OnBase®

Foundation EP5

Electronic Plan Review

Reference Guide

Includes:

Administration Guide

User Guide

Copyright

Document Name .... Electronic Plan Review
Department/Group .... Documentation
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SYSTEM ASSESSMENT TOOL

Overview

The Electronic Plan Review module allows public users to conveniently and securely upload electronic plan documents into OnBase. The uploaded plan documents can be routed through OnBase and reviewed by multiple plan reviewers to ensure their completeness and compliance with all necessary regulations.

If any of the uploaded documents need to be modified, a reviewer can note the problem by adding a comment onto the relevant plan documents or the entire project file. After all plan reviewers finish reviewing the project documents, all project documents and related comments will be compiled together and published to the Plan Review website. The submitter can then download the document and view all of the reviewer's comments. After the submitter has modified the plans as required, the submitter can resubmit the plans to begin another review cycle.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Plan Review functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 1.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 1.

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the Plan Review add-on license is required to access standard Plan Review functionality.

Additional Licensing

Additional licensing may be required to use Reporting Dashboard in conjunction with Plan Review. For the licensing requirements of Reporting Dashboard, see the **Reporting Dashboards** documentation.

Legacy Licensing

This module requires the **Plan Review** license. A **Plan Review Named User** or **Plan Review Concurrent Client** license is also required to use Plan Review.

A **Reporting Dashboards** license is required to use Reporting Dashboards in conjunction with Plan Review.

Check your current licensing status by selecting **Utils | Product Licenses** from the Configuration module.

OnBase® Foundation EP5

Electronic Plan Review

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Plan Review in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Plan Review and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Databases Supported
- Server Supported Operating Systems
- 64-Bit Server Hardware Requirements
- Server Browser Requirements
- Unity Client Platform Hardware Requirements
- Unity Client Browser Requirements
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Redistributable Package Requirements
- Third-Party Software Compatibility
- About Virtual Environments
- 64-Bit Support Statement
- Windows User Account Control Statement

Unity Client Supported Operating Systems

- Windows 8.1
- Windows Server 2012 R2
- Windows 10
- Windows Server 2016
- Windows Server 2019
- Windows Server 2019 Server Core

- Windows Server 20H2 Server Core

Note: As of OnBase Foundation EP3, the Windows 7 and Windows Server 2008 R2 operating systems are no longer supported. If you are using any of these operating systems, you should not upgrade to OnBase Foundation EP5 until you have upgraded to a Windows operating system supported by OnBase. For a complete list of operating systems that are no longer supported, see the **Technical Requirements Overview for New Installations and Upgrades** document.

Plan Review Website Hardware and Browser Requirements

To run the Electronic Plan Review public-facing website, a user's workstation must meet the following requirements:

<table>
<tr><th>Web Site Component</th><th>Minimum</th><th>Recommended</th></tr>
<tr><td>CPU</td><td>1 GHz</td><td></td></tr>
<tr><td>Memory (RAM)</td><td>1 GB</td><td>2 GB or greater</td></tr>
<tr><td>Free Hard Disk Space (for installing and running the ActiveX Web Client)</td><td>200 MB</td><td></td></tr>
<tr><td>Screen Resolution</td><td>1024 x 768 (1280 x 800)

Note: Using a lower resolution may result in a loss of functionality.</td><td>1280 x 1024 (1440 x 900 widescreen)</td></tr>
<tr><td>Web Browser</td><td>• Edge 92
• Firefox 91
• Chrome 92
• Safari 14.1.1

Note: Earlier versions of each browser may work, but are not officially supported. If issues arise, upgrade your browser as a first troubleshooting step.</td><td></td></tr>
<tr><td>Email Platform</td><td>MAPI 1.1 Compliant Email Client connection and supporting Active Messaging DLLs</td><td></td></tr>
</table>

Licensing

See Licensing on page 1 for licensing requirements.

Upgrade Considerations

The following information should be considered or noted when upgrading Plan Review deployments. Read this information prior to upgrading your version of the Plan Review application.

Unity Client Update for Plan Review

This version of Plan Review has additional Upgrade Considerations when upgrading to it from one of the following earlier versions:

- Any pre-Foundation releases prior to 18 SP 1, Build 250
- Foundation EP1
- Foundation EP2
- Foundation EP 3
- Foundation EP 4

When upgrading from any of these versions, you must ensure that all instances of Plan Review are also upgraded to the new version.

With this release, new service methods were added to Unity Client that impact the Plan Review module. In order for Plan Review to function, you must update Unity Client to the most recent build available. See the **Unity Client** module reference guide for more information.

User Group Configuration for Plan Review

This version of Plan Review has additional Upgrade Considerations when upgrading to it from one of the following earlier versions:

- Any pre-Foundation releases prior to 18 SP 1, Build 250
- Foundation EP1
- Foundation EP2
- Foundation EP 3
- Foundation EP 4

When upgrading from any of these versions, you must ensure that all instances of Plan Review are also upgraded to the new version.

With this version, new permission checks have been added to better secure service methods used by the Plan Review portal. Three User Group options in the OnBase Configuration module must be enabled in order to use the Plan Review Portal. The OnBase user that is used in the Plan Review portal web.config file must be assigned to a User Group with these permissions checked in order for the plan review portal to function properly. These options are found in the Plan Review User Group Options dialog in the user group settings. Make sure the following permissions are set:

- Manage Projects
- Manage Portal Users
- Manager Project Groups

See **Configuring User Groups** for more information.

Upgrading the Plan Review Viewer

If you are upgrading your Plan Review solution to OnBase 16 from OnBase 13 or earlier, you may need to configure your solution to use a previous version of the Plan Review viewer. Please contact your first line of support for additional information on upgrading your Plan Review solution.

Modifying HTML in a Plan Review Eform

The following lines in the PlanReviewDepartment-Proxy-DueDates.htm eform were updated:

```
3 - add end />
4 - add end />
82 - background-color (not baackgound)
91 - text-align (not just align)
113 - commented out line. (<!--spacing: 0px; this isn't a vild property
anymore, not sure what to replace it with -->)
278 - misspelled workflow
swap lines 800 and 801 - the </tr> was in the wrong place
962 - <br> (not </br>)
```

Pre-Installation

Prior to installing Plan Review, you must ensure the following pre-installation steps have been taken.

Install the OnBase Application Server

Ensure that your 64-bit OnBase Application Server has been installed correctly prior to installing Plan Review.

For more information on installing and using the Application Server, see the **Application Server** documentation.

Tip: Prior to installing Plan Review, it is considered a best practice to familiarize yourself with the Client and Server Configuration section of the **Web Server** documentation.

Install the OnBase Unity Client

Ensure that the OnBase Unity Client is properly installed prior to installing Plan Review.

For more information on installing the Unity Client, see the **Unity Client** documentation.

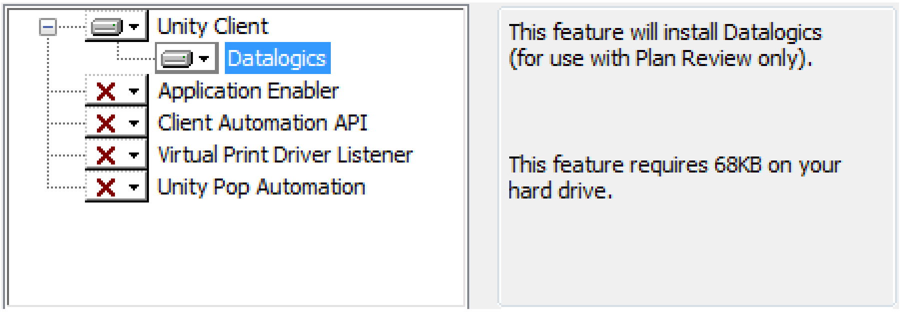
Install the Internal Viewer

Additional files are required in order to use the internal Plan Review viewer. The required Datalogics files can be installed when installing the Unity Client.

You can install the required files using the MSI or using ClickOnce.

Using the MSI Installer

If installing the Unity Client using the .msi file, you must also install the **Datalogics** feature of the Unity Client.



See the Unity Client documentation for more information on installing the Unity Client.

Using ClickOnce

If installing the Unity Client using the ClickOnce installer, the Datalogics files are automatically installed by default. No additional steps are required to install the Datalogics files required for the internal viewer.

Installation

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\"my value\" INSTALL_PROPERTY_2=\"my value 2\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Installing Plan Review

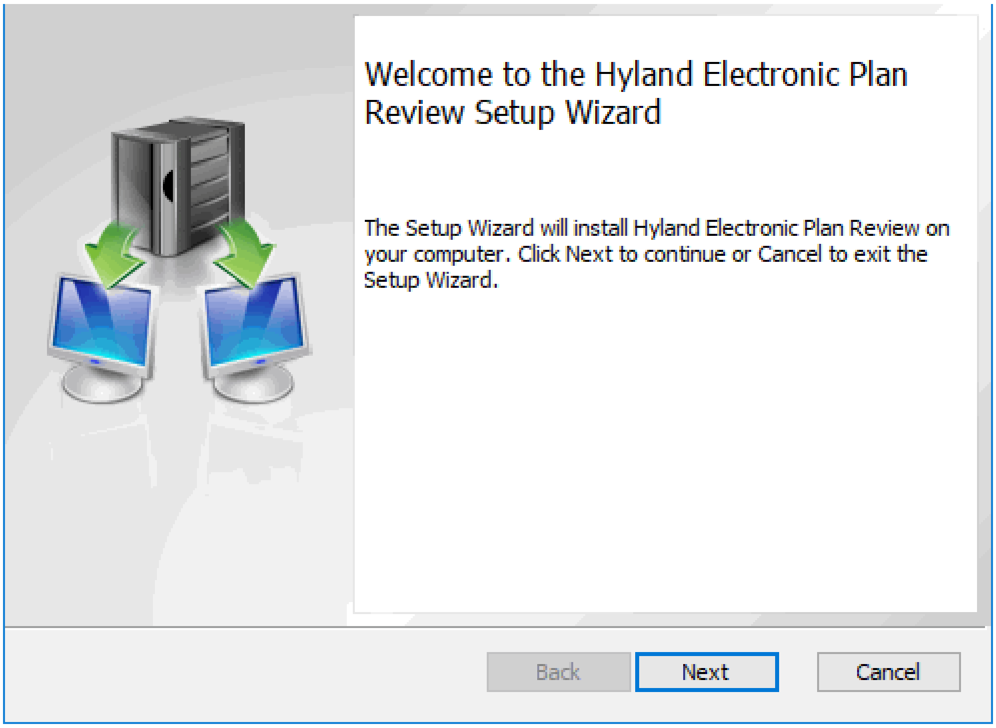
You must install Plan Review using the Plan Review installer to access the Plan Review website.

To install Plan Review:

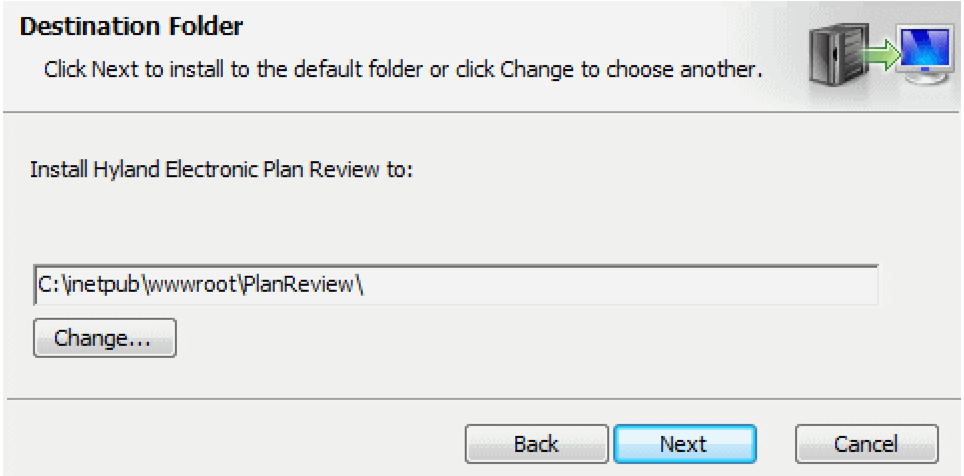
1. Launch the Plan Review installer by running the **Hyland Electronic Plan Review.msi**. This file is usually located in the **\install\x64\Electronic Plan Review** folder of your source installation files.

Tip: You can also install Plan Review from the command line. For more details on running the installer from the command line, see Controlling Installation from the Command Line on page 14.

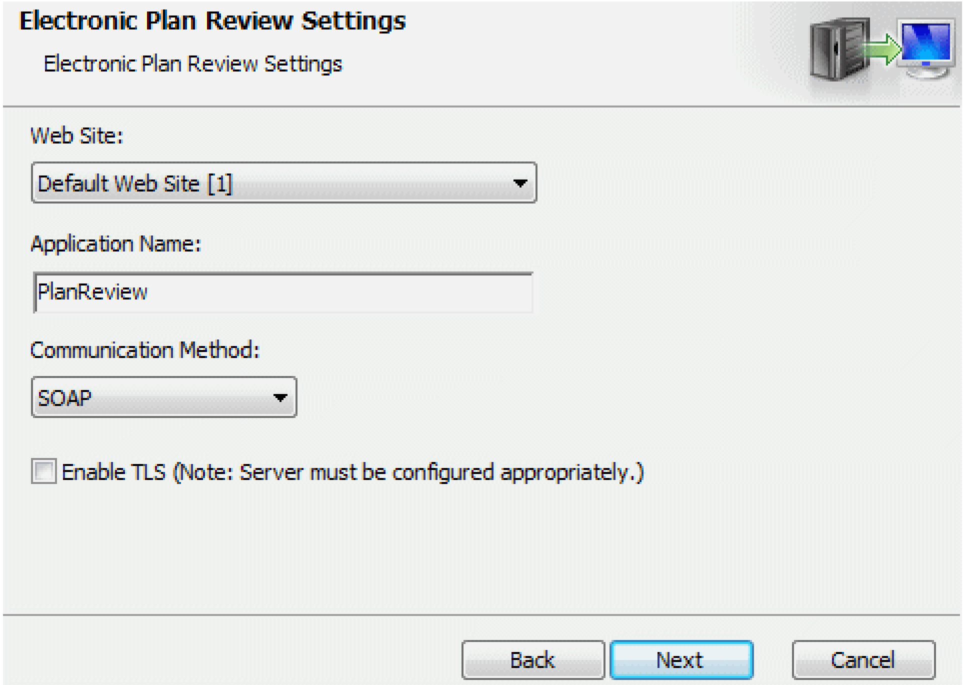
The **Hyland Electronic Plan Review Setup** dialog box is displayed.



2. Click **Next**. The **Destination Folder** dialog box is displayed.

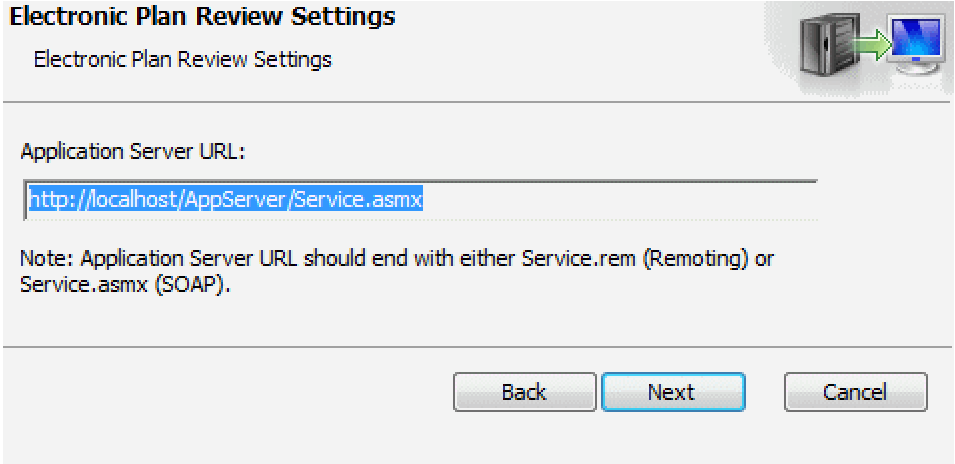


3. Enter the installation directory in the field provided, or click **Change** to browse to it.
4. Click **Next**. The **Electronic Plan Review Settings** dialog box is displayed.

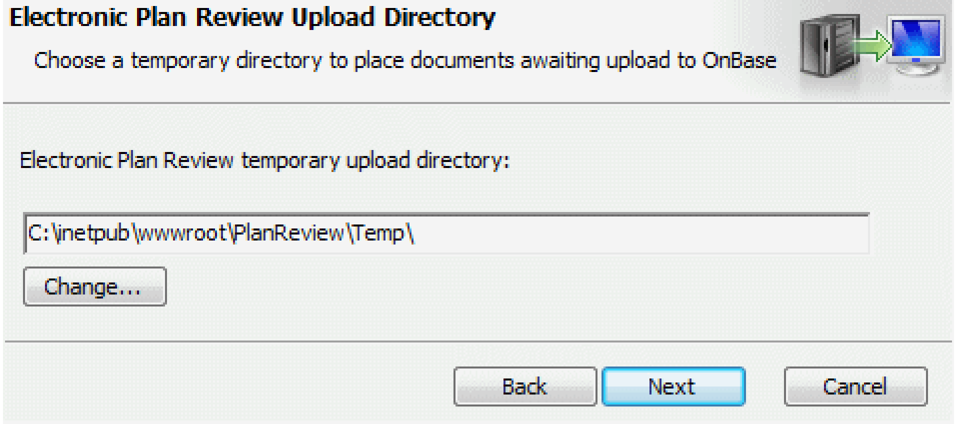


5. Select a web server to install the Plan Review site to from the **Web Site** drop-down list. The **Web Site** list is populated with the web servers configured in IIS and available to the target machine.
6. Enter a name for your Plan Review site in the **Application Name** field.
7. Under **Communication Method**, select **Remoting** if the Plan Review site and the Application Server are hosted on the same machine. If the Plan Review site and Application Server are hosted on different machines, select **SOAP**.
8. Select **Enable TLS** if you want to run your Plan Review site via an HTTPS connection. If this option is selected, you must ensure that your server is correctly configured for HTTPS connections.

9. Click **Next**. The **Application Server URL** dialog box is displayed.

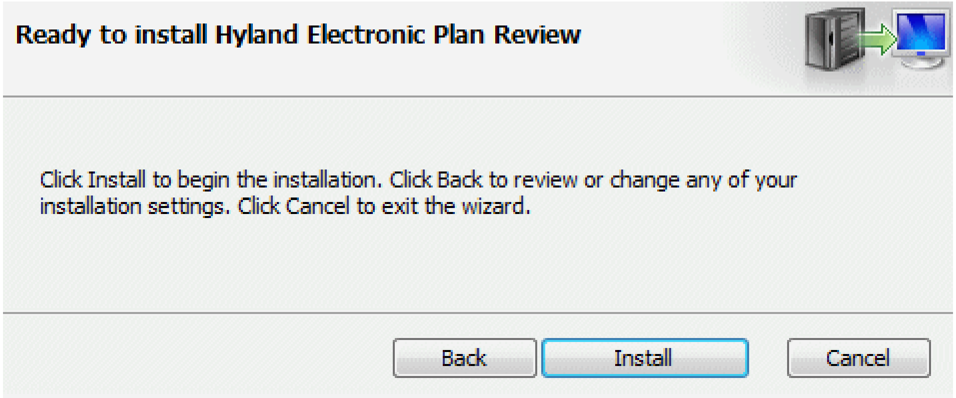


10. In the **Application Server URL** field, enter the full URL to the **Service** page of your OnBase Application Server. The file extension of the service page depends on the **Communication Method** you selected for the Application Server. If you selected **Remoting**, the service page is **Service.rem**. If you selected **SOAP**, the service page is **Service.asmx**.
11. Click **Next**. The **Electronic Plan Review Upload Directory** dialog box is displayed.



12. Enter the directory that will be used to store documents before they are uploaded into OnBase in the field provided, or click **Change** to browse to it.

13. Click **Next**. The **Ready to install** dialog box is displayed.



14. Click **Install** to continue with the installation, or click **Cancel** to cancel the installation.
15. When the installation is complete, click **Finish**.

Note: In order to ensure that the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

Controlling Installation from the Command Line

The Plan Review installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Plan Review installer, it is not necessary to uninstall the old components before running the installer.

Property Names

The following table lists the properties that you can set during installation:

Property	Description
PLANREVIEW_CLIENT_FILES	This property is used to set the installation directory. For example: **PLANREVIEW_CLIENT_FILES="C:\Inetpub\wwwroot\PlanReview"**
PLANREVIEW_IIS_WEBSITE_ID	This property should be set to the number of your Plan Review Web Site in IIS. For example: **PLANREVIEW_IIS_WEBSITE_ID="1"**

Property	Description
PLANREVIEW_APPLICATION _NAME	This property is used to set the name of the virtual directory used to store your Plan Review site. For example: **PLANREVIEW_APPLICATION_NAME="PlanReview"** By default, this value is set to **PlanReview**.
PLANREVIEW_ SERVICECLIENTTYPE	This property is used to set the **Communication Method**. For example: **PLANREVIEW_SERVICECLIENTTYPE="SOAP"** By default, this value is set to **SOAP**.
IIS_SSL	This property is used to enable HTTPS connections. To enable HTTPS connections, set this property to **1**. To disable HTTPS connections, set this property to **0**. For example: **IIS_SSL="1"** By default, this value is set to **0**.
APPLICATION_SERVER_URL	This property is used to set the URL of the Application Server. For example: **APPLICATION_SERVER_URL="http://localhost/AppServer/Service.asmx"** By default, this value is set to **http://localhost/AppServer/Service.asmx**.
PLANREVIEW_TEMP_DIRECTORY	This property is used to set the temporary upload directory. For example: **PLANREVIEW_TEMP_DIRECTORY="C:\Inetpub\wwwroot\PlanReview\Temp"**

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Configuring the Plan Review Web.Config File

The Plan Review virtual directory contains a web.config file that contains configuration options specific to the Plan Review web application.

Once the Plan Review virtual directory is created, you must modify this web.config file with information specific your OnBase Application Server configuration/installation.

1. Browse out to the Plan Review web.config file. By default, the path to the web.config file is:
   C:\inetpub\wwwroot\PlanReview\Web.config.
2. Open the web.config file with a text editor, such as Notepad.

3. Browse to the **<Hyland.Services.Client>** element and change the **ApplicationServer URL** attribute to your OnBase Application Server's URL and the **ServiceClientType** attribute to either **Remoting** or **SOAP**, depending on how your OnBase Application Server is configured.

   For example:

   ```
   <ApplicationServer URL="http://SERVER NAME/AppServer/service.asmx"
   ServiceClientType="SOAP"/>
   ```

Note: All OnBase Application Server URLs must end with either **service.asmx** or **service.rem**, depending on the Application Server's configuration.

4. Save and close the web.config file.

Tip: It is considered a best practice to use the Web Application Management Console to edit your web.config file. When you use the Web Application Management Console to edit your web.config file, the necessary sections will be automatically added to the <**configuration**> section of the web.config file.

Using the Web Application Management Console

To edit the Plan Review Client web.config file on the server hosting the web mapping application with the Web Application Management Console, follow these steps:

1. Make a backup copy of the web.config file prior to making any modifications to it.
2. Launch the Web Application Management Console locally on the server where the Plan Review application is located.

   In a typical 64-bit installation, the Web Application Management Console can be found in **C:\Program Files (x86)\Hyland\Web Applications Management Console**.
3. Select the **Plan Review** web application.

Note: If a web application is already open, you will need to click the Open Web Application button to switch to the Plan Review web application.

4. Modify settings as needed, then click **Save** to save your changes.

Plan Review WAMCON Settings

This section contains information on the WAMCON settings specific to Plan Review. For more detailed information on a specific setting, see the corresponding web.config setting under Manually Modifying the Plan Review Client Web.config File on page 19.

Server Configuration Tab

The settings on this tab are used to configure the server.

Plan Review Field	Plan Review Web.Config Setting
Service Client Type	ServiceClientType
Application Server URL	ApplicationServer URL

Plan Review Tab

The settings on this tab are used to configure the OnBase user name, password, and database.

Web Application Management Console Field	Plan Review Web.Config Setting
User Name	SessionUser
Password	SessionPassword
Data Source	DataSource

Settings Tab

The settings on this tab are used to configure the Plan Review website.

Plan Review Field	Plan Review Web.Config Setting
Stylesheet Directory Location	StyleSheetPath
Allow Sign On	AllowSignon
Allow Sign Off	AllowSignoff
Default User Time Zone	DefaultTimeZone
Search Start Year	SearchStartYear
Items Per Page	DisplayDocumentsPerPage
Reset Password Link Lifetime	ResetPasswordLinkExpiration
File Upload Directory	FileUploadDirectory
File Upload Validator	FileUploadValidator
Public CAPTCHA Key	CAPTCHAPublicKey
Private CAPTCHA Key	CAPTCHAPrivateKey

Plan Review Field	Plan Review Web.Config Setting
Password Strength Pattern	PasswordStrengthPattern
Password Strength Message	PasswordStrengthMessage
Discipline Items Per Menu	DisciplineItemsPerMenu

Single Sign On Tab

The settings on this tab are used to configure Single Sign-On.

Plan Review Field	Plan Review Web.Config Setting
Allow Single Sign On	SingleSignOn
Source ID	SingleSignOnSourceID
Resolution Mode	SSOUserResolutionMode

Manually Modifying the Plan Review Client Web.config File

If necessary, the Plan Review Client web.config file can also be manually edited in a text editor, such as Notepad. The following options change the behavior of your Plan Review solution as described:

Option	Description
StyleSheetPath	The **StyleSheetPath** setting (`<add key="StyleSheetPath" value="BasicBlue"/>`) controls the appearance of the Plan Review web site. This value can be set to **BasicBlue** or **BasicGreen**. By default, this setting is set to **BasicBlue**.
AllowSignon	The **AllowSignon** setting (`<add key="AllowSignon" value="true"/>`) is used in conjunction with Single Sign-On. For more information on using Single Sign-On with Plan Review, contact your solution provider.
AllowSignoff	The **AllowSignoff** setting (`<add key="AllowSignoff" value="true"/>`) is used in conjunction with Single Sign-On. For more information on using Single Sign-On with Plan Review, contact your solution provider.

Option	Description
DefaultTimeZone	The **DefaultTimeZone** setting (<add key="DefaultTimeZone" value="4"/>) controls the time zone that is used by default when a new user registers a Plan Review account. The value used for this setting should correspond with a time zone from the default time zone table - for more details, see Default Time Zone Table on page 23. By default, this setting is set to **4** (Eastern Standard Time). **Note:** The name of the time zone displayed to the user may not exactly match the name of the time zone in the default time zone table, due to differences in hardware.
SearchStartYear	The **SearchStartYear** setting (<add key="SearchStartYear" value="2009"/>) controls the earliest year that can be searched for when purchasing documents.
DisplayDocumentsPerPage	The **DisplayDocumentsPerPage** setting (<add key="DisplayDocumentsPerPage" value="20"/>) controls the number of projects that are displayed on a user's Project list from the Plan Review site. By default, this setting is set to **20**.
ResetPasswordLinkExpiration	The **ResetPasswordLinkExpiration** setting (<add key="ResetPasswordLinkExpiration" value="60"/>) controls the amount of time it takes for a reset password hyperlink to expire. Once a hyperlink has expired, a user will be unable to use that hyperlink to reset his or her password. This value is set in minutes. For example, if this value is set to **60**, a user will be able to access his or her reset password hyperlink up to 60 minutes after clicking the **Reset Password** button. After 60 minutes have passed, the user will no longer be able to use that hyperlink to reset his or her password.
FileUploadDirectory	The **FileUploadDirectory** setting (<add key="FileUploadDirectory" value="C:\Inetpub\wwwroot\PlanReview\Temp\"/>) allows you to specify the directory used to temporarily store documents before they are imported into OnBase. **Note:** The application pool's identity account must have the following Windows permissions for the specified directory: **Create**, **Delete**, **Read**, and **Write**.

Option	Description
FileUploadValidator	The **FileUploadValidator** setting (`<add key="FileUploadValidator" value="" />`) allows you to specify a custom-built file validator that will be used to scan files uploaded through your Plan Review site. For example, you could use a file validator to scan uploaded files for viruses before they are imported into your OnBase system. For more information on creating and configuring a file validator for use with your Plan Review site, please contact your solution provider.
TokenAuthentication	The **TokenAuthentication** setting (`<add key="TokenAuthentication" value="false" />`) allows you to enable or disable token authentication for your Plan Review solution. When this setting is set to **true**, users will be able to type a user's token into a Plan Review URL in order to access the data that would be displayed to that user. For example, an administrator could enter a submitter user's token in order to ensure that a document has been correctly transferred from one Workflow queue to another, or to ensure that a project invitation was sent to the correct user account. Tokens are added at the end of the URL, as in the following example: http://[APPSERVER]/PlanReview/Plan?token=[TOKEN]
CAPTCHAPublicKey	You can add the **CAPTCHAPublicKey** setting (`<add key="CAPTCHAPublicKey" value=""/>`) in order to require new users to answer a CAPTCHA before registering a Plan Review user account. Set the value of this setting equal to a public CAPTCHA key. If this value is left blank, users will not have to answer a CAPTCHA to register an account. **Note:** CAPTCHAs are not supported for use with Microsoft Internet Explorer 7.
CAPTCHAPrivateKey	You can add the **CAPTCHAPrivateKey** setting (`<add key="CAPTCHAPrivateKey" value=""/>`) in order to require new users to answer a CAPTCHA before registering a Plan Review user account. Set the value of this setting equal to a private CAPTCHA key. If this value is left blank, users will not have to answer a CAPTCHA to register an account. **Note:** CAPTCHAs are not supported for use with Microsoft Internet Explorer 7.

Option	Description
PasswordStrengthPattern	The **PasswordStrengthPattern** setting (<add key="PasswordStrengthPattern" value="^(?=.{4,}).*$"/>) allows you to specify regular expressions to limit the type of passwords that users can configure when registering a new account. For example, the default value of ^(?=.{4,}).*$ forces users to configure a password that is at least 4 characters long. For more information on regular expressions, see http://msdn.microsoft.com/en-us/library/hs600312.aspx.
PasswordStrengthMessage	The **PasswordStrengthMessage** setting (<add key="PasswordStrengthMessage" value="Password must contain at least 4 characters"/>) allows you to specify a message to be displayed to users who attempt to configure a password that does not meet your **PasswordStrengthPattern** criteria.
DisciplineItemsPerMenu	The **DisciplineItemsPerMenu** setting (<add key="DisciplineItemsPerMenu" value="15"/>) allows you to specify the maximum number of disciplines that will be displayed in the Disciplines menu. For example, if **DisciplineItemsPerMenu** is set to **15**, only the first 15 disciplines will be displayed in the disciplines menu. Additional disciplines will be displayed by selecting **More** from the Disciplines menu.
SessionUser	The **SessionUser** setting (<add key="SessionUser" value="MANAGER" />) allows you to specify the OnBase user account that is used to determine the Disciplines and Sheet Types that can be used by Electronic Plan Review web users. Specify the user name of your Electronic Plan Review Administrator account to give web users access to all available Disciplines and Sheet Types. For example: <add key="SessionUser" value="JOHNADAMS" /> In this example, all users who log on to the Electronic Plan Review website are able to submit documents using any Disciplines or Sheet Types that can be accessed by the OnBase user JohnAdams.
SessionPassword	The **SessionPassword** setting (<add key="SessionPassword" value="PASSWORD" />) allows you to set the value of the password for the user account you specified as your **SessionUser**.
DataSource	The **DataSource** setting (<add key="DataSource" value="[dmsdatasource]" />) allows you to set the value of your OnBase data source.

Option	Description
maxRequestLength	The **maxRequestLength** setting (`<httpRuntime maxRequestLength="4096"/>`) is located in the **system.web** node, and (in conjunction with the **maxAllowedContentLength** setting) controls the size of documents that can be uploaded through the Plan Review site. The **maxRequestLength** setting must be set to the same value as the **maxAllowedContentLength** setting.
maxAllowedContentLength	The **maxAllowedContentLength** setting (`<add key="maxAllowedContentLength" value="30000000"/>`) is located in the **system.webServer** node, and (in conjunction with the **maxRequestLength** setting), controls the size of documents that can be uploaded through the Plan Review site. The **maxAllowedContentLength** setting must be set to the same value as the **maxRequestLength** setting. **Note:** You must set the Application Server's **maxAllowedContentLength** setting to the same value used by the **maxAllowedContentLength** setting in your Plan Review web.config file.

Default Time Zone Table

The following table should be used in conjunction with the DefaultTimeZone web.config setting. See DefaultTimeZone on page 20 for more information on this setting.

Value	Time Zone Description
0	UTC
1	Pacific Standard Time
2	Mountain Standard Time
3	Central Standard Time
4	Eastern Standard Time
5	Atlantic Standard Time
6	Newfoundland Standard Time
7	Hawaiian Standard Time
8	Alaskan Standard Time

Value	Time Zone Description
9	Afghanistan Standard Time
10	Arab Standard Time
11	Arabian Standard Time
12	Arabic Standard Time
13	Argentina Standard Time
14	Armenian Standard Time
15	AUS Central Standard Time
16	AUS Eastern Standard Time
17	Azerbaijan Standard Time
18	Azores Standard Time
19	Bangladesh Standard Time
20	Canada Central Standard Time
21	Cape Verde Standard Time
22	Caucasus Standard Time
23	Cen. Australia Standard Time
24	Central America Standard Time
25	Central Asia Standard Time
26	Central Brazilian Standard Time
27	Central Europe Standard Time
28	Central European Standard Time
29	Central Pacific Standard Time
30	Central Standard Time(Mexico)
31	China Standard Time
32	Dateline Standard Time
33	E. Africa Standard Time
34	E. Australia Standard Time
35	E. Europe Standard Time

Value	Time Zone Description
36	E. South America Standard Time
37	Egypt Standard Time
38	Ekaterinburg Standard Time
39	Fiji Standard Time
40	FLE Standard Time
41	Georgian Standard Time
42	GMT Standard Time
43	Greenland Standard Time
44	Greenwich Standard Time
45	GTB Standard Time
46	India Standard Time
47	Iran Standard Time
48	Israel Standard Time
49	Jordan Standard Time
50	Kamchatka Standard Time
51	Korea Standard Time
52	Mauritius Standard Time
53	Mexico Standard Time
54	Mexico Standard Time2
55	Mid-Atlantic Standard Time
56	Middle East Standard Time
57	Montevideo Standard Time
58	Morocco Standard Time
59	Mountain Standard Time(Mexico)
60	Myanmar Standard Time
61	N. Central Asia Standard Time
62	Namibia Standard Time

Value	Time Zone Description
63	Nepal Standard Time
64	New Zealand Standard Time
65	North Asia East Standard Time
66	North Asia Standard Time
67	Pacific SA Standard Time
68	Pacific Standard Time(Mexico)
69	Pakistan Standard Time
70	Paraguay Standard Time
71	Roman Standard Time
72	Russian Standard Time
73	SA Eastern Standard Time
74	SA Pacific Standard Time
75	SA Western Standard Time
76	Samoa Standard Time
77	SE Asia Standard Time
78	Singapore Standard Time
79	South Africa Standard Time
80	Sri Lanka Standard Time
81	Syria Standard Time
82	Taipei Standard Time
83	Tasmania Standard Time
84	Tokyo Standard Time
85	Tonga Standard Time
86	Ulaanbaatar Standard Time
87	US Eastern Standard Time
88	US Mountain Standard Time
89	Venezuela Standard Time

Value	Time Zone Description
90	Vladivostok Standard Time
91	W. Australia Standard Time
92	W. Central Africa Standard Time
93	W. Europe Standard Time
94	West Asia Standard Time
95	West Pacific Standard Time
96	Yakutsk Standard Time

Troubleshooting

The following are common issues experienced when using Plan Review and how to solve them.

Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays

Notes, redactions, burned markups, and deficiencies on documents that have an overlay applied may encounter unexpected behavior. The position of notes, redactions, burned markups, and deficiencies may shift when the document is rendered.

The position shift may occur in the following instances:

- Text documents that contain overlays with an offset configured
- Text documents accessed using modules that render text documents as an image for display
- Image documents with overlays that do not have the same DPI or dimensions as the document

Caution: If a redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected. Saving or signing the document will permanently place the redaction, burned markup, or deficiency in the shifted position. In some instances, the location of a signature can only be changed by a system administrator.

When setting up overlays for documents that may also include notes, redactions, burned markups, or deficiencies:

- Ensure the dimensions of the overlay match the dimensions of the document.
- Do not use offsets with overlays since the document may contain notes, redactions, burned markups, or deficiencies.
- For text documents, use 96 DPI for overlays.

- For image documents, ensure the DPI of the overlay matches the DPI of the document.

A position shift can be corrected through the following methods:

- For text documents, recreate the overlay to match the dimensions of the document instead of using an offset. For example, add an empty space to the margin of the overlay instead of using an offset to account for this space.
- For text documents, the best practice is to set the DPI of the overlay to 96 DPI. Some OnBase modules render text documents as an image for display, and in most cases, the image is rendered at 96 DPI.
- For image documents, recreate the overlay to match the DPI and dimensions of the document.

If the issue still occurs, contact your first line of support.

Stamps Do Not Display on Applied Documents

When applying a configured stamp to a document in the Unity Client, you may notice the stamp does not display on the document. This may occur if the stamp was configured for a document that is in a different orientation than the document to which you are applying the stamp.

For example, you can configure a stamp to display in the top-right corner of a landscape-oriented document. If you apply this stamp to a portrait-oriented document, the stamp does not display on the document. Since the document is portrait-oriented, the stamp is displayed outside portrait-oriented margins.

To display the applied stamp and drag it to its intended position on the document:

1. In the Document Viewer, click the **Image** tab.
2. On the **Image** ribbon, in the **Scale** ribbon group, click **Fit to Window**. The document view is displayed to show the whole document, including outside margins. Notice the applied stamp is displayed in the outside margins.
3. Left-click the stamp and drag it to its intended position on the document.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.

- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

OnBase®
Foundation EP5

Electronic Plan Review

Administration Guide

Foundation EP5

Creating Required Keyword Types

Before you configure your Plan Review solution, you must create the following Keyword Types using the OnBase Configuration module.

Note: All Keyword Type names are suggestions. If desired, you can use different names when creating these Keyword Types.

Keyword Type Name	Description	Configuration
Project Name	This Keyword Type is used to store the name of the document's project.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 50 characters.
Project ID	This Keyword Type is used to store the ID number of the document's project.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 20 characters.
Parcel ID	This Keyword Type is used to store the ID number of any parcels associated with the project.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 30 characters.
Discipline	This Keyword Type is used to store the name of the document's Discipline.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 50 characters.
Sheet Type	This Keyword Type is used to store the name of the document's Sheet Type.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 50 characters.
Sheet Name	This Keyword Type is used to store the document's name.	**Data Type**: Alphanumeric **Length**: Varies. Typically, this is set to at least 50 characters.

Configuring Document Types

The following table lists all Document Types that must be configured for use by Plan Review.

Document Type	Description
Approved Plan Set	This Document Type should be configured with a Default File Format of PDF. This Document Type must be configured with the **Allow Multiple Revisions** option. It is recommended to configure this Document Type with all Keyword Types used by your Plan Review solution. This Document Type is used to store plan sets generated from the **Approved** folder.
Marked Plan Set	This Document Type should be configured with a Default File Format of PDF. This Document Type must be configured with the **Allow Multiple Revisions** option. It is recommended to configure this Document Type with all Keyword Types used by your Plan Review solution. This Document Type is used to store plan sets generated from the **Review Cycle** folder.
Markup Images	This Document Type should be configured with a Default File Format of Image File Format. This Document Type should also be configured with the **Name** Keyword Type. This Document Type is used to store the markup images used by the **Image** button in the internal viewer. Only .bmp, .gif, .jpg, .png, and .tiff file types are supported for use as image markups.
Plan Review Comment Letter	This Document Type should be configured with a Default File Format of MS Word Document. This Document Type should also be configured with the following Keyword Types: • **Project Name** • **Project ID** • **Discipline** • **Sheet Type** • **Sheet Name** This Document Type is used to store Plan Review Comment Letters generated using Document Composition.

Document Type	Description
Plan	This Document Type should be configured with a Default File Format of PDF. This Document Type also needs to be configured with the **Allow Redaction Bitmaps** option, the **Allow Multiple Revisions** option, and the **Allow Multiple Renditions** option. This Document Type should also be configured with the following Keyword Types: • **Project Name** • **Project ID** • **Discipline** • **Sheet Type** • **Sheet Name** This Document Type is used to store all submitted Plan Review documents.
Plan Review Imported Documents	This Document Type should be configured with a Default File Format of PDF. This Document Type should also be configured with the following Keyword Types: • **Project Name** • **Project ID** • **Discipline** • **Sheet Type** • **Sheet Name** This Document Type is used to store PDF documents that were reviewed externally and have PDF comments that need to be imported into the plan set.

Configuring Custom Queries

The following table lists Custom Queries that must be configured for use by Plan Review.

Note: All custom query names are suggestions. If desired, you can use different names when creating these Custom Queries.

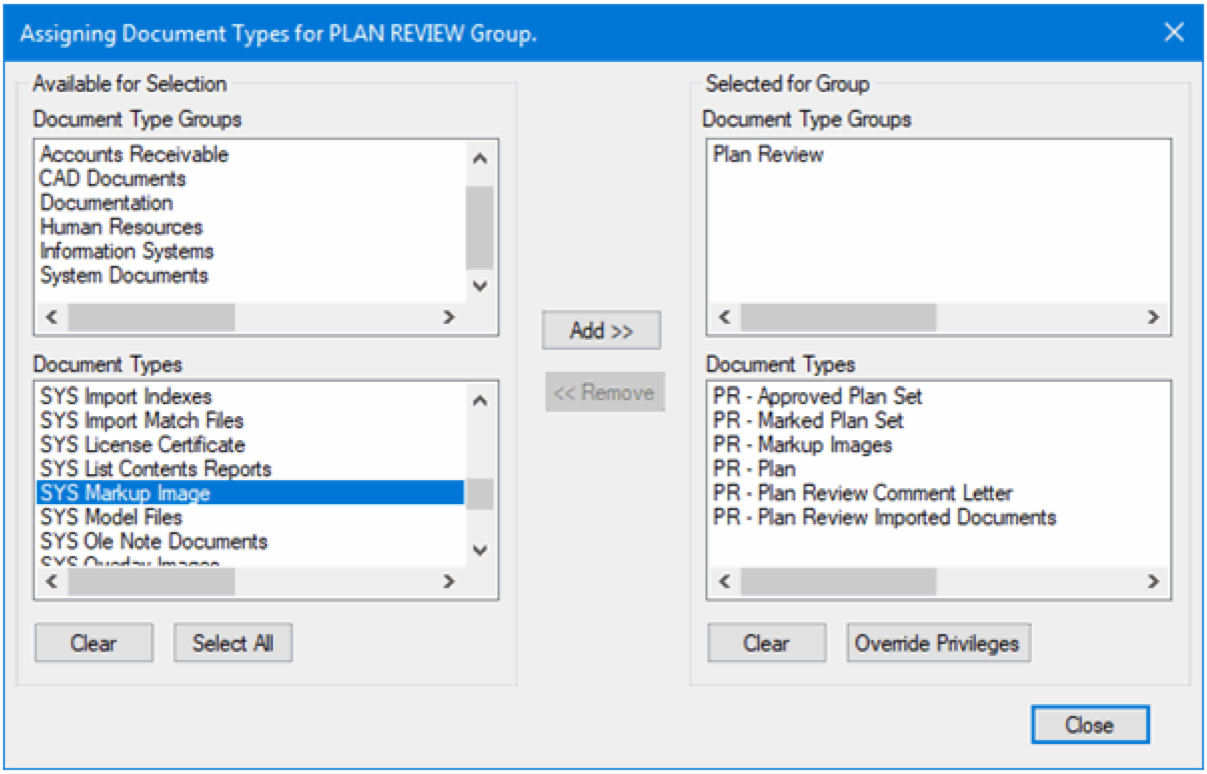
Custom Query	Description
Stamp	This custom query should be configured as a Document Type query for the **Markup Images** Document Type with the following **Retrieval Keywords**: • File Name The custom query should be assigned to all Plan Review user groups who are creating image markups. This custom query is used to determine which images can be placed on a document when a user adds a custom image markup.
Import Review	This custom query should be configured as a Document Type query for the **Plan Review Import Documents** Document Type with the following **Retrieval Keywords**: • Project Name • Project ID • Discipline • Sheet Type • Sheet Name The following **Display Columns** should be configured: • Project ID • Discipline • Sheet Type • Sheet Name • Document Name • Document Date The following **Sort Columns** should be configured: • Document Date This custom query is used to relate import review documents to an uploaded plan documents.

Configuring User Settings

Your Plan Review **Reviewer** users must be configured with the **Plan Review** Administrative Privilege to access the Plan Review interface from the Unity Client. **Reviewer** users also require the **Plan Review Named User** license to review and mark up documents through the Unity Client.

To assign these privileges to a user:

1. From the OnBase Configuration module, select **Users | User Groups / Rights**.
2. Select the user group to configure from the **User Group Name** section.
3. Click **Document Types**. The **Assigning Document Types** dialog box is displayed.



4. Select the **SYS Markup Image** Document Type from the **Available for Selection** pane in the **Document Types** section.
5. Click the **Add** button to add it to the **Document Types** section in the **Selected for Group** pane.
6. Click **Close**.
7. From the **User Groups & Rights** dialog box, click **Product Rights**. The **Assigning Product Rights for <User Group>** dialog box is displayed.
8. Select the **Plan Review** option from the **Administrative Privileges** section.
9. Click **Save**.
10. From the **User Groups & Rights** dialog box, click **Exit**.
11. Select **Users | User Names / Passwords**.
12. Select the user to configure from the list of users.
13. Click **Settings**. The **User Settings** dialog box is displayed.
14. Select the **Plan Review Named User** option from the **Licensing** section.

15. Click **Save**.
16. From the **User Names & Passwords** dialog box, click **Close**.

Note: For configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the **Service Monitoring Utilities** dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged on must log out and log on again to gain configuration changes after a cache reset.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Configuring User Groups

User Groups must be assigned specific Plan Review rights to use various Plan Review features.

There are three User Group options that must be enabled in order to use the Plan Review Portal. These options include:

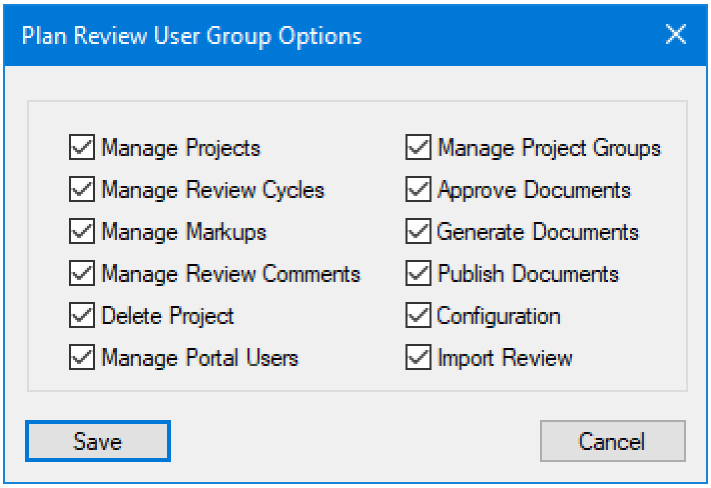
- Manage Projects
- Manage Portal Users
- Manage Project Groups

See the table in step 4 for more information.

To configure user options for your Plan Review User Groups:

1. From the Configuration module, select **Users | User Groups / Rights**. The **User Groups & Rights** dialog box is displayed.
2. Select the User Group to configure from the **User Group Name** list.

3. Click the **Plan Review** button. The **Plan Review User Group Options** dialog box is displayed.



4. Select all desired options. The following table describes each available option:

Option	Description
Manage Projects	**Note:** The Submitter User Group must have this option selected to create and submit projects for review. Select this option to grant users in the selected User Group access to the following features: • **Delete Document** • **Close Project** • **Re-Open Project** • **Delete Project** • **New Project** • **Add Project to Workflow** Users with this privilege can manage projects in project groups by creating new, re-opening, closing and deleting projects. Users can also delete documents from a project or add the existing project to a Workflow.
Manage Review Cycles	Select this option to grant users in the selected User Group access to the following features: • **Start Review Cycle** • **Complete Review Cycle** • **Cancel Review Cycle** Users with this privilege can manage review cycles for a project by starting, completing, or canceling a review cycle.

Option	Description
Manage Markups	Select this option to grant users in the selected User Group access to the **Markup Layers** feature. Users with this privilege can edit and delete markups created by other users. Users without this privilege can only view markups made by other users. **Note:** Users with this privilege must also have access to the **Markup Images** Document Type to view image markups.
Manage Review Comments	Select this option to grant users the ability to edit, re-open, and delete comments made by other users in an open Review Cycle if those users are assigned to the comment's Department. Users with the **Manage Review Comments** privilege cannot delete a comment made by another user if the comment was resolved, if the comment is in a closed Review Cycle, if the user who created the comment is not assigned to the comment's Department, or if the project itself is not in a Workflow Queue that the user has rights to. Users without the **Manage Review Comments** privilege cannot edit or delete comments made by other users.
Delete Project	Select this option to grant users in the selected User Group access to the **Delete Project** feature. Users with this privilege can delete existing projects from a project group.
Manage Portal Users	Select this option to grant users in the selected User Group access to the **Manage Portal Users** option on the **Plan Review Administration** tab. Users with this privilege can deactivate and reactivate Plan Review website users, reassign projects to other users, and revoke project invitations.
Manage Project Groups	Select this option to grant users in the selected User Group access to the **Manage Project Groups** option on the **Plan Review Administration** tab. Users with this privilege can add a new project group, delete an existing project group, or edit the name of the selected project group. **Note:** Only project groups with no assigned projects can be deleted.
Approve Documents	Select this option to grant users in the selected User Group access to the **Copy to Approval** feature. Users with this privilege can copy a project document to the **Approved Plan Documents** folder.

Option	Description
Generate Documents	Select this option to grant users in the selected User Group access to the following features: • **Create Plan Set** • **Convert to PDF** Users with this privilege can create a plan set for documents that belong to the **Review Cycle Documents** folder or the **Approved Plan Documents** folder. Users can also convert any Microsoft Word documents to PDF documents.
Publish Documents	Select this option to grant users in the selected User Group access to the following features: • **Publish** • **Unpublish** Users with this privilege can publish or unpublish selected documents to or from the Plan Review website.
Configuration	Select this option to grant users in the selected User Group access to the following features: • **Standard Comments** • **Save Project XML** Users with this privilege can add standard comments to a document and save project data as an XML file.
Import Review	Select this option to grant users in the selected User Group access to the **Import Review** feature. Users with this privilege can import PDF review comments as Plan Review comments.

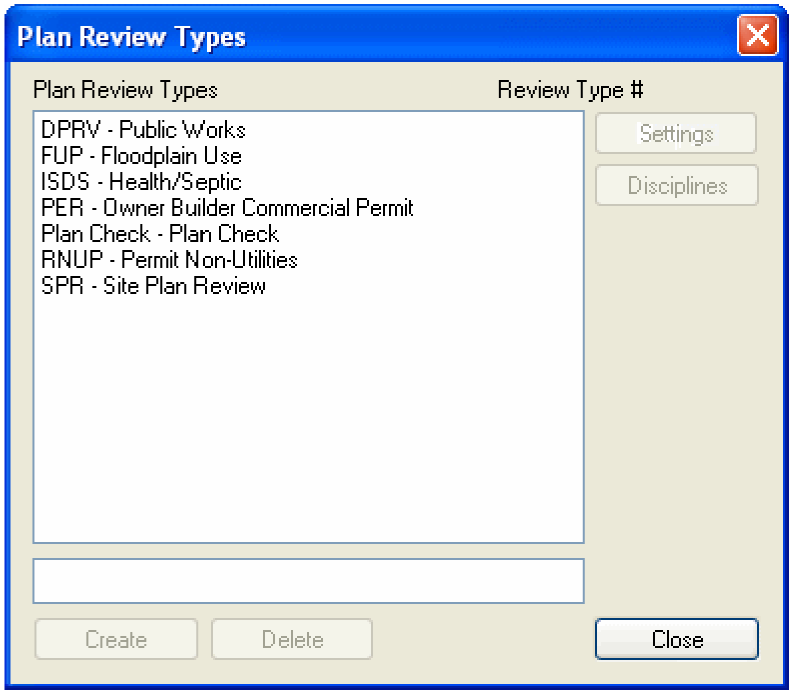
5. Click **Save**.

Creating Review Types

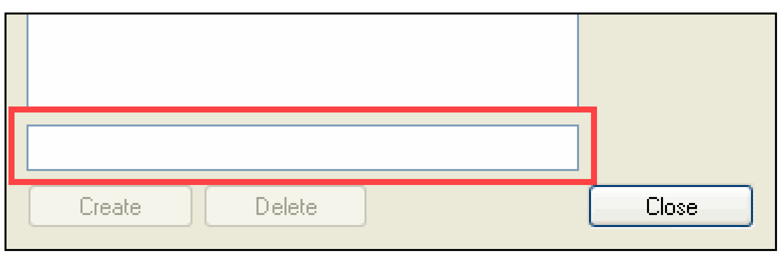
You can create Review Types for the different types of review needed for your Plan Set.

To create the Review Types used by your Plan Review solution:

1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Review Types**. The **Plan Review Types** dialog box is displayed.

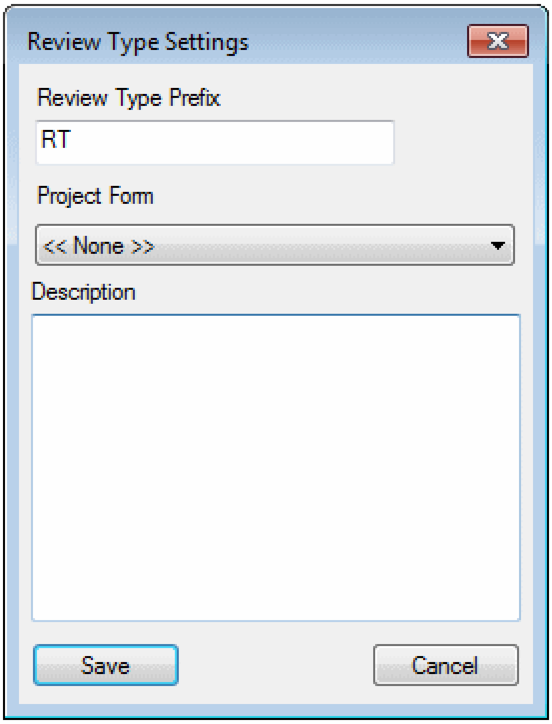


3. Type the name of your desired Review Type in the field.



4. Click **Create**.

5. Click **Settings**. The **Review Type Settings** dialog box is displayed.



6. Enter a prefix for the Review Type in the **Review Type Prefix** field. The prefix is used when generating a project's Project ID.

   For example, an organization configures a prefix of **DPRV** for their **Public Works** Review Type. When a user submits a new Public Works project, the project's **Project ID** is automatically generated using the prefix, for example, **DPRV318**.
7. If desired, select a Unity Form from the **Project Form** drop-down list. The selected Unity Form is added to the **Project Information** section for projects submitted through the public-facing website.
8. Enter a description for the Review Type in the **Description** field. The description is displayed on the Plan Review website when the user is selecting a Review Type.
9. Click **Save**.
10. Select **Disciplines**. The **Plan Review Type Disciplines** window is displayed.
11. Select all desired disciplines from the **Available Disciplines** list.
12. Click **Add**. The selected disciplines are added to the **Assigned Disciplines** list.
13. Click **Close**.
14. From the **Plan Review Types** dialog box, click **Close**.

