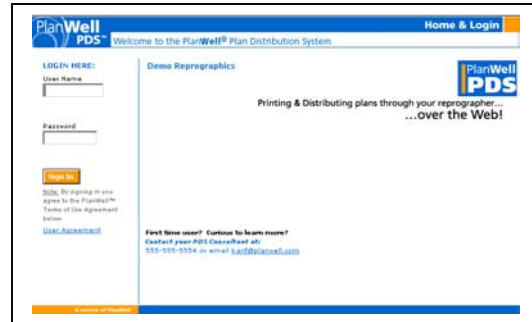


PDS Detailed User Guide

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.



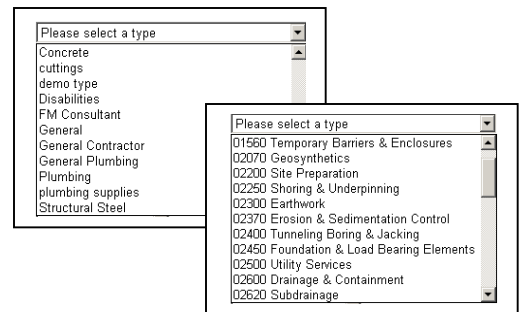
MY PROJECTS:	
PROJECT NAME	PROJECT NUMBER
Abbott	56465
E Airport	East Airport Buildings
Econolot	Econolot Building
Hammand	65465
Hammond Center	5466
Hopkins Art Institute	4763
main street	829451
Northwestern	90878
Star Building	8547545
W DCW Building	2500
W Airport	West Airport Buildings

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	MANAGE CONSULTANTS	ORDER HISTORY	CONTACT PLANWELL PDS ADMINISTRATOR
--------------------------------	------------------------------------	-------------------------------	--

Add Consultant Option ADD CONSULTANT

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 may 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. 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 (recommended). 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.

Manage Consultants Option MANAGE CONSULTANTS

Occasionally you will need to modify the information 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 make changes to this consultant’s information, or you may also choose to remove this consultant from your address book by selecting “Delete.”

Order History Option

ORDER
HISTORY

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 titles. For all orders listed, you are able to view the date the order was placed, the order number, the status of this order as maintained by your Reprographer, and you may also 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	Revised Order - Status: Pending				
- 5/13/2003 - #38	Revised Order - Status: Modified				
- 4/26/2003 - #37	Revised Order - Status: Waiting For Appro				
- 4/26/2003 - #34	Revised Order - Status: In Production				
- 4/24/2003 - #29	Revised Order - Status: Pending				
- 4/24/2003 - #28	Revised Order - Status: On Hold				
- 4/24/2003 - #27	Revised Order - Status: Pending				
Concrete Banners					
Star Building - 5/23/2003 - #47	Revised Order - Status: Waiting For Appro				
Star Building - 5/13/2003 - #42	Revised Order - Status: Open				
Star Building - 4/25/2003 - #33	Revised Order - Status: Modified				
Star Building - 4/25/2003 - #22	Revised Order - Status: In Production				
Star Building - 4/25/2003 - #21	Revised Order - Status: Modified				

Work Order: 65

Order Date: 4/19/2003 Project: 0010 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 7:05:00 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:

Line Package	Quantity	BCIF	Description	Unit	Media Type	Shadows
1	1		architectural	FULL SIZE	White Bond	Staple
			A-102, A-103			
			mechanical			
			M-112			

Contact Planwell PDS Administrator Option

CONTACT PLANWELL
PDS ADMINISTRATOR

Contact PlanWell PDS Administrator

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

Your Name: Jerry Jacobs

Messages:

Submit Reset

OR

Contact PlanWell PDS Administrative Office directly:

If 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.

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 clicking on 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 or 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 CONSULTANTS to add to project and click the "Add to Project" button below.

