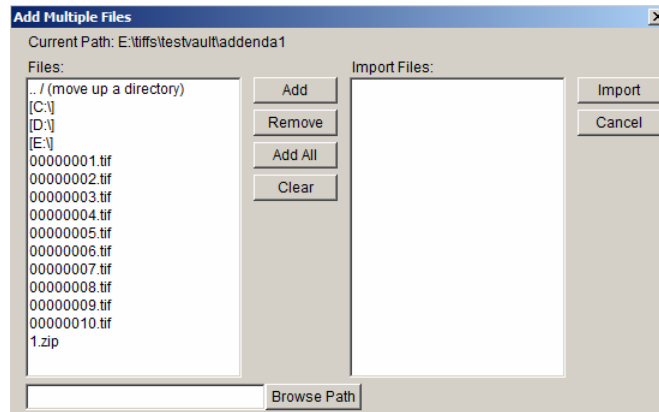
All functions in step 2 remain the same as outlined above however you must indicate that you will upload the files with this order.

Step 3: Review/Step 4: Submit

All functions remain the same as outlined above.

Upload Applet

When the upload applet appears, click on the option [Add Multiples].



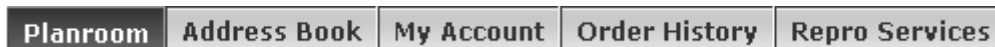
Add Multiples Window

Within the add multiples window, double click on the drive letter and continue to double click on folders until all desired documents are listed. Choose [Add All] to add all files. It is important to note that although drive letters in the above example are still shown, it is only the files that will be added.

Choose [Import] to add these files to the main upload applet and then complete the upload process as outlined above by choosing [Upload Now].

Additional EWO Features

Along the top of the company planroom are tabs for additional project management features. When you select any of these features, the available options for that feature are listed. It is again important to note that these features may or may not be available to all users for all projects.



Planroom

The Planroom tab enters the PlanWell Enterprise program. This program will not be discussed in this manual

Address Book

When selecting the address book tab, you will see your complete address book. From this list, you may choose to view the details of any user by putting a check in the box next to their name and choosing [View User Details]. You may also delete a specific user by again placing a check in the box next to their name and choosing [Delete User(s)].

From within this Users view, you may also choose to add additional employees or contacts to your address book.

Add Employee

After selecting [Add Employee], you will need to enter in all information regarding this new employee including login information, permissions and their order dollar limit.

Contact Information

* First Name * Last Name

* Company Name
Select an existing company name from the Address Book.

* Address Line 1 Address Line 2

* City * State

* Country Zip Code

* Office Phone / Ext. / Cell Phone

Alternative Phone Fax

* Email

* Indicates Required Information

Administrative Privileges

* Employee Permissions

Administrator [More Info](#)

Select all permissions below

Managing Contacts

Managing Groups

Place EWO Orders

Login Information

* Login

* Password Re-enter Password

Other Important Information

Primary Location

Trade [Edit](#)

Comments/Remarks

* Order Limit
(\$ Amt. per Order)

Status

Add Employee Window

Note: Be careful when assigning the order limit as the employee will not be able to complete any orders exceeding that amount.

By selecting "Edit" next to "Trade", you will have the opportunity to add specific trade information to this employee. Additionally, you may add ratings for each specified trade. As ratings of 1 through 5 can be assigned, it is recommended that you define each of these ratings appropriately for your company.

Highlight the appropriate trade, specify a rating of 1 through 5 and choose [>>] to add the trade to the "Assigned Trade(s) for selected user" column. You may assign as many trades as appropriate; each with a different rating if necessary. By accurately assigning this information, you will be able to fully utilize the search functionality throughout PlanWell.

Assigning Trade Window

If necessary, you may also create additional trade codes and descriptions. This process is completed by indicating a unique trade code and description and choosing [Add New/Edit Trade].

Choose [Save Changes] to save all trade information

Select [Save Changes] from the "Add Employee" window to add this new employee into the PlanWell system. This new account will become active within 24 hours; please contact your PlanWell provider if access to this account is necessary more quickly.

Add Contact

To add an additional contact, choose the [Add Contact] button. You will be brought to a window very similar to the Add Employee window however you will not be asked to specify login information, permissions or order dollar limits. Again, be sure to accurately assign trade information.

Manage Groups

By choosing [Manage Groups] you will be brought into a detailed address book search window. From within this window you may select an existing group to edit or build a new group by narrowing down the master address book through the available search criteria. After finding all desired group participants, name the group and choose [Save as new Group]. If editing an existing group, you may save your group membership changes by choosing [Save Changes to Selected Group].

sel	Company name, Contact Name, City, State, Zip	Email	Fax	Phone
<input checked="" type="checkbox"/>	CDI, Andrew Smith, Bloomington, Minnesota, 55347	bidcaster.demo@gmail.com	763-225-0624	555-5555

Manage Groups Window

In addition to the options listed, the Address Book tab includes additional address book management features.