Note: For configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the **Service Monitoring Utilities** dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged in must log out and log back in to gain configuration changes after a cache reset.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

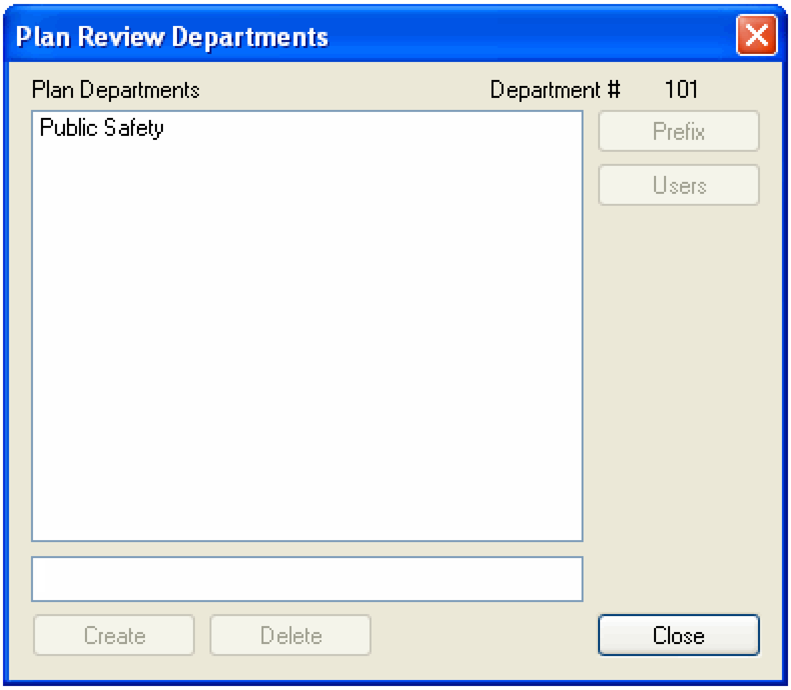
To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Creating Departments

You can create departments to assign to your Plan Review projects.

To create the **Departments** used by your Plan Review solution:

1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Departments**. The **Plan Review Departments** dialog box is displayed.



3. Enter the name of the department you want to create in the field.

4. Click **Create**.
5. Click **Prefix**. The **Department Prefix** dialog box is displayed.
6. Enter a prefix for the department in the **Department Prefix** field. The prefix is used when generating a comment's Comment ID.

   For example, an organization configures a prefix of **PBS** for their **Public Safety** department. When a reviewer user creates a comment on a document and assigns the comment to the **Public Safety** department, the comment's Comment ID is generated using the prefix, for example, **PBS1**.
7. Click **Save**.
8. From the **Plan Review Departments** dialog box, click **Users**. The **Plan Review Department Users** dialog box is displayed.
9. Select desired users from the **Available Users** section.
10. Click **Add**. All selected users are added to the **Selected Users** section.
11. Click **Close**.
12. From the **Plan Review Departments** dialog box, click **Close**.

Note: For configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the **Service Monitoring Utilities** dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged on must log out and log on again to gain configuration changes after a cache reset.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

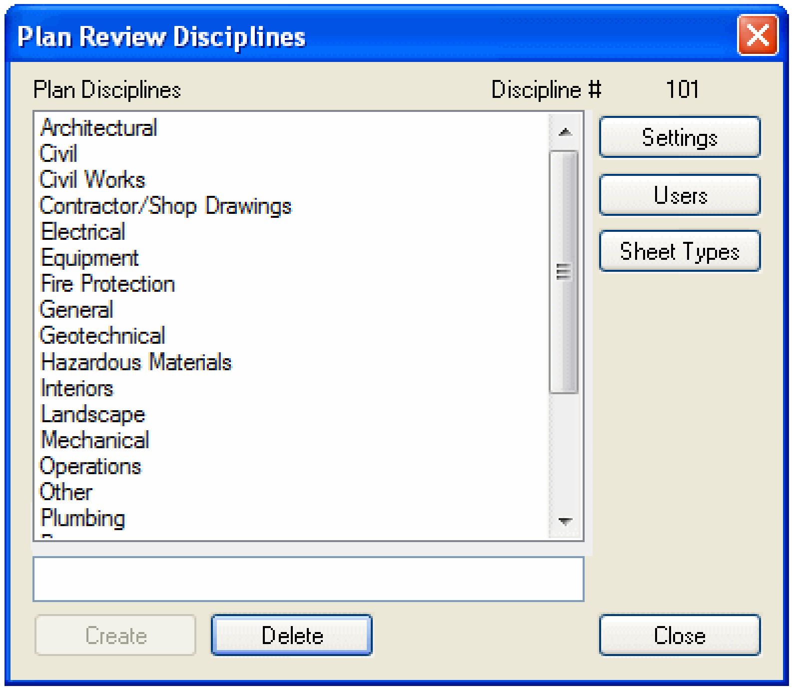
To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Creating Disciplines

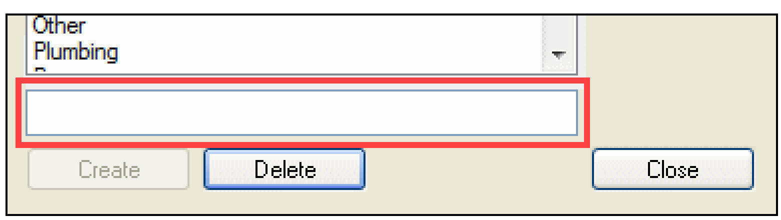
You can add disciplines to apply to your Plan Review projects.

To create the **Disciplines** used by your Plan Review solution:

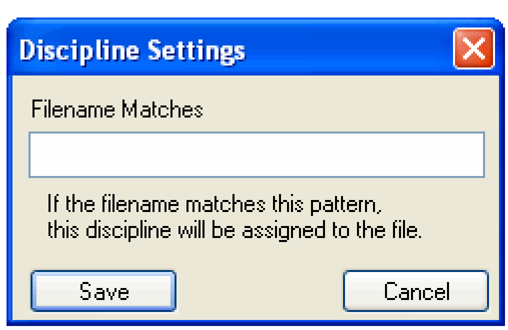
1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Disciplines**. The **Plan Review Disciplines** dialog box is displayed.



3. Type the name of your desired discipline in the field.



4. Click **Create**.
5. Click **Settings**. The **Discipline Settings** dialog box is displayed.



6. Enter a regular expression into the **Filename Matches** field to automatically assign this discipline to all submitted documents that meet the criteria specified by the regular expression.

   For more information on regular expressions, see http://msdn.microsoft.com/en-us/library/hs600312.aspx.
7. Click **Save**.
8. Click **Users**. The **Plan Review Discipline Users** dialog box is displayed.
9. Select desired users from the **Available Users** section.
10. Click **Add**. All selected users are added to the **Selected Users** section.
11. Click **Close**.
12. Click **Sheet Types**. The **Plan Review Discipline Sheet Types** dialog box is displayed.
13. Select the desired Sheet Types from the **Available Sheet Types** section.
14. Click **Add**. All selected Sheet Types are added to the **Assigned Sheet Types** section for the selected discipline.
15. Click **Close**.

Note: For configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the **Service Monitoring Utilities** dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged on must log out and log on again to gain configuration changes after a cache reset.

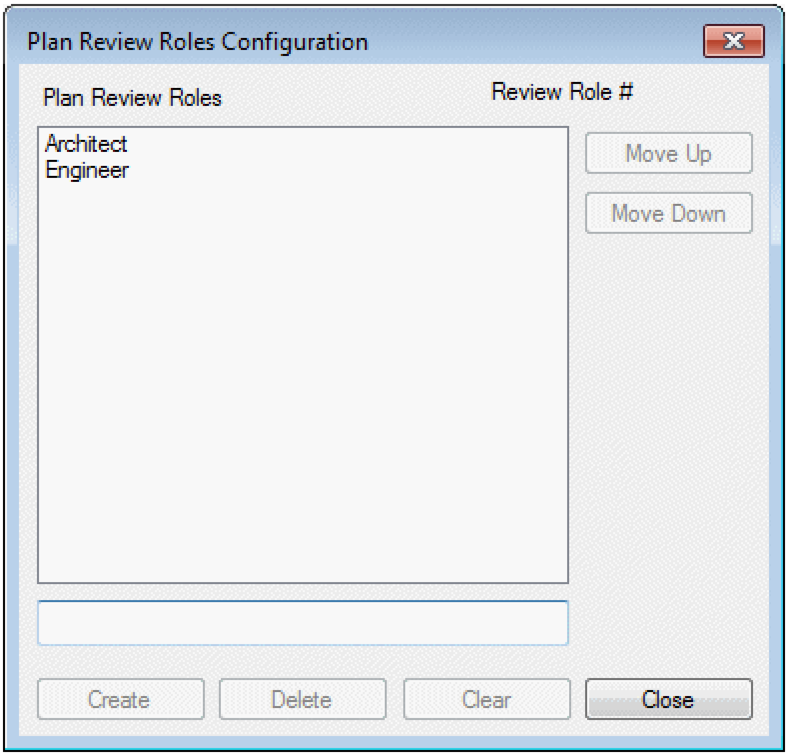
Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Creating Roles

To create the **Roles** used by your Plan Review solution:

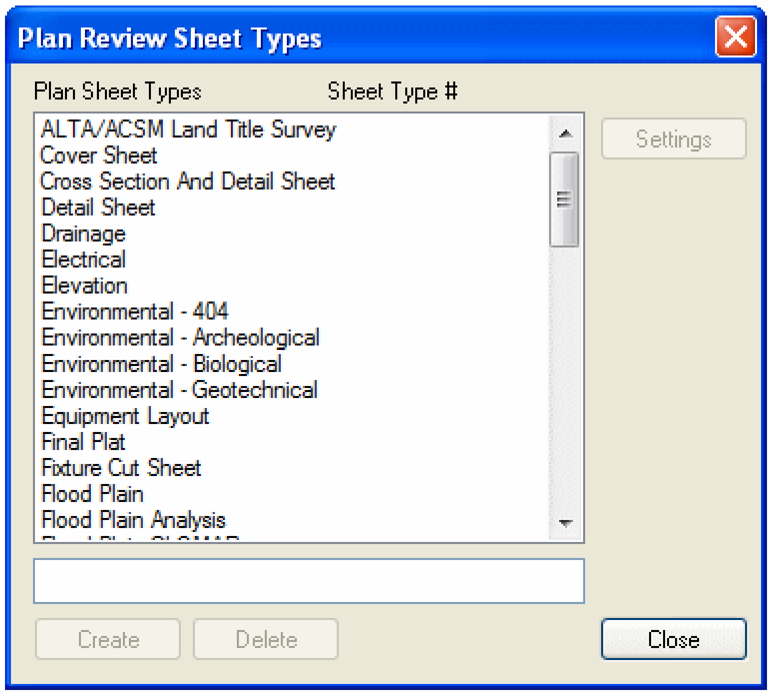
1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Roles**. The **Plan Review Roles Configuration** window is displayed.



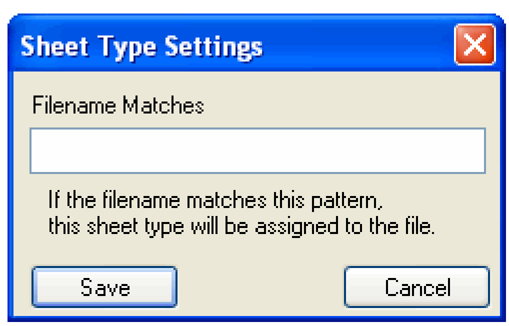
3. Type the name of your desired role.
4. Click **Create**.
5. Click **Close**.

Creating Sheet Types

1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Sheet Types**. The **Plan Review Sheet Types** window is displayed.



3. Type the name of your desired **Sheet Type** and click **Create**.
4. Select **Settings**. The **Sheet Type Settings** window is displayed.



5. Enter a regular expression into the **Filename Matches** field to automatically assign this Discipline to all submitted documents that meet the criteria specified by the regular expression.

   For more information on regular expressions, see http://msdn.microsoft.com/en-us/library/hs600312.aspx.
6. Click **Save**.

7. Click **Close**.

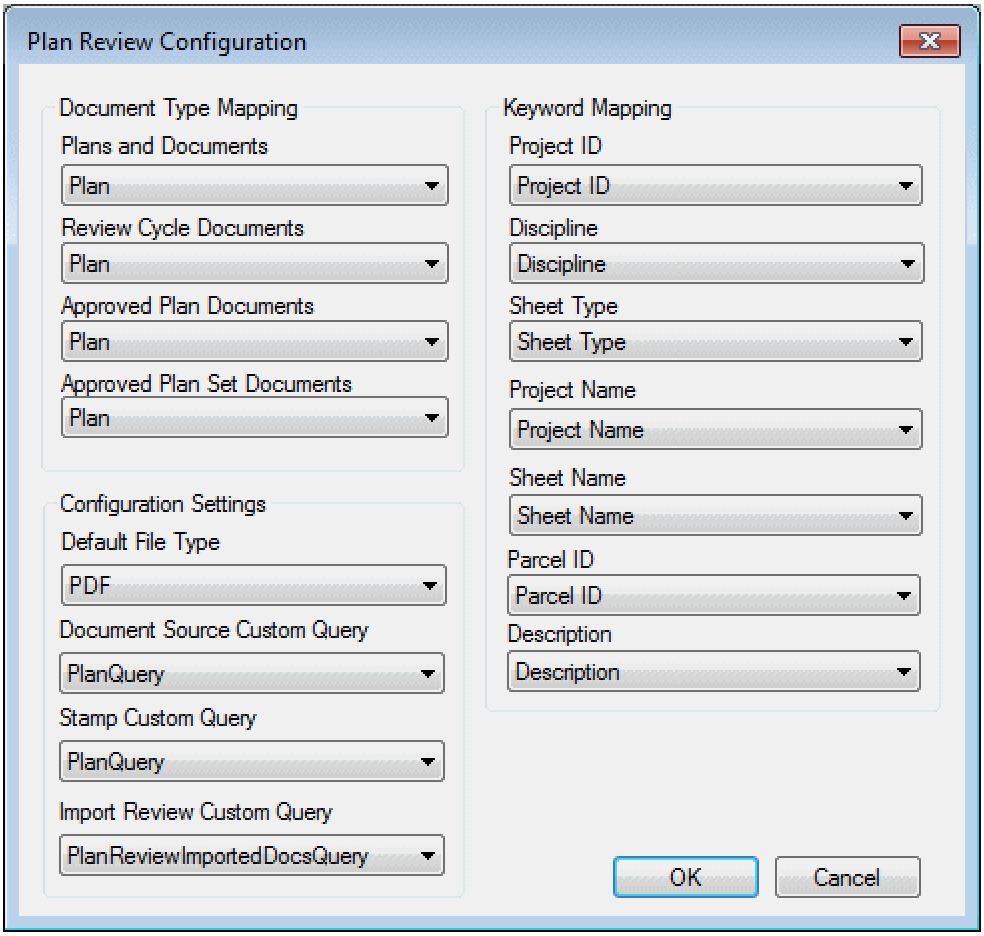
Note: In order for your configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the Service Monitoring dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged in must log out and log back in to gain configuration changes after a cache reset.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Mapping Document Types and Keyword Types

1. Log on to the OnBase Configuration module.
2. Navigate to **Document | Plan Review | Configuration**. The **Plan Review Configuration** window is displayed.



3. Specify all options as desired. The following options are available:

Document Type Mapping	Description
Plans and Documents	Select a Document Type from this drop-down list to map to submitted plans and documents. Submitted documents will be stored in OnBase using the specified Document Type.
Review Cycle Documents	Select a Document Type from this drop-down list to map to review cycle documents. Review cycle documents will be stored in OnBase using the specified Document Type.

Document Type Mapping	Description
Approved Plan Documents	Select a Document Type from this drop-down list to map to approved plan documents. Approved plan documents will be stored in OnBase using the specified Document Type.
Approved Plan Set Documents	Select a Document Type from this drop-down list to map to approved plan set documents. Approved plan sets will be created and stored in OnBase using the specified Document Type.

Configuration Settings	Description
Default File Type	Select a default file type for Plan Review documents from this drop-down list.
Document Source Custom Query	Select a Custom Query used to associate Plan Review documents from this drop-down list.
Stamp Custom Query	Select a Custom Query to be used when adding an image markup to a document from this drop-down list.
Import Review Custom Query	Select the Custom Query to be used to relate an import review document to an uploaded plan document.

Keyword Mapping	Description
Project ID	Select a Keyword Type from this drop-down list to map to the Plan Review Project ID value.
Discipline	Select a Keyword Type from this drop-down list to map to the Plan Review Discipline value.
Sheet Type	Select a Keyword Type from this drop-down list to map to the Plan Review Sheet Type value.
Project Name	Select a Keyword Type from this drop-down list to map to the Plan Review Project Name value.
Sheet Name	Select a Keyword Type from this drop-down list to map to the Plan Review Sheet Name value.
Parcel ID	Select a Keyword Type from this drop-down list to map to the Plan Review Parcel ID value.
Description	Select a Keyword Type from this drop-down list to map to the Plan Review Description value.

4. Click **OK**.

Note: In order for your configuration changes to take effect, you must reset the cache of the OnBase Application Server. The cache can be reset from the Service Monitoring dialog box in the OnBase Configuration module. A cache reset can take up to one minute to be reflected for all users. Users currently logged in must log out and log back in to gain configuration changes after a cache reset.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Configuring a Project Letter Template

Plan Review uses Document Composition to generate a letter that is sent to the plan submitter after the review cycle is completed. The Template Builder is required to generate a Plan Review project letter template.

You must configure a template for your letter as desired, then associate it with your **Plan** Document Type.

Note: For more information on creating a template, see the **Document Composition** module reference guide.

This section includes the following information:

- Generating XML Data for a Template on page 51
- Associating a Template with a Plan Document Type on page 52

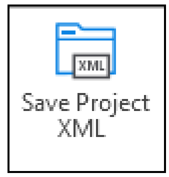
Generating XML Data for a Template

You can use XML data from a Plan Review project to create placeholders in your project letter template.

Note: For more information on incorporating XML data from your project into a project letter template, see the section on configuring XML placeholders in the **Document Composition** module reference guide.

To generate XML data for a specific project:

1. Log on to the OnBase Unity Client.
2. Click the **Plan Review** tab.
3. Select the desired project.
4. On the **Plan Review** ribbon, in the **Configuration** ribbon group, click the **Save Project XML** button.



5. Select the location you want to save the document to.
6. Click **Save**.

Note: You can also apply your Plan Review Unity Form data to a project letter template. You must be licensed for Unity Forms to use this feature. See the section on Unity Form placeholders in the **Document Composition** module reference guide for more information.

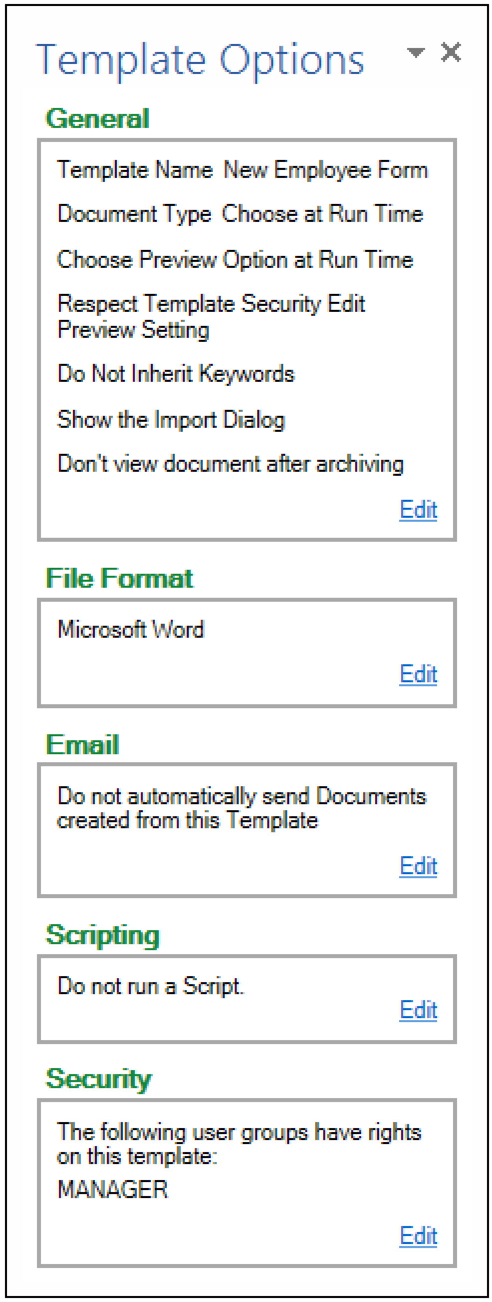
Associating a Template with a Plan Document Type

Your project letter template must be associated with a **Plan** Document Type to generate a project letter in Plan Review.

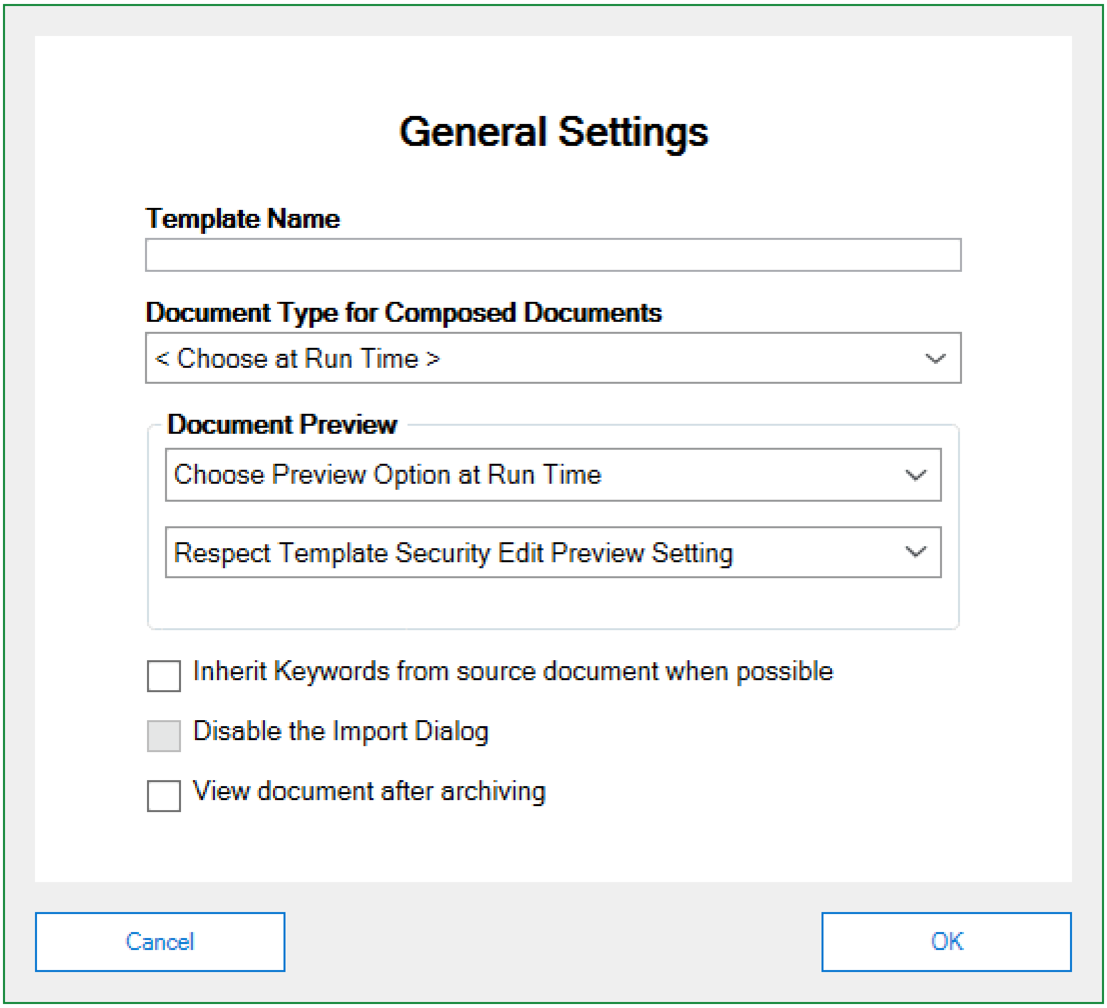
To associate your project letter template with the **Plan** Document Type:

1. Open your Document Composition template in one of the following ways:
   - From the Unity Client, on the **Home** tab, click **Templates**.
   - From Microsoft Word, click the **Template Builder** tab and click **Open Template**.

2. On the **Template Builder** tab, click **Template Options**. The **Template Options** pane is displayed.



3. Select the **Edit** hyperlink in the **General** section of the **Template Options** pane. The **General Settings** dialog box is displayed.



4. Select your **Plan** Document Type from the **Document Type for Composed Documents** drop-down list.
5. Click **OK**.
6. On the **Template Builder** tab, click **Save Template** to save the configured template options.

Configuring Signature Types

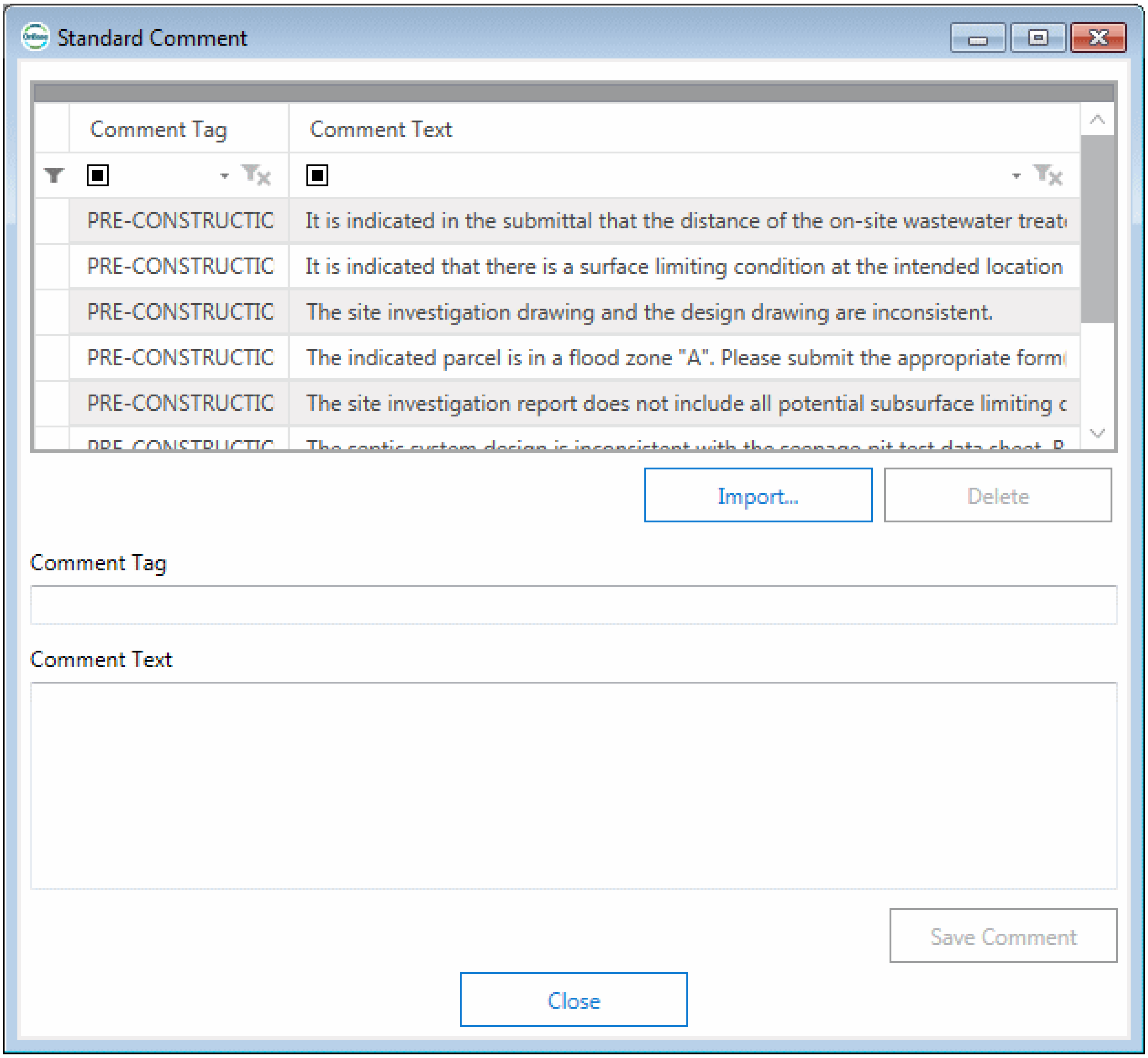
Plan Review can use Signature Pad Interface (TWAIN) to generate stamps and signatures on approved plan documents. If you want to use this functionality, you must use the Unity Client to configure all desired Signature Types for use in your Plan Review solution. For more information on using the Unity Client to create a Signature Type, see the **Signature Pad Interface (TWAIN)** documentation.

Configuring a Standard Comment

You can configure a list of standard comments for use by your reviewer users. Standard comments can be a convenient way for users to quickly add often-used comments to documents or projects. You can add comments to this list manually, or by importing a text file that contains all desired comments.

To configure your list of standard comments, follow these steps:

1. Open the Unity Client and select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Select the **Standard Comments** option from **Configuration** tab in the ribbon. The **Standard Comments** dialog box is displayed.

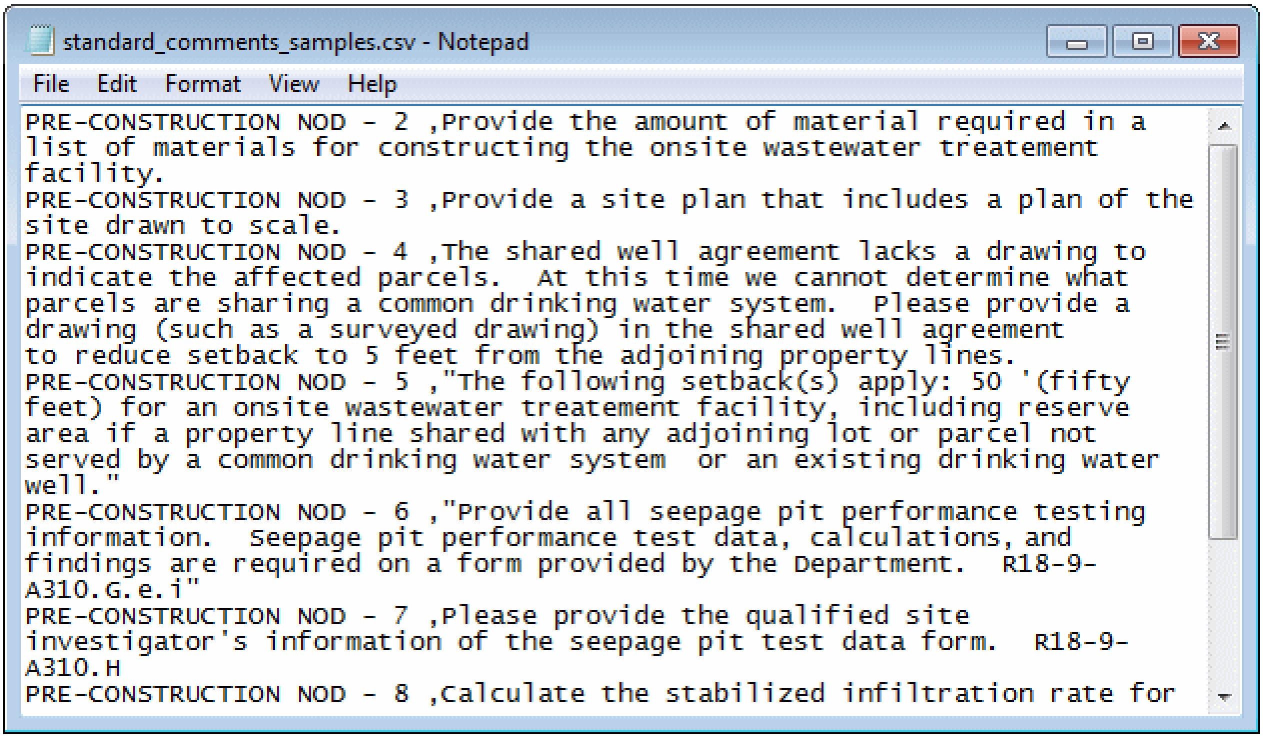


3. If you have a text file that contains your desired comments, select **Import...** and browse to the location of your text file, then click **Open**.

Note: Text files are the only supported file type when importing standard comments from a file.

Text files to be imported must be in the following format: Tag,Text

For example:




```
PRE-CONSTRUCTION NOD - 2 ,Provide the amount of material required in a
list of materials for constructing the onsite wastewater treatement
facility.
PRE-CONSTRUCTION NOD - 3 ,Provide a site plan that includes a plan of the
site drawn to scale.
PRE-CONSTRUCTION NOD - 4 ,The shared well agreement lacks a drawing to
indicate the affected parcels.  At this time we cannot determine what
parcels are sharing a common drinking water system.  Please provide a
drawing (such as a surveyed drawing) in the shared well agreement
to reduce setback to 5 feet from the adjoining property lines.
PRE-CONSTRUCTION NOD - 5 ,"The following setback(s) apply: 50 '(fifty
feet) for an onsite wastewater treatement facility, including reserve
area if a property line shared with any adjoining lot or parcel not
served by a common drinking water system  or an existing drinking water
well."
PRE-CONSTRUCTION NOD - 6 ,"Provide all seepage pit performance testing
information.  Seepage pit performance test data, calculations, and
findings are required on a form provided by the Department.  R18-9-
A310.G.e.i"
PRE-CONSTRUCTION NOD - 7 ,Please provide the qualified site
investigator's information of the seepage pit test data form.  R18-9-
A310.H
PRE-CONSTRUCTION NOD - 8 ,Calculate the stabilized infiltration rate for
```

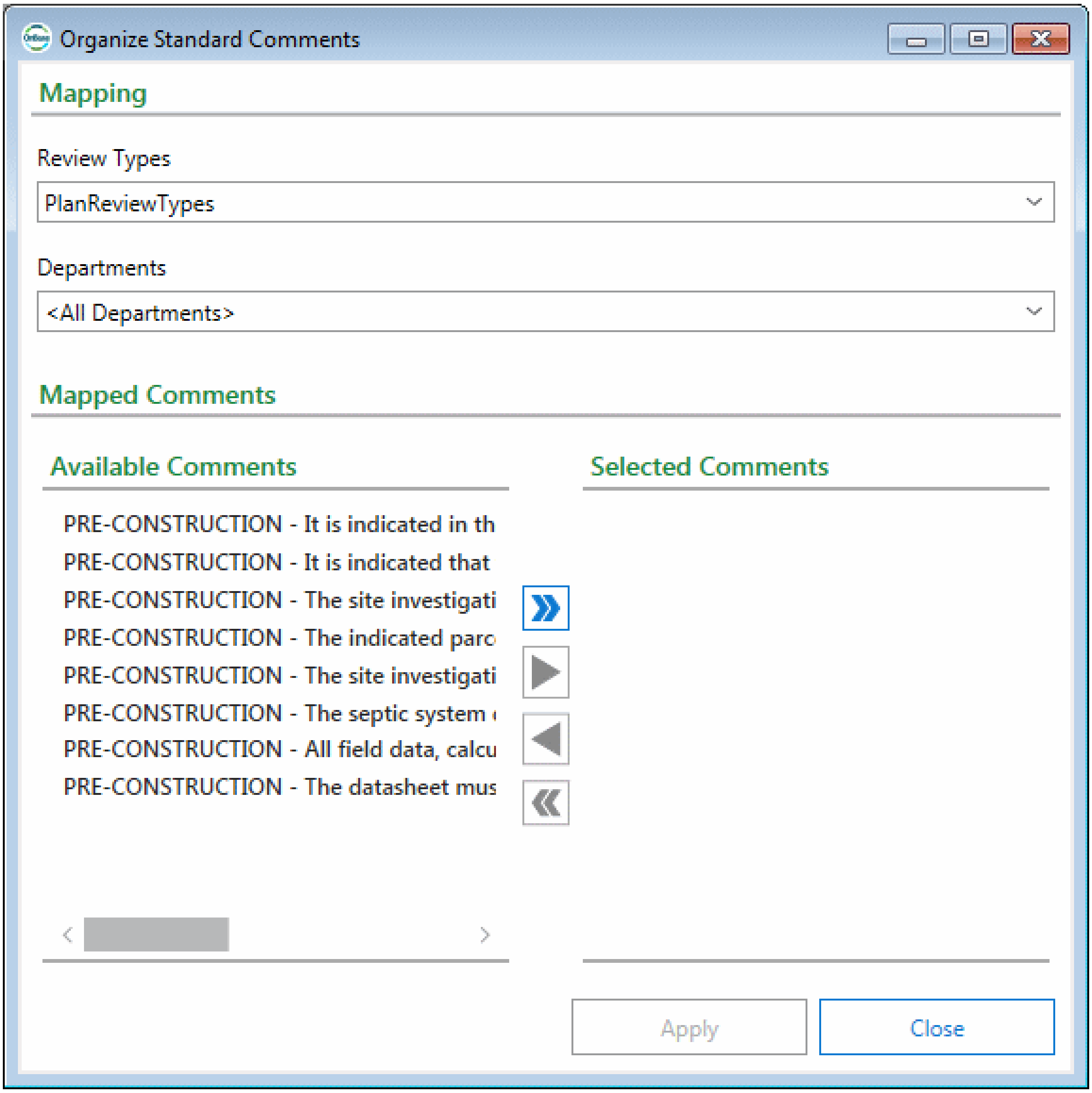
4. If you need to manually add one or more comments, enter your comment's name in the **Comment Tag** field and the comment's text in the **Comment Text** field, then click **Save Comment**.
5. Once your comment list is complete, click **Close**.

Organizing Standard Comments

You can map standard comments to specific Review Types and Departments for convenient use by your reviewer users. Users will then be able to filter the list of standard comments to only see the comments that apply to the specified Department and/or Review Type.

To organize your list of standard comments, follow these steps:

1. Open the Unity Client and select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Select the **Organize Standard Comments** option from **Configuration** tab in the ribbon. The **Organize Standard Comments** dialog box is displayed.



3. Select a Review Type to map one or more standard comments to from the **Review Types** drop-down list.
4. If desired, you can also select a Department from the **Departments** drop-down list to map the specified comment(s) to.
5. Select one or more comments from the Available Comments list.
6. Click on the **Add Selected Items** button. The selected comments are added to the **Selected Comments** field.

7. Click **Apply**. The selected comments are mapped to the selected Review Type and Department.
8. Click **Close**.

Using an External Viewer

As an alternative to using the internal viewer, you can use an external viewer to view PDF documents. After installing and configuring an external viewer, you must disable the internal viewer. To do so, deselect the **Use Internal Viewer** option from the **Edit** button in the **Project** section of the ribbon. When this option is disabled, PDF documents opened within Plan Review are displayed using the installed external viewer.

Configuring E-Mail Notifications

Plan Review uses the Hyland Distribution Service to send e-mail notifications to submitter users. In order to be able to send these e-mail notifications, you must properly install and configure your Hyland Distribution Service. See the Hyland Distribution Service documentation for more detail.

Template files control the appearance of the notifications sent to your submitter users. These files are stored in the **Views | Shared** folder of your Plan Review Web site directory, and can be modified using a standard text editor.

You can update the fields in the template file as needed to customize your solution. For example, in the **MsgUserRegistration.template** file, you can change the email address that will appear in the sender field of registration email notifications generated by Plan Review. To do so, navigate to the **else if (Model.Render == RegistrationViewModel.MessagePart.Sender)** section and replace the value in the **<text>** field with the email address you would like to use (by default, this is set to **Administrator@MyPlanReviewSite.com)**.

Note: When updating template files, do not alter parts of the syntax such as the braces or object names (**Model.Render**, etc). Only change the values noted in the table below.

File	Description
MsgAcceptProjectInvite.template	This file controls the e-mail notification sent to a user when a project invitation that the user has sent out has been accepted. Editable values: • **STR_EP_EMAIL_ACCEPT_SUBJECT**: this value is used as the subject line of the email notification. • **STR_EP_EMAIL_PROJECTACCEPT_MSG**: this value is used as the body text of the email notification. • **Model.EmailAddress**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the e-mail address of the notification's recipient. • **GrantPrivilege**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the access level being granted to the recipient of the notification. • **Model.ProjectData.ID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project to which the recipient is being invited. • **Model.ProjectData.Name**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project to which the recipient is being invited. • **Model.ProjectData.Date**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the date of the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ReviewTypeName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the review type of the project to which the recipient is being invited. • **Model.ProjectData.ProjectIdentifier**: this value can be added to this template file manually. The value entered here should be something meaningful that will help to identify the project. This value is displayed in the Identifier column on the Web Portal, and the Project ID field in Unity Client.

File	Description
MsgGrantProjectPrivilege.template	This file controls the e-mail notification sent to a user when he or she is granted access to a project by that project's owner. Editable values: • **STR_EP_EMAIL_PRIVUPDATE_SUBJECT**: this value is used as the subject line of the email notification. • **STR_EP_EMAIL_GRANTPRIV_MSG**: this value is used as the body text of the email notification. • **Model.EmailAddress**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the e-mail address of the notification's recipient. • **GrantPrivilege**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the access level being granted to the recipient of the notification. • **Model.ProjectData.ID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project to which the recipient is being invited. • **Model.ProjectData.Name**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project to which the recipient is being invited. • **Model.ProjectData.Date**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the date of the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ReviewTypeName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the review type of the project to which the recipient is being invited. • **Model.ProjectData.ProjectIdentifier**: this value can be added to this template file manually. The value entered here should be something meaningful that will help to identify the project. This value is displayed in the Identifier column on the Web Portal, and the Project ID field in Unity Client.

File	Description
MsgInviteUser.template	This file controls the e-mail notification sent to a user when he or she has been invited to join a project by that project's owner. Editable values: • **STR_EP_EMAIL_INVITE_SUBJECT**: this value is used as the subject line of the email notification. • **STR_EP_EMAIL_INVITE_MSG**: this value is used as the body text of the email notification. • **Administrator@MyPlanReviewSite.com**: this value is used as the sender's email address for the email notification. • **Model.EmailAddress**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the e-mail address of the notification's recipient. • **Model.ProjectData.ID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project to which the recipient is being invited. • **Model.ProjectData.Name**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project to which the recipient is being invited. • **Model.ProjectData.Date**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the date of the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupID**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the ID of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ProjectGroupName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the project group that contains the project to which the recipient is being invited. • **Model.ProjectData.ReviewTypeName**: this value can be added to this template file manually. When the e-mail notification is generated, this value is replaced with the name of the review type of the project to which the recipient is being invited. • **Model.ProjectData.ProjectIdentifier**: this value can be added to this template file manually. The value entered here should be something meaningful that will help to identify the project. This value is displayed in the Identifier column on the Web Portal, and the Project ID field in Unity Client.

<table>
<tr><th>File</th><th>Description</th></tr>
<tr><td>MsgRecoverUserName.template</td><td>This file controls the e-mail notification sent to a user when he or she uses the Recover Username feature.
Editable values:
STR_EP_EMAIL_RECOVER_SUBJECT: this value is used as the subject line of the email notification.
STR_EP_EMAIL_RECOVER_MSG: this value is used as the body text of the email notification.
Administrator@MyPlanReviewSite.com: this value is used as the sender’s email address for the email notification.</td></tr>
<tr><td>MsgResetPassword.template</td><td>This file controls the e-mail notification sent to a user when he or she uses the Reset Password feature.
Editable values:
STR_EP_EMAIL_PWDRESET_SUBJECT: this value is used as the subject line of the email notification.
STR_EP_EMAIL_PWDRESET_MSG: this value is used as the body text of the email notification.
Administrator@MyPlanReviewSite.com: this value is used as the sender’s email address for the email notification.</td></tr>
<tr><td>MsgRevokeProjectPrivilege.template</td><td>This file controls the e-mail notification sent to a user when his or her access to a project has been revoked by the owner of the project.
Editable values:
STR_EP_EMAIL_PRIVUPDATE_SUBJECT: this value is used as the subject line of the email notification.
STR_EP_EMAIL_REVOKEPRIV_MSG: this value is used as the body text of the email notification.
Model.ProjectData.ProjectIdentifier: this value can be added to this template file manually. The value entered here should be something meaningful that will help to identify the project. This value is displayed in the Identifier column on the Web Portal, and the Project ID field in Unity Client.</td></tr>
</table>

File	Description
MsgUserRegistration.template	This file controls the e-mail notification sent to a user when he or she registers an account on your Plan Review Web site. Editable values: • **STR_EP_EMAIL_REGISTRATION_SUBJECT**: this value is used as the subject line of the email notification. • **STR_EP_EMAIL_REGISTRATION_MSG**: this value is used as the body text of the email notification. • **Administrator@MyPlanReviewSite.com**: this value is used as the sender's email address for the email notification.

Configuring Workflow Tasks

You will need to configure a number of Workflow life cycles, queues, and ad hoc user tasks for your Plan Review solution using the Workflow interface. The required life cycles, queues, and tasks will vary greatly depending on your specific environment and needs, and can include several Plan Review-specific Workflow task types - see the Workflow documentation for more information on configuring Workflow.

Note: When configuring Plan Review ad hoc user tasks for your submitter users to access from your Plan Review site, be aware that the name of the task you configure will be used as the value of the hyperlink displayed to your submitter users.

For example: John Adams configures an ad hoc user task to transition a project into the initial review queue and types a name of **Initial queue**. When a user wants to submit a project for review, they will have to select the link that reads **Initial queue**. John's users will be better served if John configures his task with a name of **Submit Project for Review**.

Customizing Your Terms and Conditions

The **Disclaimer.htm** file in your Plan Review directory is used to determine what terms and conditions will be displayed when new users register their accounts.

To customize the terms and conditions displayed for your site, follow these steps:

1. Navigate to the **Content** folder of your Plan Review directory.
2. Open the **Disclaimer.htm** file using a text editor such as Notepad.
3. Modify the content of this file using standard HTML coding to display your desired terms and conditions.

4. Save and close the file.

Note: It is highly recommended that you test your Plan Review site to ensure that your terms and conditions are being displayed as expected. Some HTML styling elements can interfere with the Plan Review container page, which can adversely affect the appearance of your customized terms and conditions.

Note: Any changes you make to this file may be overwritten when you upgrade Plan Review to a higher version. It is recommended that you back up your **Disclaimer.htm** file before upgrading.

System Interaction

Application Enabler

Application Enabler allows users to access Plan Review projects from a third-party, line-of-business application. For example, from their LOB application, a user can double-click on a project's Project ID to retrieve that project in OnBase.

Document eCommerce

If your organization uses Document eCommerce along with Electronic Plan Review, any users who have already registered an account with your Document eCommerce Web site will be able to log on to your Plan Review Web site using the same user credentials.

Exporting and Importing

Plan Review configuration items can be exported and imported using OnBase Configuration.

In OnBase Configuration, in addition to the configuration items listed in the **System Administration** module reference guide, the following Plan Review configuration items can be exported and imported:

- Plan Review Configuration

Note: Only one Plan Review Configuration item can exist in OnBase at one time. To import a Plan Review Configuration item, ensure that one does not already exist, or select **Replace** in the Import Wizard.

- Plan Review Departments
- Plan Review Disciplines
- Plan Review Document Comments
- Plan Review Roles
- Plan Review Sheet Types
- Plan Review Types

When importing an export package, additional associated configuration items may require decisioning.

For more information, see the **System Administration** module reference guide.

Workflow

You can configure Plan Review Workflow actions and rules when using a Plan Review Project life cycle. Specific Workflow actions and rules are discussed in the following sections.

Workflow Actions

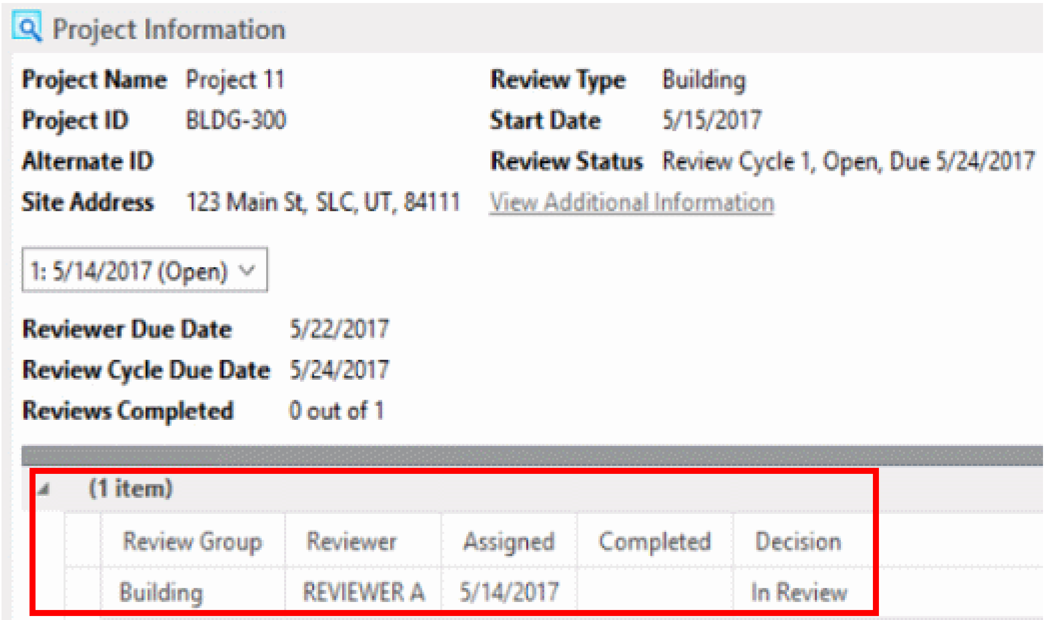
Workflow actions described in this section are only available when licensed for Plan Review.

Configuring these Workflow actions differs slightly based on the action's context. This context is automatically set when you choose the type of items that the life cycle contains, and is displayed in the **Properties** pane, on the **General** tab, in **Context**.

Log Event

The **Log Event** action allows you to log Plan Review specific events during a Workflow process.

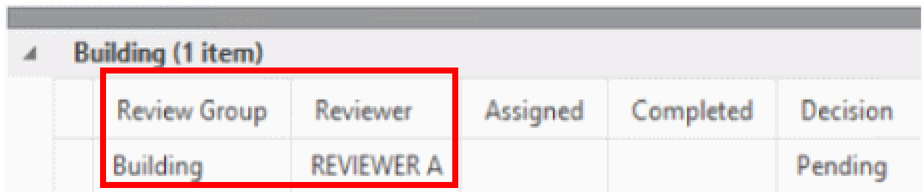
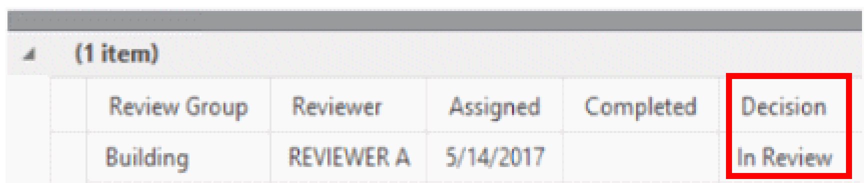
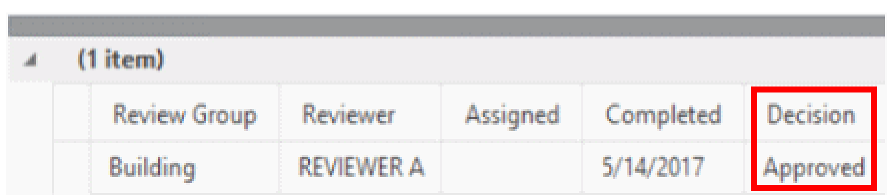
Note: Events are logged in the Review Cycle Status View for the Review Cycle that is currently open. If no Review Cycle is open for a project when a **Log Event** action is executed, the event will not be logged in the Review Cycle Status View.



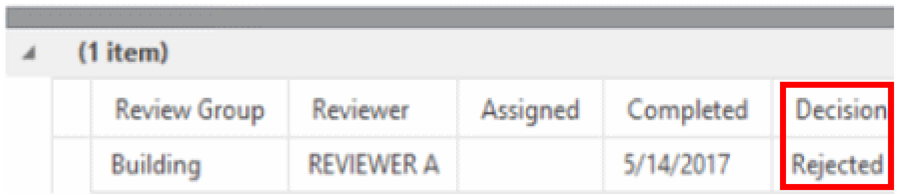
1. In the **Properties** pane, on the **General** tab, select an event type from the **Event type** drop-down list.

Note: The event types listed below are designed to be used together. Events will be displayed together in the Review Cycle Status View as long as each event type's **Set event details from** and **Set user** values are identical to the values used by the other event types.

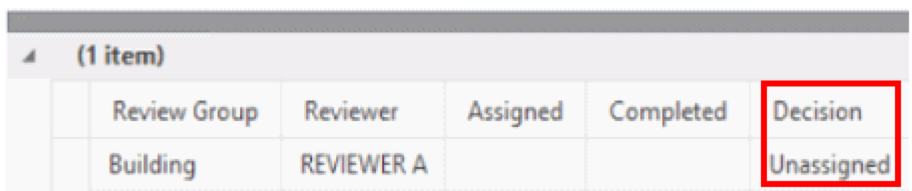
The following selections are available:

<table>
<tr><th>Event type</th><th>Description</th></tr>
<tr><td>Set Group</td><td>Select this event type to log an event when a user is assigned to a project. The values configured in the Set event details from field and the Set user field will be displayed in the Review Cycle Status View in the Unity Client.

This event type corresponds to an Event ID of 1.</td></tr>
<tr><td>In Review</td><td>Select this event type to log an event when a user has been assigned to a project using the Set Group event and should begin the review process. This event will be displayed in the Review Cycle Status View in the Unity Client.

This event type corresponds to an Event ID of 2.</td></tr>
<tr><td>Approved</td><td>Select this event type to log an event when a user assigned to review the project has approved the project based on his or her Review Group’s requirements. This event will be displayed in the Review Cycle Status View in the Unity Client.

This event type corresponds to an Event ID of 3.</td></tr>
</table>

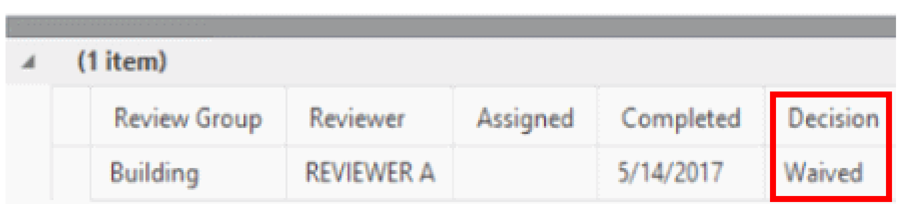
<table>
<tr><th>Event type</th><th>Description</th></tr>
<tr><td>Rejected</td><td>Select this event type to log an event when a user assigned to review the project has rejected the project based on his or her Review Group’s requirements. This event will be displayed in the Review Cycle Status View in the Unity Client.



This event type corresponds to an Event ID of 4.</td></tr>
<tr><td>Unassigned</td><td>Select this event type to log an event when a user that was previously assigned to review the project has been unassigned from the project. This event will be displayed in the Review Cycle Status View in the Unity Client.

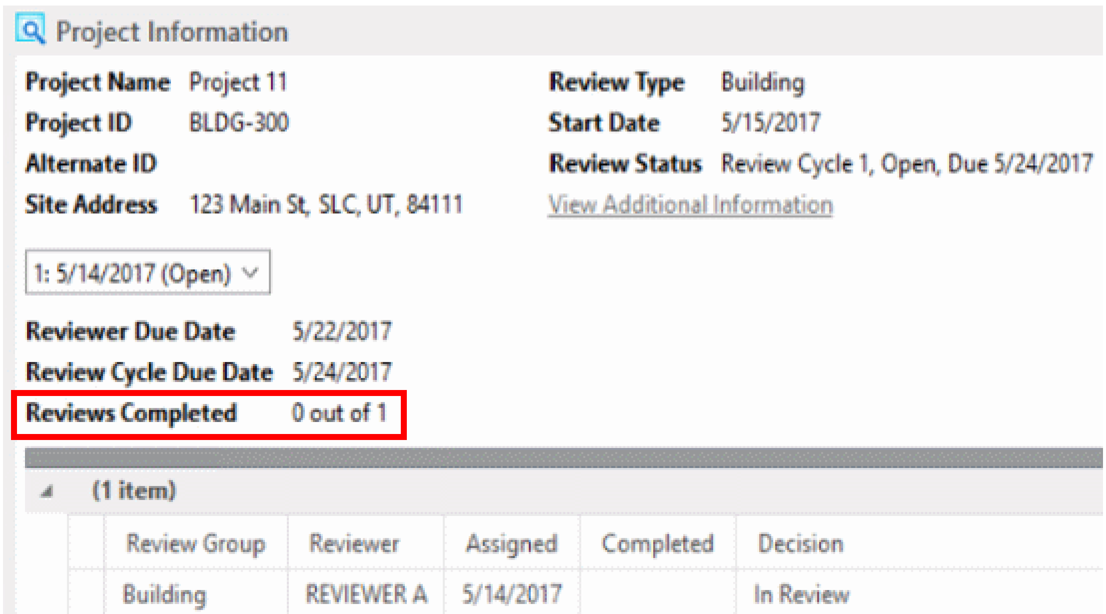


This event type corresponds to an Event ID of 5.</td></tr>
<tr><td>Waived</td><td>Select this event type to log an event when a user assigned to review the project has waived making a decision on the project based on his or her Review Group’s requirements. This event will be displayed in the Review Cycle Status View in the Unity Client.