Add to Project **Reset**

<input checked="" type="checkbox"/>	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 from which you wish to add consultants 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 project consultants, select the consultant's name. You will be given the opportunity to modify this consultant's information or to remove this consultant from the project. Please note, if you select to remove the consultant, this will simply remove the consultant from the project, not the master address book. Additional consultants can be added and removed throughout the life of the project by following these same steps.

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 document thumbnails, which can be viewed by selecting "Preview."

MASTER REVISIONS: 1 0		Rev. Displayed: 1 ▲	
Architectural			
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			
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			
DRAWING #	DRAWING NAME	REV.#	Delta Description REV. DATE
P-101		0	4/2/2003 Preview

PROJECT: Abbott [Link To Project](#)

Original Scan Date: 6/24/2003
 PlanWell PDS user 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	4/24/2003 Details	
<input type="checkbox"/>	A-102	2	4/24/2003 Details	
<input type="checkbox"/>	A-103	1	4/24/2003 Details	
<input type="checkbox"/>	A-104	0	4/24/2003 Details	
<input type="checkbox"/>	A-105	0	4/24/2003 Details	
<input type="checkbox"/>	A-106	0	4/24/2003 Details	

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

DRAWING #	DRAWING NAME	REV.#	Delta Description	REV. DATE
<input type="checkbox"/>	M-111	0	4/24/2003 Details	
<input type="checkbox"/>	M-112	0	4/24/2003 Details	
<input type="checkbox"/>	M-113	0	4/24/2003 Details	
<input type="checkbox"/>	M-114	0	4/24/2003 Details	
<input type="checkbox"/>	M-115	0	4/24/2003 Details	

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 included 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 user Imaging for Windows to preview the drawings. [Close This Window](#)

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		0	4/30/2003	architectural	000000	
A-103		9	5/27/2003	architectural	000000	
A-104		6	4/25/2003	architectural	000000	
A-105		4	4/2/2003	architectural	000000	
M-111		2	4/1/2003	mechanical	000000	
M-113		4	4/2/2003	mechanical	000000	
M-114		2	4/1/2003	mechanical	000000	
P-112		1	4/1/2003	plumbing	000000	
P-113		1	4/1/2003	plumbing	000000	

[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 - QTY: 28](#) | [Order History](#) | [Place Order](#)

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

- 01560 Temporary Barriers & Enclosures
 - QRTS
- 02200 Site Preparation
 - Moskie
 - QRTS
- Barriers
 - Joel Concrete
- Concrete
 - Joel Concrete
 - Joel 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](#)
- Brucel 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. If you would like this order to be sent back to you, allowing you to handle any distribution, select yourself in the "Deliver To" option ("Architect" in our example). If you would like your Reprographer to handle all distribution, select "Consultant". 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 the consultant(s) 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

Joel 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

Joel Concrete

CONSULTANTS

SELECT ALL CONSULTANTS

01560 Temporary Barriers & Enclosures

QRTS

02200 Site Preparation

Moskie

QRTS

Barriers

Joel Concrete

CURRENT ORDER

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

Delivery Notes:
Special Instructions to Demo Reprographics:

CONSULTANT: QRTS **Bill Ten ARCHITECT'S Demo Reprographics Account**
 Message from ARCHITECT:
 CONSULTANT Contact: Bruce Erickson **Date Time Done: 4/27/2003 9:30:00 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

Package	Qty	City	Drawings	Size	Media Type	Staple	Remove
BillDemo	1		architectural A-101, A-101A, A-102, A-102A, A-103, A-104 A-105, A-106 mechanical M-112, M-111, 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
Bill 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

[Add More To Order....](#)

Confirm 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. You may also choose to "Add More To Order". This button will bring you back to the previous screen where you can add additional pieces to the order. 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.

Consultants who have been given permission to log onto PDS have different permissions and abilities than the project owner. If you are interested in reviewing what your consultants are and are not able to do online, please read the PDS UserGuide for Subcontractors and Consultants.