Import Contacts

Although we have just discussed how to add an individual employee or contact to your address book, if you wish to add multiple users you may do this quickly and easily through the Import Contact feature.

After selecting [Import Contacts], you will need to specify the program you will be importing from and browse to the location of the file containing your contact information. Next, please indicate if a column header is present and how you would like to handle duplicate records. Choose [Next] to continue the import process.

The Match Address Book Fields window will allow you to match the fields within your document to fields PlanWell requires. Once these matches are made, select [Next] to complete the import process.

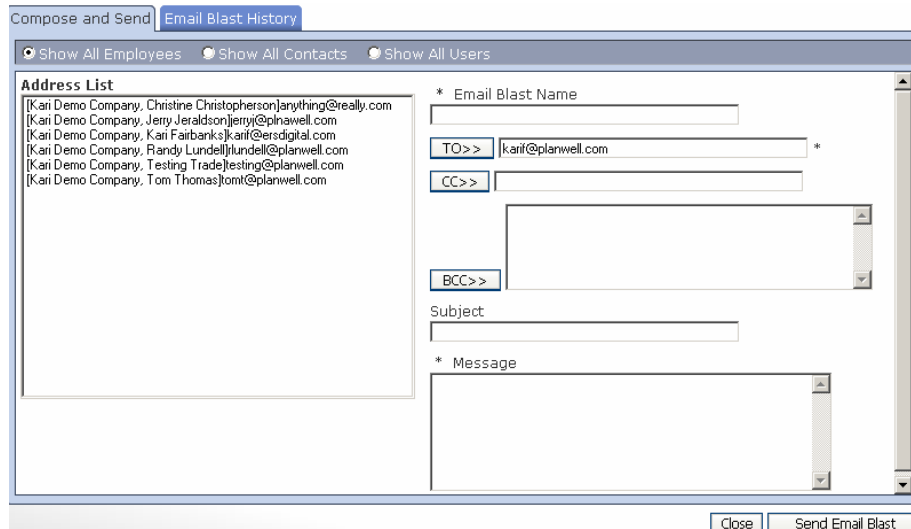
If desired, you may also utilize PlanWell's import templates to complete the import process. By choosing "Click here to download a Standard PlanWell template file along with help instructions", you will be provided with all tools necessary to format your address book file and upload the resulting file into PlanWell.

Export Contacts

Occasionally you may wish to export your address book for review. This can be accomplished by selecting [Export Contacts]. This opens a standard download window where you may select to download your entire address book or any desired group. After making this selection, choose [Export] and indicate a location to save this file to; you may access this file once the download is complete.

Send Email

This feature will allow you to send an email to users in your address book. Begin this process by selecting [Send Email].



Send Email Feature

Begin by defining an Email Blast Name. Be sure to name this clearly as you may choose to view details of this message at a later date.

Choose the appropriate option for “Show All Employees”, “Show All Contacts” or “Show All Users”. From the resulting address list, choose the recipients for this email by highlighting the name and then select either the [To>>], [CC>>] or [BCC>>] buttons.

Type in the subject and message and select [Send Email Blast]. This email will now be sent to all recipients.

By choosing the [Email Blast History] tab, you may view or resend this message. When choosing to resend, you may choose additional or different recipients for this message.

User Permissions

When initially adding a new employee to your address book, you were given the opportunity to define permissions for this employee. If necessary, you may choose to edit these permissions at a later time by selecting [User Permissions].

This can be done by highlighting the employee, specifying the appropriate permissions and choosing [Save Changes].

When accessing the address book tab, your initial view is of all users. You may change views from users to groups by selecting the [Groups Listing] tab. Within this window you may view, edit or delete any existing groups.

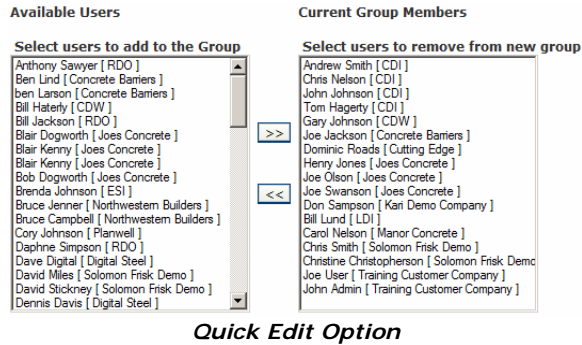
Group membership may be viewed by clicking on the group name or by placing a check box next to the name and choosing [View Group Details].

Obsolete groups may be deleted by placing a check box next to the name and choosing [Delete Group(s)]. If desired, you may delete multiple groups at one time by selecting all groups prior to making the [Delete Group(s)] selection. Although the group will be deleted, all members of that group will remain in the master address book.