This event type corresponds to an Event ID of 6.</td></tr>
</table>

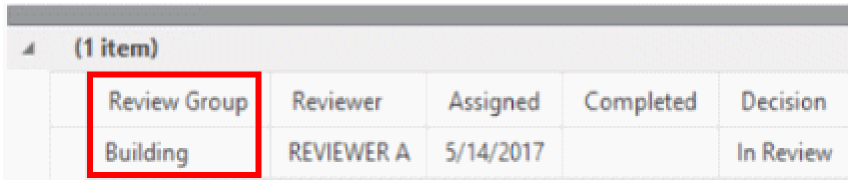
Note: The **Reviews Completed** field in the Review Cycle Status View is calculated based on the number of recorded **Log Event** items for the current Review Cycle. Review entries are considered to be completed when they have been marked as **Approved** or **Rejected**. Entries that are set to **Pending** or **In Review** are included in the total number of reviews to be completed. Entries that are set to **Unassigned** are not included in the total number of reviews to be completed.



2. From the **Set event details from** drop-down list, select the option that will be used to set the event's details. The following options are available:

Option	Description
Constant value	Select this option to set the event details to a constant specified value whenever this Workflow task is executed. Type the desired value into the text field that is displayed below the **Set event details from** field.
Current date/time	This option should not be selected. It is not supported for use with the **Log Event** action.
Current user name	This option should not be selected. It is not supported for use with the **Log Event** action.
Property	Select this option to set the event details to a specific property. Type the name of the desired property into the text field that is displayed below the **Set event details from** field.
User group name(s) of current user	This option should not be selected. It is not supported for use with the **Log Event** action.

Note: For a **Set Group** event type, the **Set event details from** field should be set to the value the Review Group should be set to when this Workflow action is executed. The Review Group will be noted in the Review Cycle Status View.

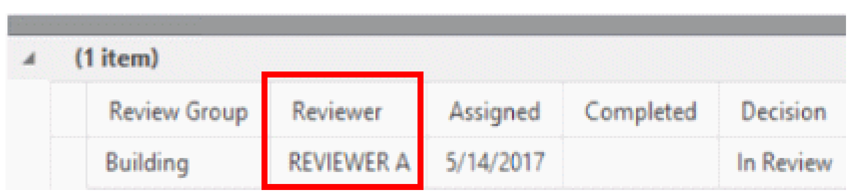


Note: For all other event types that should be related to the configured **Set Group** event type, the **Set event details from** field should be set to the same value used for the corresponding **Set Group** event type.

3. From the **Set user** drop-down list, select the option that will be used to set the user for the event. The following options are available:

Option	Description
<From Session>	Select this option to set the user to the user who is logged in when the Workflow task is executed.
<From Property>	Select this option to set the user from a specific property. Type the name of the desired property into the text field that is displayed below the **Set user** field.
User Name	Select a specific user name from the list to set the user to the specified user name.

Note: For a **Set Group** event type, the **Set user** field should be set to the value the Reviewer should be set to when this Workflow action is executed. The Reviewer will be noted in the Review Cycle Status View.



Note: For all other event types that should be related to the configured **Set Group** event type, the **Set event details from** field should be set to the same value used for the corresponding **Set Group** event type.

4. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Open/Close Project

The **Open/Close Project** action allows you to open or close a Plan Review project in the Plan Review website.

Note: This action is supported only in the Plan Review website.

To configure this action:

1. In the **Properties** pane, on the **General** tab, select one of the following options:
   - **Open** - Opens the project
   - **Close** - Closes the project

Note: Each option must have its own ad hoc task to display in the Plan Review website.

2. In the **Properties** pane, click the **Documentation** tab.
3. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Set Property from Field

Allows you to set the property specified in the **Property Name** field to the field value specified from the **Field** drop-down list.

Note: This action is supported only in the Unity Client.

To configure this action:

1. In the **Properties** pane, on the **General** tab, type a property name in the **Property Name** field.
2. From the **Field** drop-down list, select the field that will be used to set the property.

   The following selections are available:

Field	Description
Name	The Plan Review project's name field.
External ID	The Plan Review project's external ID field.
Start Date	The Plan Review project's start date field.
Project Identifier	The Plan Review project's identifier field.
Project Review Type	The Plan Review project's review type field.

Field	Description
Project Group	The Plan Review project group name.
Display Name	The Plan Review project's display name field.
Status	The Plan Review project's status field.
Project Form ID	The ID number of the Unity Form used by the Plan Review project.
Submitter's Email Address	The e-mail address of the Plan Review project's submitter.

3. In the **Properties** pane, click the **Advanced** tab.
4. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Set Value

Allows you to set the field specified in the **Field to set** drop-down list to the specified value.

Note: This action is supported only in the Unity Client.

To configure this action:

1. In the **Properties** pane, on the **General** tab, from the **Field to set** drop-down list, select the field to set.

   The following selections are available:

Field	Description
Name	The Plan Review project's name field.
External ID	The Plan Review project's external ID field.
Start Date	The Plan Review project's start date field.
Project Identifier	The Plan Review project's identifier field.
Project Review Type*	The Plan Review project's review type field.
Project Group*	The Plan Review project group name.
Display Name	The Plan Review project's display name field.
Status	The Plan Review project's status field.
Project Form ID*	The ID number of the Unity Form used by the Plan Review project.
Submitter's Email*	The e-mail address of the Plan Review project's submitter.

*These values should not be changed since they are foreign keys to other entities related to the Plan Review project entity.

2. From the **Obtain value from** drop-down list, select one of the following locations to obtain the value from:

Obtain value from	Description
Constant value	This option sets the field value to the constant value specified.
Current date/time	This option sets the field value to the current date/time.
Current user name	This option sets the field value to the user name of the currently logged in user. If you want to use the configured real name for the user, select the **Use real name** option.
Property	This option sets the field value to the name of a property.
User group name(s) of current user	This option sets the field value to the user group(s) the current logged in user.

3. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Workflow Rules

Workflow rules described in this section are only available when licensed for Plan Review.

Configuring these Workflow rules differs slightly based on the rule's context. This context is automatically set when you choose the type of items that the life cycle contains, and is displayed in the **Properties** pane, on the **General** tab, in **Context**.

Check Field Value

Checks a specified field value against another value.

1. In the **Properties** pane, on the **General** tab, from the **Field to Check** drop-down list, select the field to check.

Field to Check	Description
Display Name	The Plan Review project's display name.
External ID	The Plan Review project's external ID.
Name	The Plan Review project's name.
Project Form ID	The ID number of the Unity Form used by the Plan Review project.
Project Group	The Plan Review project group name.

Field to Check	Description
Project Identifier	The Plan Review project's project identifier.
Project Review Type	The Plan Review project's review type.
Start Date	The Plan Review project's start date.
Status	The Plan Review project's status.
Submitter's Email Address	The e-mail address of the Plan Review project's submitter.

2. Select the appropriate **Operator** from the drop-down list.

Note: The <, <=, >=, and > operators are not available for alphanumeric fields.

3. From the **Compare To** drop-down list, select one of the following for comparison:

Compare To	Description
Constant value	This option compares the field value to the constant value specified.
Current date/time	This option compares the field value to the current date/time.
Current user name	This option compares the field value to the user name of the currently logged in user. If you want to use the configured real name for the user, select the **Use real name** option.
Property	This option compares the field value to the value of the specified property.
User group name(s) of current user	This option compares the field value to the user group(s) the current logged in user.

Note: This rule evaluates false if the field to check is on a related type that does not exist, or if the field to check is null. If the field to check is an empty string, this rule will only evaluate to true when configured to compare to an empty string.

4. In the **Properties** pane, click the **Advanced** tab.
5. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Related Entity Exists

Checks to see if a related entity type exists for the current item.

1. In the **Properties** pane, on the **General** tab, from the **Related Entity Type** drop-down list, select a related entity type to evaluate using this rule.

The following selections are available:

Entity Type	Description
Plan Review Document	This entity type is used to check for documents that are part of the Plan Review project in the selected life cycle.
Plan Review History	This entity type is used to check for Plan Review history events that are part of the Plan Review project in the selected life cycle.
Review Cycle	This entity type is used to check for review cycles that are part of the Plan Review project in the selected life cycle.

2. You can filter the results by selecting the **Filter Results** check box and perform the following:
   a. From the **Field** drop-down list, select one of the following:

Entity Type	Field
Plan Review Document	The following fields are available: • **Plan Review Document ID** - the document ID of the Plan Review document • **Plan Review Project ID** - the Project ID of the Plan Review project • **Document Handle** - the document number for the document • **Document Revision Number** - the revision number of the document • **Document Name** - the auto-name of the document

Plan Review History	The following fields are available:
	• **Date Created** - the date the Workflow task was run
	• **Event ID** - the ID of the Log Event action type for the Workflow Task. The following values are available:
	  • **1** - this value corresponds to the **Set Group** Event Type
	  • **2** - this value corresponds to the **In Review** Event Type
	  • **3** - this value corresponds to the **Approved** Event Type
	  • **4** - this value corresponds to the **Rejected** Event Type
	  • **5** - this value corresponds to the **Unassigned** Event Type
	• **Event Details** - the **Event Details** of the Workflow task

Entity Type	Field
Review Cycle	The following fields are available: • **Start Date** - the date the review cycle was started • **End Date** - the date the review cycle ended • **Due Date** - the date the review cycle is due • **Reviewer Due Date** - the due date for the reviewers • **Status** - the status of the project within the review cycle **Caution:** The **Start Date**, **End Date**, and **Status** fields should not be modified through Workflow.

b. In **Must match:**, select **Constant value** or **Property** and enter a constant value or property.

3. If you do not want to use the results to execute sub-tasks, clear the **Use results for sub-tasks** check box.

Note: When using the results to execute sub-tasks, the rule's context sets the context for respective sub-tasks. The action's context is automatically set when you choose the type of items that the life cycle contains. The context is displayed in the **Properties** pane, on the **General** tab, in **Context**. If the direct task does not specify context, then the context specified by the most direct ancestor will be used. For example, if you nest multiple Related Item Exists rules that each provide context, the sub-tasks will use the deepest context.

4. If you want to store the result count in a property, select the **Save result count in property:** check box and enter the name of the property in the corresponding field.
5. In the **Properties** pane, click the **Advanced** tab.
6. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Plan Review Data Provider Configuration

Plan Review Data Provider Types

Note: The **Plan Review** data provider types are only available to systems licensed for **Plan Review Named User**.

Data providers return from a data source information to be displayed in a dashboard. New dashboards cannot be used unless at least one data provider is added to it.

Note: For information about using dashboards, see the Reporting Dashboards module reference guide.

The Create Data Provider Wizard is used to create new data providers. The process is the same for copying an existing data provider or creating a completely new data provider, except the options are pre-configured with the information from the data provider that was copied if you choose to copy an existing data provider. The pre-configured options for copied data providers can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.

The configuration process depends on the data provider type selected. This table describes the data provider type available for systems with Plan Review licensed.

Data Provider Type	Description
Plan Review	Returns data on Plan Review projects. See Adding a Plan Review Data Provider Type on page 78.

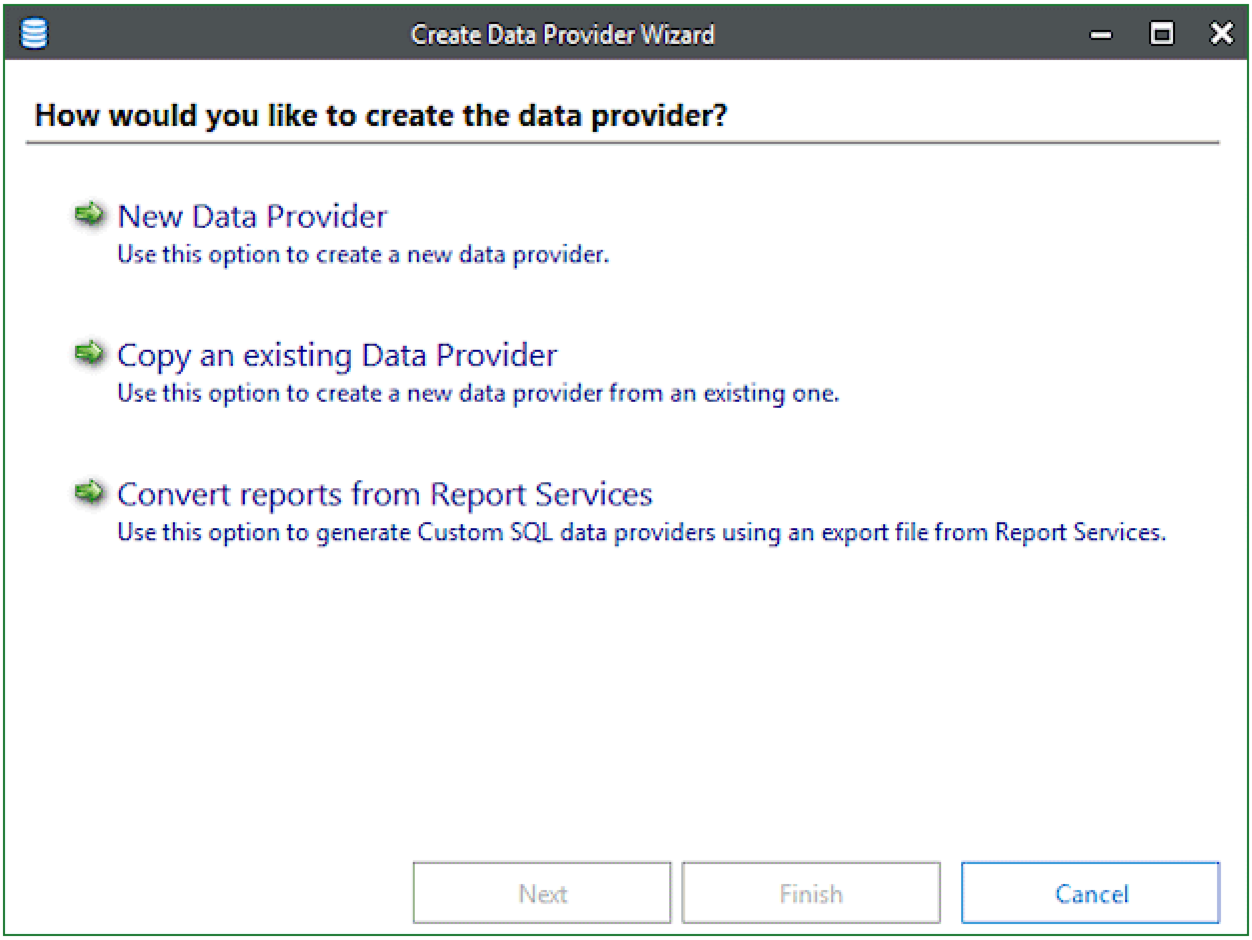
Adding a Plan Review Data Provider Type

The Plan Review data provider type returns data on Plan Review projects. This can include data on a project's name and location information, its status, reviewer due dates, etc.

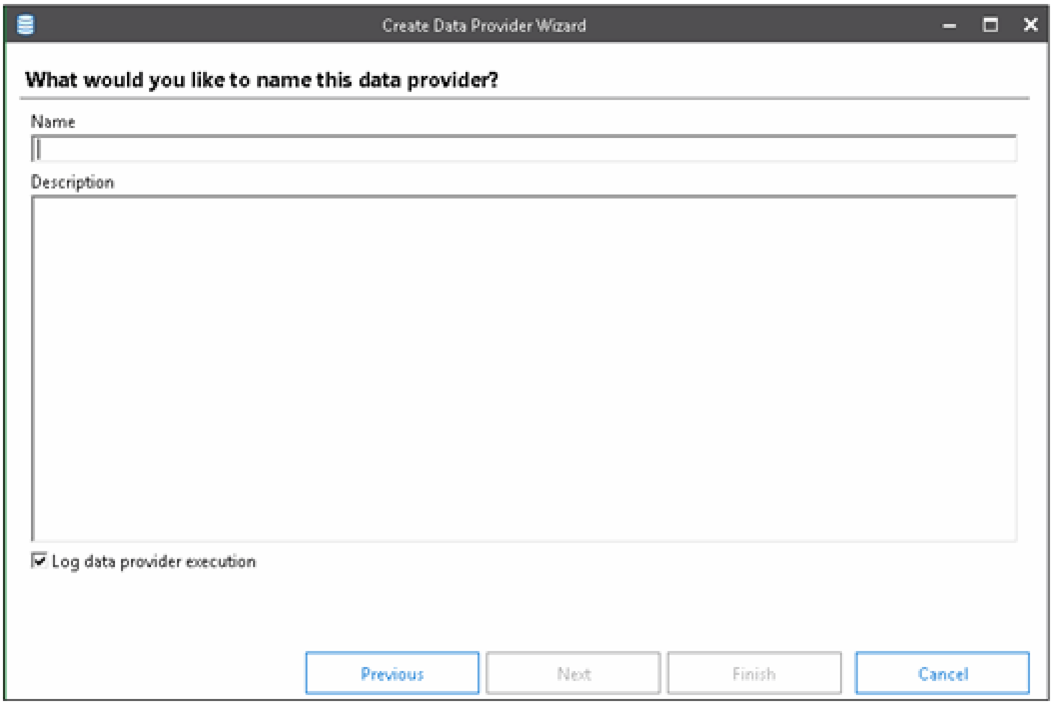
The **Create Data Provider Wizard** is used to create new data providers. To create a new data provider:

1. From the Dashboard Viewer, click **Administration** from the bottom of the Dashboard Gallery screen, and then click the **Create new Data Provider** button from the **Data Provider Administration** ribbon of the Unity Client:

2. At the **How would you like to create the data provider?** page:
   - Click **Create new Data Provider** to create a completely new data provider.
   - Click **Copy an existing Data Provider** to use an existing data provider as the template for a new data provider. The process is the same as creating a completely new data provider except the options are pre-configured with the information from the data provider that was copied. The pre-configured options can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.
   - Click **Convert reports from Report Services** to use an export file from Report Services to create a custom SQL data provider.



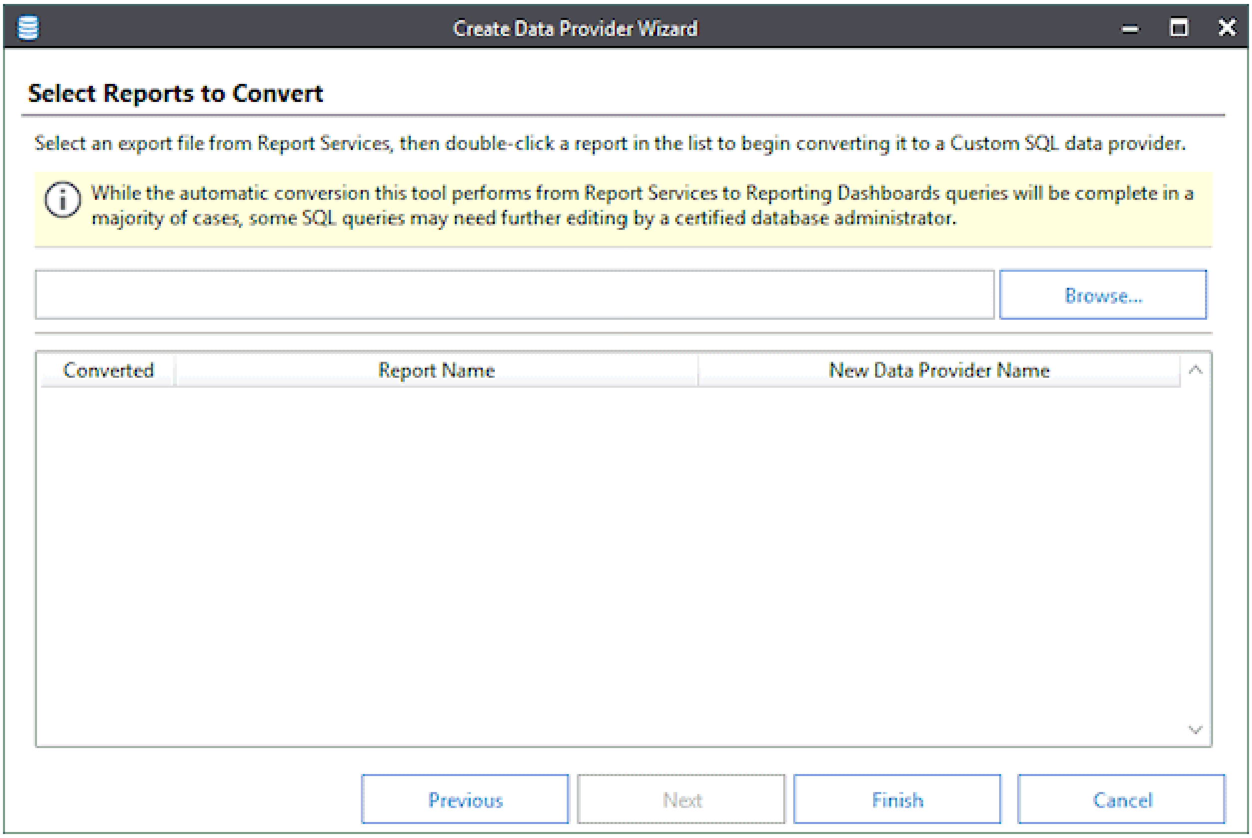
3. If you clicked **Create new Data Provider**, the **What would you like to name this data provider?** page is displayed.



If you clicked **Copy an existing Data Provider**, the **Select the data provider to copy from** page is displayed. You can search for a data provider to copy by typing the name of the data provider into the **Search** bar in this page. Select the data provider to copy, then click **Next**. The **What would you like to name this data provider?** page is displayed.

Note: When a data provider is copied, the options in the remaining pages are pre-configured with the information from the data provider that was copied. Unless otherwise noted, the pre-configured options can be changed or edited to reflect the requirements of the new data provider.

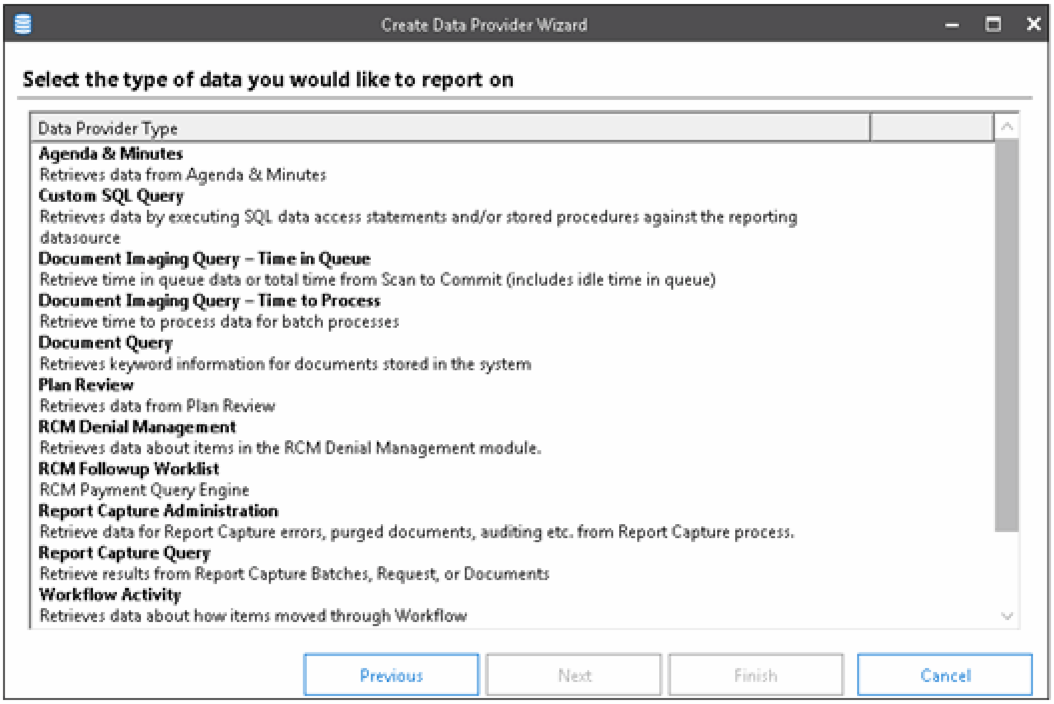
if you clicked **Convert reports from Report Services**, the **Select Reports to Convert** page is displayed. Click **Browse** to select a Report Services export file (**.xml**) to import. The file is imported as a Custom SQL data provider. Multiple Report Services export files can be added on this screen.



To edit the details of each individual import, double-click on the file in the list. The **What would you like to name this data provider?** page is displayed.

4. Type a name for the data provider in the **Name** field. The name should be unique and allow the data provider to be easily distinguished from other data providers.
5. Type a brief description of the data provider in the **Description** field. The description should briefly explain what the data provider is and what type of data a user can expect to retrieve from it.
6. Select **Log data provider execution** to include the elapsed time of data retrieval and runtime parameter information for this data provider in the **History** log. Data requests for the data provider are always logged in the history even if this option is deselected.
7. Click **Next**. Unless you are converting data from Report Services, the **Select the type of data you would like to report on** page is displayed. If you are converting data from Report Services, the **Edit SQL query** page is displayed.

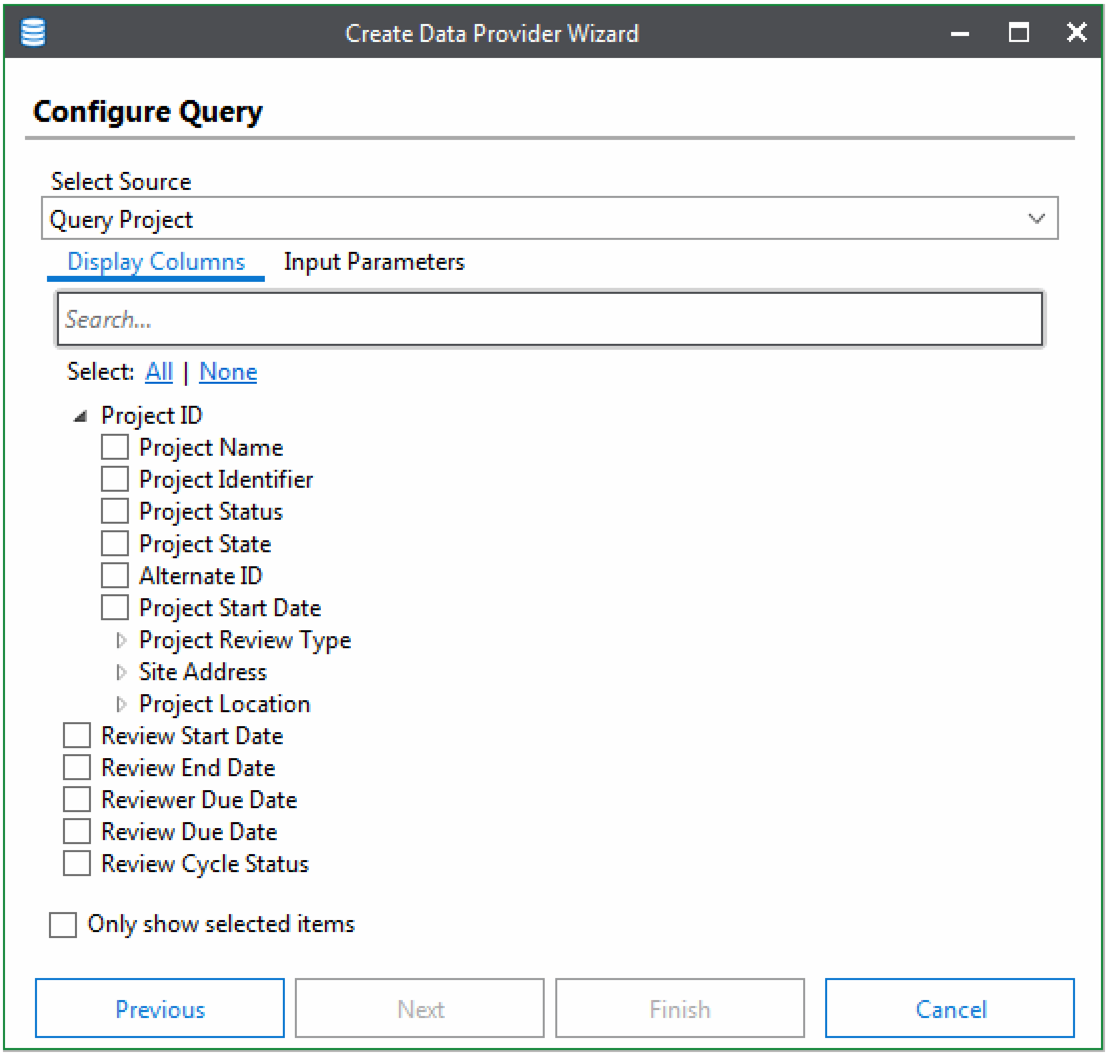
Note: If you copied an existing data provider this page is not displayed. You cannot change the data provider type for copied data providers.



Note: The data providers available depend on the modules licensed for your system. The **Custom SQL Query** and **Document Query** data provider types are available to all systems with Reporting Dashboards.

8. Select **Plan Review**.

9. Click **Next**. The **Configure Query** dialog box is displayed.

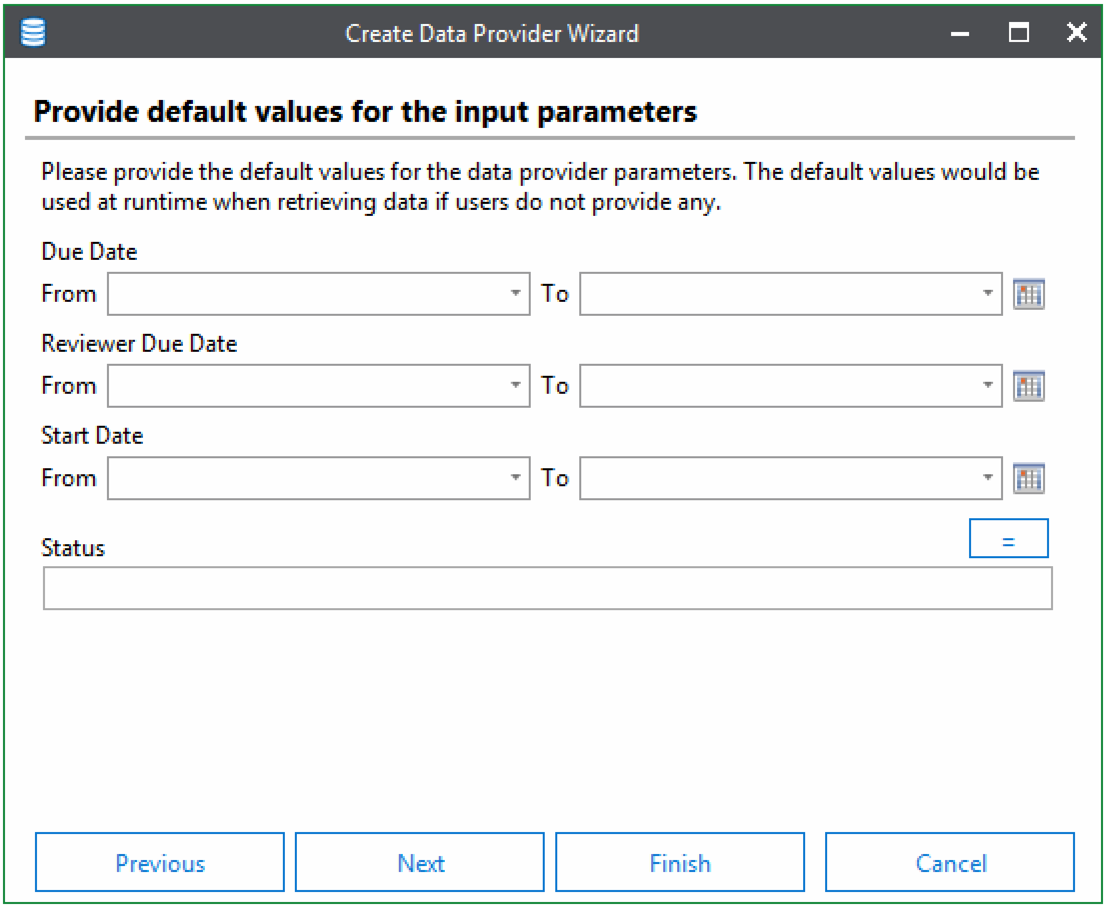


10. Select **Query Project** from the **Select Source** drop-down list. The **Display Columns** and **Input Parameters** lists are populated with columns and parameters related to the selected source.
11. Select one or more display columns from the **Display Columns** list to include it in the results or deselect it to hide it.

    Click **None** to deselect all display columns or click **All** to select all display columns.
12. Select one or more input parameters from the **Input Parameters** list to be used to limit the values returned to the dashboard.

    Click **None** to deselect all input parameters or click **All** to select all input parameters.

13. Click **Next**. The **Provide default values for the input parameters** dialog box is displayed.

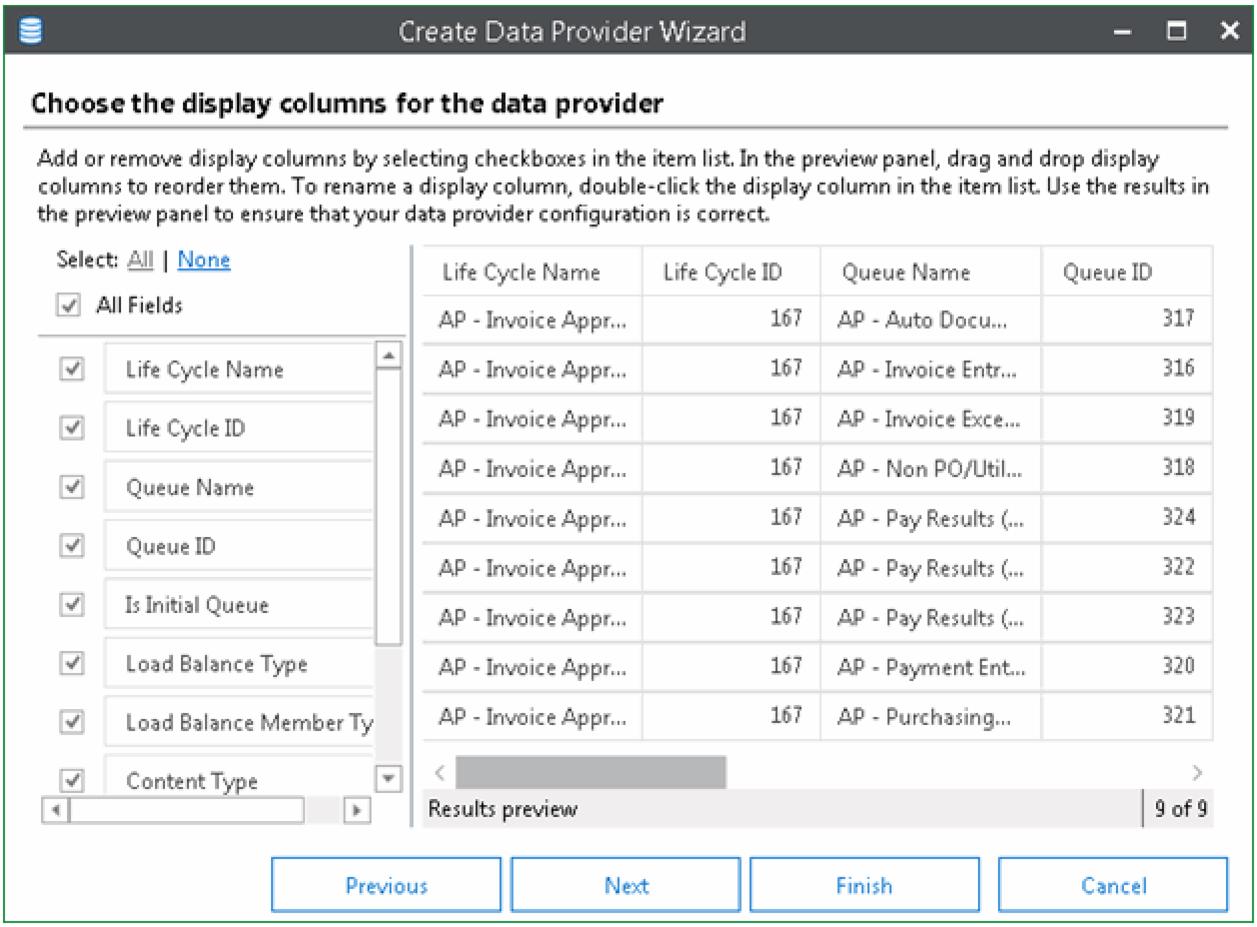


Depending on your selection in the previous dialog box, the following values may be available:

Option	Description
Due Date	Specify a default date range for the due date to be used to retrieve projects for display in the dashboard. Projects whose due date falls within the specified range will be displayed in the dashboard.
Reviewer Due Date	Specify a default date range for the reviewer due date to be used to retrieve projects for display in the dashboard. Projects whose reviewer due date falls within the specified range will be displayed in the dashboard.
Start Date	Specify a default date range for the start date to be used to retrieve projects for display in the dashboard. Projects whose start date falls within the specified range will be displayed in the dashboard.

Option	Description
Status	Specify a default date range for the project status to be used to retrieve projects for display in the dashboard. Projects whose status matches the specified criteria will be displayed in the dashboard.

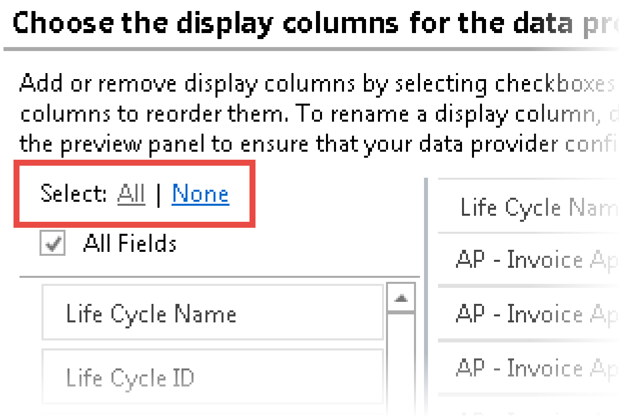
14. Click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.



15. Select a display column to include it in the results or deselect it to hide it.

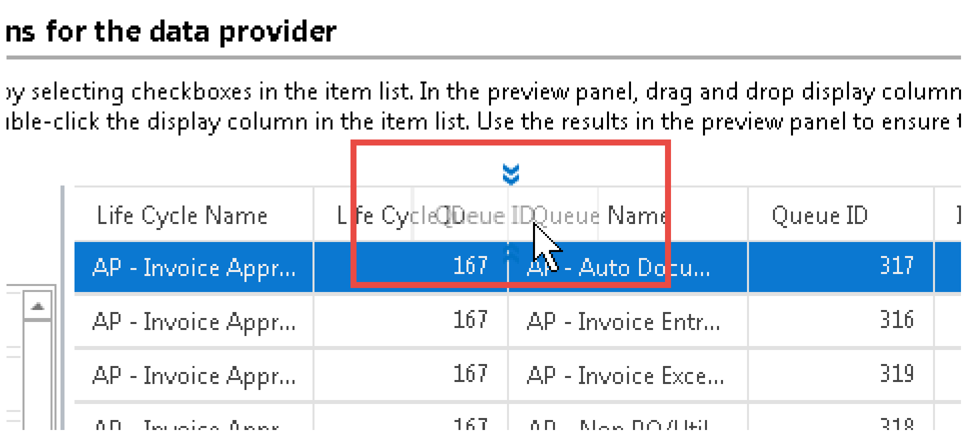
Note: In order for users to be able to open a Workflow object directly from a dashboard, the corresponding **ID** Keyword must be included as a display column.

Click **None** to deselect all display columns or click **All** to select all display columns.

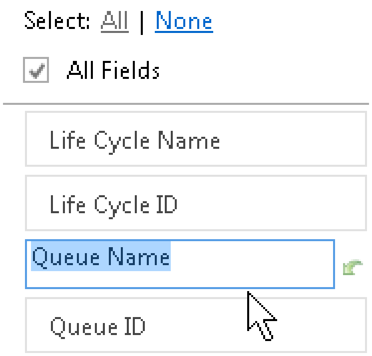


Tip: A preview of the type of data that is returned with the display columns selected is displayed in the preview pane at the right of the list of display columns. If the data returned is not acceptable, select different display columns or click **Previous** to reconfigure previous aspects of the data provider.

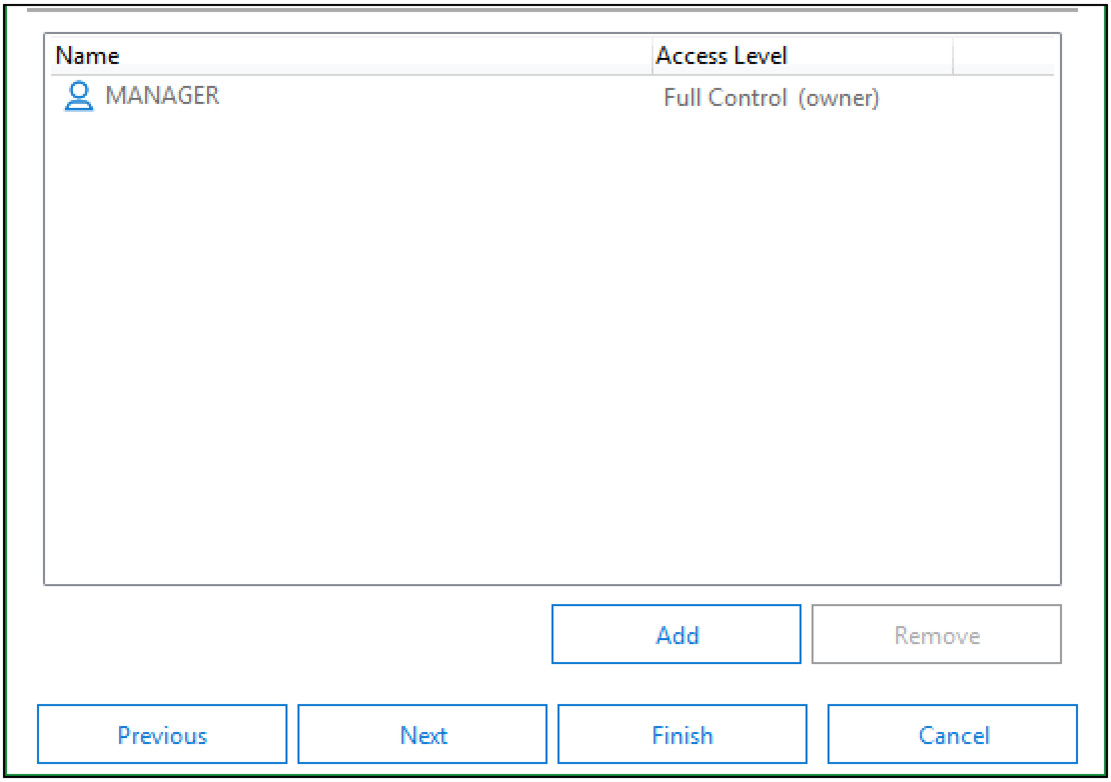
16. To reorder the display columns, drag-and-drop the column headings in the preview pane to put them in the desired order.



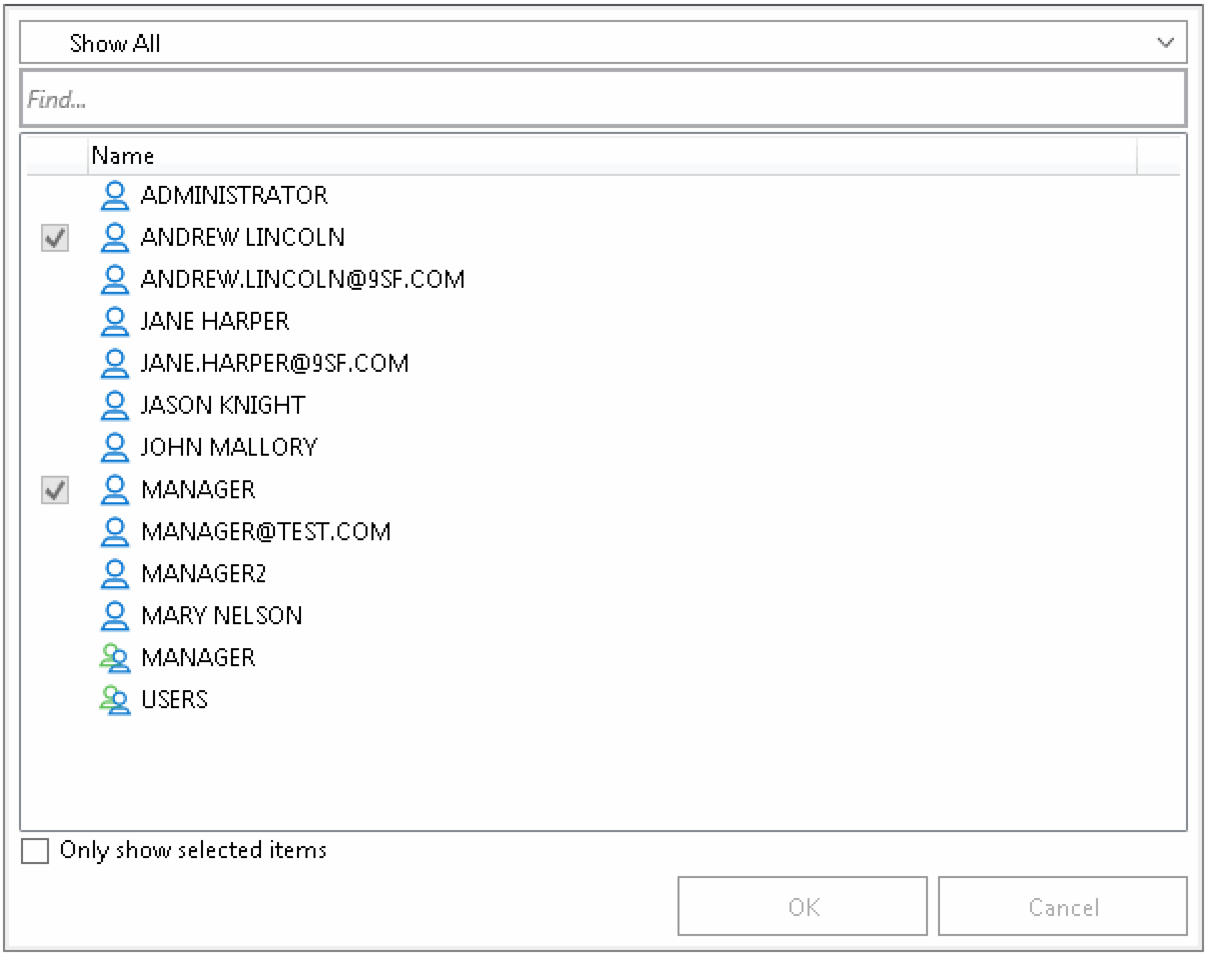
17. To rename a display column, double click it in the list and type the new name in the field provided. Click anywhere outside the field to save the changes.



18. Click **Next**. The **Who should have access to the data provider?** dialog box is displayed.

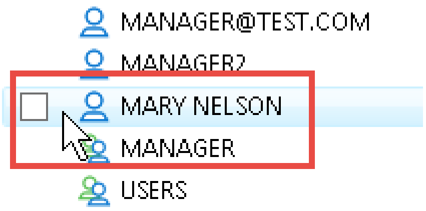


19. To grant access to a new user, click **Add**. The **Select Users** dialog box is displayed. Only users and users groups with access to Plan Review are listed.



Tip: To show only users, select **Specific User** from the drop-down list, and to show only User Groups, select **User Group** from the drop-down list. To find a specific user or User Group, type the first few letters of the name or the full name in the **Find...** field and the list is filtered accordingly. To show only previously selected users, select **Only show selected items**.

20. To grant access to the dashboard or report to a user or User Group, move the cursor over that user or User Group's row and select the check box that is displayed.



To remove a user or User Group's access, deselect the check box beside their name.

Note: Access cannot be changed for the owner.

21. Click **OK** to save your user selections.

Caution: When any dashboard or report is accessed by a user, data for all configured items (such as Document Types or Workflow queues) is returned, even if the user accessing the dashboard or report does not have access to those items in OnBase.

22. To remove users or user groups, right-click the user's name and select **Remove**. You are not prompted to confirm this action.

Note: Access for the user account that created the data provider cannot be removed or changed. The data provider creator always has the full access to the data provider.

23. To change a user's access level, right-click the user's name in the list and select **Full Control**:
    - If the user currently has Execute Only access, they are granted Full Control.
    - If the user currently has Full Control, their access level is reduced to Execute Only.

    Full Control allows the user to configure the settings for the data provider, including user access. **Execute Only** allows the user to use, but not configure, the data provider.

Note: The owner is the user who created the data provider. Access cannot be changed for the owner.

24. Click **Next**. The **Summary** dialog box is displayed. Review the information in the main pane to confirm that the data provider is correctly configured. If not, click **Previous** to return to the various configuration dialog boxes so that changes can be made.
25. Click **Finish**. The data provider is saved and is available for use with dashboards.

OnBase®

Foundation EP5

Electronic Plan Review

User Guide

Foundation EP5

Getting Started

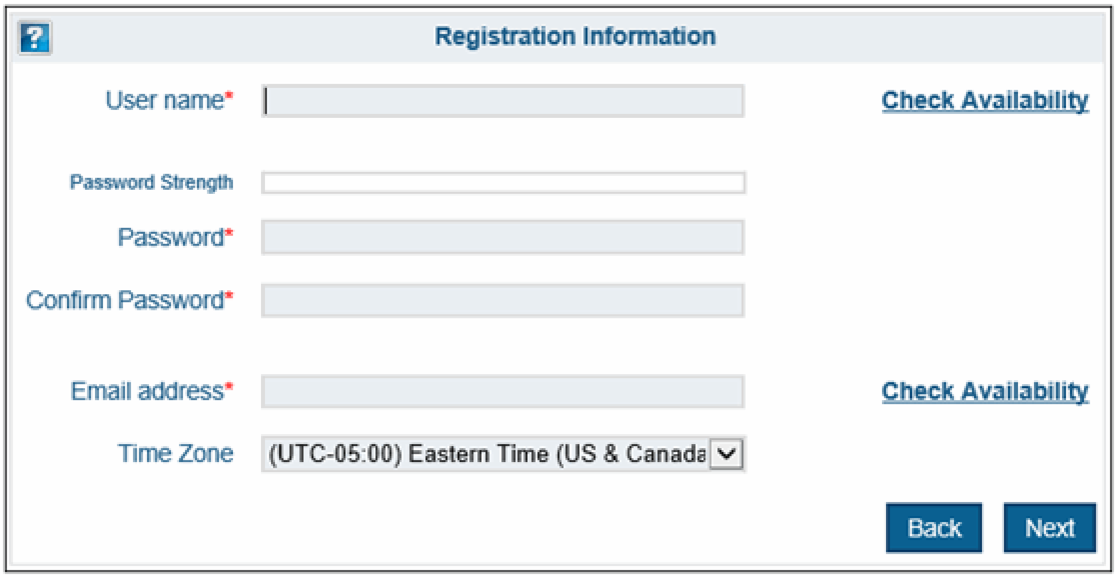
All Plan Review **Submitter** users can use the Plan Review website to register users, add contacts and project groups, and submit plan documents for review.

Registering an Account

To upload plan documents for review, you must first create a Plan Review account.

To register an account for Plan Review:

1. Navigate to the address of your Plan Review website.
2. Select the **Register** hyperlink. The **New User Registration** window is displayed.
3. Read the disclaimer and select the **I agree to the above terms and conditions** option.
4. Click **Next**. The **Registration Information** window is displayed.

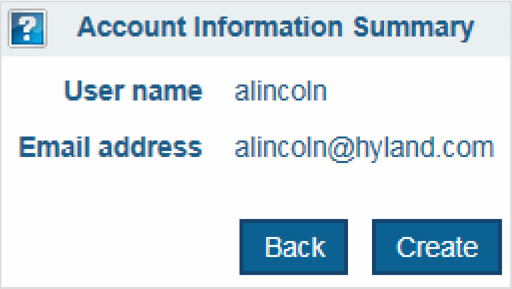


5. Enter your user information into the appropriate fields:

Registration Option	Description
User name	Enter your unique user name in the **User name** field. This is a required field. Your user name is not case-sensitive. **Note:** You cannot use a user name that is already in use. Click **Check Availability** to see if your chosen user name is available.

Registration Option	Description
Password	Enter your password for your Plan Review website account. This is a required field. Your password is case-sensitive. **Note:** The **Password Strength** indicator displays the strength of your password by color with red indicating a weak password, yellow indicating a medium strength password, and green indicating a strong password.
Confirm Password	Enter your password again for confirmation of the password entered in the **Password** field. This is a required field. Your password is case-sensitive.
Email address	Enter your email address to use for Plan Review projects. This is a required field. **Note:** You cannot use an email address that is already in use. Click **Check Availability** to see if your chosen email address is available.
Time Zone	Select the time zone in which you reside from the drop-down list.

6. Click **Next**. The **Account Information Summary** window is displayed.



7. Review your account information for accuracy. If any information is incorrect, click the **Back** button and revise your information as needed.

Note: Depending on your system configuration, you may also have to answer a CAPTCHA before proceeding with your registration.

8. After your information is verified and any required CAPTCHAs are answered, click **Create**. Your Plan Review account is created.

Logging On

Log on to your Plan Review account to start submitting projects and creating contacts for the project.

To log on to your Plan Review account:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.
3. Enter your user name and password in the **User name** and **Password** fields.

Note: If you forgot your password, you can select the **Forgot Name/Password** hyperlink to reset your password. See Resetting or Retrieving Your User Name and Password on page 93 for more information.

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4. Click the **Sign In** button.

Resetting or Retrieving Your User Name and Password

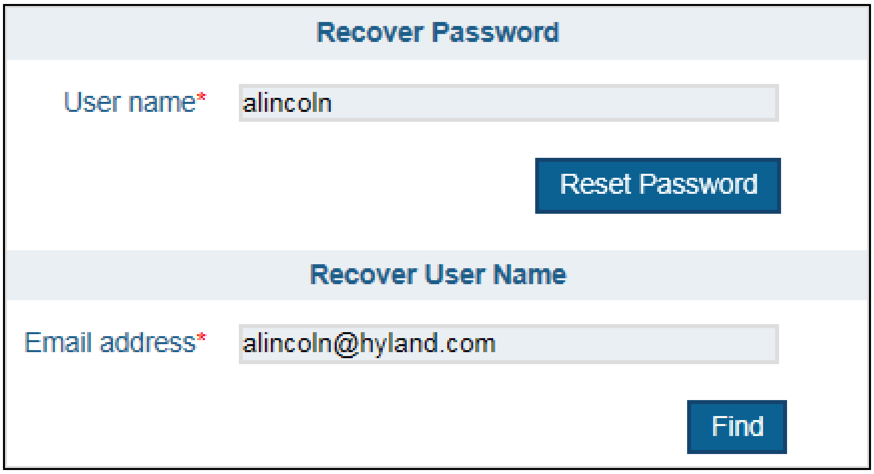
If you forgot your user name or password, you can use the **Forgot Name/Password** feature to reset or retrieve your user name or password.

Resetting or Retrieving Your Password

You can reset or retrieve your password for your Plan Review account.

To retrieve or reset your password:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.
3. Select the **Forgot Name/Password** hyperlink. The **Account Recovery** window is displayed.



4. Type your user name in the **User name** field.

5. Click **Reset Password**. An email message that contains a hyperlink to reset your password is sent to your email account. After you reset your password, log on to Plan Review with your user name and new password.

Note: Depending on your system's configuration, the hyperlink that resets your password may expire after a specified time. If your hyperlink has expired, you need to click the **Reset Password** button again to receive a new hyperlink.

Retrieving Your User Name

You can recover your user name for your Plan Review account.

To retrieve your user name:

1. Navigate to the address of your Plan Review website.
2. Select the **Sign In** hyperlink.
3. Select the **Forgot Name/Password** hyperlink. The **Account Recovery** window is displayed.

4. Type your email address associated with your Plan Review account in the **Email address** field.
5. Click **Find**. An email message that contains your user name is sent to your email account.

Using the Plan Review Website

The following list contains a brief overview of the steps you need to perform to create and submit a project for review using the Plan Review website.

1. Enter contact information for people that are associated with your project (including information for the company at which they are employed). For more information, see Adding People to Your Contacts List on page 95.
2. Create a project within Plan Review that is used to store all documents and information related to your project. For more information, see Creating A New Project on page 102.

3. Assign the contacts you added in step 1 to the roles they perform for your project (for example, Architect or Subcontractor). For more information, see Assigning Someone to a Project Role on page 110.
4. Enter the locations at which the project is taking place. For more information, see Adding a New Location Parcel on page 118.
5. Upload plan documents associated with the project. For more information, see Adding Documents to a Project on page 120.
6. Submit your project for review. For more information, see Submitting A Project on page 128.

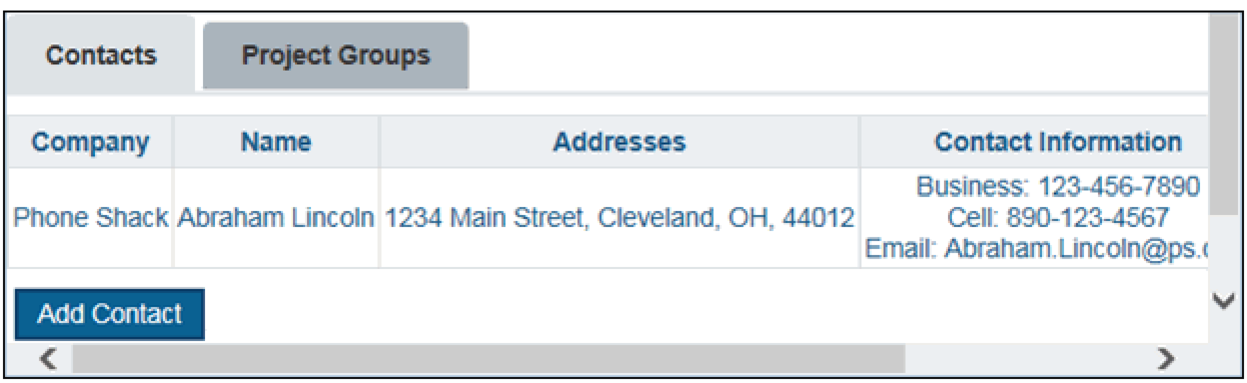
   Once your project is reviewed, the reviewed documents are displayed in the **Review Documents** or **Approved Documents** views.
7. Review any documents added to the **Review Documents** view, and modify the documents per the reviewers comments. Once all required modifications are made, re-upload your revised plan documents. For more information, see Viewing Reviewed Documents on page 139.
8. Resubmit your project for review. For more information, see Submitting A Project on page 128.

Adding People to Your Contacts List

Your Plan Review contact list is used to store contact information for every person that has a significant level of involvement with any of your projects. This could include a project's architect, an engineer, or a subcontractor. Any contact in your contact list can be assigned to one or more projects before it is submitted for review.

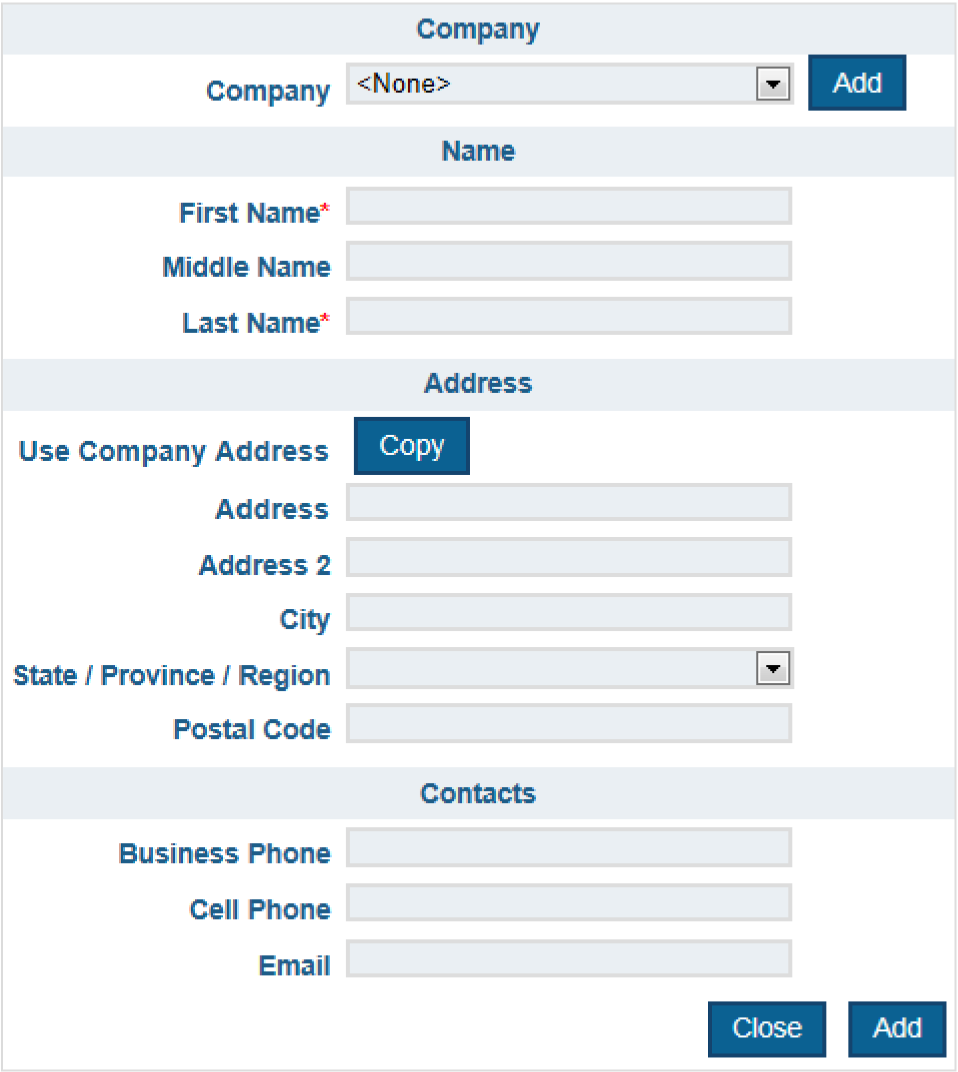
To add a new contact to your Plan Review account:

1. Click the **Settings** tab. The **Settings** window is displayed.



2. Click the **Contacts** tab.

3. Click **Add Contact**. The **New Contact** window is displayed.



4. Enter the information for your new contact:

Option	Description
Company	Select the company the contact is affiliated with from the drop-down list. If the contact's company does not yet exist, see Adding Company Information on page 98.
First Name	Enter the contact's first name. This is a required field.
Middle Name	Enter the contact's middle name.
Last Name	Enter the contact's last name. This is a required field.

Option	Description
Use Company Address	Select the **Copy** button to copy the selected company's address to the contact address fields.
Address	Enter the contact's address.
Address 2	Enter the contact's address.
City	Enter the contact's city.
State / Province / Region	Enter the contact's state, province, or region.
Postal Code	Enter the contact's ZIP or Postal Code.
Business Phone	Enter the contact's business phone number.
Cell Phone	Enter the contact's cell phone number.
Email	Enter the contact's email address.

5. Click **Add**. The contact's information is added to your **Contact** list.

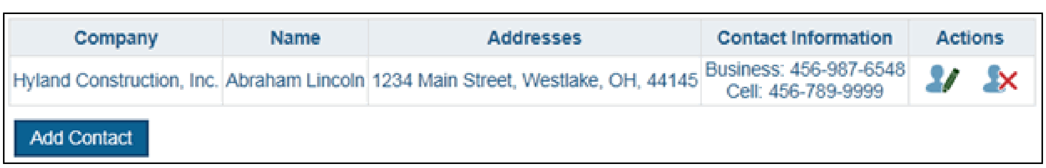
Note: Contacts in your **Contact** list must be manually assigned to the projects they are associated with. For more information on assigning a contact to a project, see Assigning Someone to a Project Role on page 110.

Modifying An Existing Contact

You can remove or modify an existing contact's information in the **Contacts** tab

To modify an existing contact:

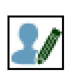
1. Click the **Settings** tab. The **Settings** windows is displayed.
2. Click the **Contacts** tab. The list of existing contacts is displayed.



Company	Name	Addresses	Contact Information	Actions
Hyland Construction, Inc.	Abraham Lincoln	1234 Main Street, Westlake, OH, 44145	Business: 456-987-6548 Cell: 456-789-9999	

Add Contact

3. Select one of the following actions from the **Actions** column:
   - Click the **Edit** button to modify an existing contact's information.



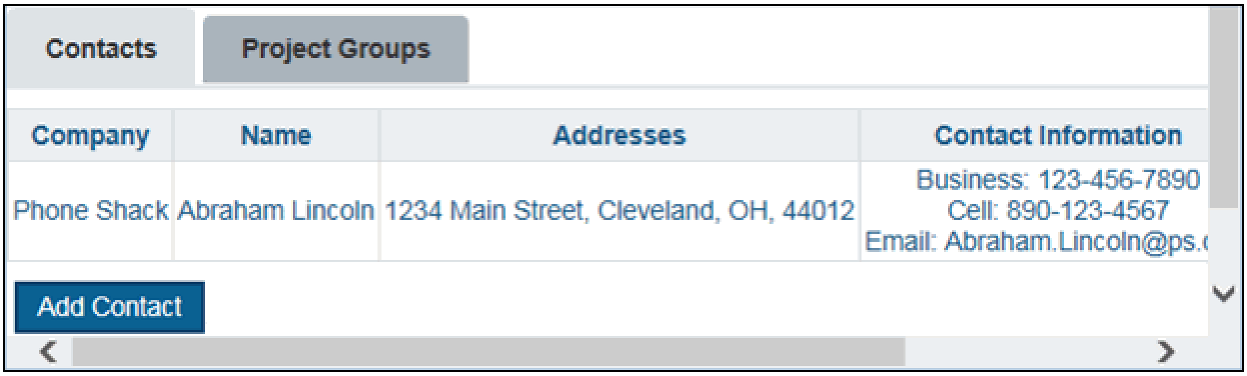
   - Click the **Delete** button to remove a contact from your **Contacts** list.

Adding Company Information

Each contact you create must be assigned to a company.

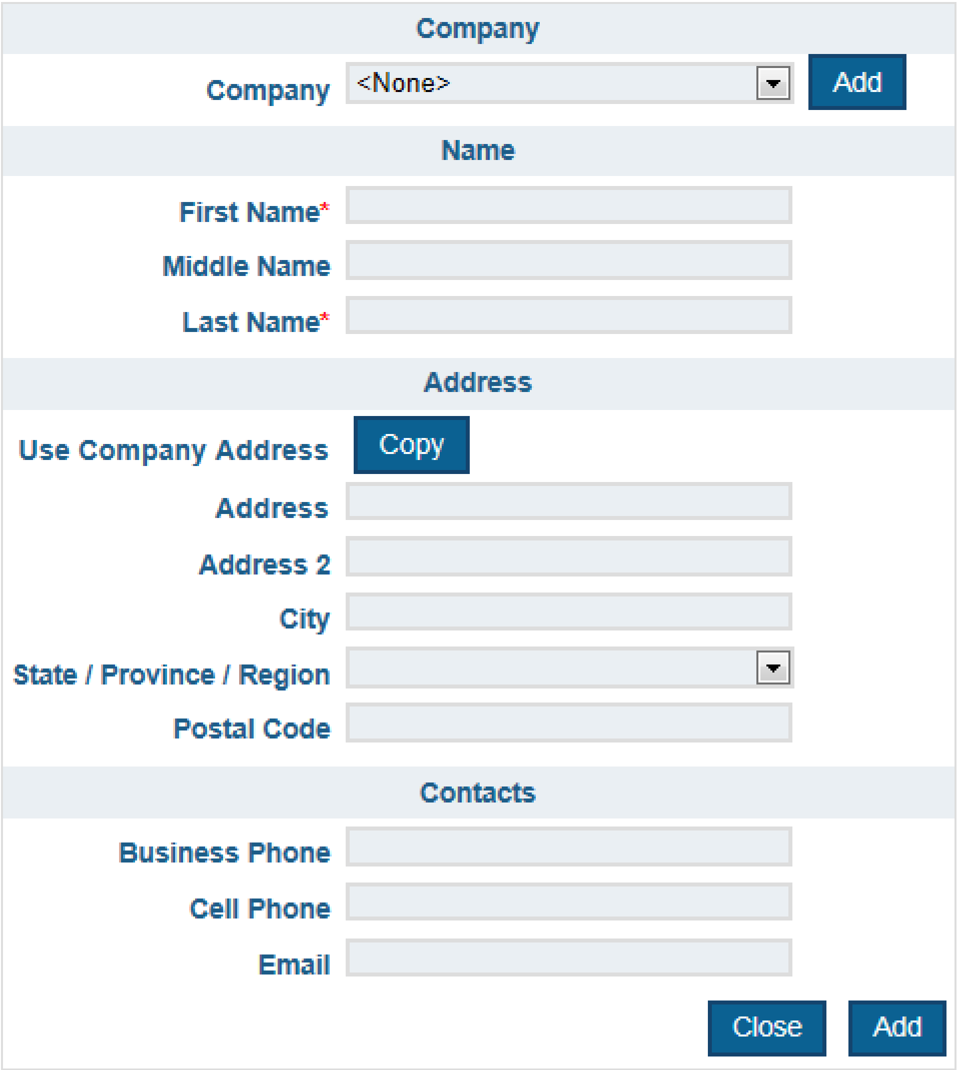
To add a new company to your **Company** list:

1. Click the **Settings** tab. The **Settings** window is displayed.

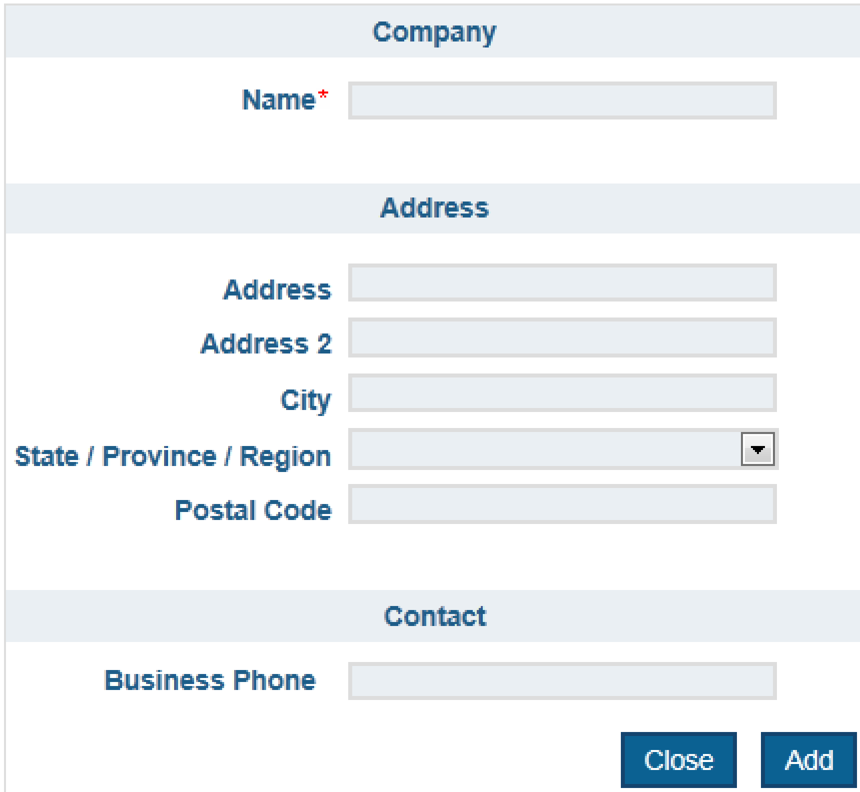


2. Click the **Contacts** tab.

3. Click **Add Contact**. The **New Contact** window is displayed.



4. Click the **Add** button to the right of the **Company** drop-down list. The **Company** window is displayed.



5. Enter the following information for your new company:

Option	Description
Name	The name of the company. This is a required field.
Address	The company's address.
Address 2	The second line of a company's address.
City	The company's city.
State / Province / Region	The company's state, province, or region.
Postal Code	The company's ZIP or Postal Code.
Business Phone	The company's phone number.

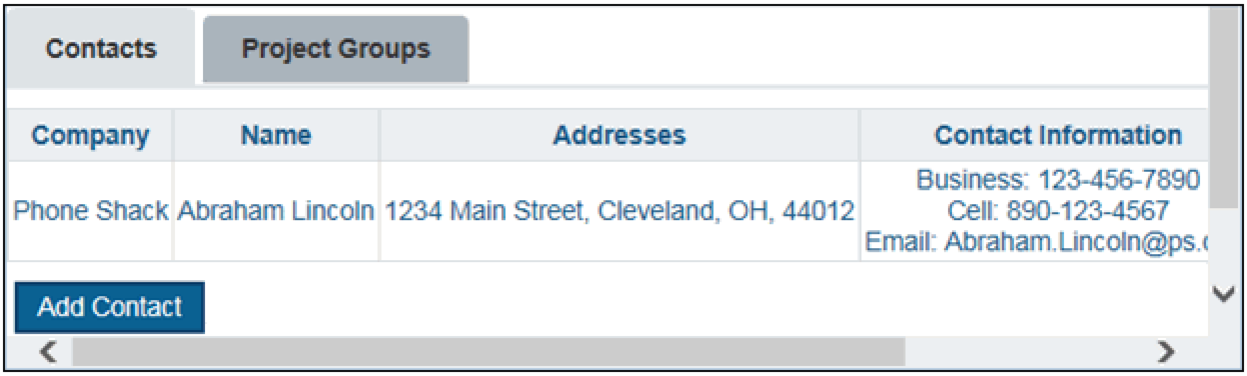
6. Click **Add**. Your new company is added to your **Company** list.

Adding Project Groups

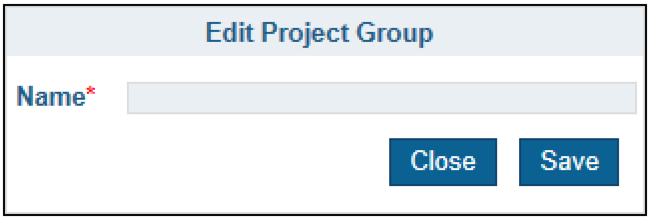
Your Plan Review project group list is used to store project group names that can then be assigned to any new or existing projects to help organize the submitted project.

To create a new project group:

1. Click the **Settings** tab. The **Settings** window is displayed.



2. Click the **Project Groups** tab.
3. Click **Add Project Group**. The **Edit Project Group** window is displayed.



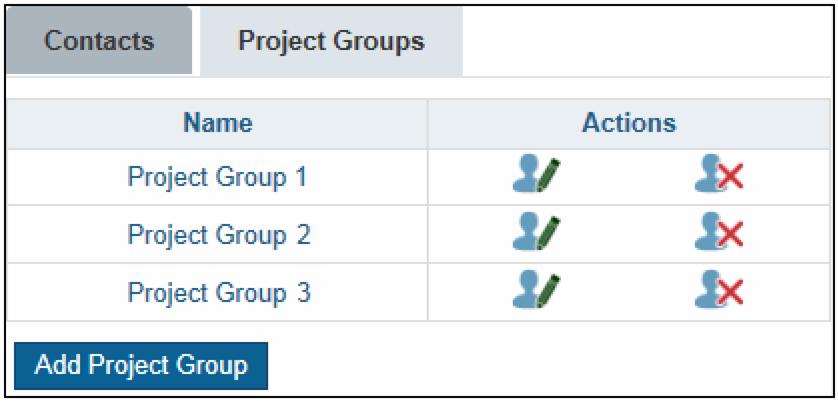
4. Enter the name of the new project group in the **Name** field.
5. Click **Save**. The new project group is added to the **Project Group** list.

Modifying An Existing Project Group

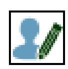
You can remove or modify an existing project group from the **Project Groups** tab.

To modify existing project groups:

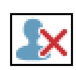
1. Click the **Settings** tab. The **Settings** window is displayed.
2. Click the **Project Groups** tab. The **Project Groups** window is displayed.



3. Select one of the following actions from the **Actions** column:
   - Click the **Edit** button to modify the name of an existing project group.



   - Click the **Delete** button to remove a project group from the **Project Groups** list.



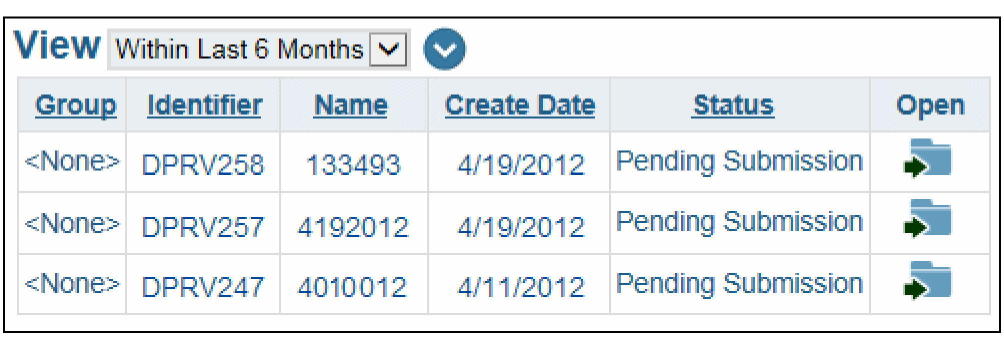
Note: You cannot delete a group from your **Project Groups** list if it is already assigned to an existing project.

Creating A New Project

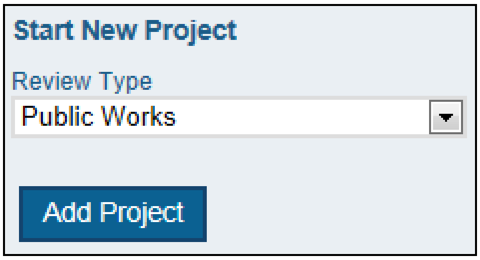
You can create a new project to submit for review.

To create a new project:

1. Click the **Projects** tab. The **Projects** window is displayed.



2. Perform one of the following actions to create a project:
   - Select a Review Type for your new project from the **Review Type** drop-down list in the **Start New Project** pane and click **Add Project**.

   - From an existing project, select the blue arrow icon next to the **New Project** section.

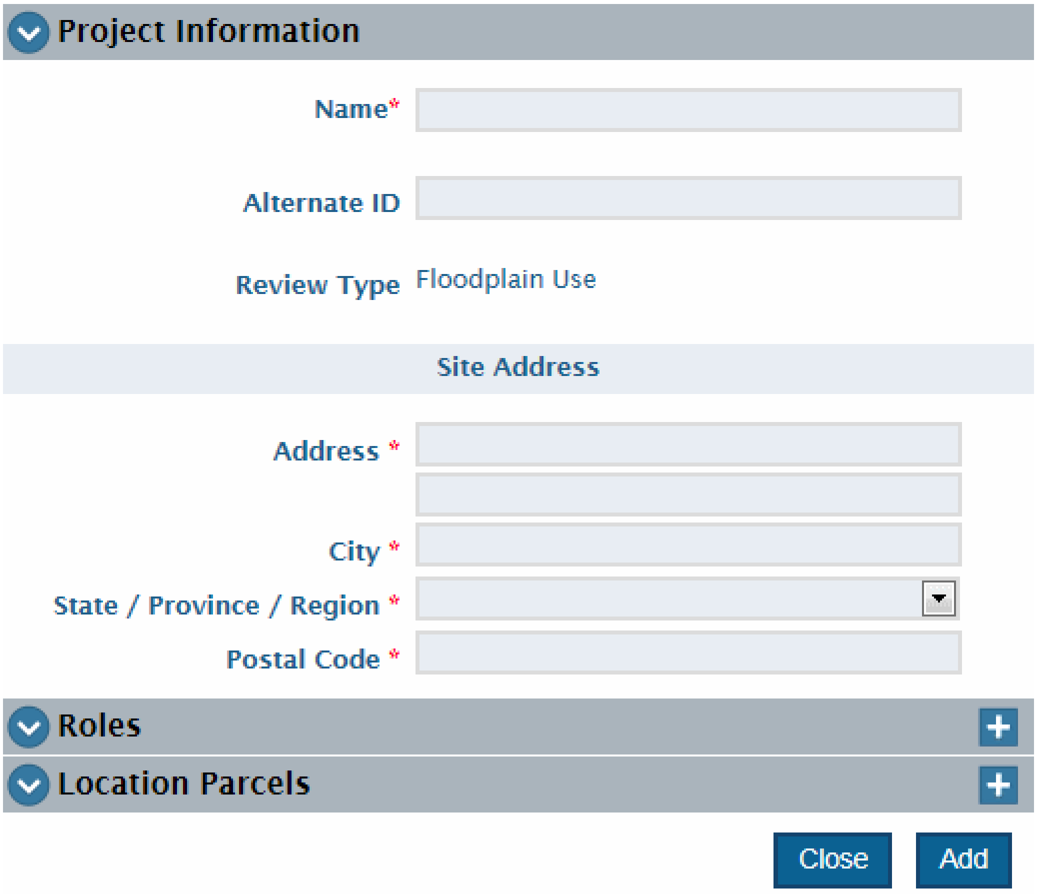
     

     The **Review Type** drop-down list is displayed.
   - Select the **Review Type** you want to assign to the new project and click **Add**.

- Select the **Copy** button to copy the selected project's information into the new project.

Note: Project documents are not copied into the new project.

The **New Project** window is displayed.



3. Enter the information for your new project.

Option	Description
Name	The name of your project.
Alternate ID	An alternate ID number for your project.
Address	The address where the project will be built.
City	The name of the city where the project will be built.
State / Province / Region	The name of the state or province where the project will be built.
Postal Code	The ZIP or Postal Code where the project will be built.

Note: Depending on your system's configuration, additional fields may be displayed. Fill out all available fields with the required information before submitting your project.

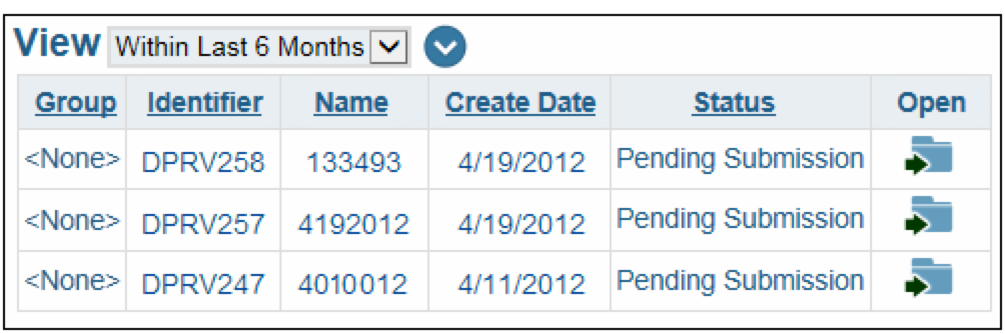
4. If desired, add one or more **Roles** to your project. For more information on adding roles, see Assigning Someone to a Project Role on page 110.
5. If desired, add one or more **Parcels** to your project. For more information on adding location parcels, see Adding a New Location Parcel on page 118.
6. Click **Add**. Your project is added to your **Projects** list, and the **Project Information** page is displayed.

Editing Project Information

Once you have created a project, you can edit that project's information.

To edit the information of a project:

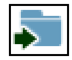
1. Click the **Projects** tab. The **Projects** window is displayed.



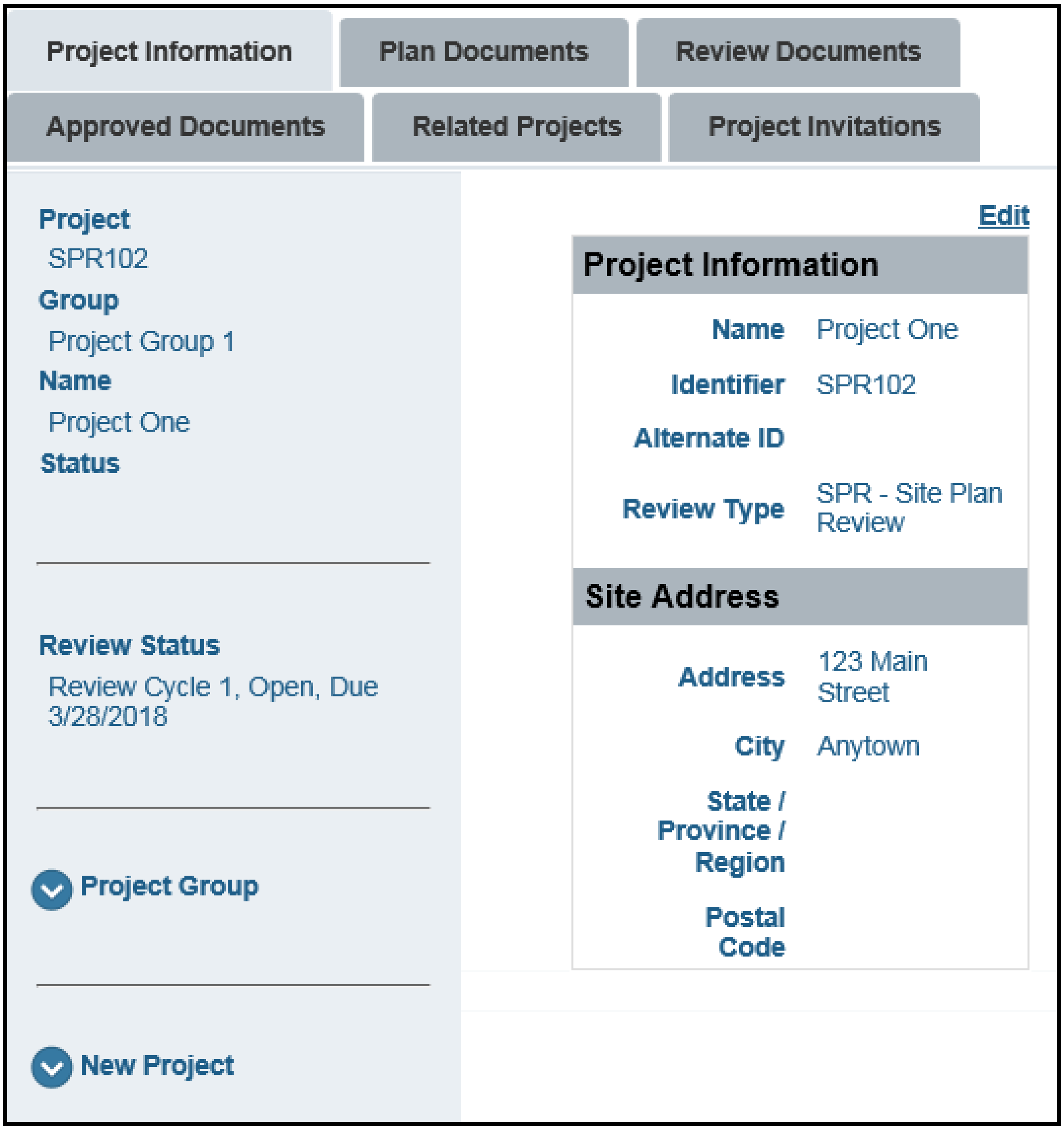
View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

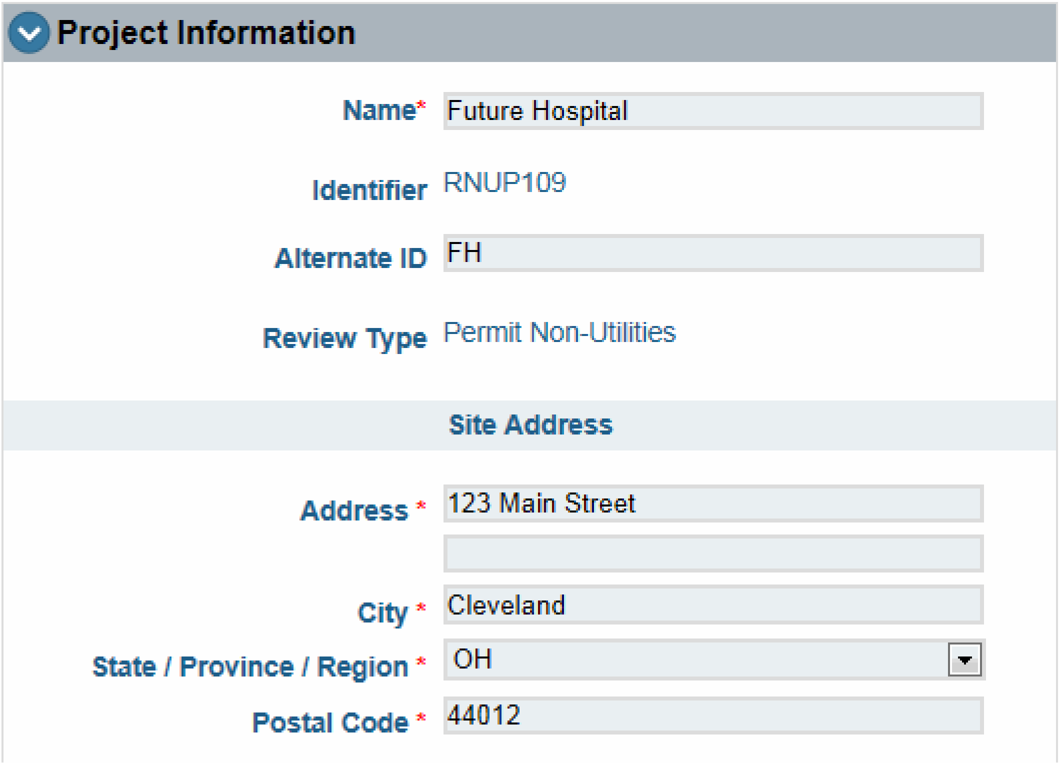
2. Click the **Select** button for the project you want to add a contact to.



The **Project Information** window is displayed.



3. Select the **Edit** hyperlink. The **Edit Project Information** window is displayed.



4. Edit the following fields as desired.

Option	Description
Name	The name of your project.
Alternate ID	An alternate ID number for your project.
Address	The address where the project will be built.
City	The name of the city where the project will be built.
State / Province / Region	The name of the state or province where the project will be built.
Postal Code	The ZIP or Postal Code where the project will be built.

Note: Depending on your system's configuration, additional fields may be displayed. Fill out all available fields with the required information before submitting your project.

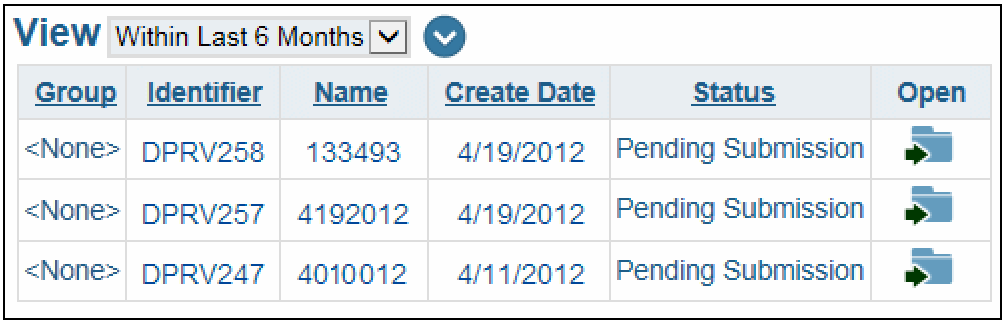
5. Click **Save**.

Assigning a Project Group to a Project

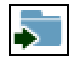
You can assign project groups to any selected project.

To assign a project group to a Plan Review project:

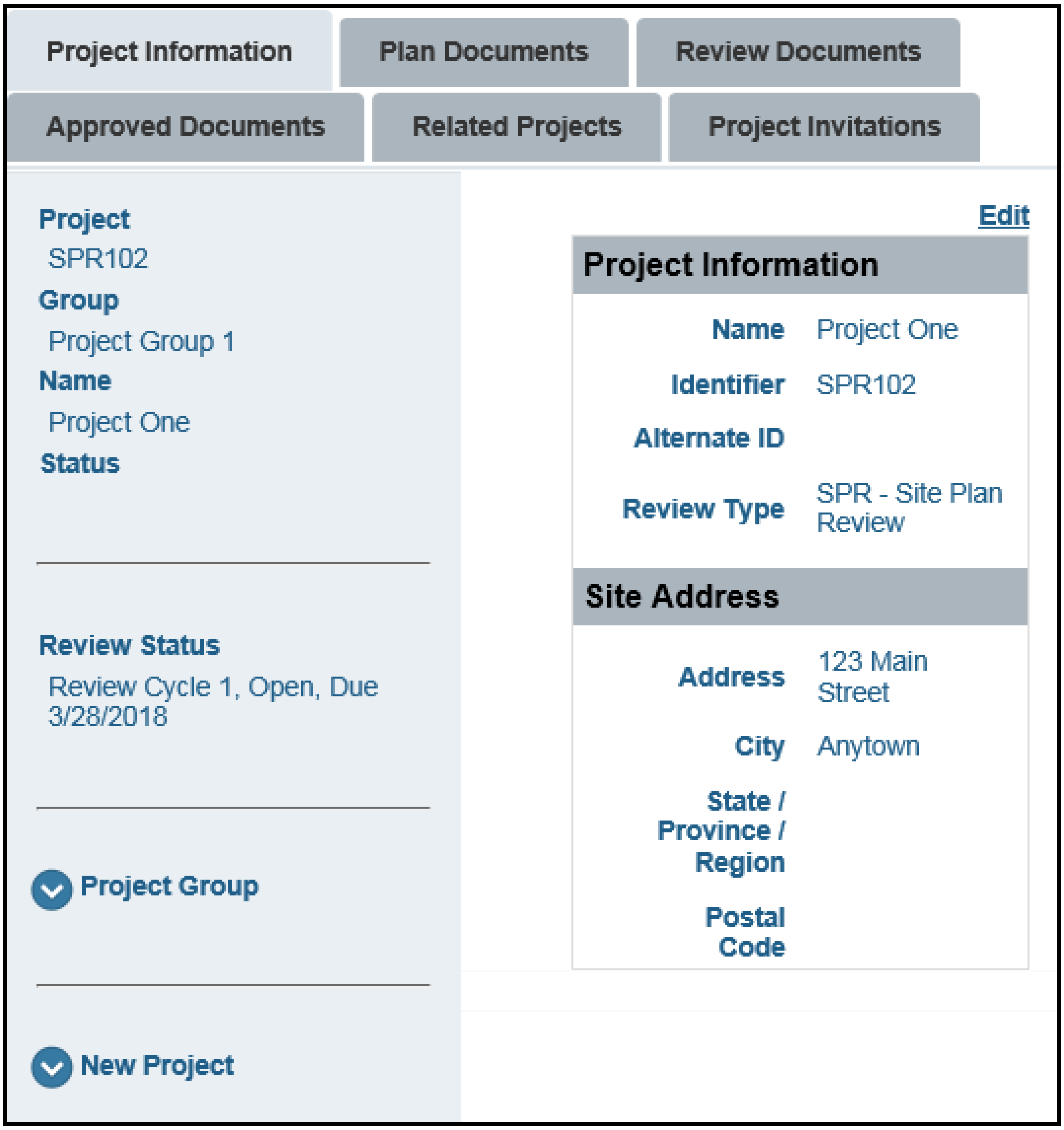
1. Select the **Projects** tab. The **Projects** layout is displayed.



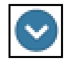
2. Select the folder button for the project you want to add a project group to.



The **Project Information** layout is displayed.



3. Select the blue arrow icon next to the **Project Group** section.



The **Project Group** drop-down list is displayed.

4. From the **Project Group** drop-down list, select the project group you want to assign to the project.

Tip: You can remove a project group assigned to a project by selecting **<None>** from the **Project Group** drop-down list.

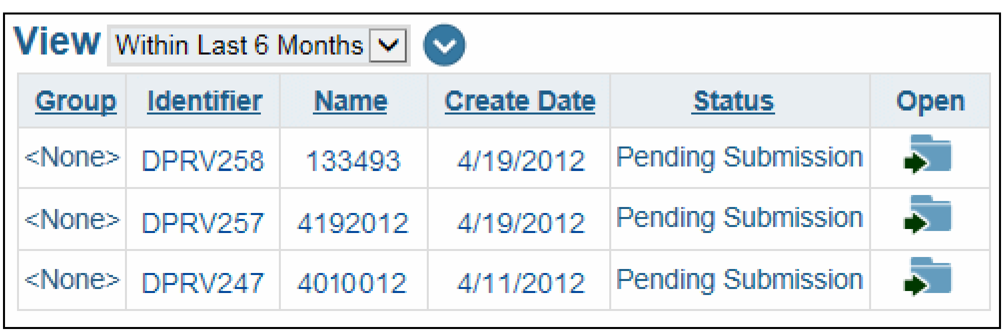
5. Click **Set**.

Assigning Someone to a Project Role

A project role can be assigned to a person involved with the project. This person can be an existing contact or a new person that is not an existing contact. For more information about adding a contact, see Adding People to Your Contacts List on page 95.

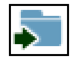
To assign someone to a role for your Plan Review project:

1. Click the **Projects** tab. The **Projects** layout is displayed.

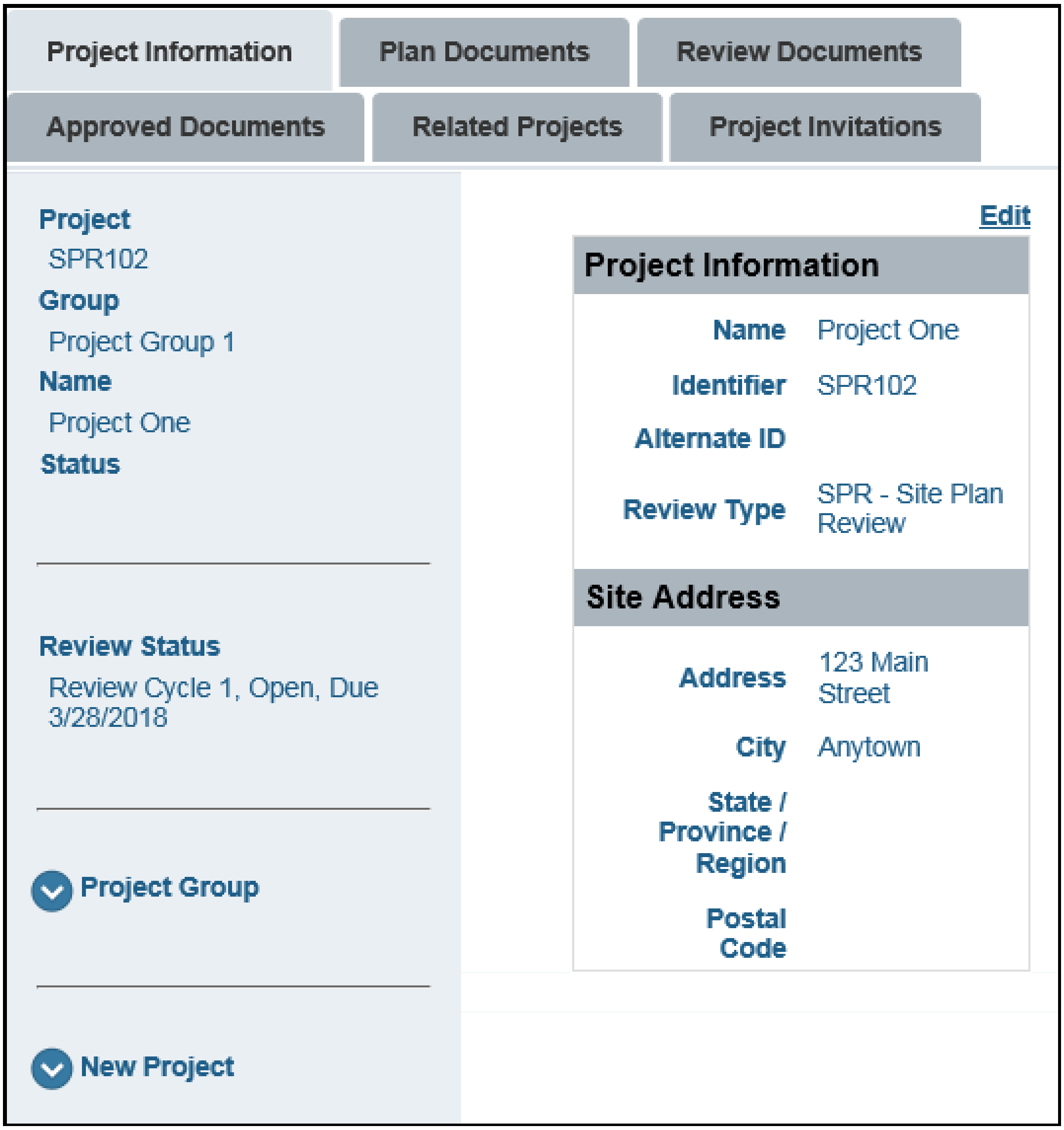

View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

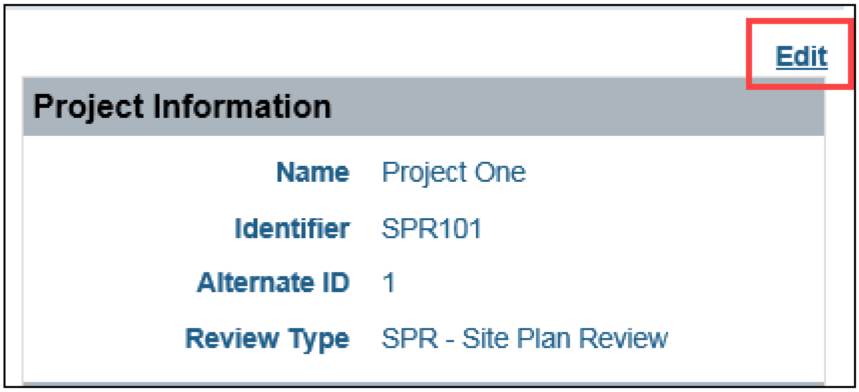
2. Click the folder button for the project you want to add a role to.



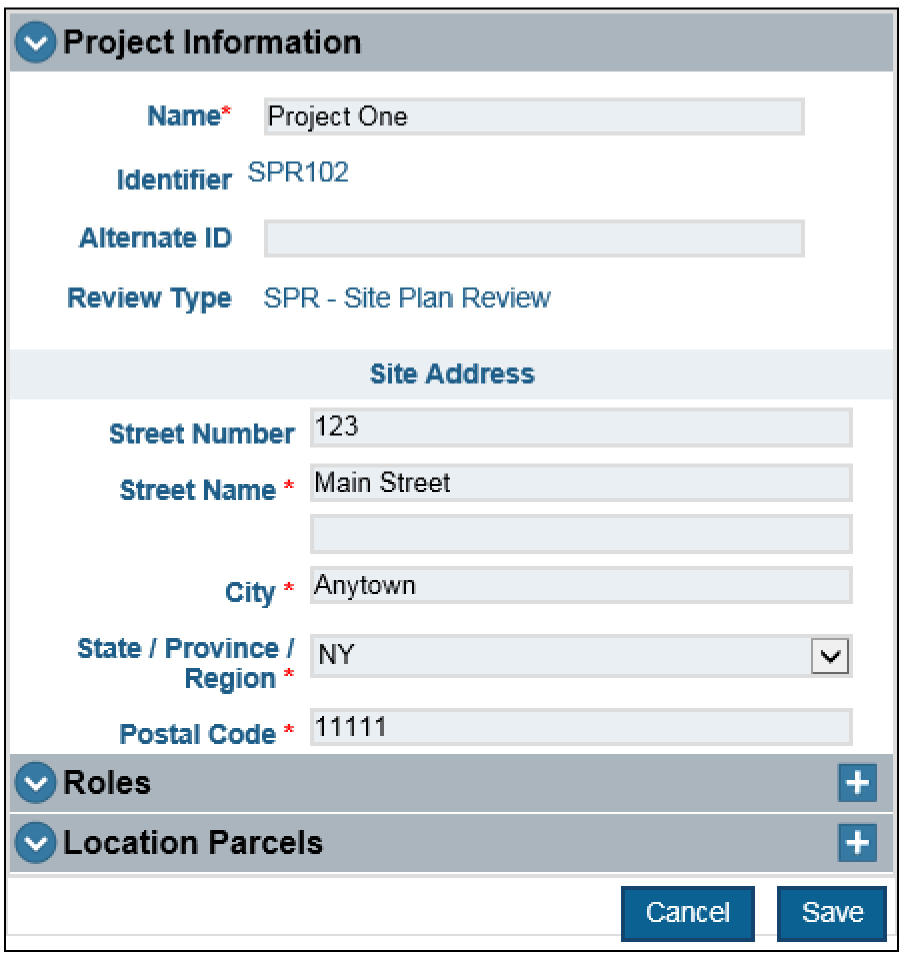
The **Project Information** layout is displayed.



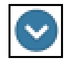
3. Above the **Project Information** heading, click **Edit**.



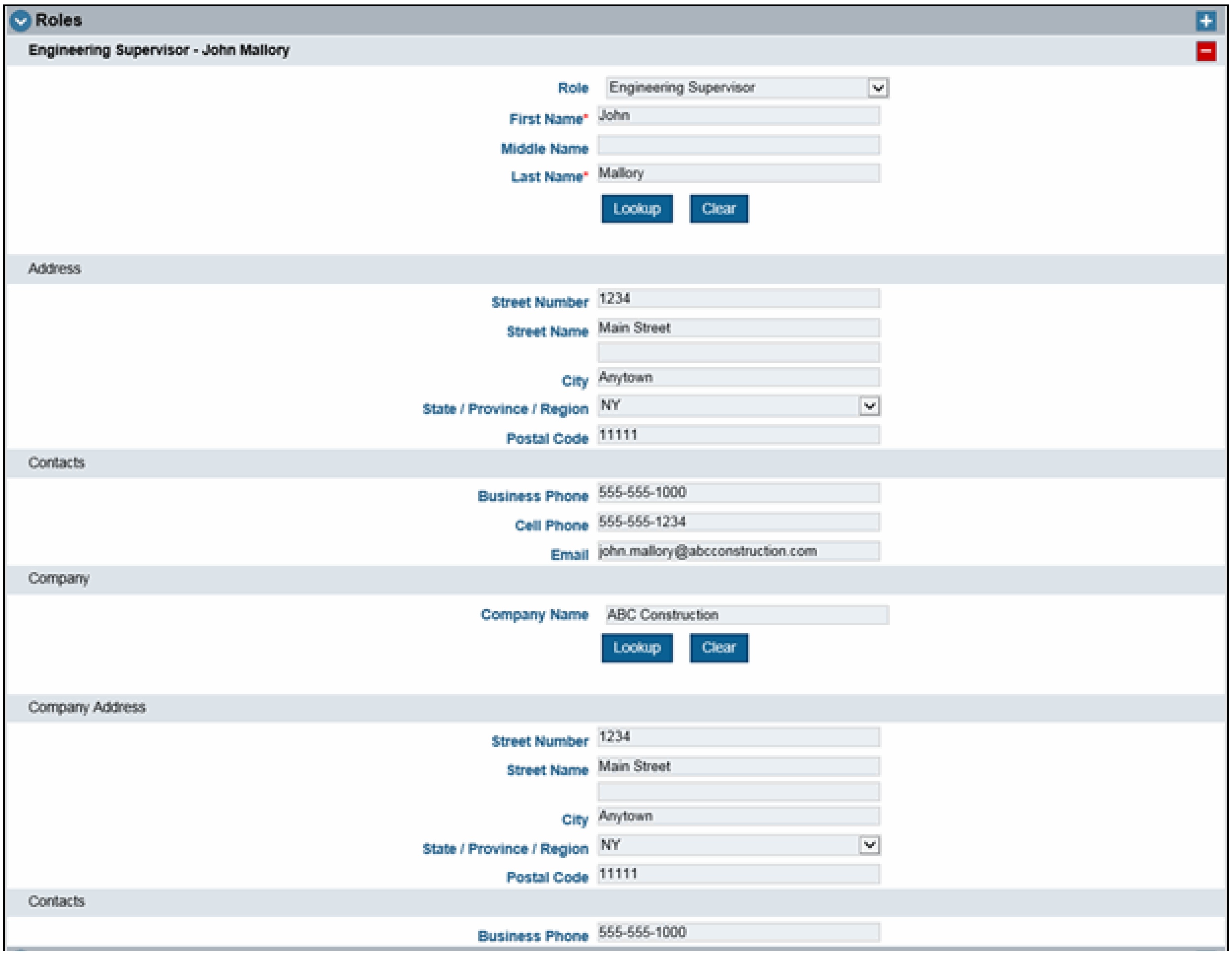
The edit project information layout is displayed.



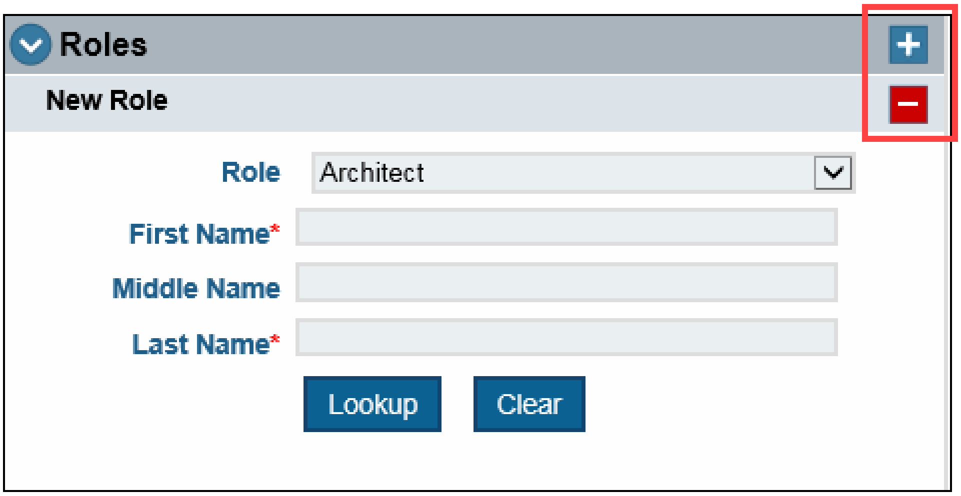
4. From the **Roles** section, click the blue arrow icon to expand it.



The **Roles** section is expanded and its fields are displayed.



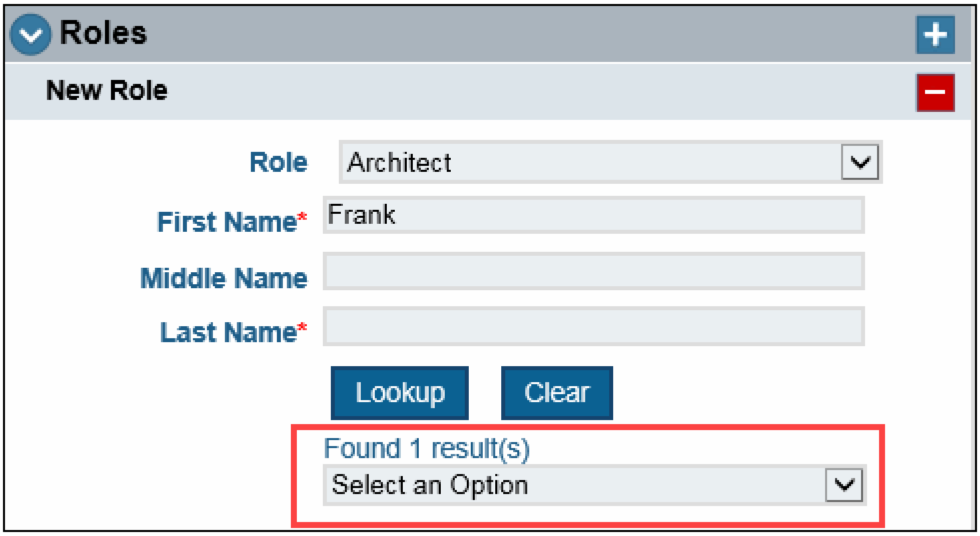
5. Click the + (plus) button. A new role is added within the **Roles** section. Click the - (minus) button to remove that role from the list.