Editing Groups

Group membership may be edited through two functions – Quick Edit and Advanced Edit.

The **Quick Edit** option will allow you to view your master address book and add users to your group by highlighting the user in the “Available Users” column and choosing [>>] to add them to the “Current Group Members” column. Users may be removed from a group by highlighting their name in the “Current Group Members” column and choosing the [<<] button.



The **Advanced Edit** option will allow you to utilize the detailed address book and search criteria previously discussed in “Manage Groups”.

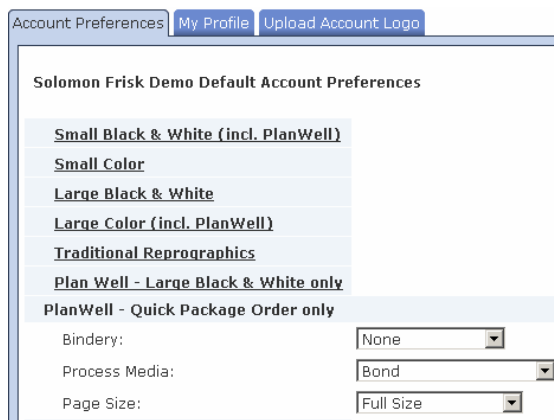
Create New Group (Quick)/Create New Group (Advanced)
 You may also choose to create additional groups by selecting either [Create New Group (Quick)] or [Create New Group (Advanced)]. From within this window, enter a group name and add users utilizing either the Quick or Advanced options previously discussed.

My Account

Within the [My Account] feature, you will have the ability set your account default preferences, view your profile information and upload your account logo.

Account Preferences

You may set default online ordering information for every service your reprographer offers through the Account Preferences tab. By selecting the link before the service name, you will be given a list of options which can have defaults assigned to them.



In our example, we selected Planwell – Quick Package Order Only. We now may specify our default printing options for Bindery, Process Media and Page Size. By using the drop down arrows next to each of these categories, we may choose our default from all options available.

Note: These are simply defaults. When ordering you may choose different options.

When all default information has been selected for a specific service, choose [Save Changes]. You may now select the next service and repeat the process.

Note: You must choose [Save Changes] between each service.

My Profile

The [My Profile] tab allows you to view standard user information PlanWell utilizes for your account. By selecting the [Change Profile] option you may change any of your information listed. By selecting [Change Password] you may change your password.

Upload Account Logo

If you would like to further personalize PlanWell EWO, you may add your company logo for all of your projects. This can be accomplished through the [Upload Account Logo] tab.

Simply browse to the location of your logo file and choose [Upload Logo] from the upper right corner.

Once a logo has been uploaded, you may either edit or delete that logo by selecting the appropriate option.

Manage Templates

This option is only viewable when accessing PlanWell from a provider who also offers BidCaster. This function will be discussed in detail in the BidCaster section of this document and in the full BidCaster User Manual.

Order History

The order history tab will provide you will information on all previously placed orders. The main screen will provide you with the order number, job name, service, ordered by details, date ordered and the current status within your reprographic shop.

Further options are available by putting a check in the box next to the order, and choosing [View Order Details], [Reorder], [Re-Upload Files], or [Delete Order(s)].

View Order Details Reorder Re-Upload Files Delete Order(s)				
	Order No.	Job Name	Service	Ordered By
<input checked="" type="checkbox"/>	310489	Project5(ERSD_Custom Bundles Only)	PlanWell	Jerry Jacobs
<input type="checkbox"/>	180448	Project2(ERSD_Project2)	PlanWell	Kari Fairbanks
<input type="checkbox"/>	180277	project1(ERSD_Project1)	PlanWell	Kari Fairbanks
<input type="checkbox"/>	180273	project1(ERSD_Project1)	PlanWell	Kari Fairbanks

View Order Details

By selecting this option, you will open a window showing all details of this order including billing information, requested delivery due date and time, items ordered, special instructions indicated and distribution details. Further, you will have the ability to print this information for your records.

Reorder

By selecting [Reorder] you will be brought back into the order process with all documents and printing options pre-selected. This option will allow you to print an additional order exactly as the first was printed.

Re-Upload Files

Occasionally you will find that you would like to re-upload files you previously uploaded to your PlanWell provider. Begin this process by selecting the order your upload references and choose [Re-Upload Files]. If your PlanWell

provider has multiple locations, you will need to specify which location you would like to upload these files to and choose [OK]. You will now be presented with the upload applet and may attach documents in the same way outlined above.

Delete Order(s)

You may find that this order list contains information regarding orders you no longer need to reference. You may remove these orders from the list by selecting [Delete Order(s)].

Note: This simply removes this order from the order history listing. It does not cancel printing on a newly submitted order. Further, this option does not remove references to this order from the Planholders list.