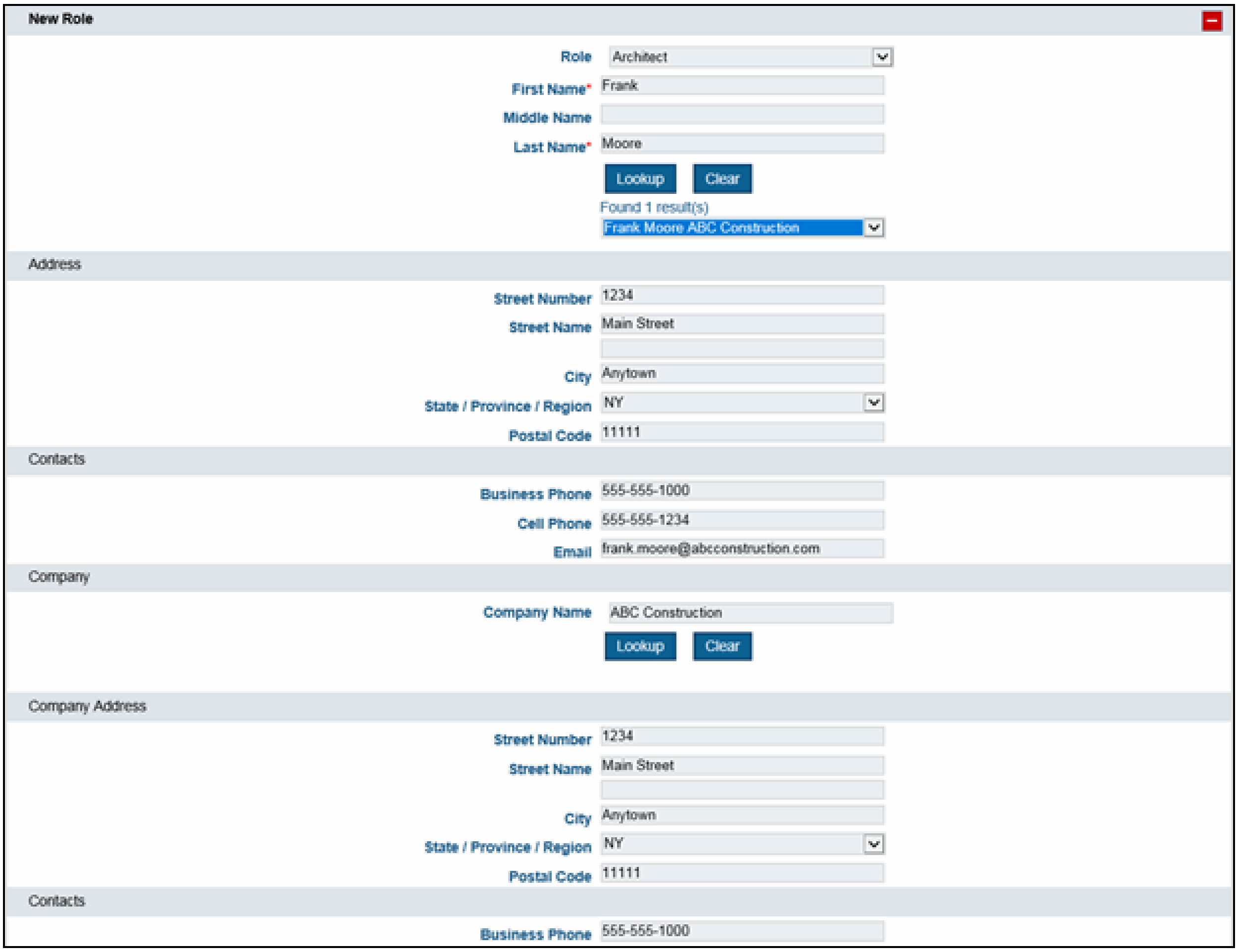
6. Select a role from the **Role** drop-down list.
7. Enter the first name of the person assigned to the new role in the **First Name** field.
8. Enter the middle name of the person assigned to the new role in the **Middle Name** field.
9. Enter the last name of the person assigned to the new role in the **Last Name** field.

Note: If you are looking up an existing contact, you can search by either the first name, middle name, or last name. If you are entering a person that is not an existing contact, you must enter information into the **First Name** and **Last Name** fields to save the role.

10. Click **Lookup**. A drop-down list is displayed with the results of existing contacts who match the information entered in the name fields.

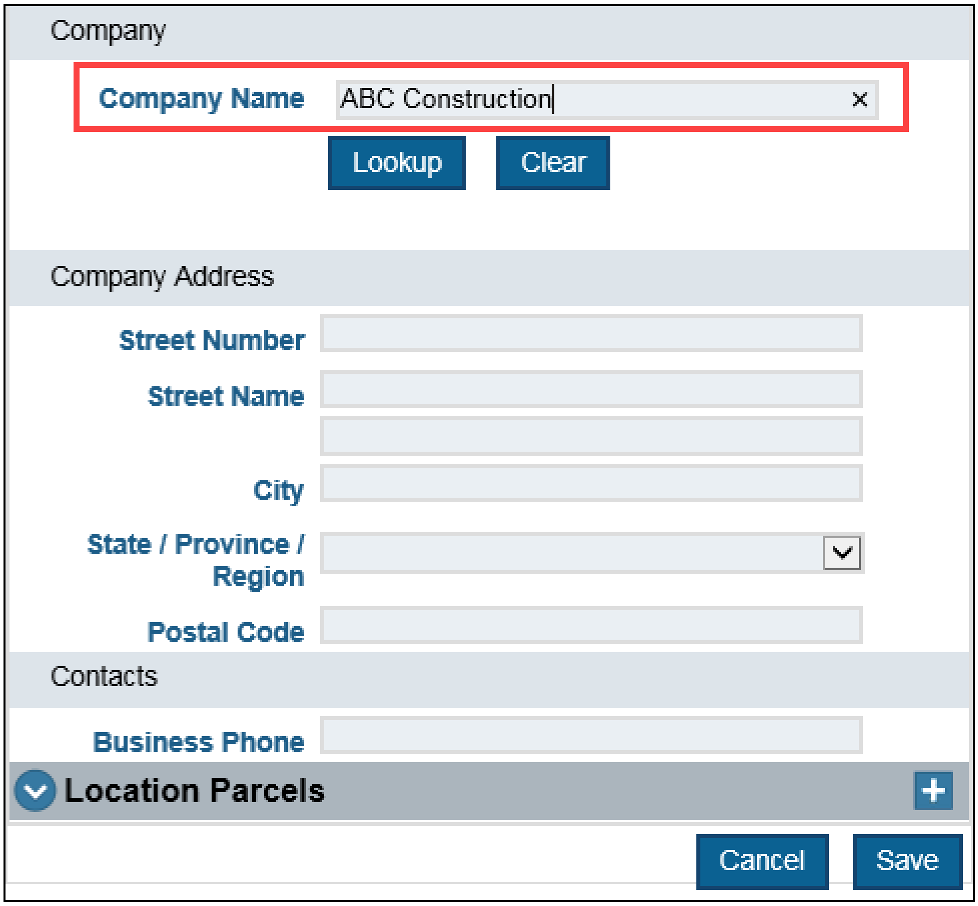


11. From the drop-down list, select the name of the contact you want to assign to the project. The **Address**, **Contacts**, and **Company** sections for the new role are automatically populated with the contact's available information.

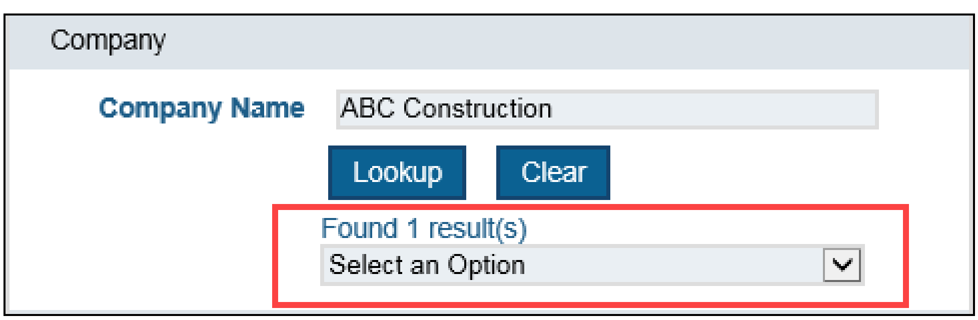


12. Click the **Clear** button in the **New Role** section to clear the contact's name, address, and contact information in the data fields. Click the **Clear** button in the **Company** section to clear the company name, address, and contact information in the data fields.

13. If the contact information does not include company information, enter the name of the company in the **Company Name** field.



14. Click **Lookup**. Existing companies whose name matches the information you entered in the **Company Name** field are now available for selection from a drop-down list.



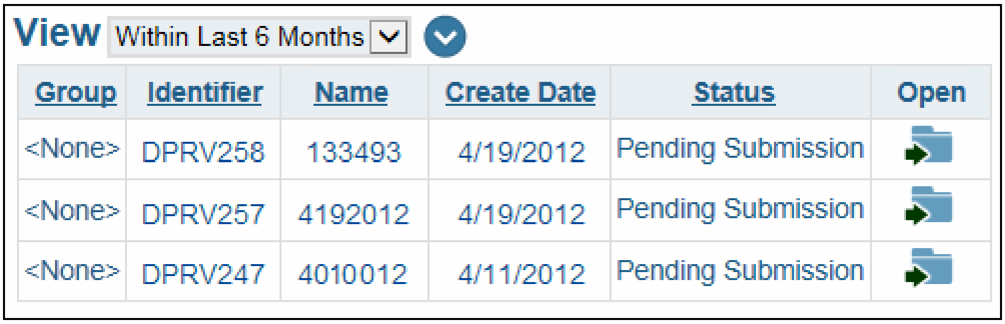
15. From the drop-down list, select the name of the company you want to assign to the project. The **Company Address** and **Contacts** sections are automatically populated in the available data fields.

16. Modify any of the populated fields as required.
17. Click **Save**. The new role is displayed in the project's **Roles** list.

Adding a New Location Parcel

To add a new location parcel to a Plan Review project, follow these steps:

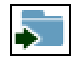
1. Select the **Projects** tab. The **Projects** window is displayed.



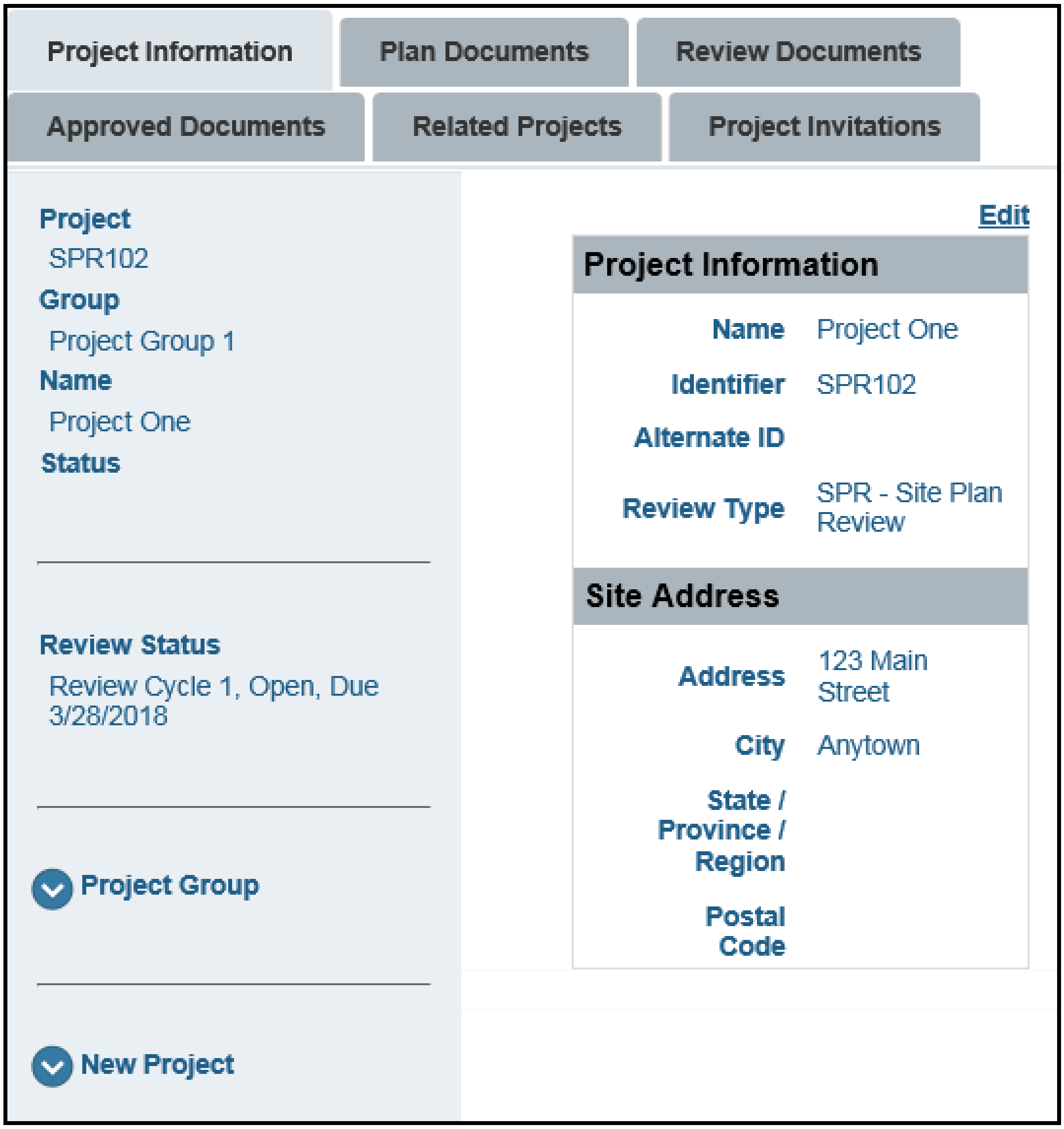
View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the folder button for the project you want to add a location to.

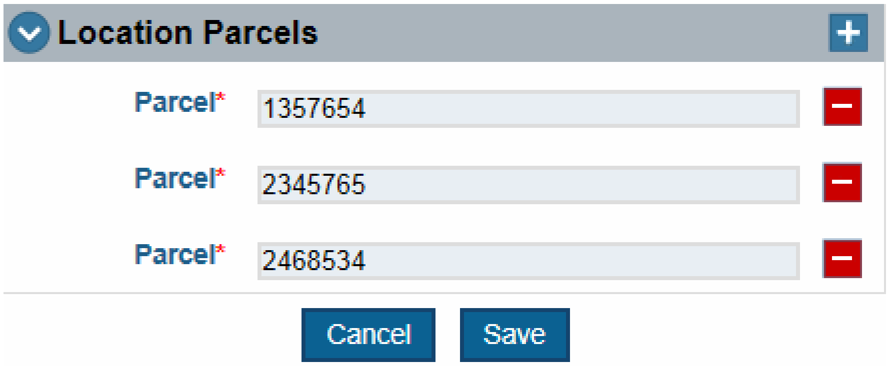


The **Project Information** window is displayed.



3. Select the **Edit** hyperlink. The **Edit Project Information** window is displayed.

4. Expand the **Location Parcels** section.



5. Click the + (Plus) button. A new **Parcel** field is added within the **Location Parcels** section.
6. Type the value of your new parcel in the **Parcel** field.

Tip: You can click the - (minus) button next to a **Parcel** field to remove that parcel from the list.

7. Click **Save**.
8. Repeat this process as many times as needed to assign all required locations to your project. Once you have finished assigning locations to your project, you should continue on to Adding Documents to a Project on page 120.

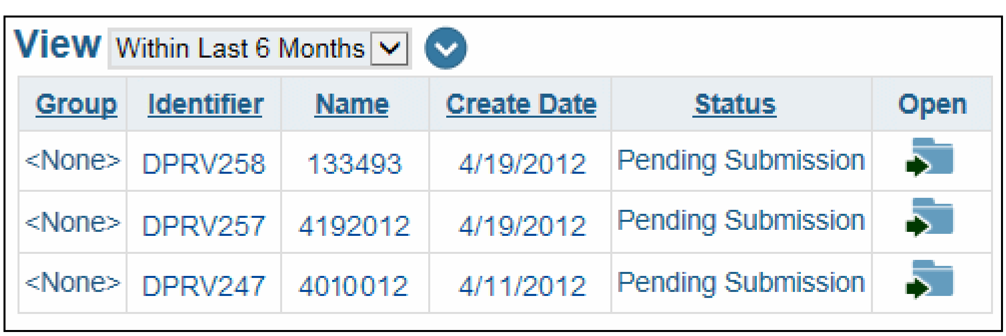
Adding Documents to a Project

You can add plan documents to your Plan Review project for review.

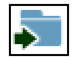
Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

To add documents to a project:

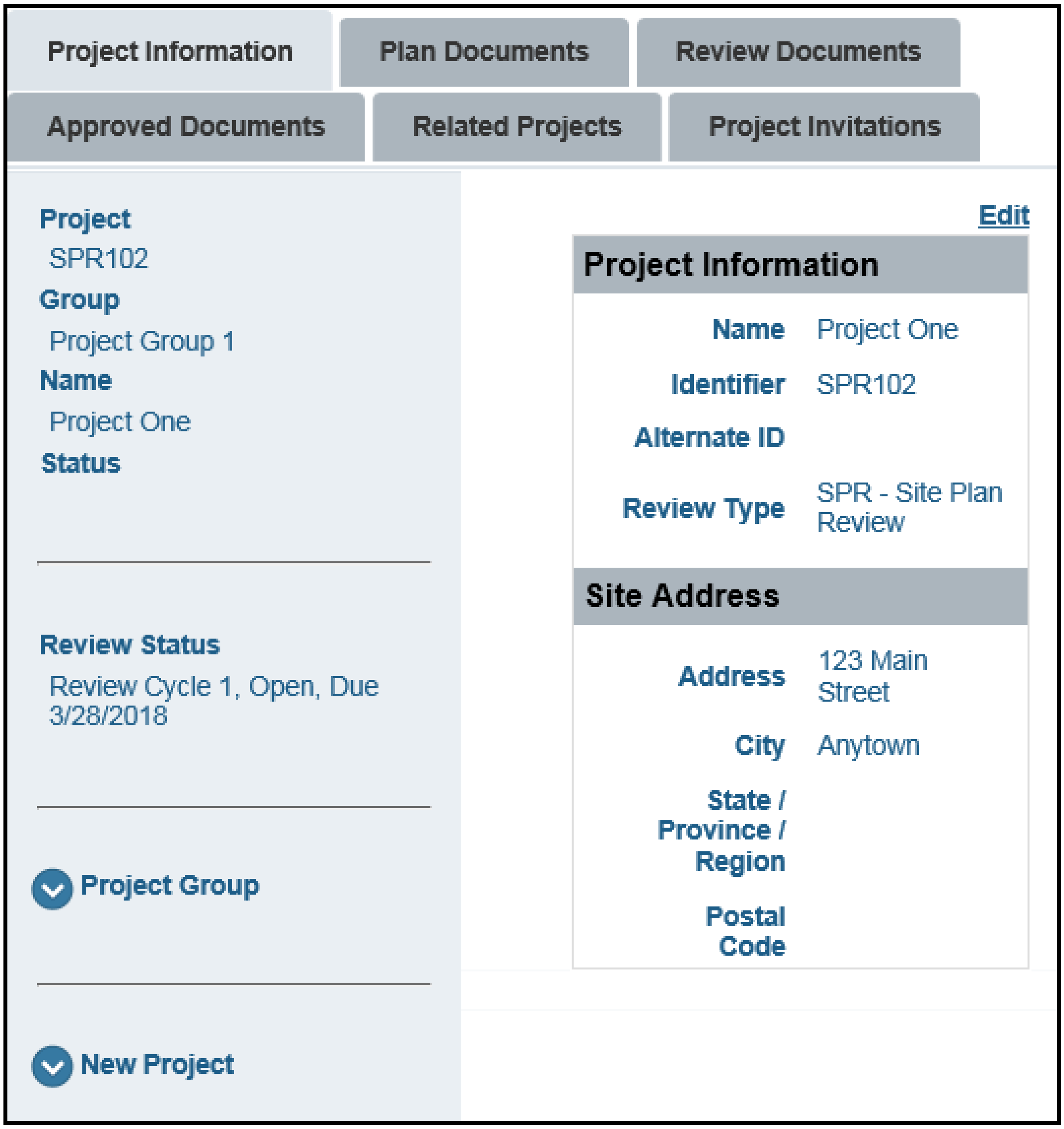
1. Click the **Projects** tab. The **Projects** window is displayed.



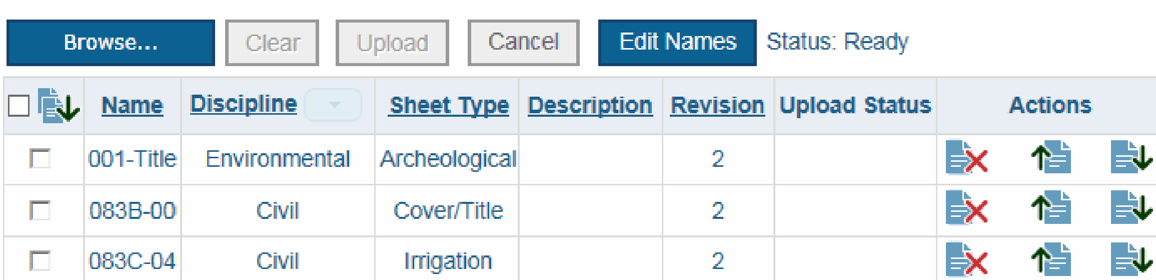
2. Click the **Select** button for the project you want to add documents to.



The **Project Information** window is displayed.



3. Click the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. Click the **Browse** button. The **Choose File to Upload** window is displayed.

Note: PDF documents created with security options are not supported for use with Plan Review. Do not upload secured PDF documents into your Plan Review solution.

5. Navigate to the documents you want to upload.

Note: Document file names must not exceed 100 characters and should not contain double spaces.

6. Click **Open**. The selected documents for upload are displayed in the **Plan Documents** list.

Tip: Click the **Clear** button to remove all documents that are not yet uploaded from the **Plan Documents** list. Or, click the **Remove** button located in the **Actions** column.

7. Select the Discipline for the document from the **Discipline** drop-down list for all selected documents.

Tip: You can apply a single Discipline to all documents available for upload by selecting the button next to the **Discipline** header and selecting a discipline from the drop-down list.

8. Select the Sheet Type for the document from the **Sheet Type** drop-down list for all selected documents.
9. Type a description of the document in the **Description** field.
10. Click **Upload**. A confirmation decision notification is displayed.
11. Click **Yes**. The documents are added to your project file.

Note: You can click **Cancel** while documents are uploaded to halt the upload process. Halting the upload process does not affect any documents that were already uploaded from your current **Plan Documents** list, but any documents that are not yet uploaded are removed from the **Plan Documents** list and are not uploaded.

12. Repeat this process as many times as needed to upload all documents for your project. Once you are ready to upload your project for review, continue on to Submitting A Project on page 128.

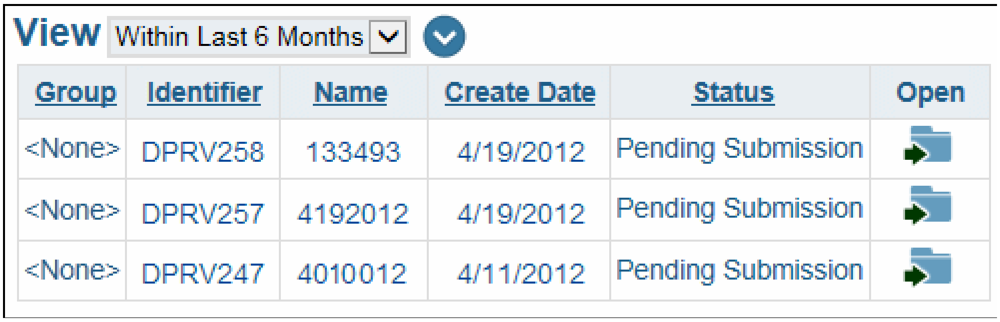
Uploading a Revision of a Document

You can upload a revision of a document that is already uploaded to the Plan Review project.

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

To upload a revision of a document:

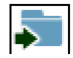
1. Click the **Projects** tab. The **Projects** window is displayed.



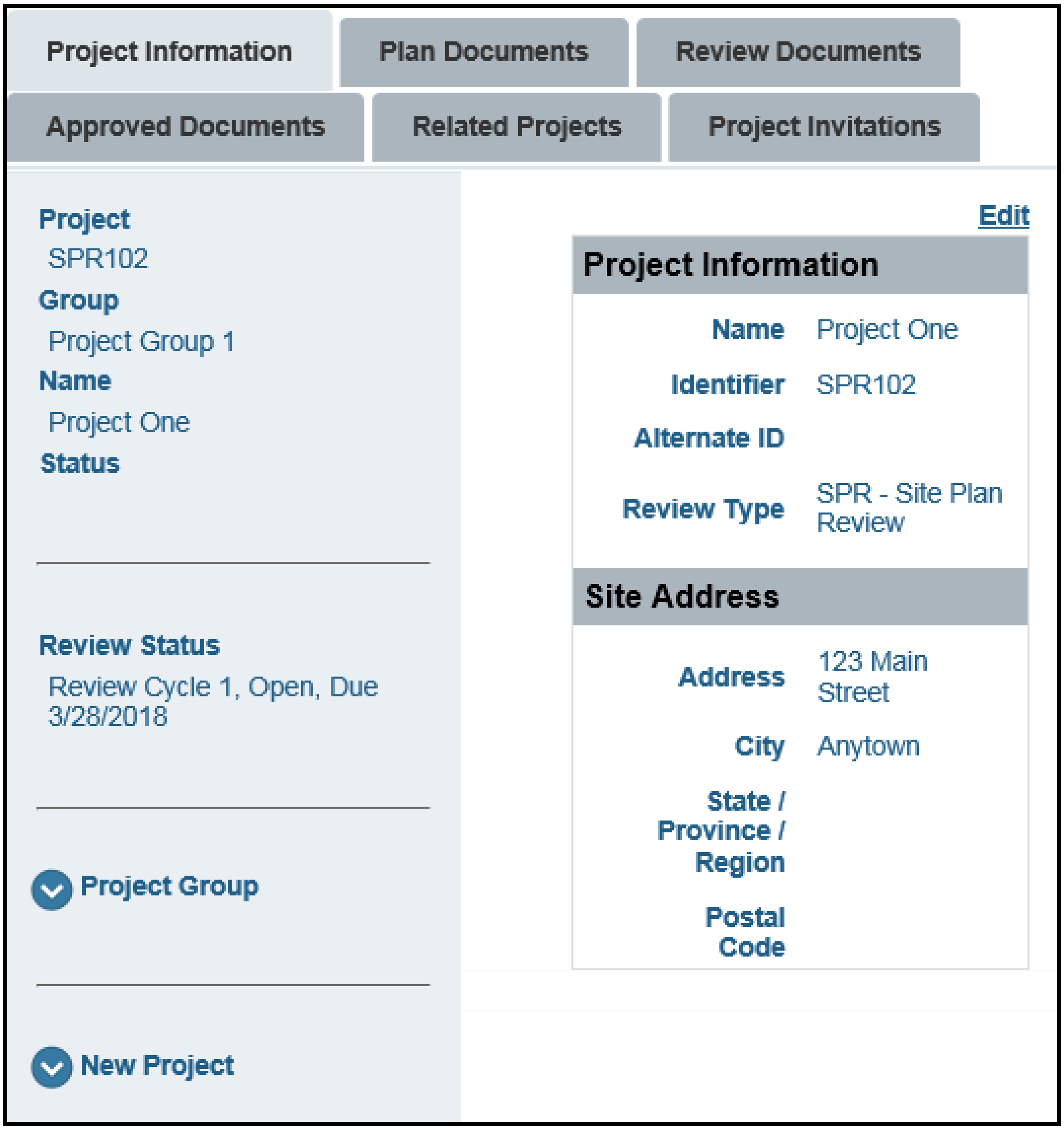
View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

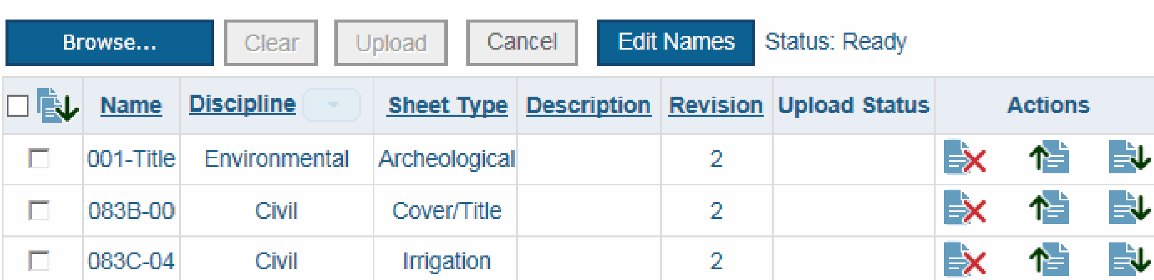
2. Click the **Select** button for the project that contains the document you want to modify.



The **Project Information** window is displayed.



3. Click the **Plan Documents** tab. The **Plan Documents** window is displayed.



Browse... | Clear | Upload | Cancel | Edit Names | Status: Ready

	Name	Discipline	Sheet Type	Description	Revision	Upload Status	Actions
	001-Title	Environmental	Archeological		2		
	083B-00	Civil	Cover/Title		2		
	083C-04	Civil	Irrigation		2		

4. For the document you want to update, click the document's **Browse** button.

5. Navigate to the document you want to upload and click **Open**.

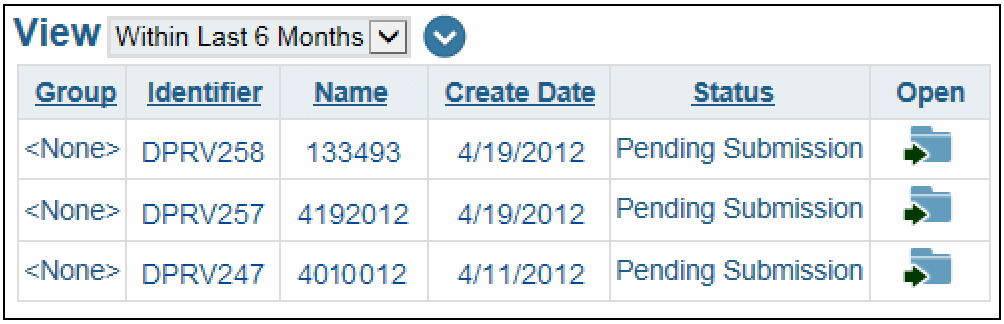
Note: PDF documents created with security options are not supported for use with Plan Review. Do not upload secured PDF documents into your Plan Review solution.

6. Click **Upload**. You will be prompted to confirm your decision.
7. Click **Yes**. The selected revision replaces the existing document.

Removing Documents from a Project

To remove documents from a project, follow these steps:

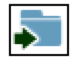
1. Select the **Projects** tab. The **Projects** window is displayed.



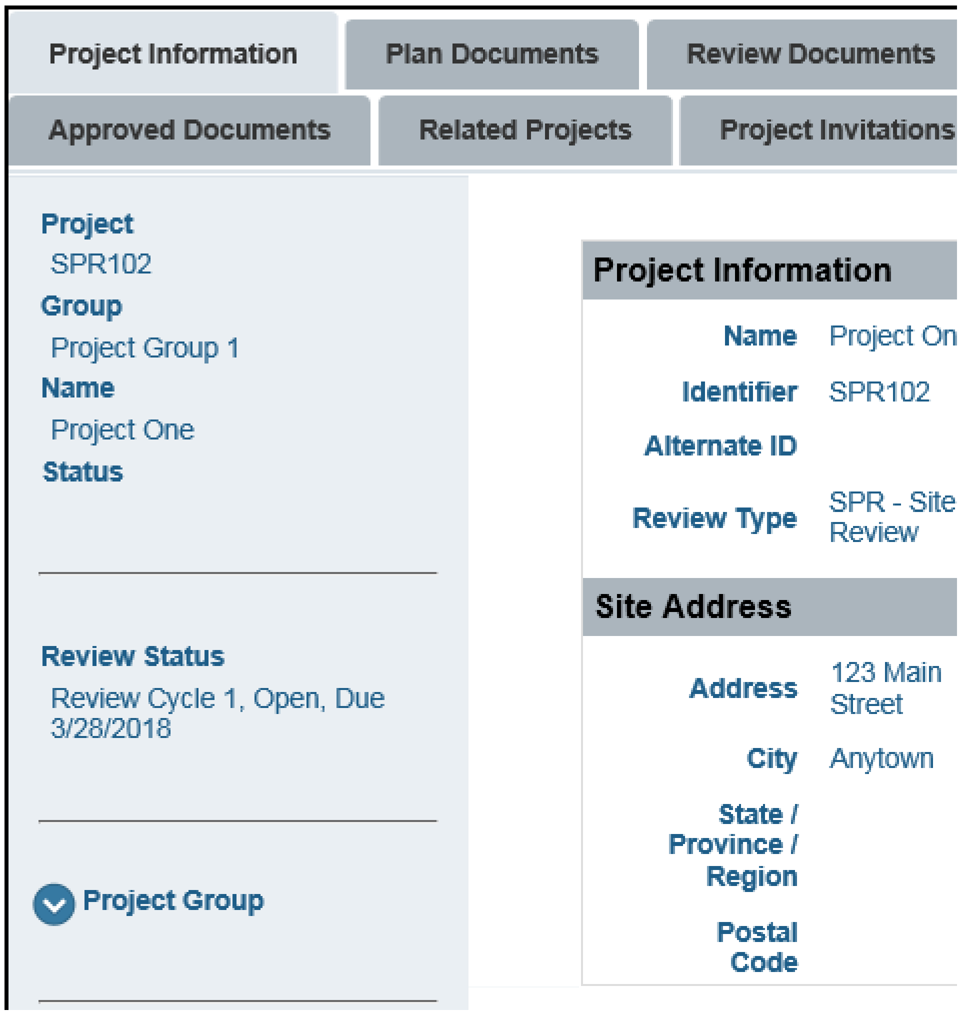
View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

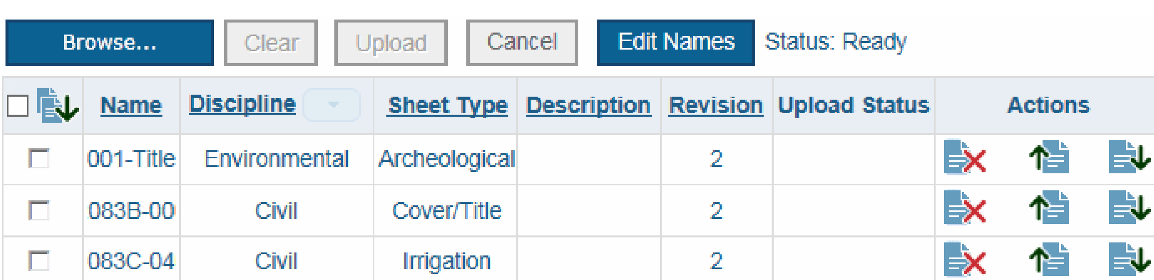
2. Select the folder button for the project from which you want to remove documents.



The **Project Information** window is displayed.



3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. Click the **Delete** action for the document(s) you want to remove from your Plan Review project.

   You will be prompted to confirm your decision.
5. Click **Yes**. The selected document is removed from your **Plan Documents** list.

Editing Document Names

To edit the name of the document you have submitted, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

View: Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.

Browse... | Clear | Upload | Cancel | Edit Names | Status: Ready

	Name	Discipline	Sheet Type	Description	Revision	Upload Status	Actions
	001-Title	Environmental	Archeological		2		
	083B-00	Civil	Cover/Title		2		
	083C-04	Civil	Irrigation		2		

3. Click **Edit Names**. The **Edit Names** dialog box is displayed.

Name	Sheet Type	Sheet Type	Description	Revision
001-Title	Environmental	Archeological		2
083B-00	Civil	Cover/Title		2
083C-04	Civil	Irrigation		2

Close | Save

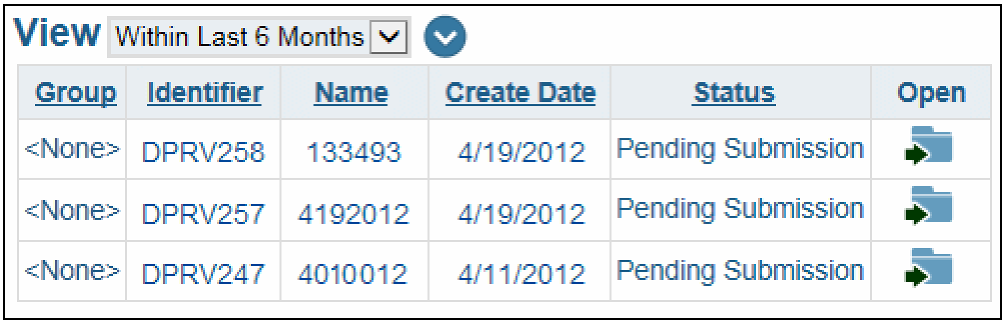
4. Type the desired value in the **Name** field for any documents whose name you want to change.

5. Click **Save**.

Submitting A Project

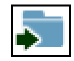
To submit a project for review, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

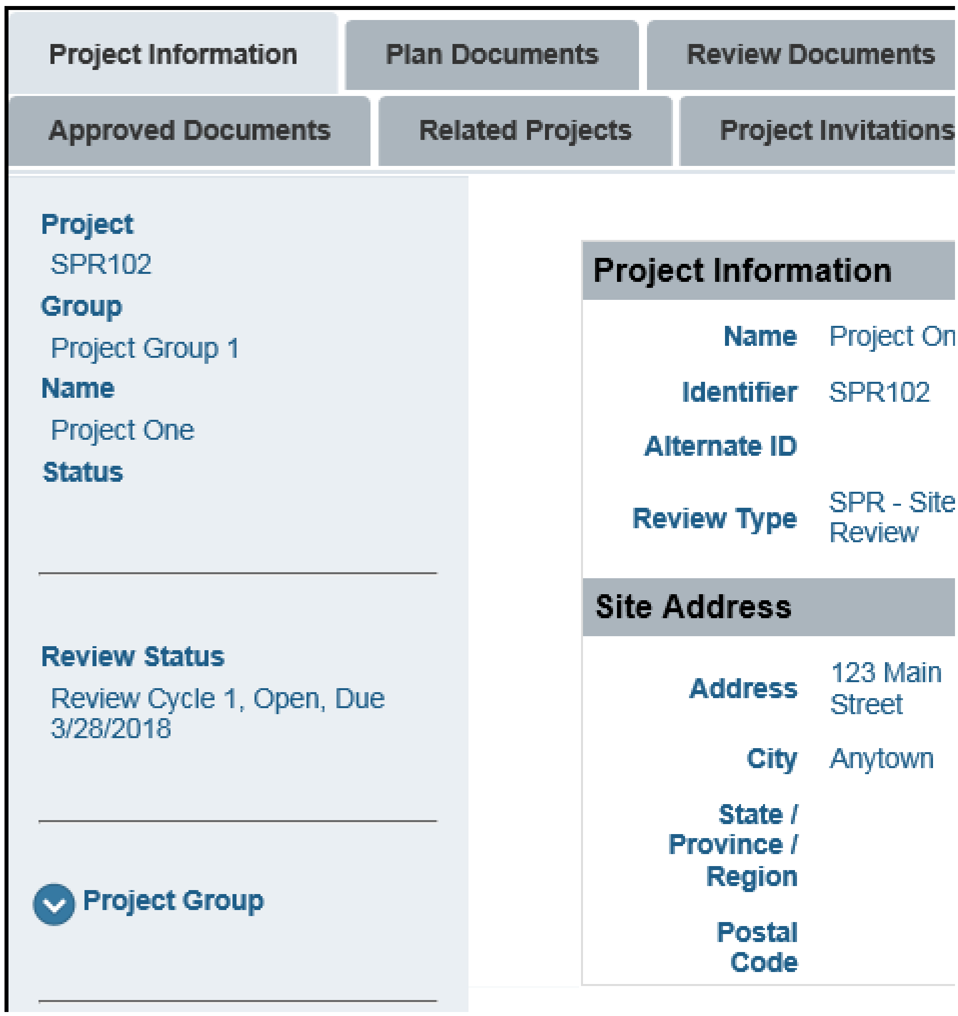

View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Click the folder button for the project you want to add documents to.



The **Project Information** window is displayed.



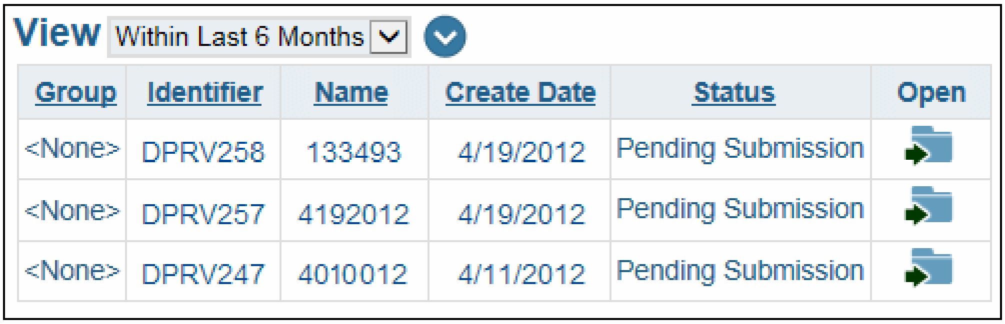
3. Select the appropriate **Action** hyperlink. Your project is uploaded for review.

Note: Depending on your system's configuration, you may have multiple actions to choose from. Contact your system administrator if you are unsure which action you should select to upload your project.

Searching for Projects

You can filter your project list using a variety of date criteria, as well as several advanced search options. The Plan Review site will only display projects that meet the criteria you have selected. To specify criteria to filter your project list, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

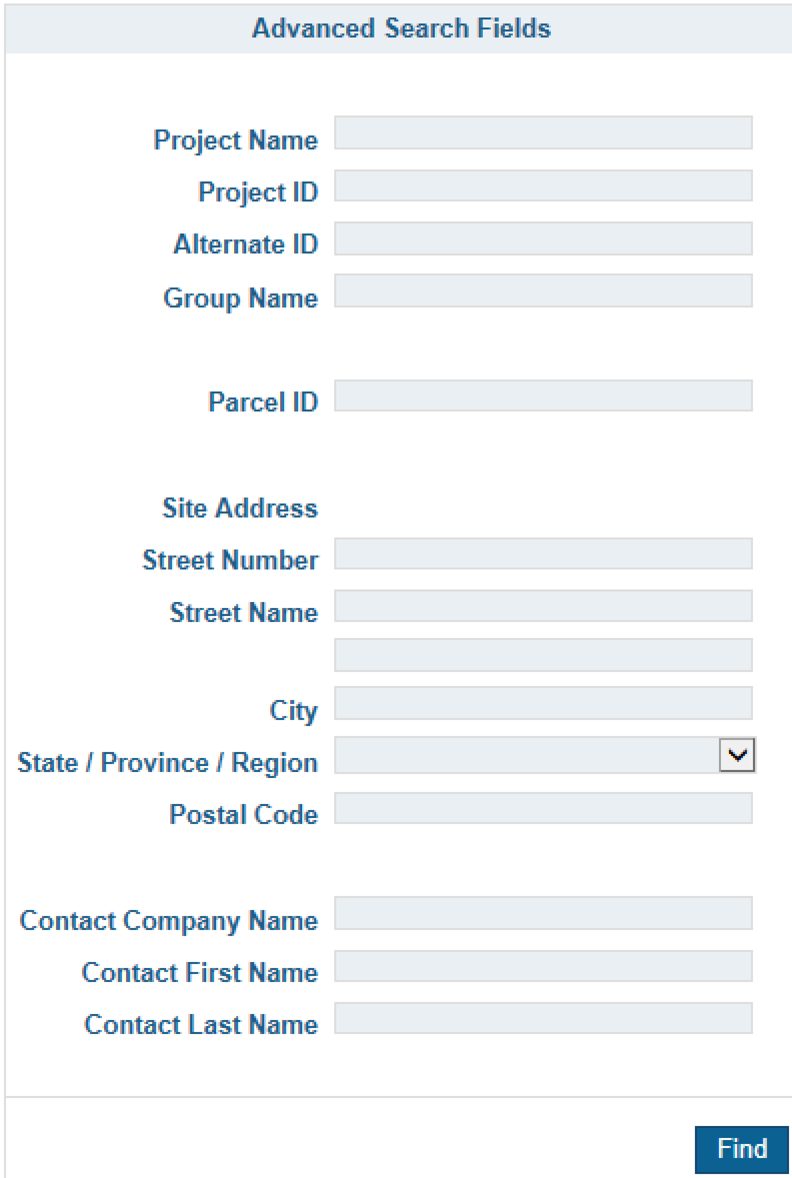


View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Use the **View** drop-down list to specify a date or range of dates.
3. Select the blue arrow icon to display the **Advanced Search Fields** window.

4. Enter values in the available fields as desired.



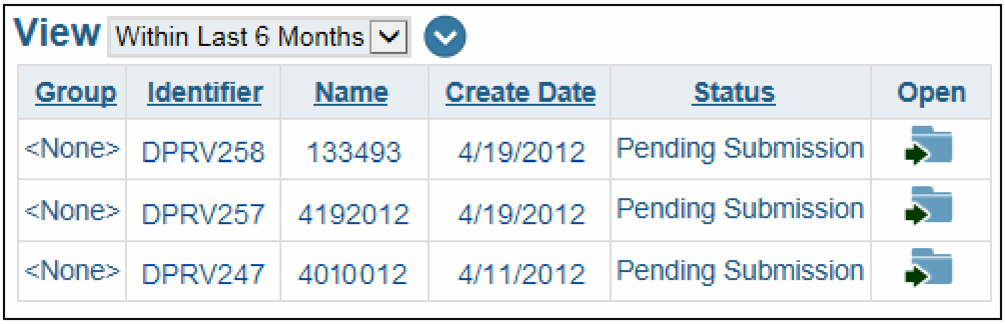
Note: By default, searches will only locate values at the beginning of a field. For example, if you search for Main in the **Street Name** field, the search will not return any projects with a **Street Name** of North Main Street. In order to locate values in the middle of a field, you must begin your search with a wildcard character: *

5. Select **Find**. The project list will be updated to only display projects that match your specified criteria.

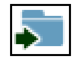
Inviting Other Users

You can grant access to a project that you have created to another person by sending them an invitation to your project. To send someone an invitation, follow these steps:

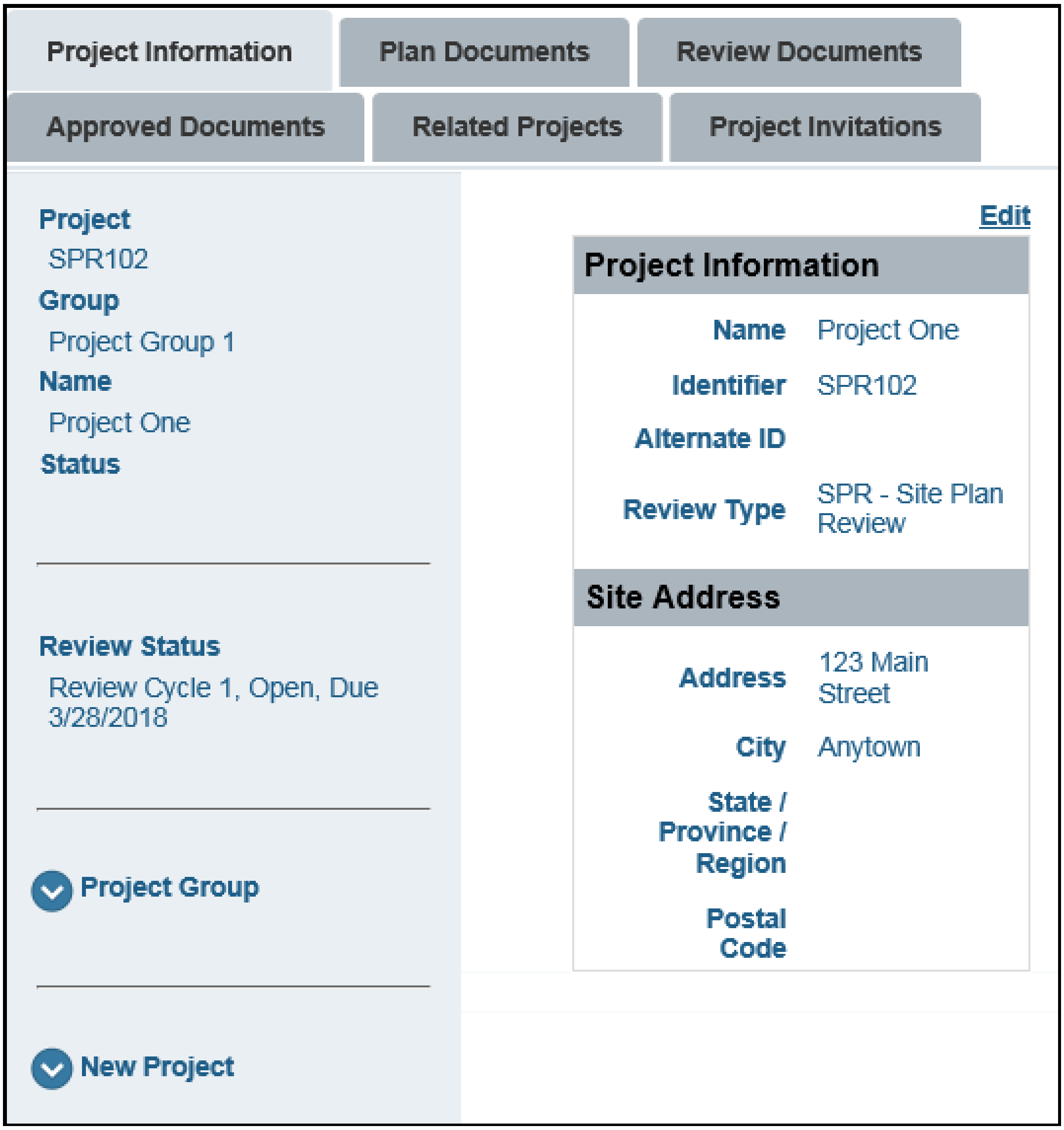
1. Select the **Projects** tab. The **Projects** window is displayed.



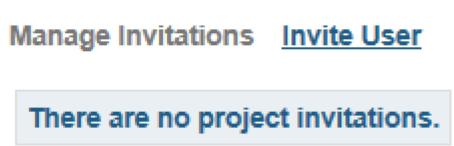
2. Click the folder button for the desired project.



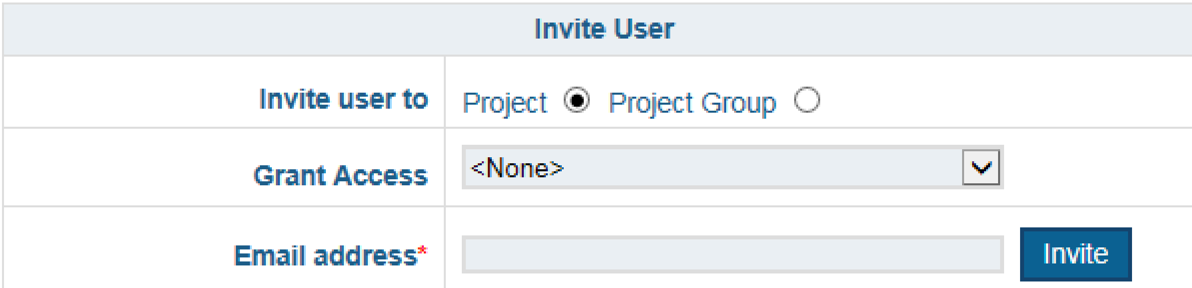
The **Project Information** window is displayed.



3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.



4. Click **Invite User**. The **Invite User** window is displayed.



5. Select one of the following options:
   - **Project** - select this option to invite the specified person to the selected project.
   - **Project Group** - select this option to invite the specified person to the project group assigned to the selected project. The invited user will be able to access all projects assigned to the project group of the selected project.

Note: These options are only displayed if the selected project has been assigned to a project group.

6. To change the access level to be granted to the user, select the desired access level from the **Grant Access** drop-down list. The following selections are available:

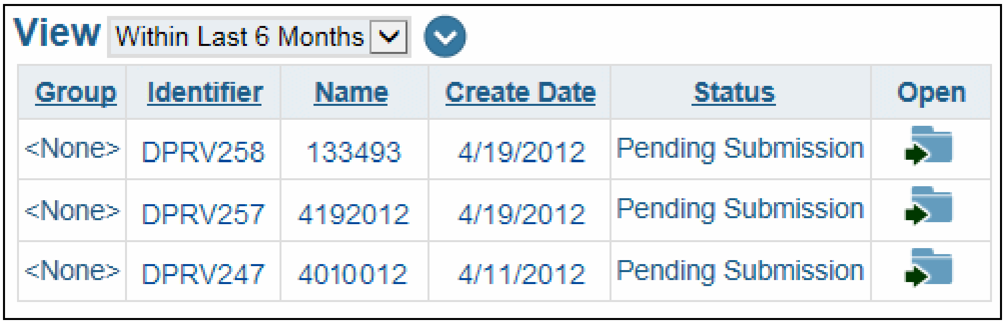
Option	Description
View Only	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

7. Enter the e-mail address of the person you want to invite to view your project or project group into the **Email address** field.
8. Click **Invite**. The invitation will be sent to the specified address.

Managing Invitations

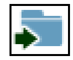
Once another user has accepted your invitation, you can manage the level of access that you are allowing them to have for this project. To manage the level of access your invitees have, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

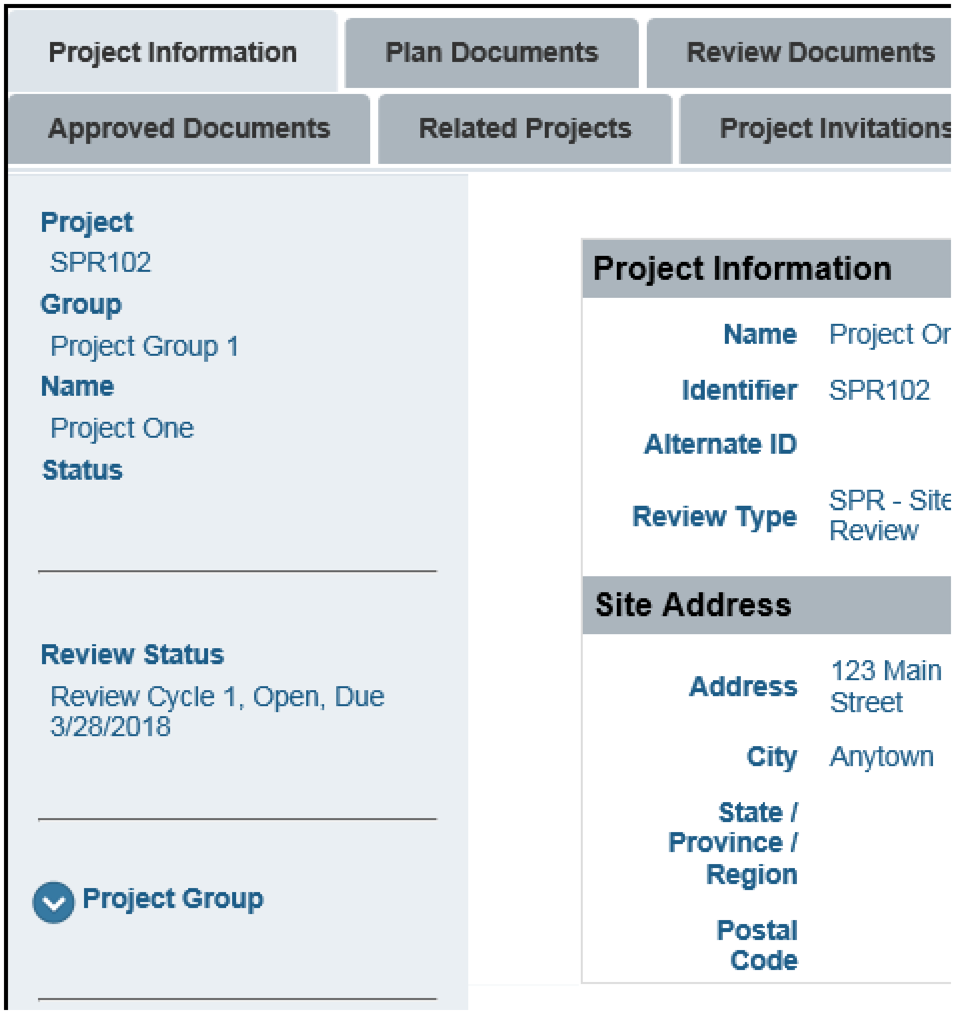

View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

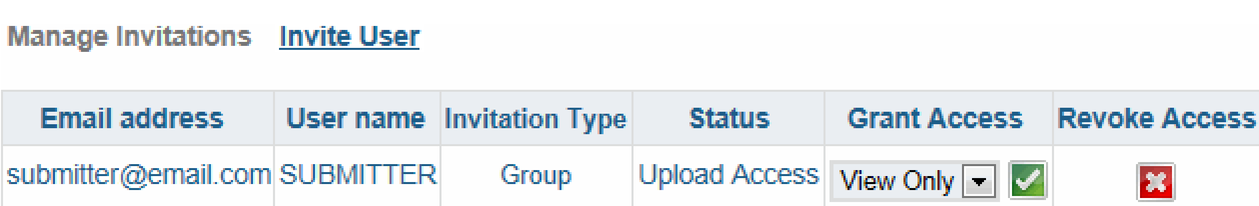
2. Click the folder button for the desired project.



The **Project Information** window is displayed.



3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.
4. Click **Manage Invitations**. The **Manage Invitations** window is displayed.



5. To change a user's access level, select the desired access level from the user's **Grant Access** drop-down list. The following selections are available:

Option	Description
View Only	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

Click the **Check** icon to save your changes.

You can also select the **X** icon to revoke a user's access to the project entirely.

Viewing Related Projects

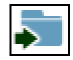
You can view a list of all projects related to the currently selected project by the assigned Project Group. To do so, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

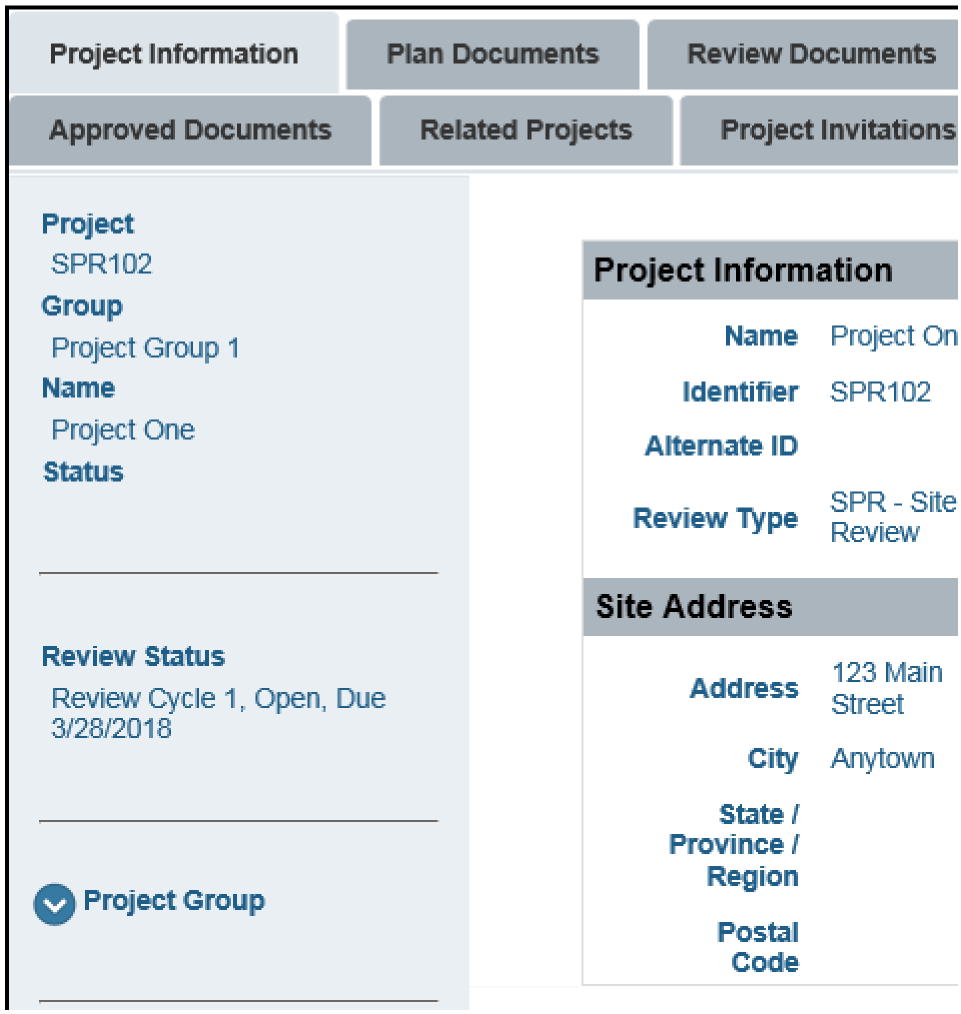
View Within Last 6 Months

Group	Identifier	Name	Create Date	Status	Open
<None>	DPRV258	133493	4/19/2012	Pending Submission	
<None>	DPRV257	4192012	4/19/2012	Pending Submission	
<None>	DPRV247	4010012	4/11/2012	Pending Submission	

2. Select the folder button for the project you want to add documents to.



The **Project Information** window is displayed.



3. Select the **Related Projects** tab. The **Related Projects** window is displayed.

Group	Identifier	Name	Create Date	Status	Open
Project Group 1	RT117	133492	5/11/2017		
Project Group 1	RT115	International Road	2/15/2017		

4. For more details on a specific project, you can click on the folder button for the project you want to open.

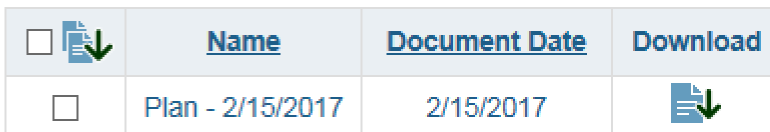
Viewing Reviewed Documents

Project reviewers will review your submitted plans and add comments or markups to any sheets that require modification. These updated documents will then be posted onto your Plan Review site, under the **Review Documents** tab. When you see a document in this tab, you should review the document to determine the issue, modify your document so that the issue is resolved, then re-submit your document for another review cycle.

Downloading Documents

To download a document that has been reviewed, follow these steps:

1. Select the **Review Documents** tab. All available documents will be listed in the **Review Documents** window.



	Name	Document Date	Download
☐	Plan - 2/15/2017	2/15/2017	

2. Select a review cycle from the **Review Cycle** drop-down list to filter the list of available documents.
3. Click on the document download button to download the document.

Tip: You can also download multiple documents as a compiled ZIP file. To do so, select the check box next to every document you want to include in the ZIP file, then click the zip download button.

4. Review all comments and markups that have been made by your plan reviewer(s).
5. Revise your plan document(s) as noted by the reviewers and save the revised documents using the same file name as the original document.

Note: When re-uploading a document, the document must use the exact file name that the original document initially used so that the modified document is correctly uploaded as a revision of the original document.

6. Re-upload the document. For more information on uploading documents, see Adding Documents to a Project on page 120.

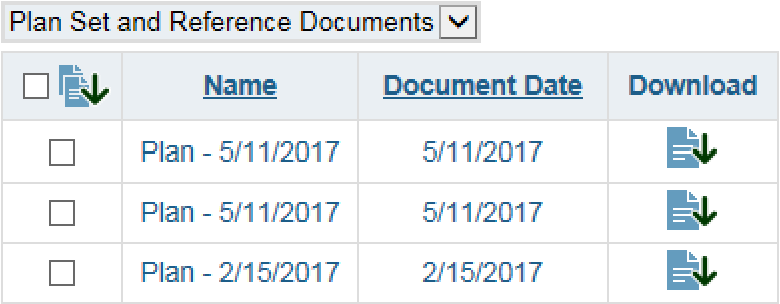
Downloading Approved Documents

Submitted documents that have been approved and require no modifications are displayed in the **Approved Documents** tab. The **Approved Plan Sets** option allows you to download a set of approved documents and any comment letters, while the **Approved Plan Sheets** option allows you to download one or more approved plan sheets by themselves.

Approved Plan Sets

To download a set of documents that have been approved, follow these steps:

1. Select the **Approved Documents** tab.
2. Select the **Plan Set** and **Reference Documents** option from the drop-down list.
3. All available plan sets and comment letters will be listed in the **Approved Documents** window.



4. Click on the document download button to download the document or plan set.

Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.

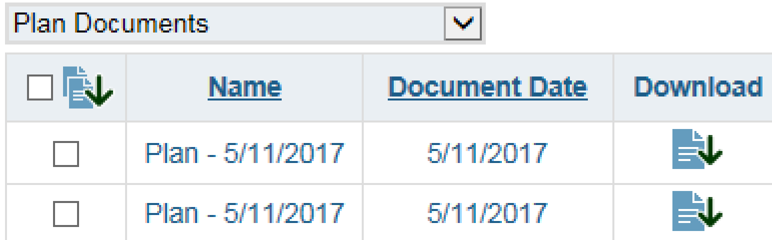
Approved Plan Sheets

Documents or plans that have been approved and require no modifications will appear in your **Approved Documents** tab.

To download a document that has been approved, follow these steps:

1. Select the **Approved Documents** tab. All available documents will be listed in the **Approved Documents** window.
2. Select the **Plan Documents** option from the drop-down list.

3. All available documents will be listed in the **Approved Documents** window.

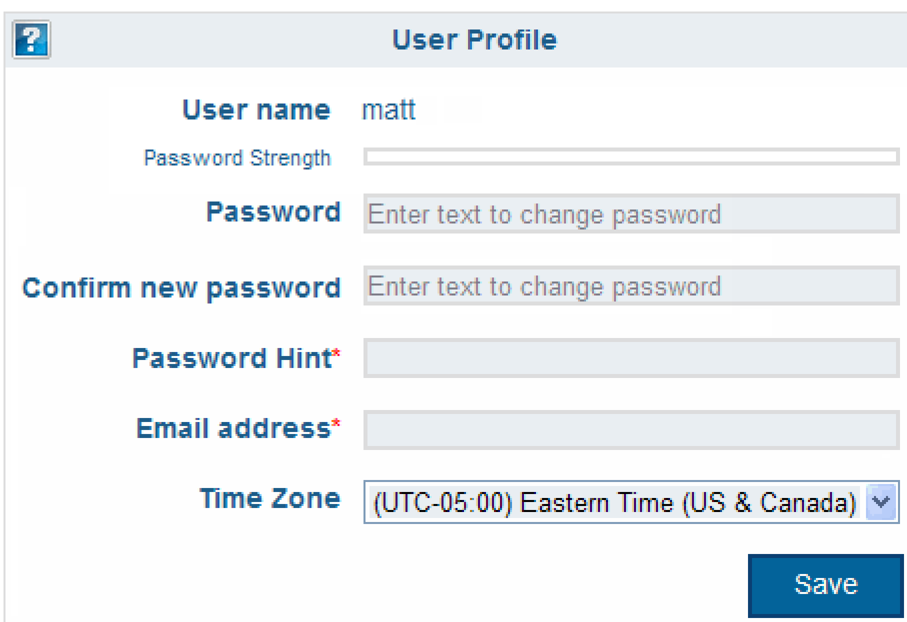


4. Click on the document download button to download the document or plan set.

Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.

Modifying Your Account Information

You can modify your user information at any time by selecting the **Profile** tab.



Make sure you select **Save** after making your changes.

Definitions

The following list consists of common terms that are used with the general operations of the Plan Review module:

Discipline

This is a broad category under which several types of similar plan documents are grouped together. A single Discipline often contains multiple Sheet Types. For example, you can configure a Discipline for **Architectural**. The **Architectural** Discipline contains plan sheets that are related to the architectural aspects of the building, such as site plans, floor plans, and elevations.

Review Type

This is a classification of a Plan Review Project. It allows for specific configuration settings on a project, such as:

- A meaningful prefix to assign to a Project ID when the project is created
- A specific Unity Form to assign to allow for additional information to be captured for a project
- A unique set of Disciplines that can be assigned to the plan sheets that are uploaded to a project

It also allows administrators to determine the flow of review. In many cases, an organization will have a number of different departments or review groups tasked with reviewing plan documents. Some groups only review certain types of projects. For example, a Commercial project could be reviewed by 10 groups of reviewers and a Residential project could be reviewed by different groups.

Sheet Type

This is a more specific category under which documents are grouped and stored, which falls under a larger Discipline. For example, under the Discipline of **Building Safety**, you might configure a **Drainage** Sheet Type to store drainage documents. All submitted **Drainage** sheets are grouped under this Sheet Type.

Stipulation

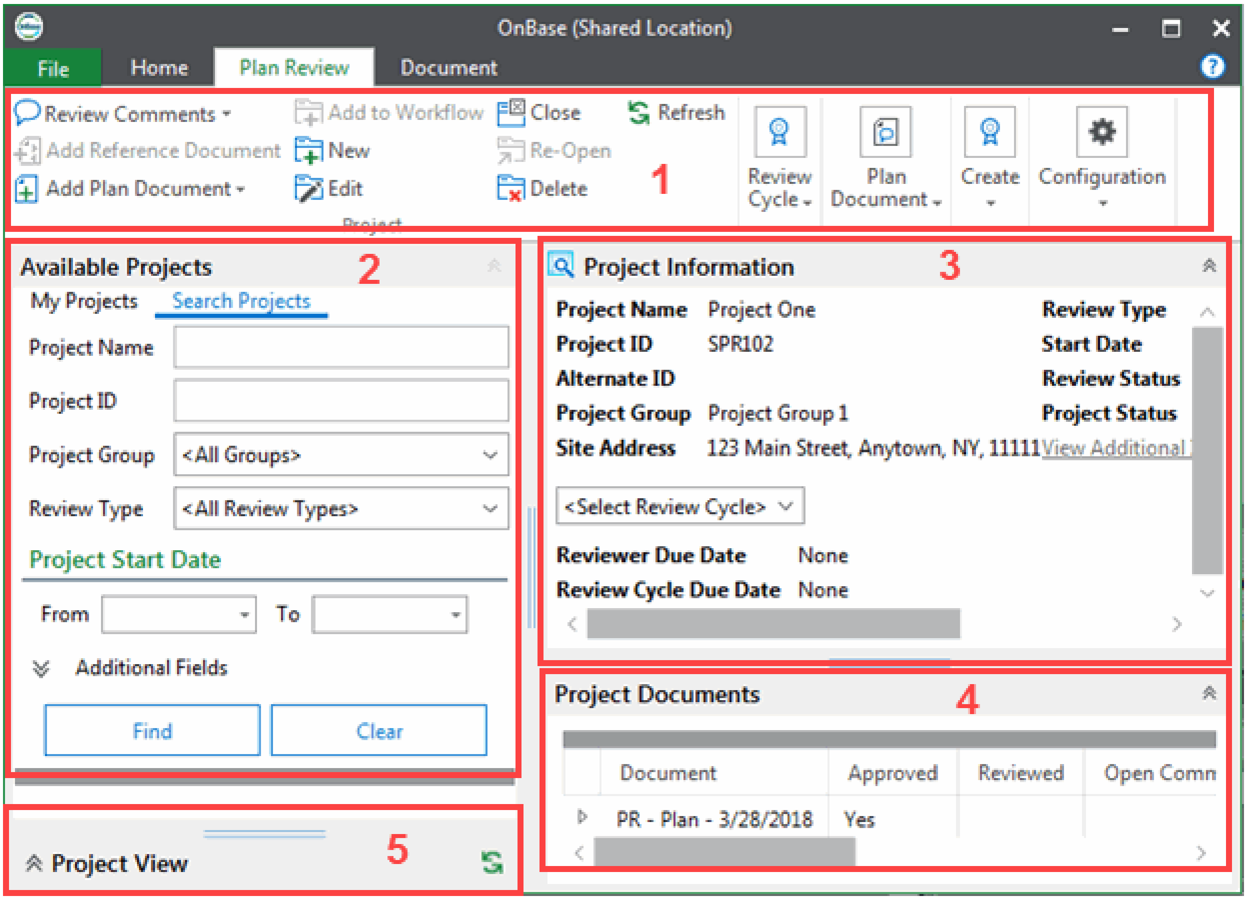
This is a Plan Review comment added to a plan document which was not resolved before the plan document was approved. A stipulation indicates that the plan document is only approved under the circumstances specified by the comment.

Getting Started

All Plan Review **Reviewer** users can use the Plan Review Unity Client interface to review, markup, and approve submitted plan documents.

Navigating the Plan Review Unity Client

The following image displays the basic layout of the Plan Review Unity interface.



1. The **Plan Review** ribbon contains a wide variety of options and features.
2. The **Available Projects** pane allows you to view and search for Plan Review projects stored in OnBase.
3. The **Project Information** pane displays information on the selected project, some of which is based on the review cycle selected from the **<Select Review Cycle>** drop-down list.
4. The **Project Documents** pane displays a list of documents related to the selected project based on your current folder selection in the **Project View** pane.

5. The **Project View** pane displays a list of folders you can use to filter the list of documents displayed in the **Project Documents** pane. This section also allows you to access the information for any contacts or locations that are associated with this project.

   Right-click inside the **Project View** pane to display the right-click menu. The following options are available in the right-click menu:

   - **Show Empty Folders / Hide Empty Folders**: Select **Show Empty Folders** to display empty subfolders under the **Plan and Documents** folder. Select **Hide Empty Folders** to not display empty subfolders under the **Plans and Documents** folder. By default, the **Hide Empty Folders** option is selected.
   - **Refresh Project View**: Select to refresh the list of folders displayed in the **Project View** pane.

Retrieving a Plan Review Project

You can retrieve a Plan Review project to review, edit, or add documents to during the cycle of a project.

Opening Your Plan Review Projects

Plan Review projects that are assigned to you are displayed in your **My Projects** tab.

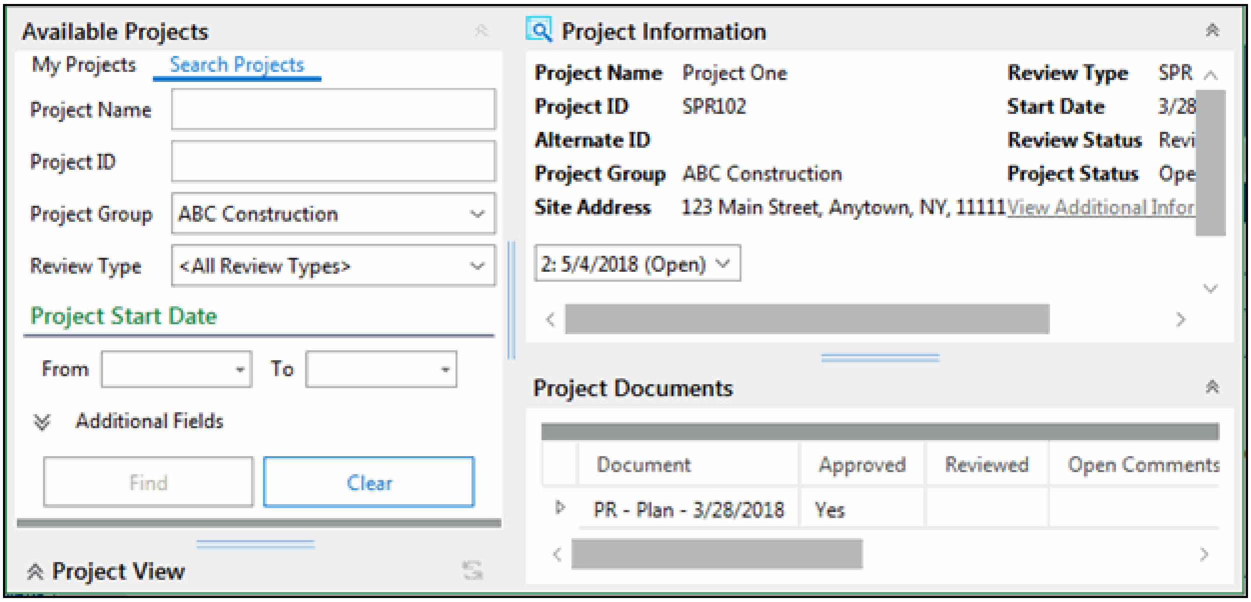
Tip: You can sort and group the list of displayed projects by column. For more information on sorting and grouping by column, see the **Unity Client** documentation.

Finding a Plan Review Project

You can find a Plan Review project in the Unity Client to review.

To find a Plan Review project:

1. From the **Home** ribbon, select **Plan Review**. The **Plan Review** layout is displayed.



2. From the **Available Projects** pane, select the **Search Projects** tab.
3. Specify your desired search criteria.

Note: You can specify additional search criteria in the **Additional Fields** section.

4. Click **Find**. Projects that match your query are displayed in a list below the **Search Projects** section.
5. Select a project from the list. The documents belonging to the project are displayed in the **Project Documents** pane.

Viewing Related Projects

You can view a list of all projects related to a currently selected project by the assigned Project Group. To view related projects, click on the **Related Projects** folder from the **Project View** section. A list of related projects is displayed.

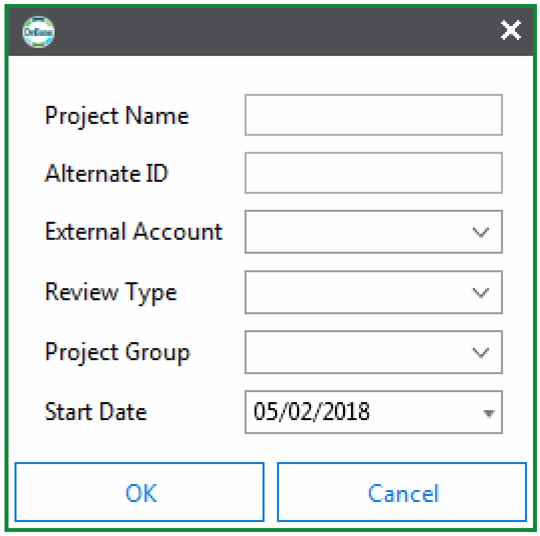
Creating a New Project

In many cases, projects are imported into your OnBase solution when submitter users upload their projects using the Plan Review website. However, you can also create a project manually in the Unity Client, if needed.

To create a new project in the Unity Client:

1. From the **Plan Review** ribbon, click the **New** button.

The **New Project** dialog box is displayed.



2. Enter a name for your project in the **Project Name** field.
3. Enter an alternate ID number for the project in the **Alternate ID** field.
4. Select a submitter user account from the **External Account** drop-down list to be assigned to the project.
5. Select a review type for your project from the **Review Type** drop-down list.
6. Select a project group to be assigned to the project from the **Project Group** drop-down list.
7. Specify the appropriate start date in the **Start Date** field.
8. Click **OK**. The project is added to your OnBase system, but it does not yet contain any documents. To add documents to your new project, continue to Adding Documents to a Project on page 120.

Adding Documents to a Project

You can add new or existing documents to a Plan Review project.

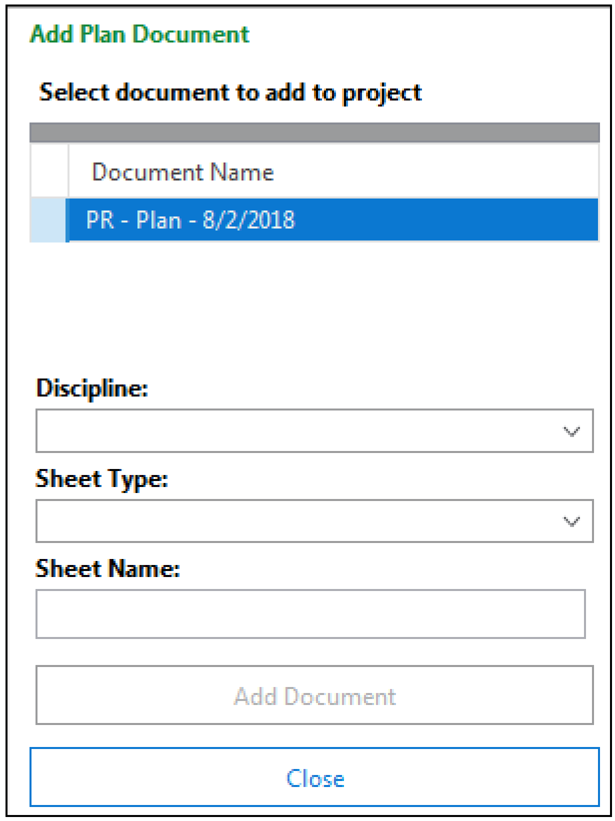
Adding Existing Documents

You can add existing documents in OnBase to a Plan Review project.

To add existing OnBase documents to a Plan Review project:

1. From the **Plan Review** ribbon, select a Plan Review project from the **Available Projects** pane.
2. Click the **Add Plan Document** drop-down button.

3. Select **Add Plan Document**. The **Add Plan Document** pane is displayed.



Note: The **Add Plan Document** pane contains a list of all documents currently in OnBase with a **Project ID** Keyword Value equal to the **Project ID** of the selected project.

4. Select a document to add to the selected project.
5. Select the Discipline for the document from the **Discipline** drop-down list.
6. Select the Sheet Type for the document from the **Sheet Type** drop-down list.
7. Enter a sheet name for the document in the **Sheet Name** field.

Note: If the document being added uses the same **Sheet Name** as an existing document within the selected project, it is imported as a revision of the existing document.

8. Click **Add Document**. The document is added to your project list.
9. Repeat this process as many times as needed to upload all documents for your project. If you need to add any documents to your project to be used solely for reference, see Adding Reference Documents to a Project on page 151.

Adding New Documents

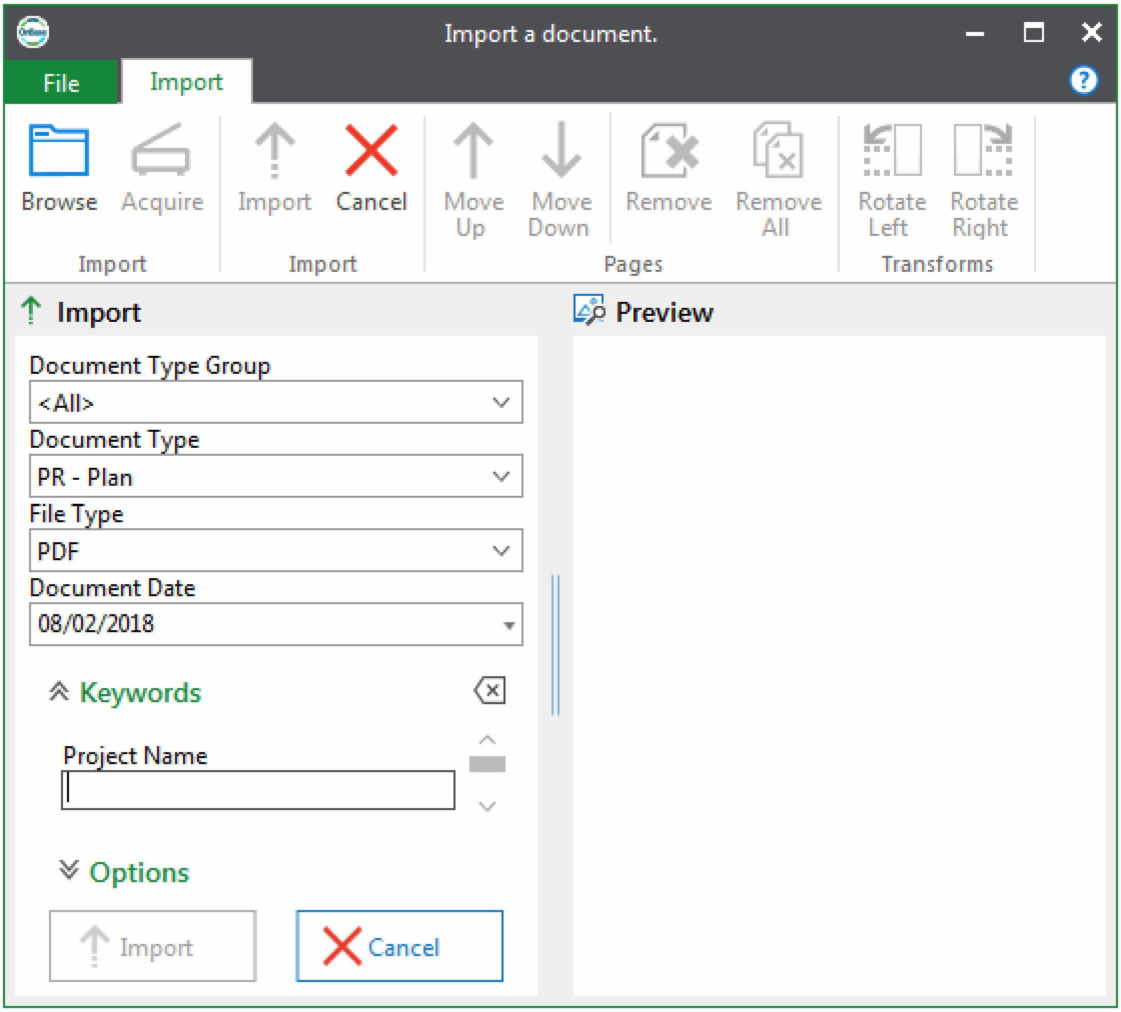
You can import new documents into OnBase and add it to an existing Plan Review project.

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

To import a new document:

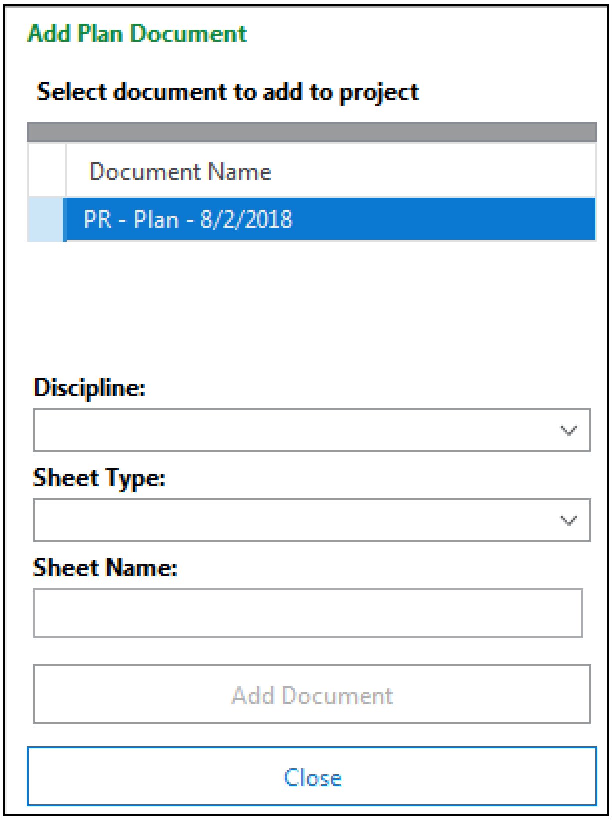
1. From the **Plan Review** ribbon, select a Plan Review project from the **Available Projects** pane.
2. Click the **Add Plan Document** drop-down button.

3. Select **Add Plan Document From File**. The **Import a document** window is displayed.



4. From the **Import** tab, click **Browse** to browse to the location of the file you want to upload.
5. Select the Document Type for the document from the **Document Type** drop-down list.
6. Select the File Type for the document from the **File Type** drop-down list.
7. Enter the document date in the **Document Date** field.
8. Enter any Keyword Values in the **Keywords** section.
9. Click **Import**. A message is displayed that notifies that you must enter a sheet name for the project to complete adding the document to the project.

10. Click **OK**. The **Add Plan Document** pane is displayed in the Plan Review layout.



11. Select the document in the **Document Name** list.
12. Select a Discipline for the document from the **Discipline** drop-down list.
13. Select a Sheet Type for the document from the **Sheet Type** drop-down list.
14. Enter a sheet name for the document in the **Sheet Name** field.

Note: If the document being added uses the same **Sheet Name** as an existing document within the selected project, it will be imported as a revision of the existing document.

15. Click **Add Document**. You document is uploading into OnBase and added to your project.
16. Repeat this process as many times as needed to upload all documents for your project. If you need to add any documents to your project to be used solely for reference, see Adding Reference Documents to a Project on page 151.

Editing a Project

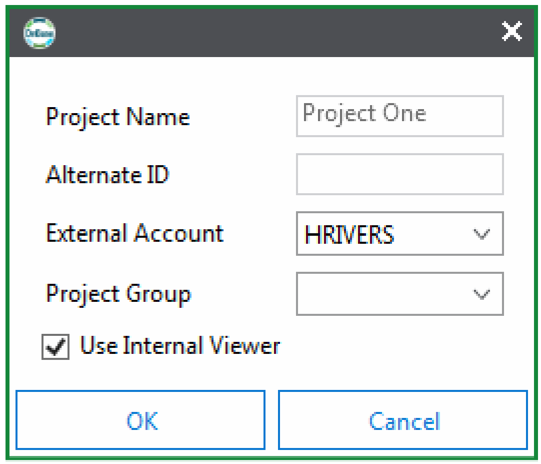
You can modify the following project details in the Unity Client:

- The external submitter account attached to an existing project
- The project group assigned to the project
- Viewing project documents using the OnBase viewer or an external viewer

To edit a project:

1. In the Plan Review layout, select the project to edit from the **Available Projects** pane.
2. From the **Plan Review** ribbon, click the **Edit** button.

The **Edit Project** dialog box is displayed.



3. Select a submitter user from the **External Account** drop-down list to be assigned to the project.
4. Select a project group to be assigned to the project from the **Project Group** drop-down list.
5. Select the **Use Internal Viewer** option to view project documents using the OnBase viewer. Not selecting this option displays project documents using an external viewer. See Using an External Viewer on page 182 for more information on how to use an external viewer.
6. Click **OK** to apply your edits.

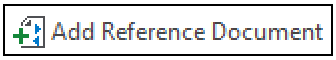
Adding Reference Documents to a Project

You can add a reference document to a project to the **Review Cycle Documents** or **Approved Plan Documents** folders.

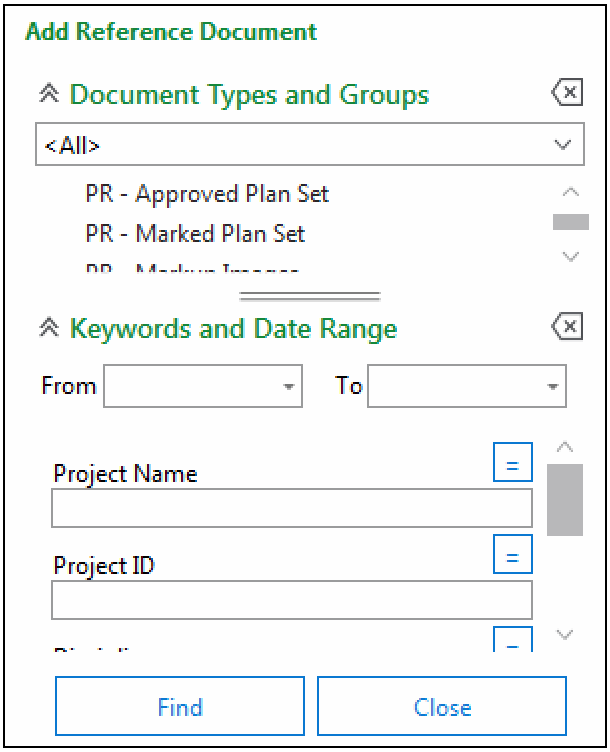
To add reference documents to an existing Plan Review document:

1. From the **Home** tab, select **Plan Review**. The Plan Review layout is displayed.
2. Select the Plan Review project you want to add a reference document to from the **Available Projects** pane.
3. From the **Project View** pane, select the **Review Cycle Documents** folder or **Approved Plan Documents** folder.

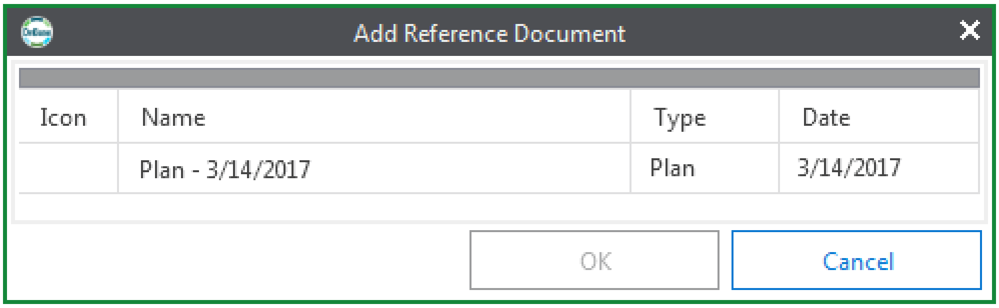
4. From the **Plan Review** ribbon, click the **Add Reference Document** button.



The **Add Reference Document** pane is displayed.



5. From the **Document Types and Groups** section, select a Document Type from the drop-down list.
6. From the **Keywords and Date Range** section, enter all required Keyword Values in the available Keyword Type fields.
7. Click **Find**. The **Add Reference Document** search results dialog box is displayed with the documents matching your search criteria.



8. Select a document from the list of search results.
9. Click **OK**. The document is added to the selected project folder. Once you are ready to start the review cycle for this project, see Starting a Review Cycle on page 156.

Deleting Documents

The **Documents Pending Delete** folder contains any documents marked for deletion by the project submitter from the Plan Review website. Once a document is marked for deletion by the submitter, a project reviewer can either fully delete the document from the project, or restore the document to the project. Project reviewers can also fully delete documents that are not marked for deletion by the project submitter.

Caution: Do not delete or purge a document from your OnBase solution without first deleting it from all Plan Review projects. Attempting to do so can prevent you from later uploading a document with the same file name.

Deleting Documents from a Project

You can delete a Plan Review document from a Plan Review project.

To delete a Plan Review document:

1. From the Plan Review layout, select a Plan Review project from the **Available Projects** pane.
2. Select one or more project documents to delete from the **Project Documents** section.
3. From the **Plan Review** ribbon, in the **Plan Document** ribbon group, click **Delete Document**.

The selected documents are removed from the selected Plan Review project.

Note: Though the deleted documents are removed from your Plan Review project, they are still stored in your OnBase database. For information on completely purging a document from your OnBase solution, see the System Administration documentation.

Deleting Reference Documents from a Project

You can delete a reference document from a Plan Review project if a reference document is available and that document is not published.

To delete a reference document:

1. From the Plan Review layout, select a Plan Review project from the **Available Projects** pane.
2. In the **Project View** pane, select the **Review Cycle Documents** folder or the **Approved Plan Documents** folder.
3. In the **Project Documents** section, select one or more reference documents to delete.

4. From the **Plan Review** ribbon, in the **Plan Document** ribbon group, click **Remove Reference Document**.

The selected documents are removed from the selected Plan Review project.

Note: Though the deleted documents are removed from your Plan Review project, they are still stored in your OnBase database. For information on completely purging a document from your OnBase solution, see the System Administration documentation.

Restoring Documents to a Project

You can restore a document to a Plan Review project from the **Documents Pending Delete** folder.

To restore a document to a Plan Review project:

1. From the Plan Review layout, select a Plan Review project from the **Available Projects** pane.
2. Select the **Documents Pending Delete** folder from the **Project View** pane.
3. Select one or more documents to be restored from the **Project Documents** pane.
4. From the **Plan Review** ribbon, in the **Plan Document** ribbon group, click **Restore Document**.

The selected documents are restored to the project.

Adding a Project to a Workflow Life Cycle

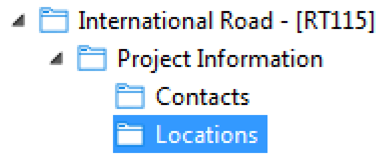
In many cases, projects are added to the correct Workflow Life Cycles automatically when they are created. However, you can also manually add a project to a Workflow Life Cycle, if needed. To add a project to a Workflow Life Cycle, select a Plan Review project from the **Available Projects** pane and click the **Add to Workflow** button from the **Plan Review** ribbon. The project is added to all Workflow Life Cycles that are configured to accept Plan Review projects.

Adding Locations to a Project

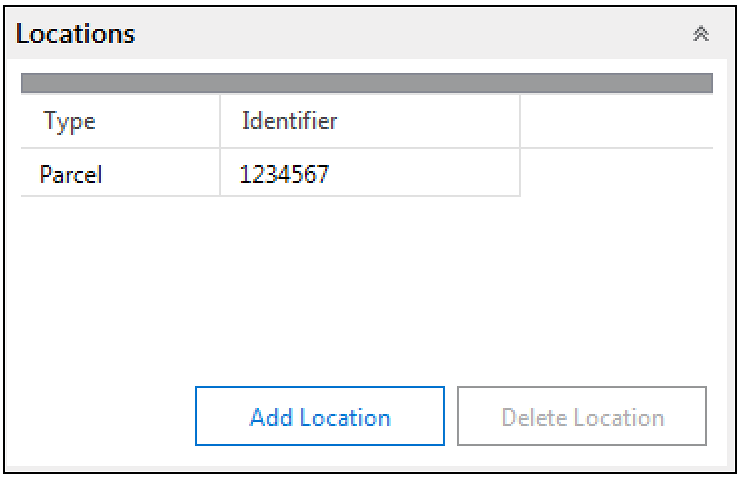
You can manually add locations to a Plan Review project.

To add a location to an existing project:

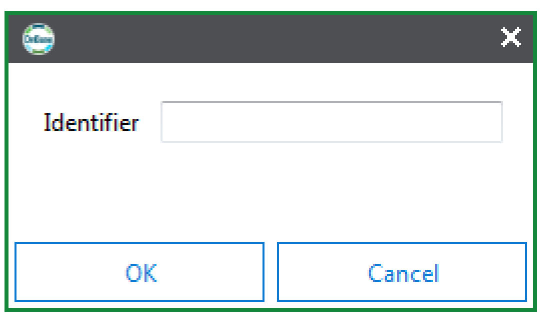
1. From the **Available Projects** pane, select a Plan Review project.
2. In the **Project View** pane, select the **Project Information** folder. The **Project Information** folder is expanded.



3. Select the **Locations** folder. The **Locations** pane is displayed.



4. Click **Add Location**. The **New Location** window is displayed.



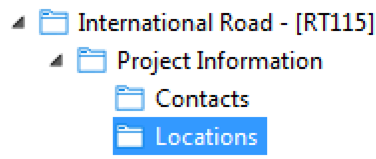
5. Enter a value for your parcel location in the **Identifier** field.
6. Click **OK**. Your location is added to the project.

Deleting Locations from a Project

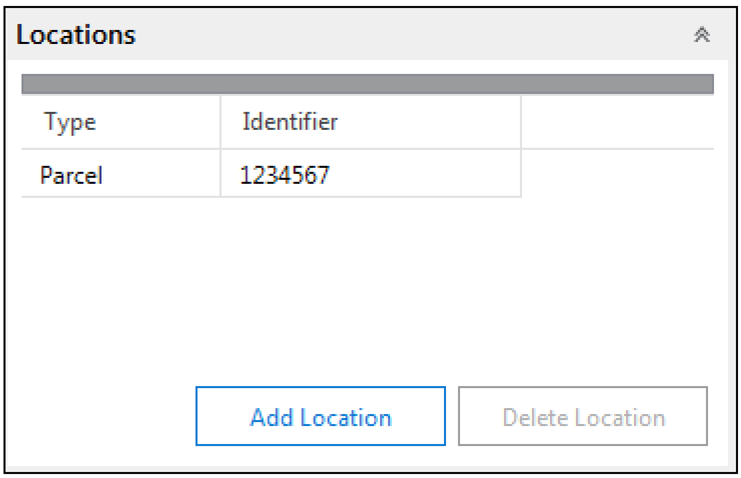
You can delete existing locations for a Plan Review project.

To delete a location from a project:

1. From the **Available Projects** pane, select a Plan Review project.
2. In the **Project View** pane, select the **Project Information** folder. The **Project Information** folder is expanded.



3. Select the **Locations** folder. The **Locations** pane is displayed.



4. Select a location from the list of available locations.
5. Click **Delete Location**. The location is deleted from the selected Plan Review project.

Starting a Review Cycle

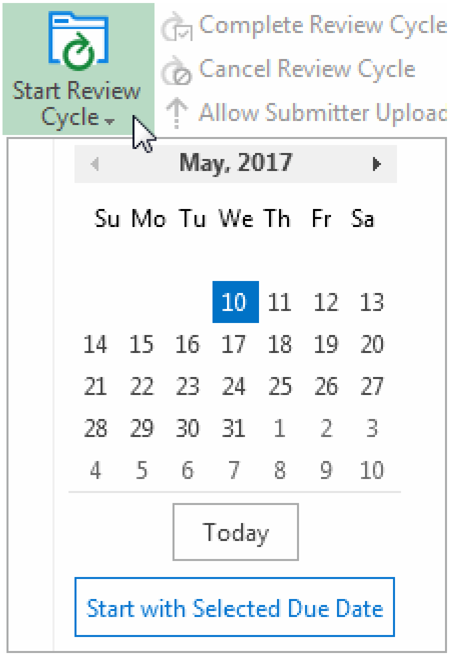
When a project is ready to be reviewed, you can begin the review cycle process with or without adding a project due date.

Starting a Review Cycle With a Project Due Date

You can start a review cycle for a Plan Review project with a specified project due date.

To start a review cycle with a project due date:

1. Navigate to the **Plan Review** tab and retrieve the desired project.
2. Click the bottom half of the **Start Review Cycle** button. The Project Due Date calendar is displayed.



3. Select a date.
4. Click the **Start with Selected Due Date** button. The project will be transitioned to the first review queue and can be reviewed by the configured reviewer(s).

Starting a Review Cycle Without a Project Due Date

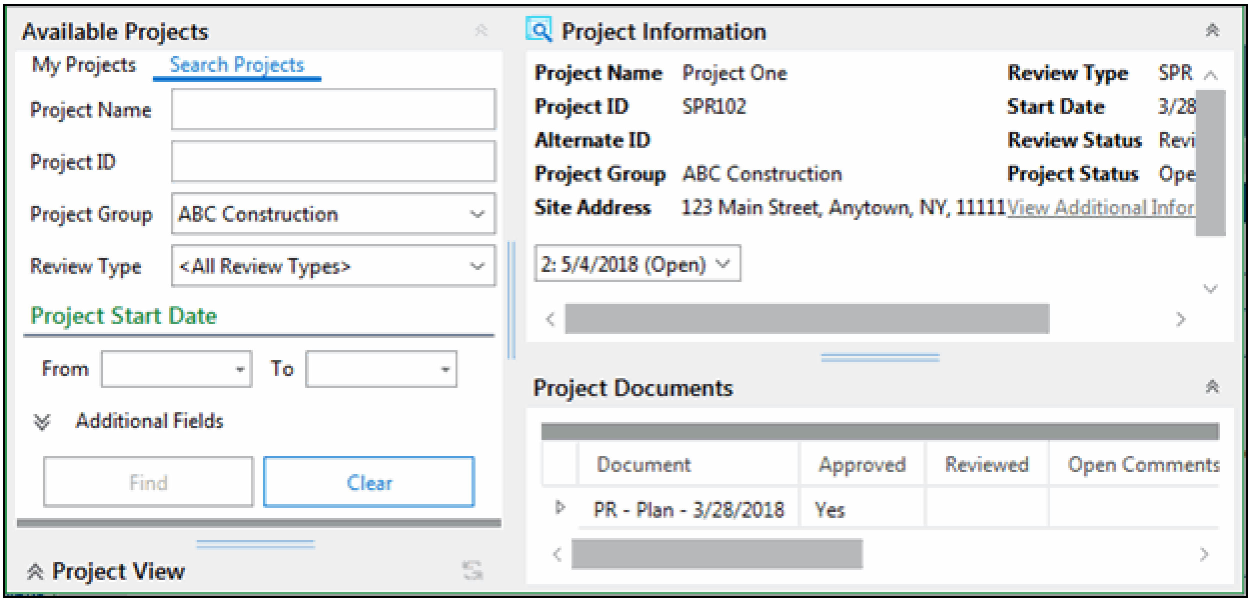
1. Navigate to the **Plan Review** tab and retrieve the desired project.
2. Click the top half of the **Start Review Cycle** button.

The project will be transitioned to the first review queue and can be reviewed by the configured reviewer(s).

Reviewing Project Documents

To review a Plan Review project, open the Unity Client and follow these steps:

1. Select the **Plan Review** tab. The **Plan Review** window is displayed.



2. Open the **My Projects** tab from the **Available Projects** section.

Note: If necessary, you can also use the **Search Projects** interface to retrieve a Plan Review project.

3. Select a project from the list. The project's documents will be displayed in the **Project** section.

Tip: By default, the **Project** view contains every single document submitted for this project. You can filter the list to only display specific Disciplines and/or Sheet Types by selecting the desired criteria from the **Project View** section.

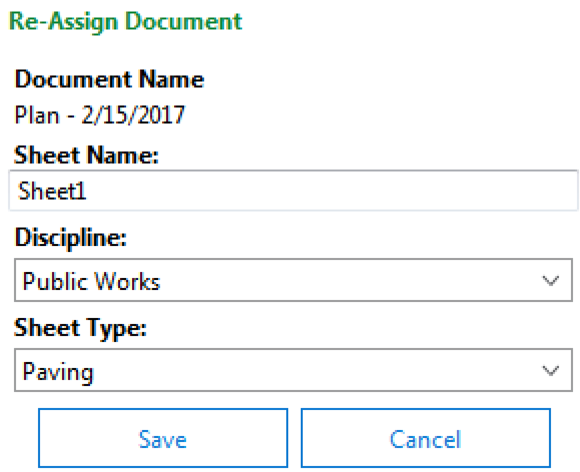
4. Open one or more documents from the list.

Tip: You can open multiple documents within the same viewer window by selecting multiple documents and clicking the **Open Document Set** option from the **Plan Document** section of the ribbon.

5. Review the documents and make comments/markups as needed - for more information on adding comments or working with markups, see Reviewing Documents on page 159.

Note: You can right-click on a document in the Project Documents section to access general Unity Client functionality, such as viewing notes and Keyword Values. See the Unity Client documentation for more information on general Unity Client functionality.

6. If a document has been submitted under an incorrect Discipline or Sheet Type, you can resolve this issue by following these steps:
   a. Select the **Re-Assign Document** button from the ribbon. The **Re-Assign Document** pane is displayed.



   b. Modify the **Discipline** and **Sheet Type** as needed.
   c. Click **Save**.
7. After you have finished reviewing and commenting on the submitted project, you need to transition the project to the next stage in the review cycle. To do so, select the **Plan Review Tasks** tab from the ribbon, then select the appropriate task to send the project to the next stage.

If one or more issues were found, the project will need to be returned to the submitter for correction - if this is the case, continue on to Creating a Plan Set on page 202. If no issues were found, the project documents can be approved and sent back to the submitter for reference - for more information, see Preparing Documents for Approval on page 206.

Allowing Submitter Uploads

By default, once a project has been submitted users can no longer upload additional documents to the project. You can allow submitter users to upload additional documents by selecting the **Allow Submitter Uploads** option in the ribbon.

Note: This option is only enabled when a project is in an open review cycle.

Reviewing Documents

If a previous revision of a document exists, you can compare the latest revision of a document with a previous revision to more easily identify changes between revisions. After reviewing documents, you can modify documents as needed by adding comments or by marking up the document itself.

Refreshing a Project

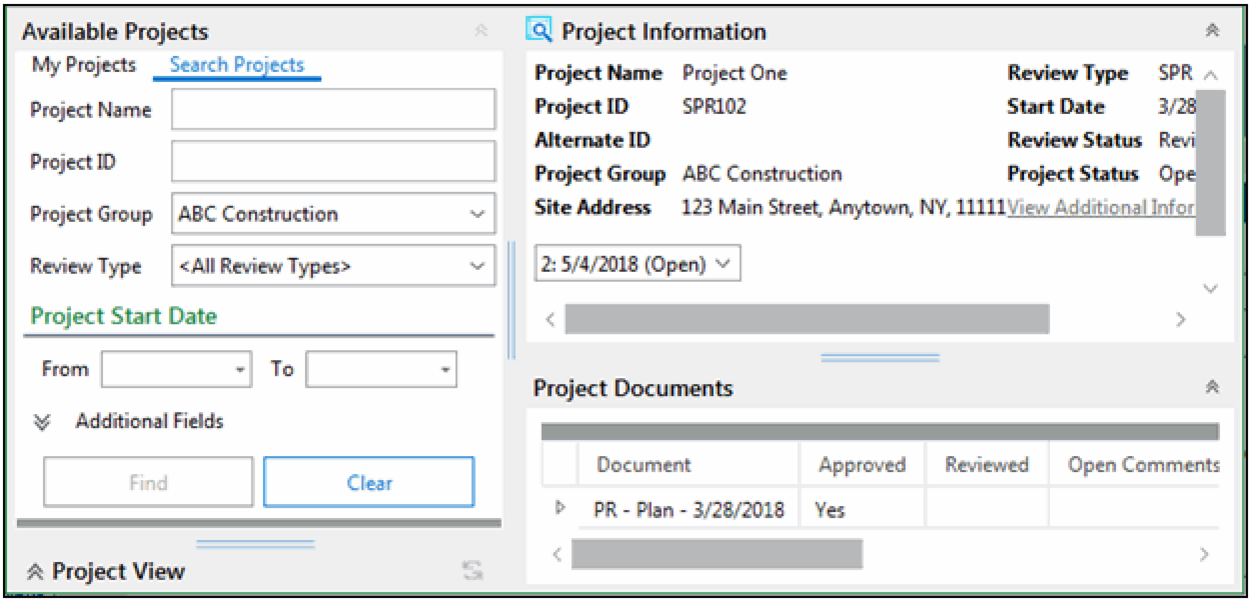
In some cases, others users may make changes to a project while you have it open within the Unity Client. To ensure that you have the most up-to-date information, click the Refresh button. Doing so refreshes all project data, including the list of project documents, comments, and Workflow queues that contain the project.

Comparing Documents

Often, documents are uploaded and reviewed multiple times. In some cases, you may be able to review a document more quickly by comparing the document to a previous revision. The Plan Review comparison tool provides the ability to quickly identify any differences between two documents, allowing users to quickly focus on the modified areas. When you compare a document to another document, Plan Review identifies and color codes the differences between the two documents.

To compare documents, follow these steps:

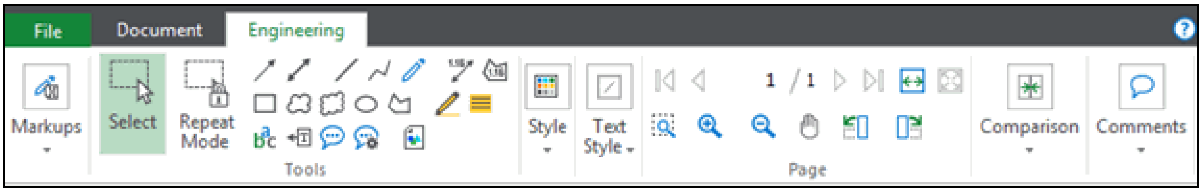
1. Select the **Plan Review** tab. The Plan Review window is displayed.



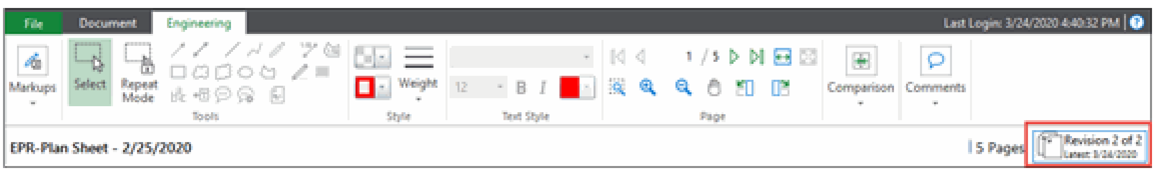
2. Open and select your desired Plan Review project.
3. Open a document from the **Project** section. The document is displayed in the **Document Viewer**.

Tip: Compare functionality is not supported for use with the **Open Document Set** feature.

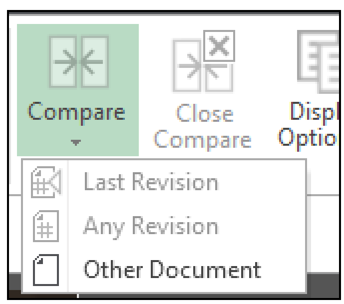
4. Select the **Plan Review** or **Engineering** tab from the ribbon to display all markup and comment options available for the selected documents.



5. If revisions are available for the document, the number of revisions, along with the revision you are currently viewing, is displayed.

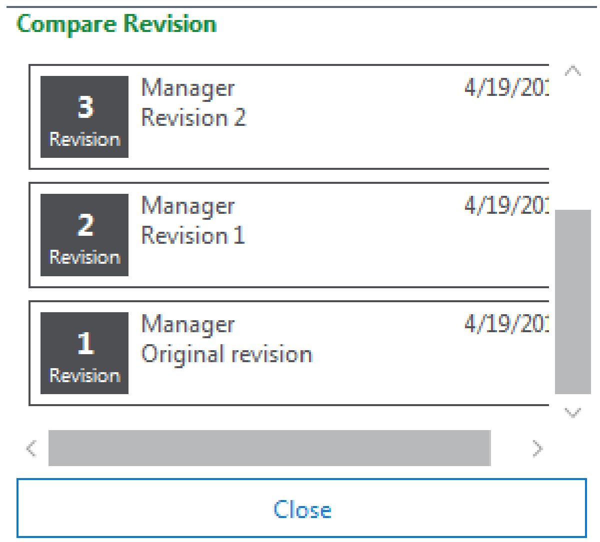


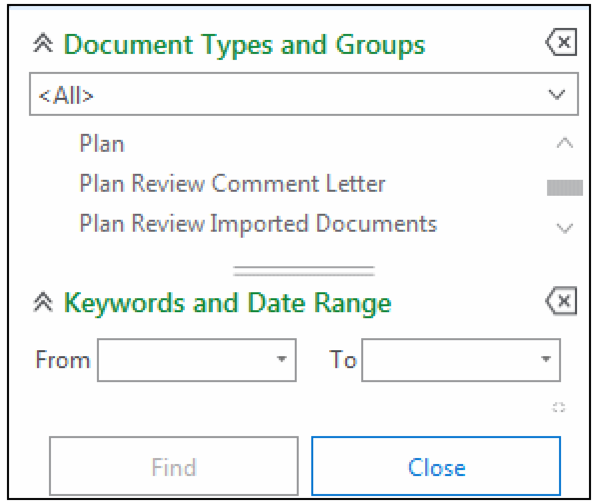
6. Select one of the options from the **Compare** button in the **Comparison** ribbon group.



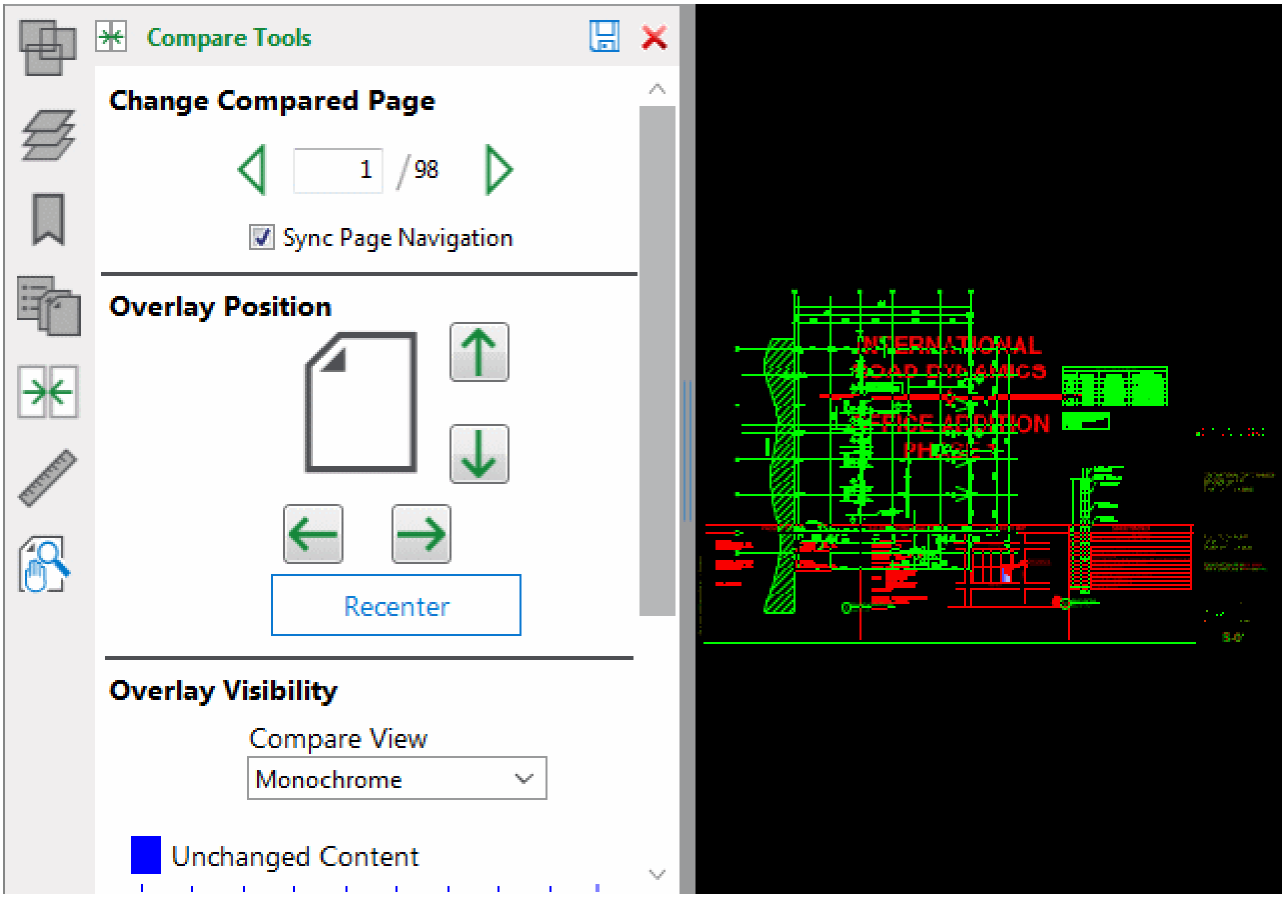
The following options are available:

Option	Description
Last Revision	The selected document is compared with the most recent revision of the document. **Note:** This option is only enabled if the selected document has at least one previous revision stored in OnBase and your user account has permission to view revisions and/or versions for the appropriate Document Type.

Option	Description
Any Revision	The selected document is compared with any revision of the document you select from the **Compare Revision** pane.  Double-click on the revision you want to compare the document to. **Note:** This option is only enabled if the selected document has at least one previous revision stored in OnBase and your user account has permission to view revisions and/or versions for the appropriate Document Type.

Option	Description
Other Document	The selected document is compared to another document you select from the **Document Retrieval** pane.  Enter search criteria for the document you want to compare the selected document to, then click **Find**. Select the document you want to use from the document search results list. The document is compared with the selected revision.

The **Document Comparison** window is displayed.



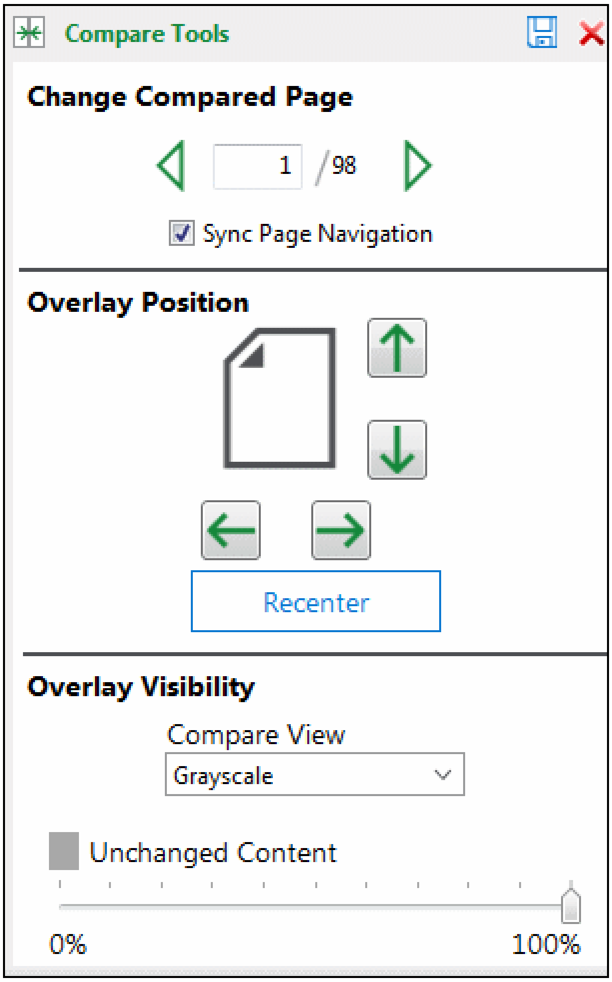
The comparison document is displayed atop the original document in the comparison viewer. The viewer window contains an analysis of the difference between the two documents.

Note: While using the comparison viewer, markups added to the document are not displayed and new markups cannot be added. Exit comparison mode to view and add markups to the document.

Note: The page used for comparison from the comparison document is the page with the same page number as the page of the original document. If no such page exists on the comparison document, the last available page will be displayed instead.

Using Compare Tools

You can adjust the appearance of the comparison view using the **Compare Tools** pane. When a document is opened for comparison, the **Compare Tools** pane is displayed.



When the comparison document is being displayed on top of the original document, the visibility of the overlay can be customized to suit your needs.

You can use the **Change Compared Page** field to change the page of the documents being compared. Select the **Sync Page Navigation** option to keep the compared document's page number synced with the original document. When this option is deselected, changing the page number for the main document also changes the page number of the comparison document, and vice-versa. When this option is not selected, you can use the options in the **Change Compared Page** section of the **Compare Tools** pane to change the page for the comparison document only, and the options in the **Page** section of the **Engineering** ribbon to change the page of the original document.

If the overlay is off-center, you can use the **Overlay Position** options to move the overlay around. Click on the arrow icons to move the overlay as desired. Click **Recenter** to return the overlay to its original position.

By default, clicking the arrow icons moves the overlay by a distance of one pixel. You can increase the distance the overlay is moved after each button click by using keyboard shortcuts. The following shortcuts are available:

- **Shift** + **Left-click**: moves the overlay by 10 pixels
- **Ctrl** + **Left-click**: moves the overlay by 20 pixels
- **Shift** + **Ctrl** + **Left-click**: moves the overlay by 50 pixels

The **Overlay Visibility** section contains sliders which control the opacity of the analysis of the documents. When a slider is set to 100%, items of that color are completely opaque. When a slider is set to 0%, items of that color are completely transparent and cannot be seen on the document.

When **Monochrome** is selected from the **Compare View** drop-down list, the colors in the viewer indicate the following:

Color	Description
Blue	Items displayed in blue are exactly the same in both documents.
Red	Items displayed in red only exist in the original document - they do not exist in the comparison document.
Green	Items displayed in green do not exist in the original document - they only exist in the comparison document.

When **Grayscale** is selected from the **Compare View** drop-down list, the colors in the viewer indicate the following:

Color	Description
Gray	Items displayed in gray are exactly the same in both documents.
Red	Items displayed in red only exist in the original document - they do not exist in the comparison document.
Green	Items displayed in green do not exist in the original document - they only exist in the comparison document.

Tip: You can click the **Save** icon in the **Compare Tools** header to save the selected **Compare View** as your default selection.

Marking Up Documents

You can only mark up a document if you have one or more Workflow tasks assigned to you for that document. Users can create multiple markups on a single document, and create multiple markups per revision. Markups are saved per revision, and can be viewed by any user with the appropriate rights. Markups can only be deleted by the user who created them and users with the **Manage Markups** privilege.

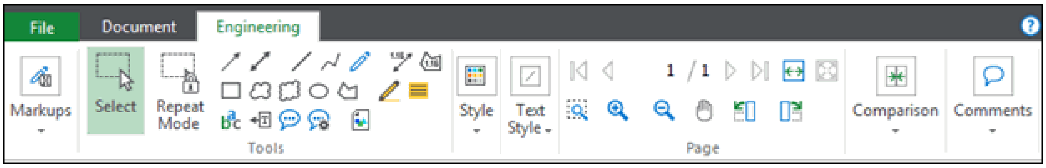
Tip: Multiple users can add markups to a plan document simultaneously. While reviewing a plan document, you can select the **Refresh Markups** button from the **Markups** ribbon group to refresh the document and display any markups that were created by other reviewers. Clicking this button also allows you to save any markup changes you made.

To mark up a document:

1. Open a document.

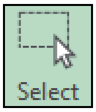
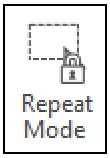
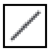
Tip: You can open multiple documents within the same viewer window by selecting multiple documents and clicking the **Open Document Set** option from the **Plan Document** ribbon group of the **Plan Review** ribbon.

2. Select the **Engineering** tab. The markup toolbar is displayed.



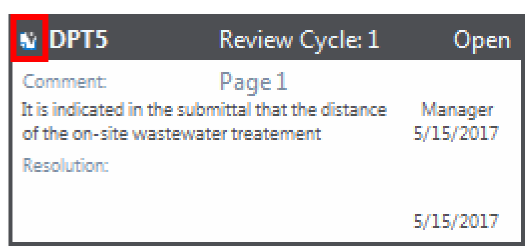
3. Click the **Show Markups** button from the **Markups** ribbon group to display existing markups on the document.

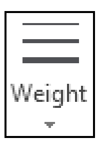
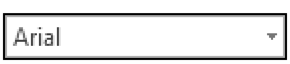
4. Mark up the document as needed. See the following table for a brief description of the options available in the internal viewer.

Button	Description
Select 	When this option is selected, you can select existing markups by clicking on them. You can select more than one markup by clicking and dragging to create a selection rectangle over multiple markups. **Tip:** You can also hold **Ctrl** and click on a markup to add the selected markup to the selection group. Markups that have not yet been burned in can be moved, resized, or rotated once they are selected. **Tip:** You can also use the **Ctrl + Q** keyboard shortcut from an open document to select the **Select** option.
Repeat Mode 	When this option is selected, you can add a selected markup multiple times on the document. When this option is not selected, after a markup is made on the document, the **Select** tool is automatically selected by default. The **Repeat Mode** option is automatically deselected when you select a **Note**, **Standard Note**, or **Stamp** markup type.
Arrow 	When this option is selected, you can add arrow markups to the document.
Double Arrow 	When this option is selected, you can add double-sided arrow markups to the document.
Line 	When this option is selected, you can add a straight line to the document. **Tip:** When adding a **Line** markup, you can hold the **SHIFT** key to snap the line markup to the nearest 45 degree angle.
Polyline 	When this option is selected, you can add polyline markups to the document. Left-click to add another point to the polyline, or right-click to place the final endpoint. Hold **Ctrl** while right-clicking to create a final line segment linking the endpoint to the first point created, which closes the polyline.
Freehand 	When this option is selected, you can add a freehand line to the document.

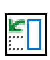
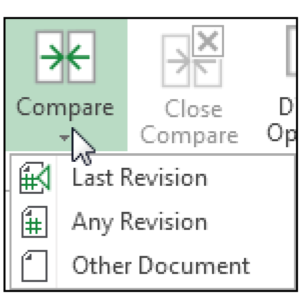
Button	Description
Line Measure	When this option is selected, you can add a line measurement markup to the document. The units used to perform the measurement are determined by the units selected on the **Measurement** pane of the toolbar.
Area Measure	When this option is selected, you can add an area measurement markup to the document. Left-click to add another corner to the area measurement polygon, or right-click to place the final point. The units used to perform the measurement are determined by the units selected on the **Measurement** pane of the toolbar.
Rectangle	When this option is selected, you can add a rectangular markup to the document.
Cloud	When this option is selected, you can add a cloud-shaped markup to the document.
Polycloud	When this option is selected, you can add a polycloud markup to the document. Left-click to add another corner to the cloud-shaped polygon, or right-click to place the final corner.
Ellipse	When this option is selected, you can add an ellipse markup to the document.
Polygon	When this option is selected, you can add a polygon to the document. Left-click to add another corner to the polygon, or right-click to place the final point.
Highlight Pen	When this option is selected, you can add a freehand highlight markup to the document.
Highlight	When this option is selected, you can add a rectangular highlight markup to the document.
Text Box	When this option is selected, you can add text box markups to the document. **Note:** Text box markups can store a maximum of 1024 characters.

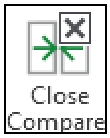
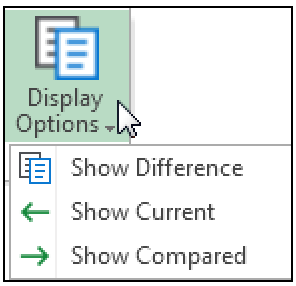
Button	Description
Leader Line 	When this option is selected, you can add leader line markups (for example, arrow markups with an attached text box) to the document. **Note:** Leader line markups can store a maximum of 255 characters.
Note 	**Note:** This option is only supported for use with Electronic Plan Review. When this option is selected, users with permission to create review comments can add a Note markup that is linked to a review comment. After adding a Note markup, the **Plan Review Comment** dialog box is displayed, allowing you to create the review comment that is linked to the added note. See the section on adding user comments in this module reference guide for more information on creating review comments. **Note:** When the owner of the document enters a comment, that comment can be viewed by other users, but not deleted, copied, or pasted by anyone but the owner. Linked comments are displayed in the **Plan Review Comments** pane when reviewer users select the linked markup. When a user deletes a review comment that is linked to a Note markup displayed on the current page of the document, the linked Note markup is also deleted. **Note:** Users cannot delete review comments linked to a Note markup that is not on the page.

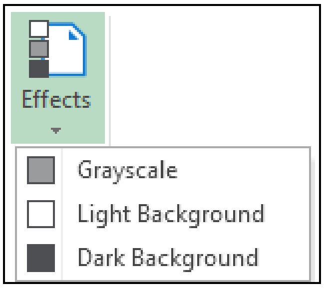
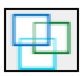
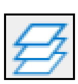
Button	Description
Standard Note 	**Note:** This option is only supported for use with Electronic Plan Review. When this option is selected, users with permission to create review comments can add a Standard Note markup that is linked to a standard comment. After adding a Standard Note markup, the **Standard Comment** dialog box is displayed, allowing you to select the standard comment that will be linked to the added note. See the section on adding standard comments in this module reference guide for more information on creating review comments. **Note:** When the owner of the document enters a comment, that comment can be selected and viewed by other users, but not deleted, copied, or pasted by anyone but the owner. Linked comments are displayed in the **Plan Review Comments** pane when reviewer users select the linked markup. When a user deletes a standard comment that is linked to a Standard Note markup displayed on the current page of the document, the linked Standard Note markup is also deleted. **Tip:** You can quickly navigate to a Standard Note markup linked to a document comment by clicking the **Select note markup** icon on the comment.  **Note:** Users cannot delete standard comments linked to a Note markup that is not on the page.

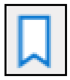
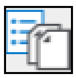
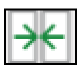
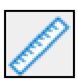
Button	Description
Image 	**Note:** This option is only supported for use with Electronic Plan Review. When this option is selected, you can add an Image markup to the document. You will only be able to use images to which you have access (for example, through configured Security Keywords or appropriate Document Type privileges). **Tip:** When resizing an Image markup, you can hold the **SHIFT** key to force the markup to maintain its aspect ratio.
Fill Color 	Select a value from this drop-down select list to specify the color of the interior of any shape markups added to the document (such as Cloud, Rectangle, or Ellipse).
Line Color 	Select a value from this drop-down select list to specify the line color used when creating shapes, lines, or text markups.
Weight 	Select a value from this drop-down select list to specify the weight (width) of the lines used when creating markups. Line weight affects the width of lines used to create most markups, such as shapes, lines, or the outline of text markups.
Font 	Select a value from this drop-down select list to specify the desired font used when creating text and leader line markups.
Font Size 	Select a value from this drop-down select list to specify the desired text size used when creating text and leader line markups.
Bold 	Select this option to format the selected text in bold.
Italic 	Select this option to format the selected text in italics.
Text Color 	Select this option to specify the text color to be used when creating text markups.

Button	Description
First Page	Select this option to navigate to the first page of the document. **Tip:** You can also use the **Ctrl + Home** keyboard shortcut from an open document to select the **First Page** option.
Previous Page	Select this option to navigate to the previous page of the document. **Tip:** You can also use the **Ctrl + Page Up** keyboard shortcut from an open document to select the **Previous Page** option.
Page Number	Enter a number in the **Page Number** field and press **Enter** to navigate to that page of the document, or press the **Up** or **Down** arrow keys to navigate to the next or previous page.
Next Page	Select this option to navigate to the next page of the document. **Tip:** You can also use the **Ctrl + Page Down** keyboard shortcut from an open document to select the **Next Page** option.
Last Page	Select this option to navigate to the last page of the document. **Tip:** You can also use the **Ctrl + End** keyboard shortcut from an open document to select the **Last Page** option.
Fit To Width	Select this option to scale the view of the document so that the document takes up the entire width of the viewer window. **Tip:** You can also use the **Ctrl + 2** keyboard shortcut from an open document to select the **Fit to Width** option.
Fit To Window	Select this option to scale the view of the document so that the entire document is visible within the viewer window. **Tip:** You can also use the **Ctrl + 1** keyboard shortcut from an open document to select the **Fit to Window** option, or the **Ctrl + 0** keyboard shortcut from an open document to select the **Fit to Window** option and reset the page rotation to 0.

Button	Description
Selection Zoom Tool 	Select this option to enable the **Selection Zoom Tool**. When this tool is enabled you can click on the document to zoom in to a specific region, or press and hold **Ctrl** while clicking on the document to zoom out. **Tip:** You can also hold **Ctrl** and use the mouse wheel to zoom in and out on the document, or hold **Ctrl** and press the **+** or **-** keys to zoom in and out. To zoom in or out on the entire document, use the zoom field and slider in the bottom right corner of the document viewer. You can adjust the zoom level by moving the slider, or by entering a specific value in the available field. **Tip:** You can also use the **Ctrl + N** keyboard shortcut from an open document to select the **Selection Zoom Tool** option.
Pan Image 	Select this option to pan through the document by clicking and dragging. **Tip:** You can also use the **Ctrl + M** keyboard shortcut from an open document to select the **Pan Image** option, or press and hold the middle mouse button.
Rotate Left 	Select this option to rotate the view of the document counterclockwise by 90 degrees. **Tip:** You can also hold **Ctrl** and press the left arrow key to rotate the document counterclockwise.
Rotate Right 	Select this option to rotate the view of the document clockwise by 90 degrees. **Tip:** You can also hold **Ctrl** and press the right arrow key to rotate the document clockwise.
Compare 	Select this option to compare the selected document with another document in OnBase.

Button	Description
Close Compare 	Select this option to exit compare mode and close the comparison document.
Display Options 	Select this option to control which documents are displaying in comparison mode. • **Show Difference -** Select this option to display both documents for comparison. **Tip:** You can also use the **Ctrl + D** keyboard shortcut from an open document in Comparison mode to select the **Show Difference** option. • **Show Current -** Select this option to display the current (original) document. **Tip:** You can also use the **Ctrl + F** keyboard shortcut from an open document in Comparison mode to select the **Show Current** option. • **Show Compared -** Select this option to display the comparison document. **Tip:** You can also use the **Ctrl + R** keyboard shortcut from an open document in Comparison mode to select the **Show Compared** option.
Review Comments 	Select this option to review, create, and manage document-level and project-level comments. For more information on creating, reviewing, and managing document-level and project-level comments, see the sections on adding, viewing, and deleting comments in the **Electronic Plan Review** documentation. **Note:** This option is only supported for use with Electronic Plan Review.

Button	Description
Effects 	Select this option to change the background color of the opened CAD document. The following available color options are available: • **Grayscale** • **Light Background** • **Dark Background** When a different background color is selected for the CAD document, the color remains selected when saving or printing the document. **Note:** This option is only supported for use with CAD Services.
Markup Layers 	Click this button to view a list of all markups on the document, including markups created by other users. You can click on a markup that you have created to select the markup on the document. You can click the **View** button to display or hide a specific markup.  **Note:** This option is only available for users that are members of a User Group that have the **Manage Markups** privilege.
PDF Layers 	Click this button to view PDF layers for the open PDF document. If the selected PDF Document has PDF layers, the layers list is populated with the names of all active layers for the current page. To hide or display a layer, double-click on the layer. The layer's status is changed from hidden to displayed, or vice-versa. **Tip:** Click the **Reset Visibility** button to reset the viewer to display the PDF layers that were initially displayed. To hide or display multiple layers simultaneously, press and hold the **Shift** key and click layers to select multiple layers at once, then press the **Space** or **Enter** key to toggle their status between hidden and displayed. **Note:** If a layer spans multiple pages, changing that layer's visibility on one page also changes that layer's visibility for other pages.

Button	Description
Bookmarks 	Click this button to view bookmarks for the open PDF document. You can click on a bookmark from the list to navigate to the linked page of the PDF document. **Note:** This option is only supported for use with Electronic Plan Review.
Page List 	Click this button to view a list of thumbnails for each page of the open PDF document. You can click on a thumbnail from the list to navigate to that page of the PDF document, and you can use the slider beneath the thumbnails to increase or decrease the size of the thumbnails.
Compare Tools 	Select this option to modify the appearance of the comparison view when a document is being compared with another document in OnBase.
Measurement 	Click this button to display the **Measurement** pane. See the section on using measurement tools in this module reference guide for more information on using the **Measurement** pane.
Page View 	Click this button to display a thumbnail of the current page in a pane below the currently selected pane. When you zoom in on the document, a zoom selection box is displayed on the thumbnail in the **Page View** pane. You can click and drag the zoom selection box on the thumbnail to pan across the document image.

Note: Ensure that all markups are completely on the document. Any segment of a markup that extends off of the document will be cropped off when the markup is burned onto the document.

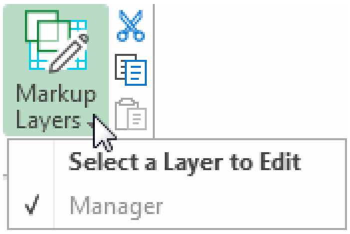
5. Once you have finished creating all required markups, you must save your markups by selecting the **Save** button from the **Markups** ribbon group of the **Engineering** ribbon.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

Deleting Markups

You can delete markups you have added to a document. If you have the appropriate permissions, you can also modify or delete markups made by other users. To modify or delete markups on a document, follow these steps:

1. Select **Show Markups**.
2. If you want to modify or delete another user's markups, click **Markup Layers** and select the name of the user whose markups you want to delete. This option is disabled if you do not have permission to delete other user's markups, or if there are no other user's markups on the document.



3. To modify a markup, select the markup you want to change and make the desired changes using the markup toolbar.
4. To delete a single markup, select that markup and click **Delete Markup**.
5. To delete all markups in the selected layer, click **Delete Markup Layer**. You are prompted to confirm deletion.
6. Click **Yes**. All markups on the selected markup layer are deleted.
7. Once you have finished deleting markups, click the **Save** button from the ribbon.

Cutting, Copying, and Pasting Markups

In some cases you may need to use identical markups multiple times throughout one or more documents. In such situations, you may find it useful to cut, copy, and paste markups from one document onto another document, or onto another page of the current document.

Cutting Markups

To remove one or more markups from a document and place them on your clipboard, open a document and perform one of the following actions:

- Select one or more markups and then click the **Cut Selected Markups** button from the **Markups** section of the ribbon.
- Select one or more markups and then press **Ctrl + X**
- Open the **Markup Layers** side panel, then right-click on a markup and click **Cut**.

Copying Markups

To copy one or more markups onto your clipboard without removing them from the original location, select a markup on an open document and then perform one of the following actions:

- Click the **Copy Selected Markups** button from the Markups section of the ribbon.
- Press **Ctrl + C**
- Open the **Markup Layers** side panel, then right-click on a markup and click **Copy**.

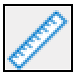
Pasting Markups

To paste one or more markups from your clipboard onto a document, open a document and perform one of the following actions:

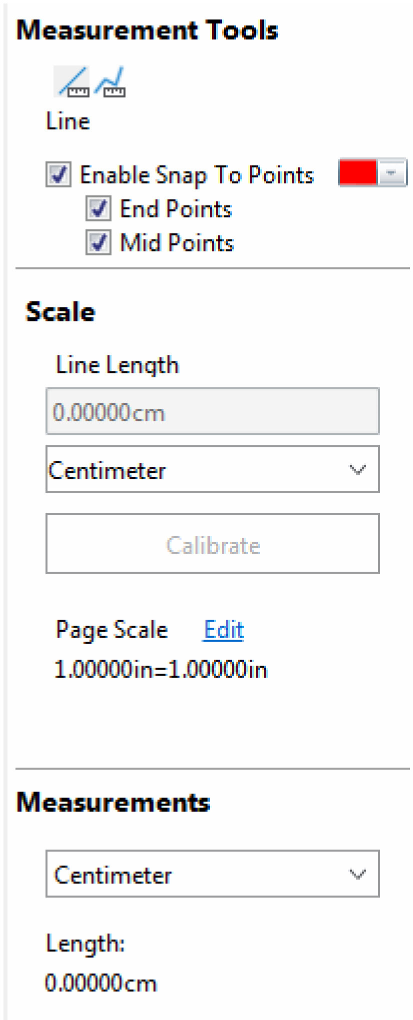
- Click the **Paste Markups** button from the **Markups** section of the ribbon.
- Press **Ctrl** + **V**
- Open the **Markup Layers** side panel, then right-click on a markup and click **Paste**. The new markup is added to the bottom of the list.

Using Measurement Tools

You can use the measurement tools to measure and analyze the lengths of lines on plan documents. To open the Measurement toolbar, click the **Measurement** option from the toolbar.



The Measurement toolbar is displayed.



Click the **Line Measurement** option to measure the distance between two points on the document. With this option selected, click and drag on the document to create a line. The length of the line is displayed in the **Scale** and **Measurements** section of the toolbar. Use the available drop-down lists to change the unit of measurement used to measure the line.

Click the **Polyline Measurement** option to measure the distance of a line with multiple points and the area of the shape. With this option selected, click and drag on the document to create a line. Left-click to add another point to the polyline, or right-click to place the final endpoint. Hold **CTRL** while right-clicking to create a final line segment linking the endpoint to the first point created, thereby closing the polyline.

Note: Only shapes closed using **CTRL + Right-click** can be used to calculate the area of the shape. Manually placing the final line segment in such a way as to appear to close a shape does not link the line segments together and cannot be used to calculate the area of the shape.

The length of the entire line or polyline is displayed in the **Scale** and **Measurements** section of the toolbar, and the area of closed polyline shapes is displayed in the **Measurements** section only. Use the available drop-down lists to change the unit of measurement used to measure the line and calculate the area. Use the drop-down list next to the **Enable Snap To Points** option to change the color of the line being drawn.

Select the **Snap To Points** option to display the closest SnapTo locations that can be used with the measurement tools. SnapTo locations are displayed on the document as blue shapes. When a SnapTo location is displayed on the document and a measurement tool is used to start or finish drawing a measurement near that location, the SnapTo location is used instead of the exact mouse position. Deselect the **Snap To Points** option if you need to select a specific location on the document when creating measurements.

When the **Snap To Points** option is selected, the **End Points** and **Mid Points** options are enabled. Select the **End Points** option to enable the ability to snap to end point SnapTo locations on the document. Select the **Mid Points** option to enable the ability to snap to mid point SnapTo locations on the document.

Note: OnBase creates SnapTo locations by analyzing the document to find relevant points. Not all likely locations are discoverable, so users may find it necessary to use manual selection to measure between two points accurately.

Note: SnapTo locations are not available on secured PDF documents that were created without enabling the **Enable copying of text, images, and other content** option.

Calibrating the Scale

You can calibrate the scale used to convert the length of lines drawn into a different unit of measurement at the desired ratio. To calibrate the scale, perform one of the following.

Calibrating the Scale Using a Line Segment

1. Draw a line or polyline segment on the document that is the length you want to use to calibrate the scale.
2. Click **Calibrate**.
3. Enter a number in the available field and select a unit of measurement from the drop-down list. The length of the line segment you created will be converted to the selected number and unit of measurement.
4. Click **Make Default Page Calibration** to set the configured conversion as the default conversion to use when this document is measured.
5. Click **Calibrate**.

Calibrating the Scale Manually

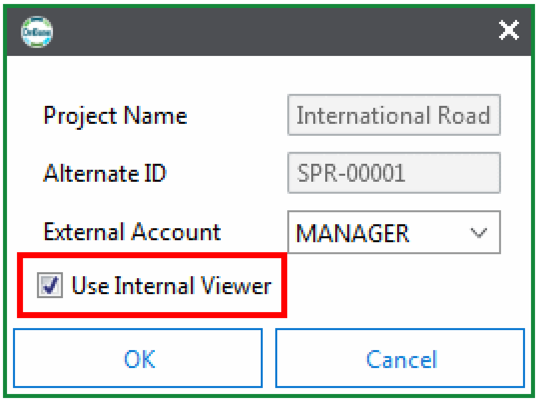
1. Click the **Edit** option.
2. Select one of the following options:
   - **Calibrate by Ratio:** Enter a number in the available fields and select a unit of measurement from the drop-down list. The length configured on the left side of the equation will be converted to the length configured on the right side of the equation.
   - **Calibrate by Factor:** Enter a standard scale factor in the available field to set the calibration to that scale factor. See http://www.archtoolbox.com/representation/cad/scalefactor.html for a list of scale factors.
3. Enter a number in the available field and select a unit of measurement from the drop-down list. The length of the line segment you created will be converted to the selected number and unit of measurement.
4. Click **Make Default Page Calibration** to set the configured conversion as the default conversion to use when this document is measured.
5. Click **Calibrate**.

Using an External Viewer

Note: Using an External Viewer only applies to customers who have installed Plan Review prior to OnBase 16. Please contact your first line of support for more information.

By default, you can use the internal viewer to view and mark up PDF documents. However, if your solution includes an external viewer, you can disable the internal viewer so that plan documents are displayed using the external viewer. To disable the internal viewer and use a configured external viewer, follow these steps:

1. Select the **Edit** option from the **Project** section of the ribbon.
2. Deselect the **Use Internal Viewer** option.



3. Click **OK**.

Adding Comments to a Document

You can add comments to a document as long as you have one or more Workflow tasks assigned to you for that document. Document-level comments are used to record your feedback regarding one specific document or to clarify a markup you have made.

There are two types of comments: user comments and standard comments. User comments are custom comments created by the user to address a specific issue. Standard comments are pre-defined comments that are created by a system administrator. Standard comments can provide a convenient way to quickly add often-used comments to documents.

Note: Depending on the configuration of your system, standard comments may not be available.

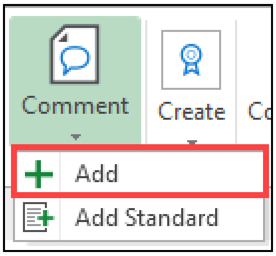
Adding User Comments to a Document

User comments are custom comments created by the user to address a specific issue.

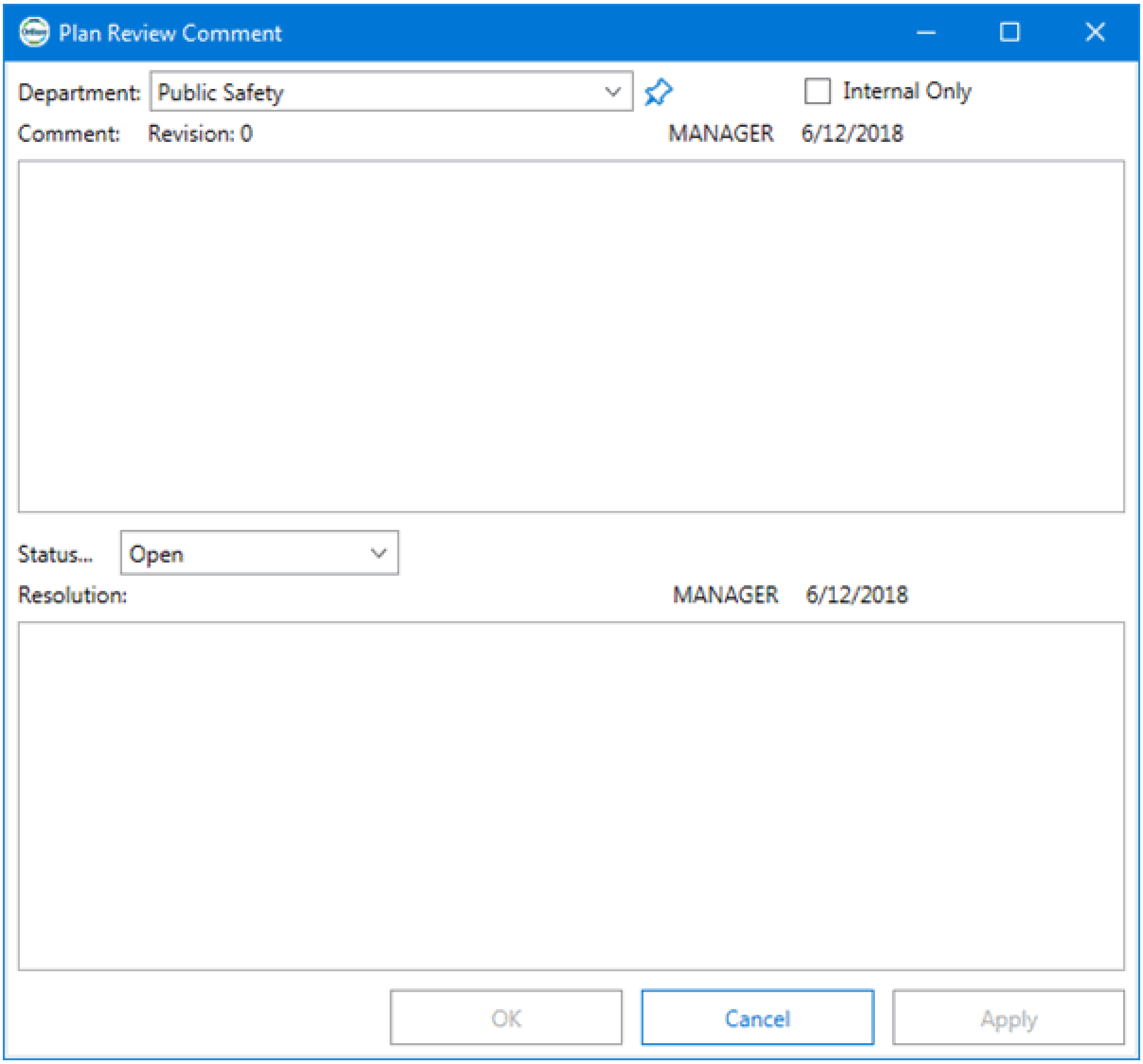
To add a user comment at the document level:

1. Select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Open the Plan Review project to add comments to.
3. From the **Project Documents** section, select one or more specific documents.

4. From the **Plan Document** ribbon group, click the **Comment** button and select **Add**.



The **Plan Review Comment** dialog box is displayed.



5. Select a department from the **Department** drop-down list. This is the department to which the comment is assigned. If the department is left blank, the first value in the drop-down list is selected. The department that is selected is retained in the next new comment.

Tip: If you typically create comments from a single department, you can click the **Set as Default Department** button (the pushpin icon to the right of the **Department** drop-down list) to set the currently selected department as your default. When you create a new comment, the **Department** field is automatically populated with your default department even if a different department was selected in a previously created note.

6. To make the comment visible only to other OnBase users, select the **Internal Only** option. If this option is not selected, external submitter users can see the comment.
7. Enter your comment in the **Comment** field.
8. Click **OK**. Your comment is added to the selected documents.

   The **Revision** number above the **Comment** field indicates the number of the document revision that the comment is added to.

   The **Resolution** field is used when resolving a comment, and should be left blank during comment creation.

Note: When you add a comment to a document, the page number of the currently displayed page is assigned to the comment.

Adding Standard Comments to a Document

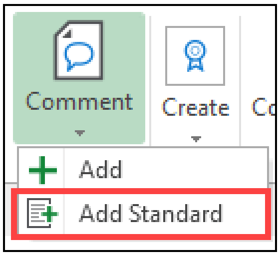
Standard comments are pre-defined comments that are created by a system administrator. Standard comments can provide a convenient way to quickly add often-used comments to documents.

Note: Depending on the configuration of your system, standard comments may not be available.

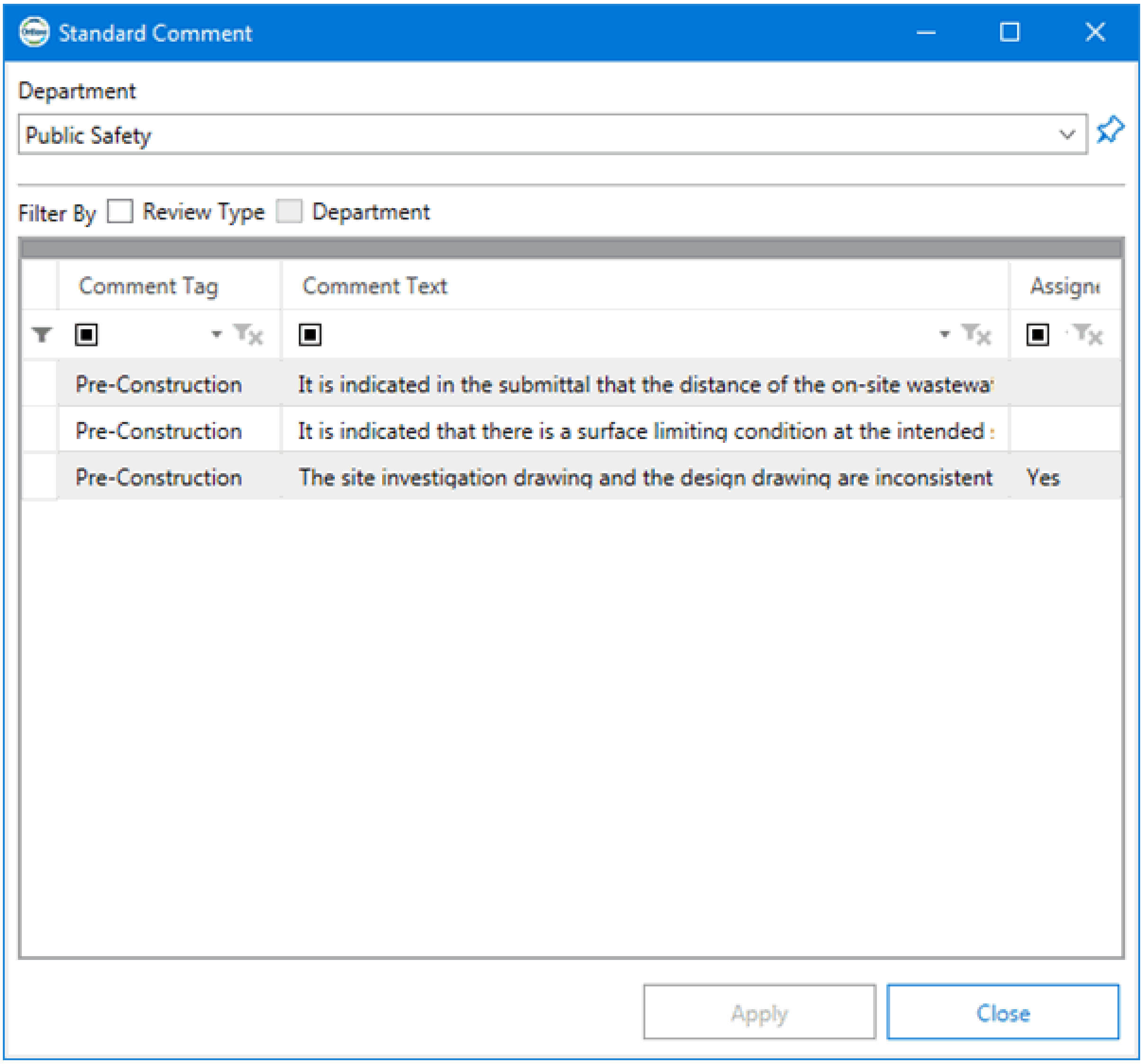
To add a standard comment:

1. Select the **Plan Review** tab. The **Plan Review** ribbon is displayed.
2. Open the Plan Review project to add comments to.
3. From the **Project Documents** section, select a document to add a standard comment to.

4. From the **Plan Document** ribbon group, click the **Comment** button and select **Add Standard**.



The **Standard Comment** dialog box is displayed.



5. Select a department from the **Department** drop-down list. This is the department to which the comment is assigned. If the department is left blank, the first value in the drop-down list is selected. The department that is selected is retained in the next new comment.

Tip: If you typically create comments from a single department, you can click the **Set as Default Department** button (the pushpin icon to the right of the **Department** drop-down list) to set the currently selected department as your default. When you create a new comment, the **Department** field is automatically populated with your default department even if a different department was selected in a previously created note.

6. Select the **Review Type** or the **Department** option to filter the list of comments by these filter types. When selected, only comments mapped to the current department and/or review type are displayed.
7. Select the comments you want to add to the document. You can add more than one standard comment at a time. Comments already applied to the document or project display **Yes** in the **Assigned** column.

Tip: You can preview the full text of a comment by hovering your mouse over the **Comment Text** field of the selected comment.

8. Click **Apply**. All selected comments are added to the selected document.

Note: When you add a comment to a document, the page number of the currently displayed page is assigned to the comment.

Adding Comments to a Project

You can add comments to a project as long as you have one or more Workflow tasks assigned to you for that project. Project-level comments are used to summarize your overall feedback or to call attention to an issue that occurs throughout many of the documents in the project.

There are two types of comments: user comments and standard comments. User comments are custom comments created by the user to address a specific issue. Standard comments are pre-defined comments that are created by a system administrator. Standard comments can provide a convenient way to quickly add often-used comments to projects.

Note: Depending on the configuration of your system, standard comments may not be available.

Adding User Comments to a Project

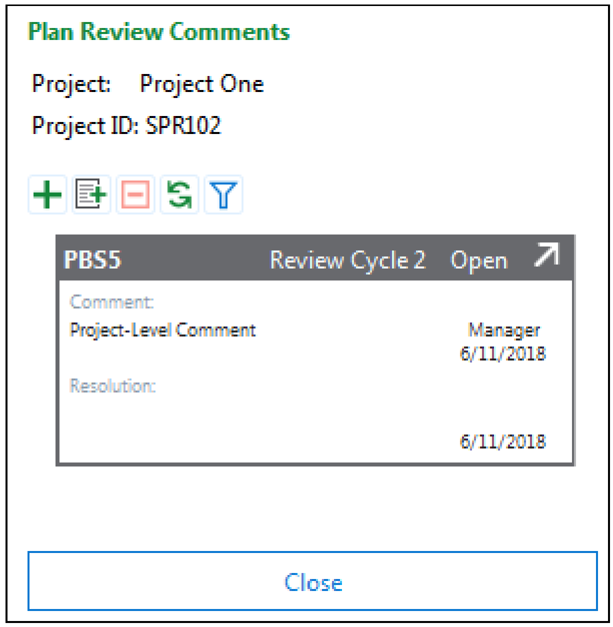
User comments are custom comments created by the user to address a specific issue.

To add a user comment at the project level:

1. Select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Open the Plan Review project to add comments to.

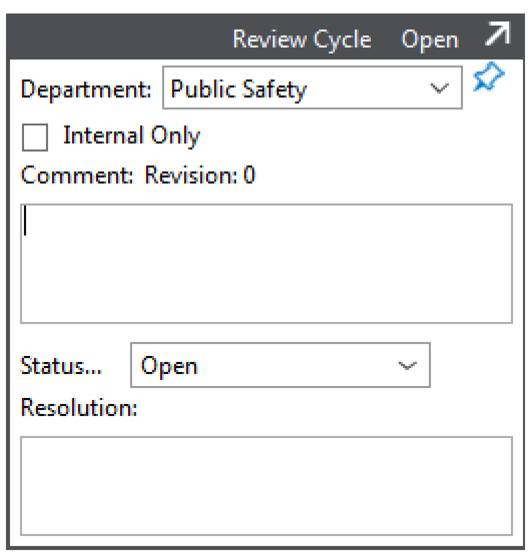
3. From the **Project** ribbon group, click **Review Comments**.

The **Plan Review Comments** pane is displayed.



4. Click the **Add Comment** button.

A new comment is added to the **Plan Review Comments** pane.



5. Select a department from the **Department** drop-down list. This is the department to which the comment is assigned. If the department is left blank, the first value in the drop-down list is selected. The department that is selected is retained in the next new comment.

Tip: If you typically create comments from a single department, you can click the **Set as Default Department** button (the pushpin icon to the right of the **Department** drop-down list) to set the currently selected department as your default. When you create a new comment, the **Department** field is automatically populated with your default department even if a different department was selected in a previously created note.

6. To make the comment visible only to other OnBase users, select the **Internal Only** option. If this option is not selected, external submitter users can see the comment.
7. Enter your comment in the **Comment** field.
8. Click **OK**. Your comment is added to the selected project.

   The **Resolution** field is used when resolving a comment, and should be left blank during comment creation.

Adding Standard Comments to a Project

Standard comments are pre-defined comments that are created by a system administrator. Standard comments can provide a convenient way to quickly add often-used comments to projects.

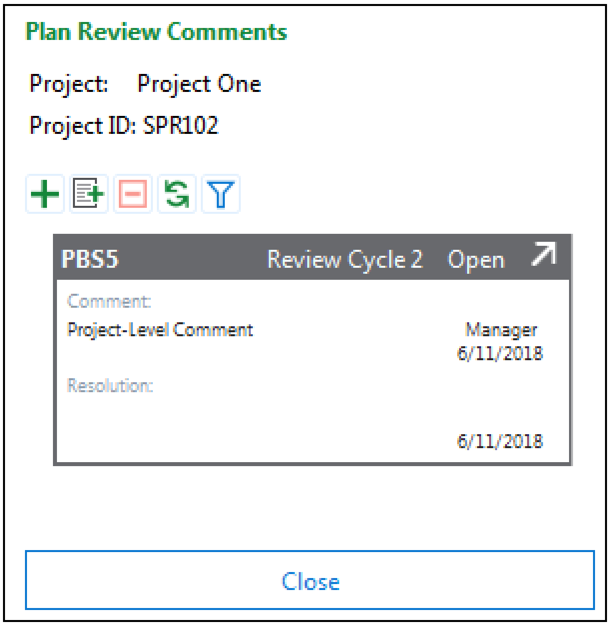
Note: Depending on the configuration of your system, standard comments may not be available.

To add a standard comment at the project level:

1. Select the **Plan Review** tab. The **Plan Review** ribbon is displayed.
2. Open the Plan Review project to add comments to.

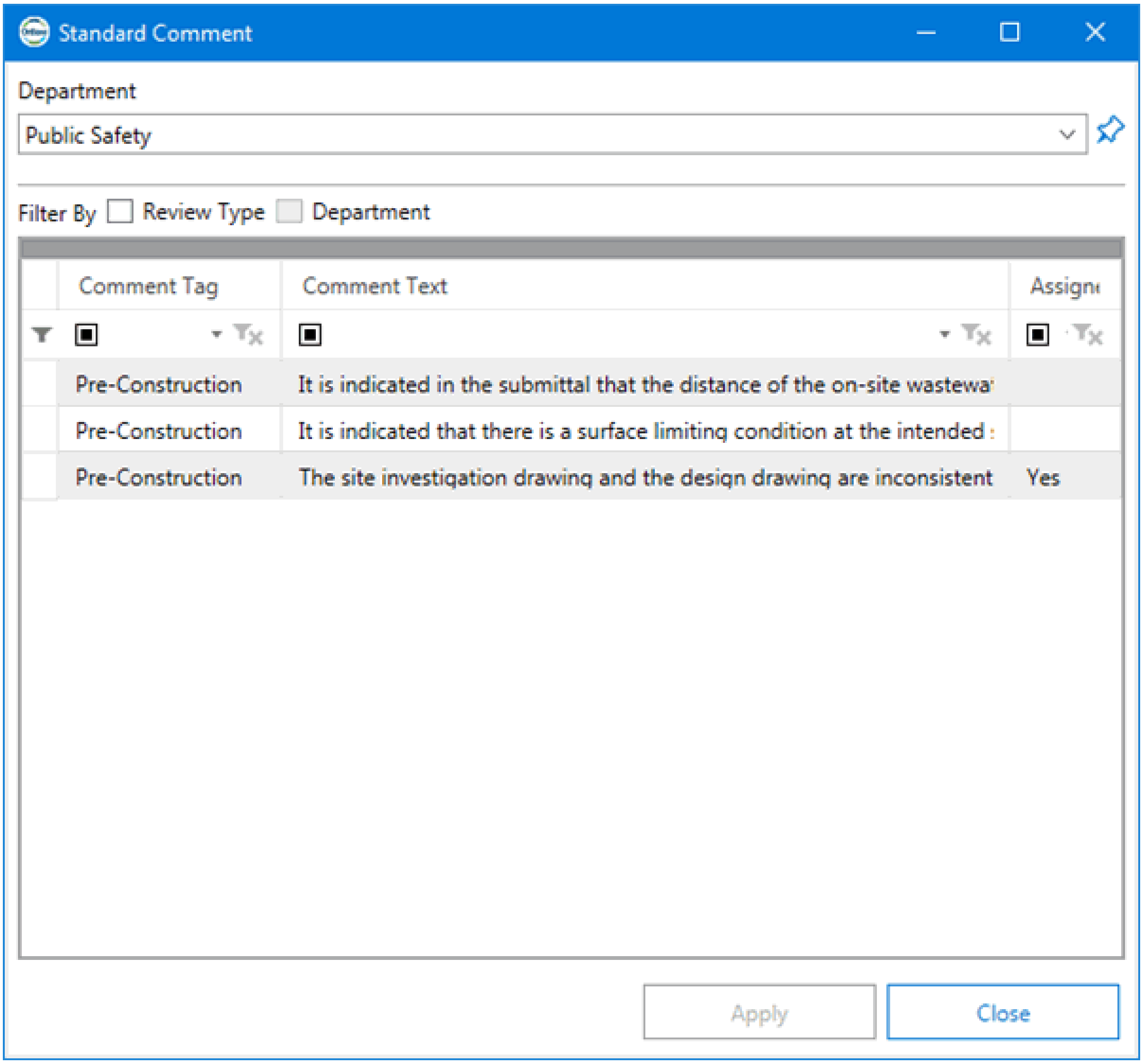
3. From the **Project** ribbon group, click **Review Comments**.

The **Plan Review Comments** pane is displayed.



4. Click the **Add Standard Comment(s)** button.

The **Standard Comment** dialog box is displayed.



5. Select a department from the **Department** drop-down list. This is the department to which the comment is assigned. If the department is left blank, the first value in the drop-down list is selected. The department that is selected is retained in the next new comment.

Tip: If you typically create comments from a single department, you can click the **Set as Default Department** button (the pushpin icon to the right of the **Department** drop-down list) to set the currently selected department as your default. When you create a new comment, the **Department** field is automatically populated with your default department even if a different department was selected in a previously created note.

6. Select the **Review Type** or the **Department** option to filter the list of comments by these filter types. When selected, only comments mapped to the current department and/or review type are displayed.
7. Select the comments you want to add to the project. You can add more than one standard comment at a time. Comments already applied to the project display **Yes** in the **Assigned** column.

Tip: You can preview the full text of a comment by hovering your mouse over the **Comment Text** field of the selected comment.

8. Click **Apply**. All selected comments are added to the selected project.

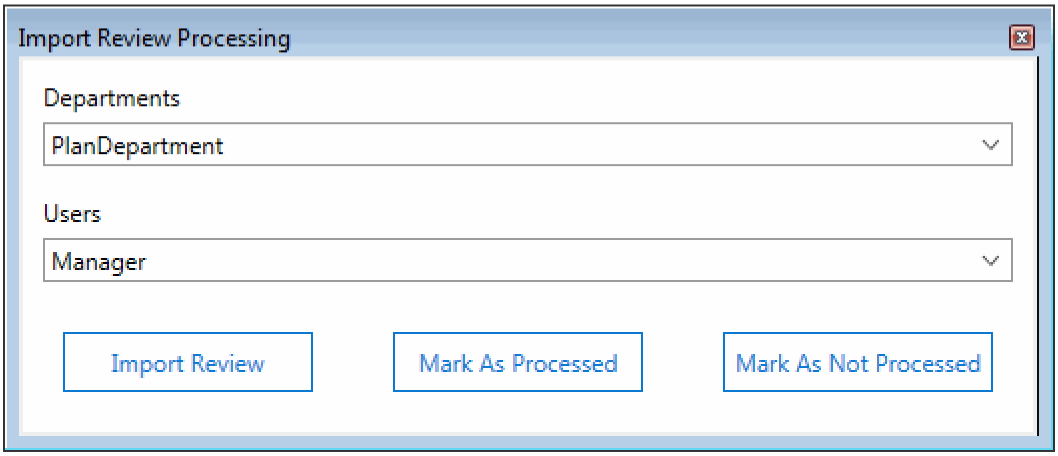
Importing Review Comments from an External File

In some cases, users may review PDF plan documents outside of OnBase. After a user creates a PDF document with PDF review comments, the comments can be imported into OnBase as Plan Review comments. To import PDF comments from an external PDF document, follow these steps:

1. Select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Open a Plan Review project.
3. Select the **Import Review** folder from the **Project View** pane. The **Project Documents** list is populated with all Import Review documents related to the selected project.
4. Select a document from the **Project Documents** list.

5. Click the **Import Review** button from the **Plan Document** section of the ribbon.

The **Import Review Processing** dialog box is displayed.



6. Select the department all imported comments should be mapped to from the **Departments** drop-down list.
7. Select the user all imported comments should be mapped to from the **Users** drop-down list.
8. Click **Import Review**. The PDF comments on the selected document are imported onto the related plan document and converted into Plan Review comments.

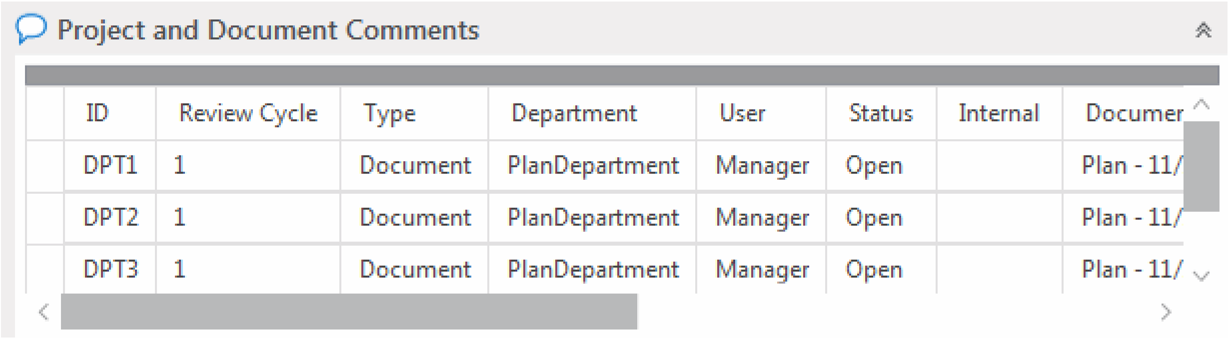
Tip: You can select the **Mark as Processed** or **Mark As Not Processed** option to update the processed status of the document without importing its comments. The document's status is displayed in the **Processed** column of the **Project Documents** list.

Viewing Comments

You can view a list of all comments that have been added to the project and to any documents within the project. To do so, follow these steps:

1. Select the **Plan Review** tab. The Plan Review window is displayed.
2. Open and select your desired Plan Review project.
3. Select the arrow next to the **Review Comments** option.

4. Select **Project and Document Comments** from the drop-down list. The **Project and Document Comments** pane is displayed.



Project and Document Comments

ID	Review Cycle	Type	Department	User	Status	Internal	Documer
DPT1	1	Document	PlanDepartment	Manager	Open		Plan - 11/
DPT2	1	Document	PlanDepartment	Manager	Open		Plan - 11/
DPT3	1	Document	PlanDepartment	Manager	Open		Plan - 11/

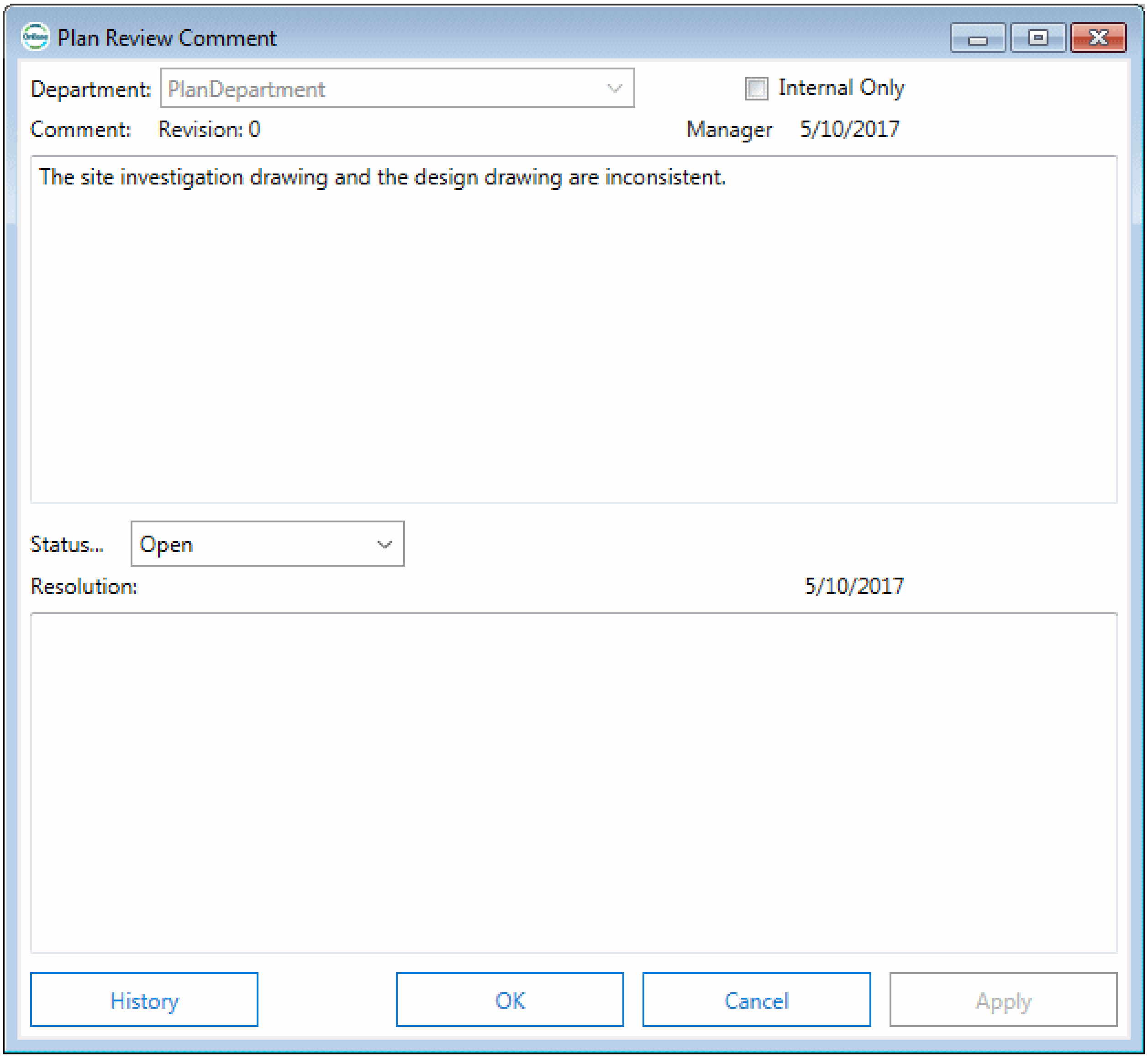
You can double-click on a **Document** comment to open the document the comment is attached to. Double-click on a **Project** comment to edit or resolve the comment.

Note: If you edit or resolve a comment on a document, the comment's page number will be changed to the page number of the currently displayed page of the document.

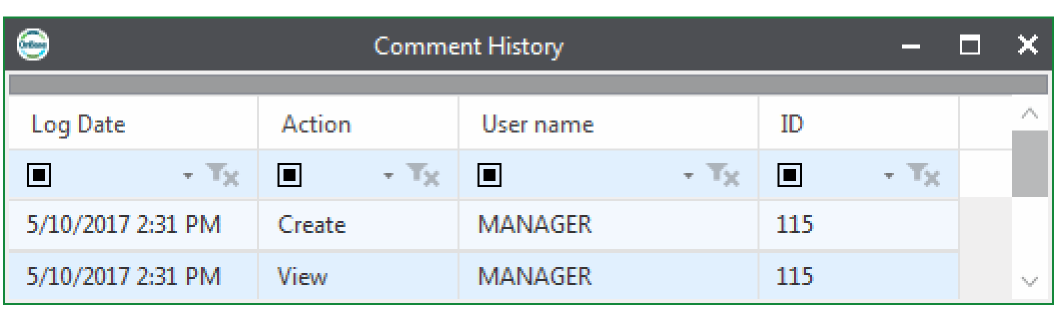
Reviewing Comment History

You can view the history of all the actions performed on the selected comment. You cannot change any of the information in a comment's history.

To view the history of a comment, open the comment and click the **History** button.



The **Comment History** dialog box is displayed.



The **Comment History** dialog displays actions in the following columns:

- **Log Date** - lists the date when the action was performed.
- **Action** - lists the action performed. Actions include, but are not limited to:
  - Creating a comment
  - Viewing a comment
  - Modifying a comment (this includes editing the comment text, changing the comment's **Department** or **Status**, and selecting or deselecting the Internal Only option)
- **User name** - lists the name of the user who performed the action.
- **ID** - lists the ID number of the comment.

Resolving Open Comments

When a plan document has one or more open comments on it, it will be included in any Review Plan Sets generated for this project. To make sure you are publishing the most accurate and up-to-date documents possible, you should always resolve any open comments that have been fixed in the latest version of a project document. To resolve any existing comments, follow these steps:

1. Open a Plan Review project.
2. Select the **Plan Review** pane from the ribbon.

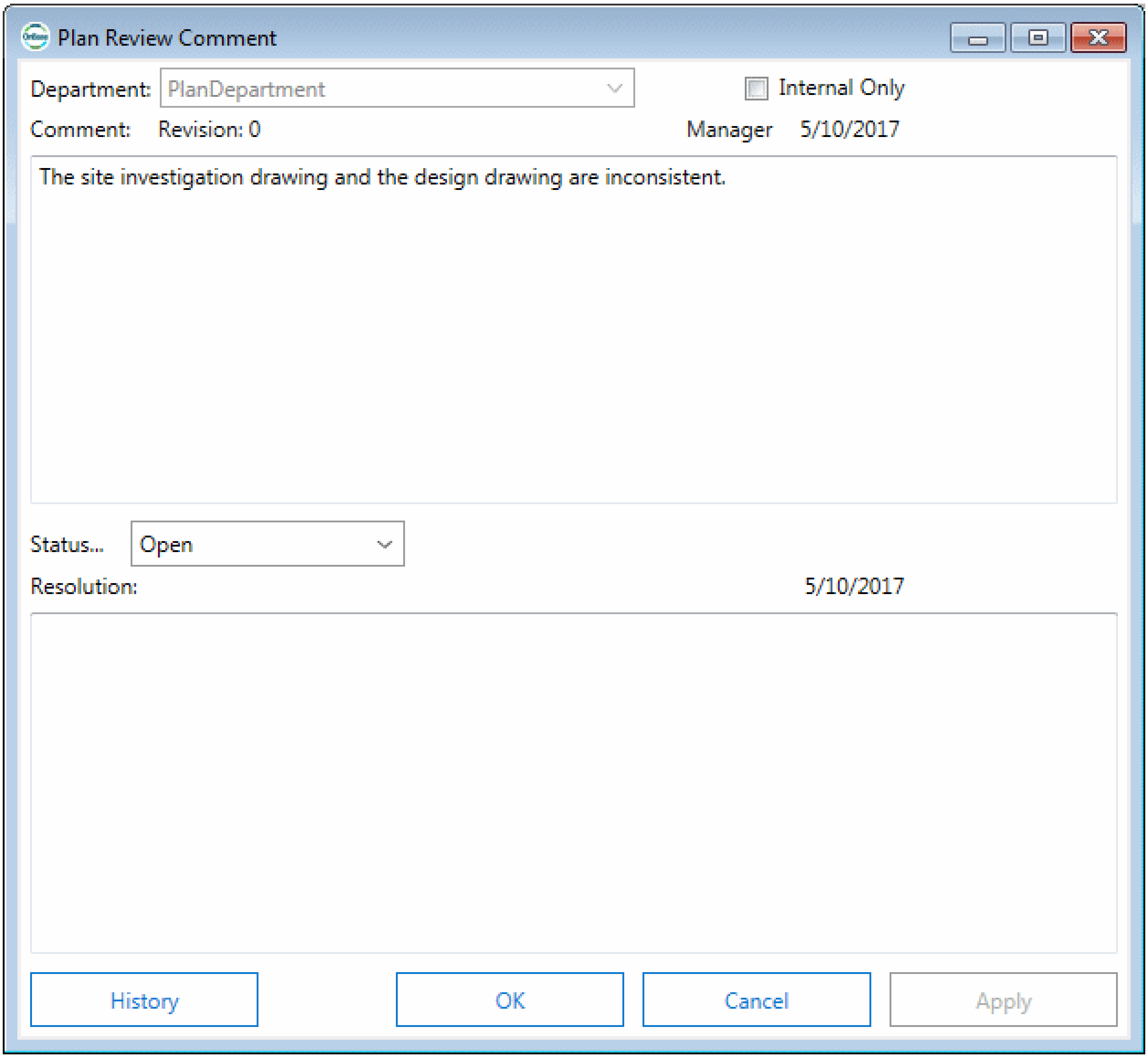
3. Select the **Review Comments** option. The **Plan Review Comments** pane is displayed.

Tip: You can filter the list of available comments by a specific Department, Reviewer, Status, or Visibility by selecting the **Filter** icon.

When applying a filter to the **Review Comments** list, note the following:

- When viewing comments **inside the Viewer**, new review comments are displayed in the **Plan Review Comments** list, even if they do not fall within the filter parameters. After the document has been saved, the new review comments are filtered out if they do not fall within the filter parameters.
- When viewing comments **outside the Viewer**, new review comments are automatically saved, which if excluded by existing filters, will be filtered out immediately after being added and exiting the text box. When Standard Comments are added, it may seem as if they are not added to the list because they may be immediately filtered out.
- When all applied filters are removed, all comments are displayed.

4. Select an available comment. The **Plan Review Comment** dialog box is displayed.



5. Select **Resolved** from the **Status** drop-down list.
6. Enter your comment in the **Resolution** field. This field is often used to store your reason or justification for marking the comment as **Resolved**.
7. Click **OK**.

Deleting Comments

You can delete any comment you have created as long as it is not being viewed by another user.

Document-Level Comments

To delete a document-level comment that you have created, follow these steps:

1. Select the **Plan Review** tab. The **Plan Review** window is displayed.
2. Open and select your desired Plan Review project.
3. Open a document from the Project section.

Tip: You can open multiple documents within the same viewer window by selecting multiple documents and clicking the **Open Document Set** option from the **Plan Document** section of the ribbon.

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4. Select the **Review Comments** option.

   The **Plan Review Comments** pane is displayed.
5. Select the **Remove Comment** icon.

   You will be prompted to verify the deletion.
6. Click **Yes** to delete the comment.

Project-Level Comments

To delete a project-level comment that you have created, follow these steps:

1. Select the **Plan Review** tab. The Plan Review window is displayed.
2. Open and select your desired Plan Review project.
3. Select the **Review Comments** option.

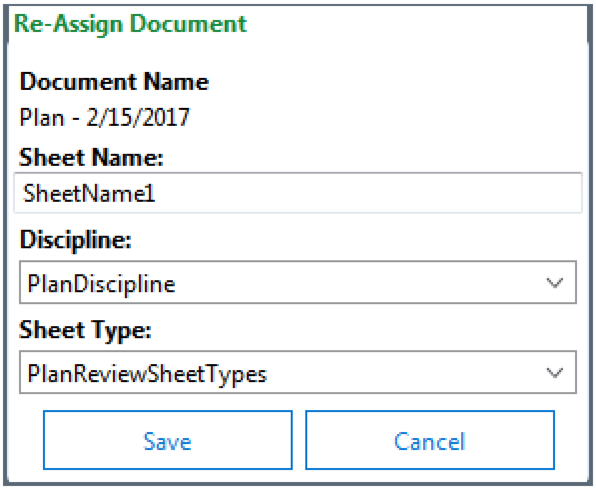
   The **Plan Review Comments** pane is displayed.
4. Select the **Remove Comment** icon.

   You will be prompted to verify the deletion.
5. Click **Yes** to delete the comment.

Re-Assigning Documents

In some cases, plan documents may be assigned to the incorrect Discipline or Sheet Type. To re-assign a document's Discipline or Sheet Type, or modify a document's Sheet Name, follow these steps:

1. Select the **Plan Review** tab. The Plan Review window is displayed.
2. Specify your desired search criteria in the **Search Project** section, then click **Find**.
3. Select a project from the list.
4. Select a project documents.
5. Select the **Re-Assign Document** button from the ribbon. The **Re-Assign Document** window is displayed.

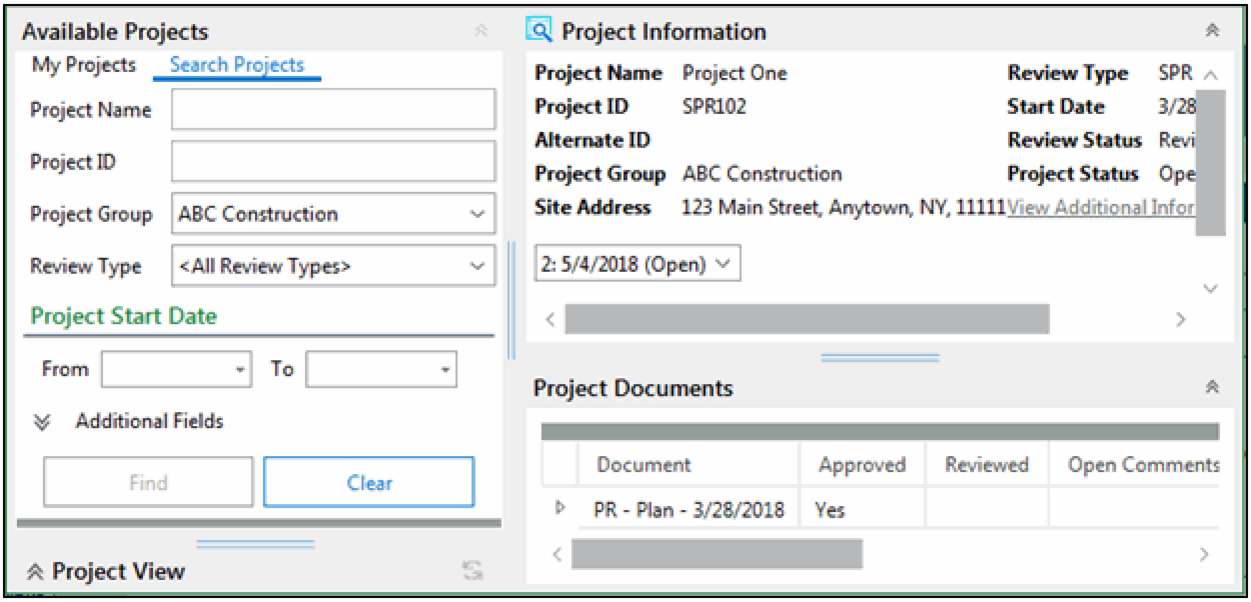


6. Modify the **Sheet Name** as desired.
7. Select the appropriate Discipline from the **Discipline** drop-down list. The document will be grouped and stored in the selected Discipline.
8. If desired, select a Sheet Type from the **Sheet Type** drop-down list. The document will be grouped and stored in the selected Sheet Type.
9. Click **Save**.

Reviewing Additional Information

Depending on your system's configuration, additional information may be submitted when a new project is created. To view or edit this information, follow these steps:

1. Select the **Plan Review** tab. The Plan Review window is displayed.



2. Open and select your desired Plan Review project.
3. Click on the **View Additional Information** link from the **Project Information** section. A form containing the additional information will be displayed in the **Document Viewer**.

Setting Document Review Status

Once you have finished reviewing a document, you can mark the document as **Reviewed** to help organize and track the documents that you have finished reviewing.

Marking a Document as Reviewed

To mark a document as **Reviewed**, follow these steps:

1. Select the document you want to mark as **Reviewed** from the **Project Documents** hit list.
2. Click on the **Document Review Status** button from the **Plan Document** section in the ribbon.
3. Click the **Set Review Status** option. The document is marked as **Reviewed**.

Clearing a Document's Review Status

To clear a document's review status that has been marked as **Reviewed**, follow these steps:

1. Select the document whose status you want to clear from the **Project Documents** hit list.
2. Click on the **Document Review Status** button from the **Plan Document** section in the ribbon.
3. Click the **Clear Review Status** option. The document's review status is cleared.

Creating a Plan Set

If a project's documents were reviewed and one or more issues were found, you can return the problematic documents to the submitter with your comments and markups. To expedite this process, you can compile a set of relevant documents together for distribution to your submitter. Typically, this plan set consists of all documents that were commented on or marked up. For more information, see Creating a Review Plan Set on page 202.

If a project's documents were reviewed and no issues were found, you can create a set of all approved documents for publication to the submitter. For more information, see Creating an Approved Plan Set on page 202.

Creating a Review Plan Set

Review plan sets only contain plan documents that have one or more open comments.

To create a plan set for distribution:

1. Select the **Plan Review** tab. The **Plan Review** layout is displayed.
2. Specify your desired search criteria in the **Search Project** section.
3. Click **Find**. The search results list is displayed.
4. Select a project from the search results list.
5. Select one of the following folders from the **Project View** pane:
   - **Plans and Documents**: Select this folder to select the individual plan documents with open comments to include in the review plan set.
   - **Review Cycle Documents**: Select this folder to add all plan documents with open comments to the review plan set.
6. From the **Plan Review** ribbon, in the **Create** ribbon group, select **Create Plan Set**. Documents with open comments are merged together into a plan set document and saved in the **Review Cycle Documents** folder.

Note: Comments marked as **Internal Only** are not included in generated plan sets.

Creating an Approved Plan Set

Approved plan sets only contain plan documents that were reviewed and approved.

To create an approved plan set for distribution:

1. Select the **Plan Review** tab. The **Plan Review** layout is displayed.
2. Specify your desired search criteria in the **Search Project** section.
3. Click **Find**. The search results list is displayed.
4. Select a project from the search results list.
5. From the **Project View** pane, select the **Approved Plan Documents** folder. All approved documents are displayed in the **Project Documents** list.
6. Select one or more project documents.

Note: If a plan document contains one or more open comments, it is displayed in your approved plan set as a stipulation.

7. From the **Plan Review** ribbon, in the **Create** ribbon group, select **Create Plan Set**. The selected documents are merged together into a plan set document and saved in the **Approved Plan Documents** folder.

Note: Comments marked as **Internal Only** are not included in generated plan sets.

Creating a Project Letter

Once you have finished reviewing all project documents, you can create a project letter from a configured document template to transmit to the project submitter.

Note: The Template Builder is required to create project letters. See your system administrator for more information.

You can either generate a Review Project Letter if one or more changes are needed, or an Approved Project Letter if all project documents were approved.

Note: For more information on configuring project letter templates for Plan Review, see Configuring a Project Letter Template on page 51. For more information on creating templates and template groups, see the **Document Composition** module reference guide.

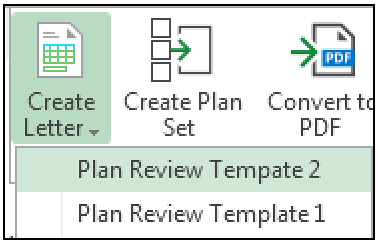
Generating a Review Project Letter

Once you have finished reviewing and marking up the project documents and are ready to submit your feedback to the submitter, you can generate a letter to be transmitted to the project submitter along with your comments and revisions.

To generate a project letter:

1. Click the **Plan Review** tab. The **Plan Review** layout is displayed.
2. In the **Available Projects** pane, click the **Search Projects** tab.
3. Specify your desired search criteria.
4. Click **Find**. The search results list is displayed.
5. Select a project from the search results list.

6. From the **Project View** pane, select the **Review Cycle Documents** folder.
7. On the **Plan Review** ribbon, in the **Create** ribbon group, click **Create Letter**.



8. Select the desired letter template for the project letter. A project letter is generated and saved in the **Review Cycle Documents** folder.

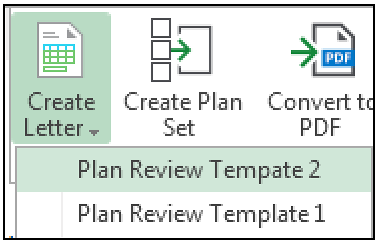
Note: This letter is saved as a Microsoft Word document. If you would rather store this document as a PDF, see Converting a Word Document to a PDF Document on page 205.

Generating an Approved Project Letter

Once you have finished reviewing all project documents and no problems have been found, you can generate a project approval letter to be transmitted to the project submitter.

To generate a project letter:

1. Click the **Plan Review** tab. The **Plan Review** layout is displayed.
2. In the **Available Projects** pane, click the **Search Projects** tab.
3. Specify your desired search criteria.
4. Click **Find**. The search results list is displayed.
5. Select a project from the search results list.
6. From the **Project View** pane, select the **Approved Plan Documents** folder.
7. On the **Plan Review** ribbon, in the **Create** ribbon group, click **Create Letter**.



8. Select the desired letter template for the project letter. A project letter is generated and saved in the **Approved Plan Documents** folder.

Note: This letter is saved as a Microsoft Word document. If you would rather store this document as a PDF, see Converting a Word Document to a PDF Document on page 205.

Converting a Word Document to a PDF Document

You can convert Word documents (such as Project Letters) into PDF documents before submitting them to the project submitter.

To convert Word documents into PDF documents:

1. Select one or more Microsoft Word documents from the Project Documents pane in the **Plan Review** layout.
2. On the **Plan Review** ribbon, in the **Create** ribbon group, click the **Convert to PDF** button.

The new PDF documents are available in the same Plan Review folder as your original documents.

Publishing Reviewed Documents to the Plan Review Website

Once a set of Plan Review documents have been reviewed, they must be published onto the Plan Review site so the submitter can review your comments and markups. You can also publish generated documents like plan sets and project letters onto the Plan Review site.

To prepare a Plan Review document for publication to the Plan Review site, follow these steps:

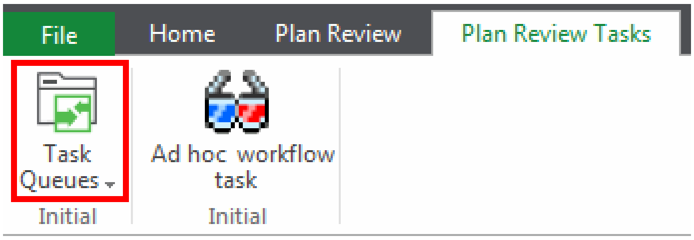
1. Select the **Plan Review** tab. The Plan Review window is displayed.
2. Specify your desired search criteria in the **Search Project** section, then click **Find**.
3. Select a project from the list, then select one of the following folders from the **Project View** section:
   - Select the **Approved Plan Documents** folder to publish documents that have been reviewed and approved.
   - Select the **Review Cycle Documents** folder to publish documents that have one or more issues that must be corrected before they can be approved.
4. Select one or more project documents.
5. Select **Publish**. The selected documents are published to the Plan Review site and can be accessed by the project submitter.

Note: After a document has been published to the Plan Review site, it will be available for view/download by the project submitter. If you need to remove a document from the Plan Review site for any reason, you can do so by selecting the document and clicking **Unpublish**.

Executing Plan Review Tasks

Depending on your system's configuration, you may be required to execute certain Workflow tasks at certain points in the review process. These tasks are configured by your system administrator according to your specific work environment - see your system administrator if you have any questions about specific Workflow tasks or actions.

Workflow tasks are available on the **Plan Review Tasks** ribbon tab. If a project exists within multiple Workflow queues, you can change the tasks displayed in the ribbon by selecting a different queue from the **Task Queues** button in the ribbon.



Approving Documents

Depending on your system's configuration, you may need to apply a certain stamp or signature to your document to indicate it's status of **Approved** before actually approving it.

Preparing Documents for Approval

Once you have finished reviewing a Plan Review document and no issues have been found, you can transition the document to the next stage in the review cycle so that it can be approved. To prepare a Plan Review document for approval, follow these steps:

1. Open a Plan Review project.
2. Specify your desired search criteria in the **Search Project** section, then click **Find**.
3. Select a project from the list, then select one or more project documents.
4. Select **Copy to Approval**. The selected documents are copied into the **Approved Plan Documents** folder.

Applying Markups

Documents to be approved in the **Approved Plan Documents** folder must have all required markups applied before the documents are stamped.

To apply markups onto your documents:

1. Select the **Plan Review** tab. The Plan Review project layout is displayed.
2. Select the documents from the project requiring applied markups.
3. From the **Project View** pane, open the **Approved Plan Documents** folder. The documents in the folder are displayed in the **Project Documents** pane.
4. Select the desired documents to apply markups to and click **Apply Markups**. All existing markups are applied to the selected documents.

Stamping a Document

Once markups are applied to the appropriate documents, the documents are ready to be stamped or signed for approval.

Note: Ensure that all required markups are applied to the document before stamping it. Markups that are not applied do not appear on the stamped document. See Applying Markups on page 206 for more information on applying markups to a document.

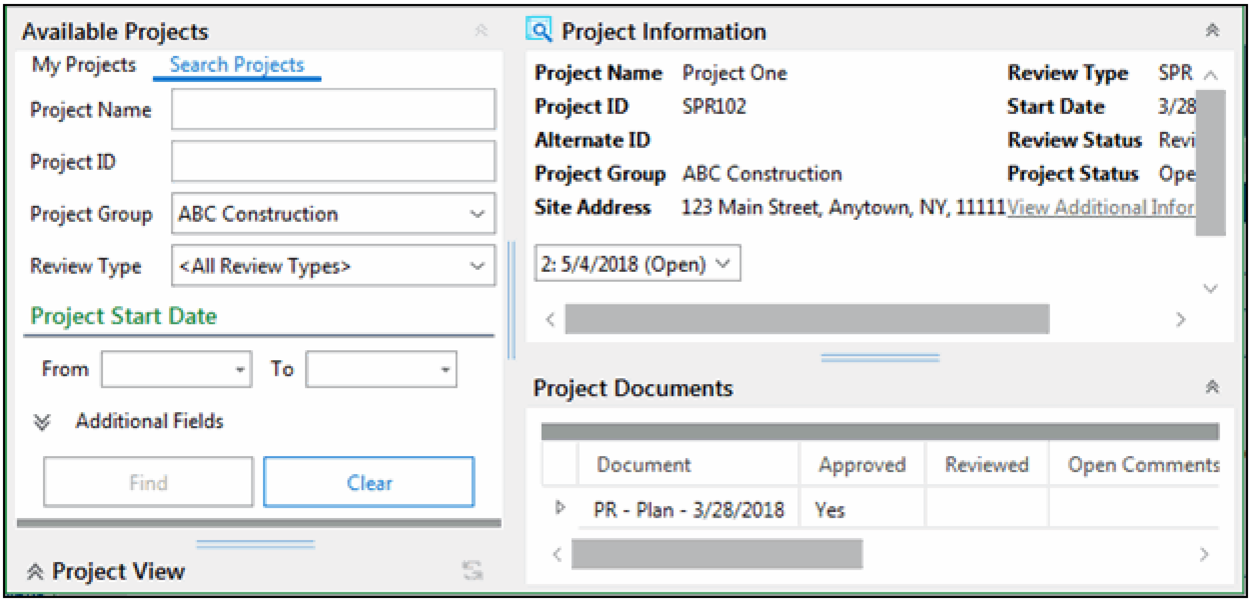
Adding a Configured Stamp to a Document

You can add configured stamps to a document for approval.

Note: For more information on configuring stamps and signature types, see Configuring Signature Types on page 54.

To add a configured stamp to your document:

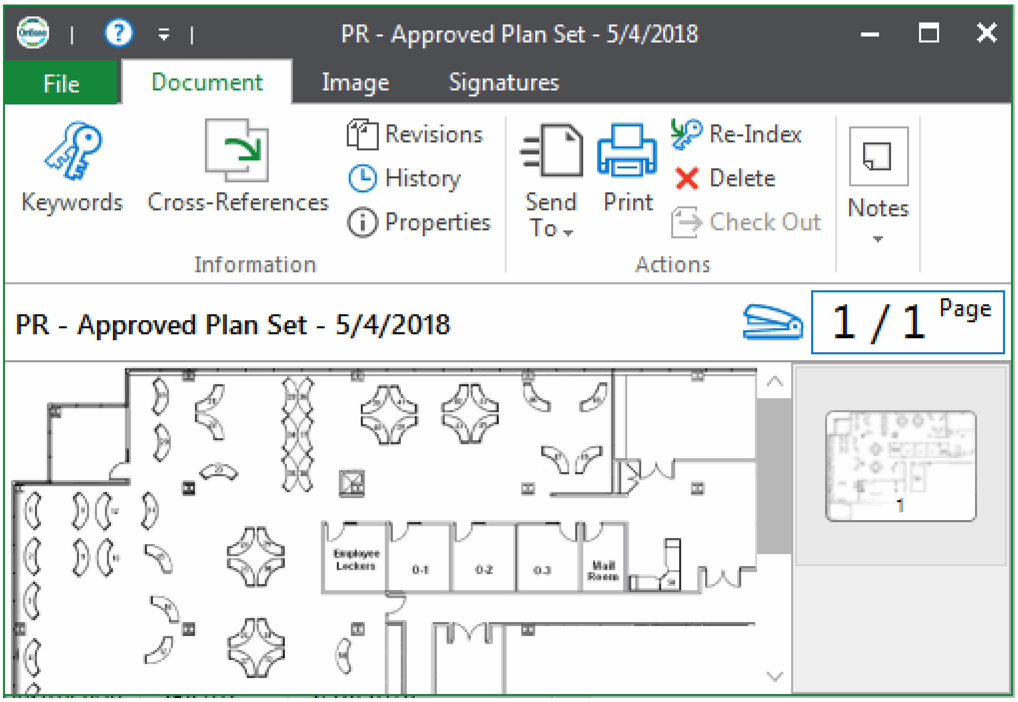
1. Click the **Plan Review** tab. The Plan Review project layout is displayed.



2. From the **Available Projects** pane, select the Plan Review project with documents to stamp.
3. From the **Project View** pane, open the **Approved Plan Documents** folder. Documents in the folder are displayed in the **Project Documents** pane.
4. Select the desired document to be stamped.

5. From the **Plan Review** ribbon, click the **Stamp** button.

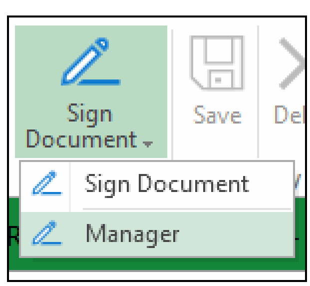
The document is displayed in the Unity Document Viewer.



6. Click on the **Signatures** tab.
7. From the **Signatures** ribbon, click the **Enter PDF Signing Mode** button.

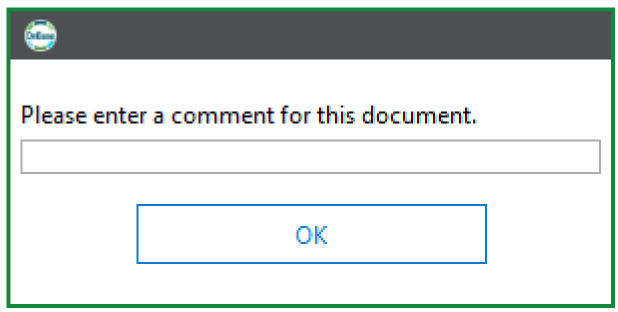
Note: The **Transforms** and **Modify** functions on the **Image** tab are not available in PDF Signing Mode.

8. Click the drop-down arrow on the **Sign Document** button to expand the drop-down list.



9. Select the configured stamp you want to add to your document. The stamp is displayed on the document.
10. Left-click the stamp and drag it to its desired location on the document.
11. Click the **Save** button on the **Signatures** ribbon.

A comment dialog box is displayed.



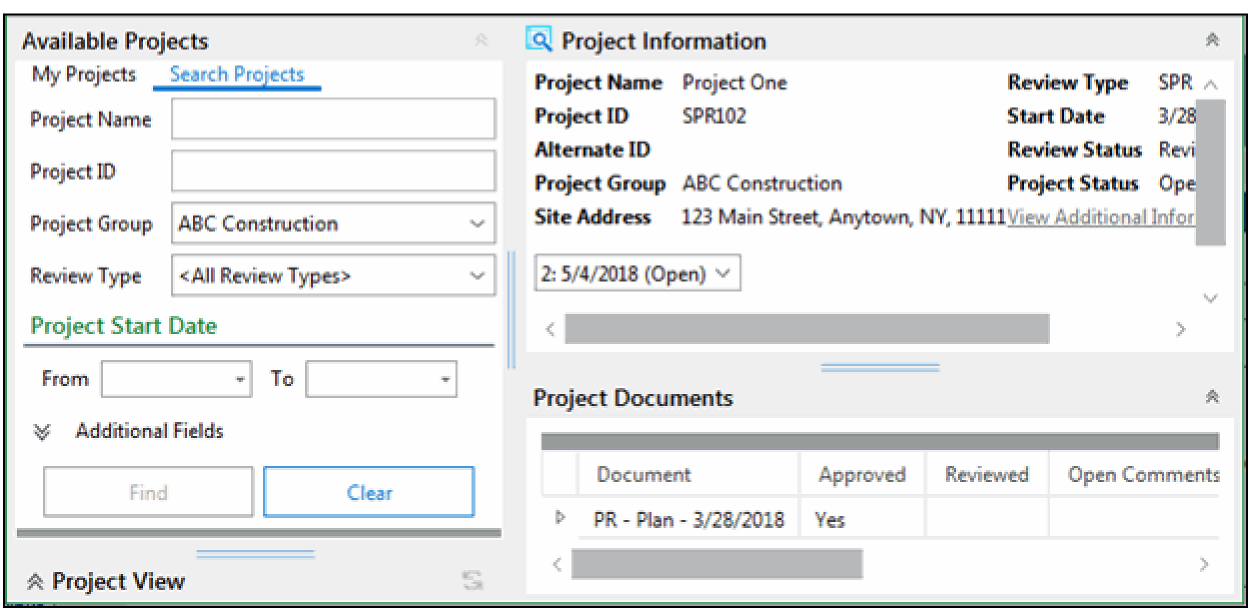
12. Enter a comment, if desired, in the field.
13. Click **OK**. Your stamp is saved to your document.

Adding a Signature to a Document

You can add signatures to a document for approval.

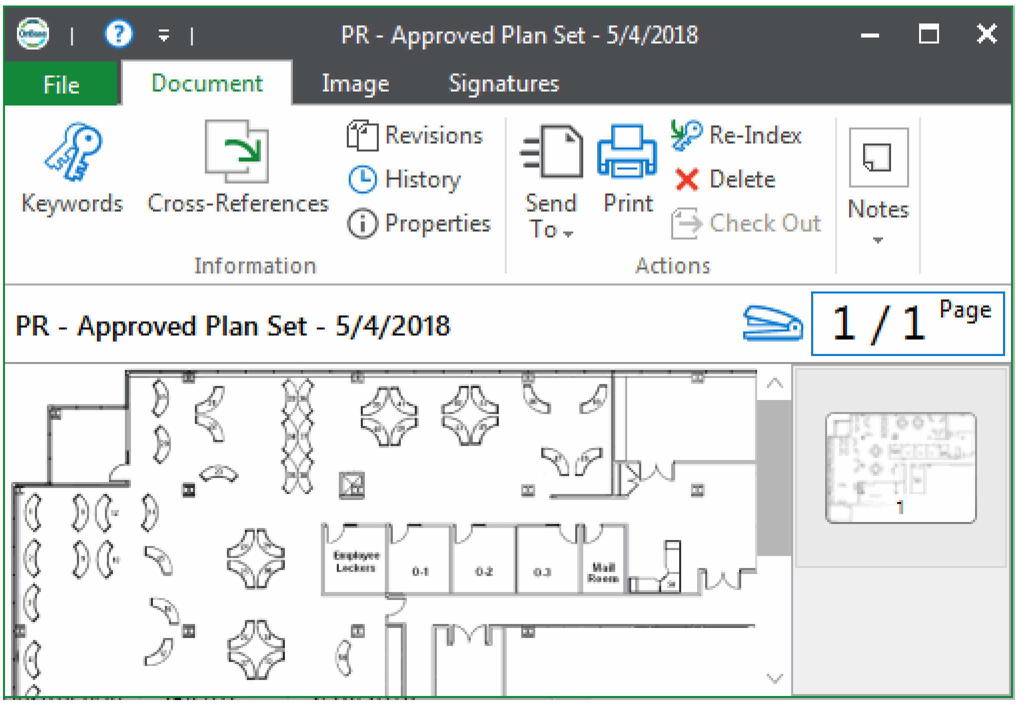
To add a signature to a document:

1. Click the **Plan Review** tab. The Plan Review project layout is displayed.



2. From the **Available Projects** pane, select the Plan Review project with documents to stamp.
3. From the **Project View** pane, open the **Approved Plan Documents** folder. Documents in the folder are displayed in the **Project Documents** pane.
4. Select the desired document to be signed.
5. From the **Plan Review** ribbon, click the **Stamp** button.

The document is displayed in the Unity Document Viewer.

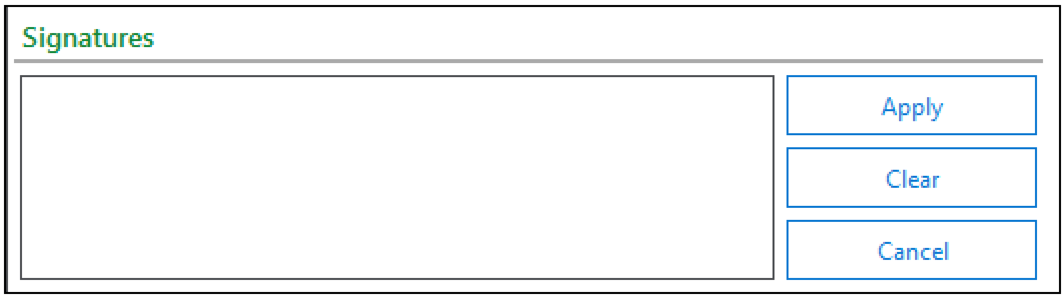


6. Click on the **Signatures** tab.
7. From the **Signatures** ribbon, click the **Enter PDF Signing Mode** button.

Note: The **Transforms** and **Modify** functions on the **Image** tab are not available in PDF Signing Mode.

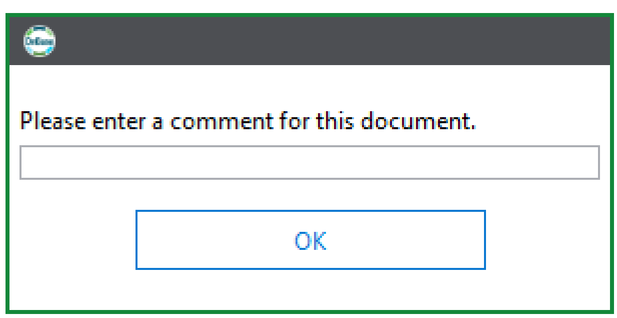
8. Click the **Sign Document** button.

The **Signatures** dialog box is displayed in the lower left corner of the Unity Document Viewer.



9. Depending on your configuration, use your mouse or a signature pad to sign your signature in the field.
10. Click **Apply**. Your signature is added onto your document.
11. Left-click the signature and drag it to its desired location on the document.
12. Click the **Save** button in the **Signatures** ribbon.

A comment dialog box is displayed.



13. Enter a comment, if desired, in the field.
14. Click **OK**. Your signature is saved to your document.

Completing a Review Cycle

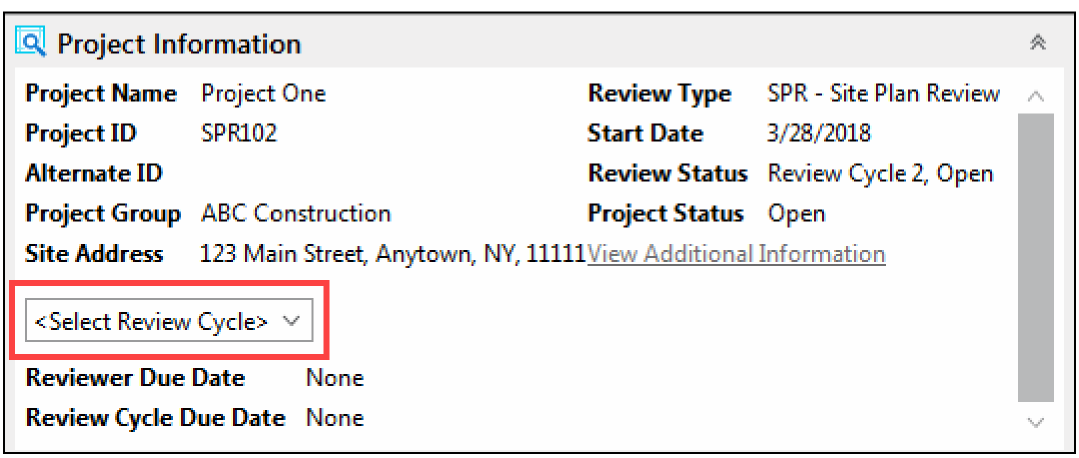
After all plan documents have been approved and an up-to-date project letter has been generated, you can complete the review cycle by selecting the project and clicking the **Complete Review Cycle** button.

After completing the review cycle, make sure to publish all required documents onto the Plan Review site. For more information, see Publishing Reviewed Documents to the Plan Review Website on page 205. After you complete the review cycle, you still need to close the Plan Review project - for more information, continue on to Closing a Plan Review Project on page 213.

Note: In some cases, you may need to cancel a review cycle. To cancel a review cycle that is currently in progress, navigate to the **Plan Review tab** and retrieve the desired project, then click the **Cancel Review Cycle** button.

Viewing a Review Cycle's Status

You can review the status of a review cycle by selecting a review cycle from the **<Select Review Cycle>** option in the **Project Information** pane.



The status information for the selected review cycle will be displayed in the Review Cycle Status View table.

Closing a Plan Review Project

The final step in the review process is to close the Plan Review project. Once a project is closed, that project's information can no longer be modified by the submitter. This includes all project documents, project locations, assigned users, and configured user roles.

Note: The only information that can be modified after a project has been closed are the review comments. See Adding Documents to a Project on page 146 for information on creating and modifying comments.

To close a project, select the project and click the **Close** button from the ribbon.

Re-Opening a Plan Review Project

In some cases, you may need to re-open a Plan Review project for additional review. When a Plan Review project is re-opened, the project information is available for modification again by the submitter. This includes all project documents, project locations, assigned users, and configured user roles.

To re-open a project, select the closed project and click the **Re-Open** button from the ribbon.

Deleting a Plan Review Project

In some cases, you may need to delete a Plan Review project from your solution. When a Plan Review project is deleted, the project documents are placed into Document Maintenance where they can be purged or restored. Reference documents are not placed into Document Maintenance and can still be accessed within OnBase.

Caution: Any reference documents added to a project in OnBase version 15 or below are sent to Document Maintenance when the project is deleted. Only reference documents added in version 16 or higher remain undeleted.

To delete a project, select the project and click the **Delete** button from the ribbon.

Note: When a project is deleted, the project and all of its documents are also removed from all Workflow queues and life cycles.

Plan Review Administration

Plan Review Administration in the Unity Client gives users with the **Manage Portal Users** and **Manage Project Groups** Plan Review rights the ability to manage Plan Review users and user groups.

If users have the proper licenses, there are additional settings that can be established in the **User Options** dialog box in Unity Client.

To access the **Plan Review Administration** layout, go to **File | Administration | Plan Review Administration**.

Plan Review Administration options are discussed in the following sections:

- Managing Plan Review Website Users on page 214
- Managing Project Groups on page 223

Note: Ensure that you have selected the **Configuration** right for the **Plan Review** option in **User Groups & Rights**. See Configuring User Groups on page 36 for more information.

Managing Plan Review Website Users

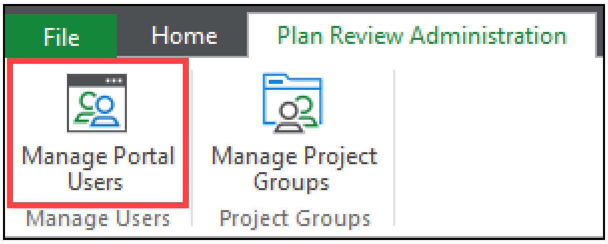
Plan Review website users can be managed from the **Manage Portal Users** option on the **Plan Review Administration** tab. Users can be deactivated or reactivated, projects assigned to specific users can be reassigned to another user, and project invitations to users can be revoked.

Deactivating Plan Review Website Users

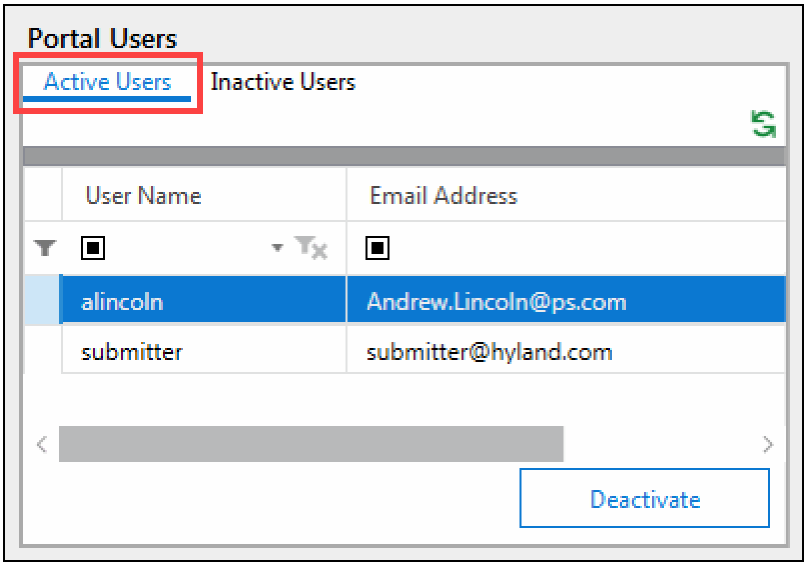
Plan Review website users can be deactivated from the **Plan Review Administration** layout. Once a user is deactivated, they cannot log on to the Plan Review website.

To deactivate an active user:

1. On the **Plan Review Administration** tab, click **Manage Portal Users**.



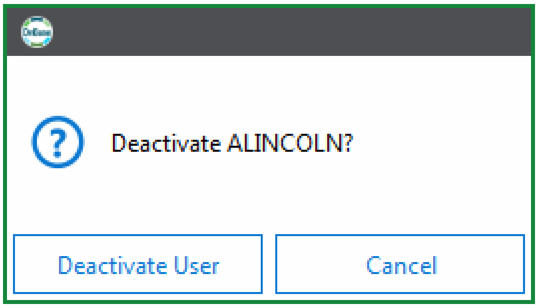
2. From the **Portal Users** pane, select the **Active Users** tab.



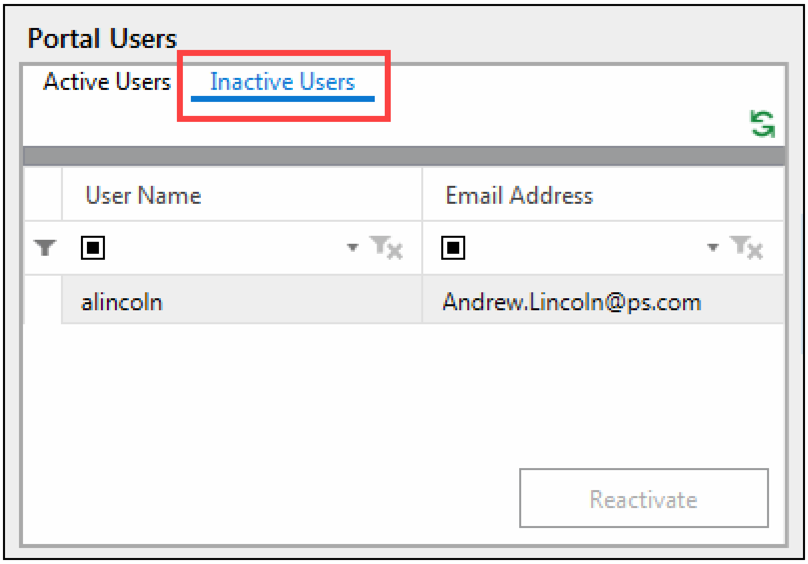
3. Select a user to deactivate.

Note: You cannot deactivate multiple users at one time.

4. Click **Deactivate**. The **Deactivate User** dialog box is displayed.



5. Click **Deactivate User**. The deactivated user is removed from the **Active Users** tab and is moved to the **Inactive Users** tab.

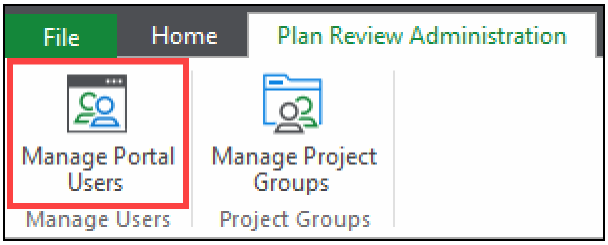


Reactivating Plan Review Website Users

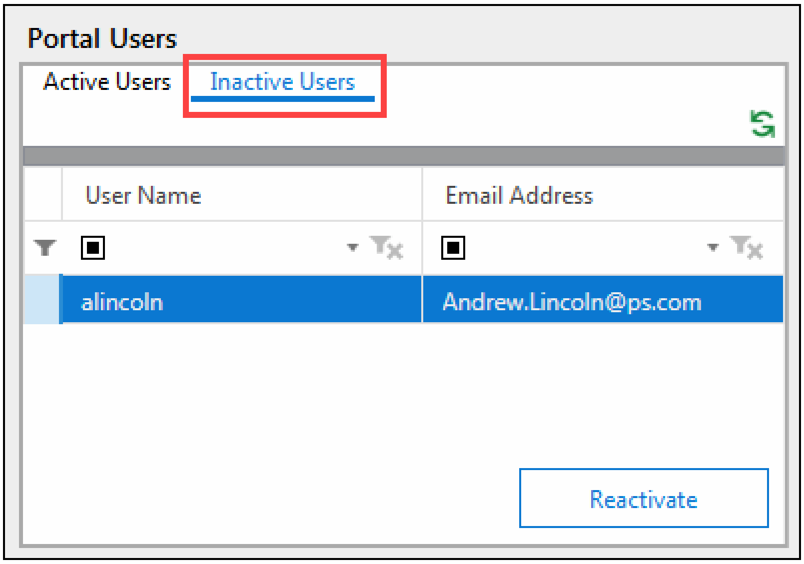
Inactive Plan Review website users can be reactivated from the **Plan Review Administration** layout. Once a user is reactivated, they can log on to the Plan Review website and perform tasks.

To reactivate an inactive user:

1. On the **Plan Review Administration** tab, click **Manage Portal Users**.



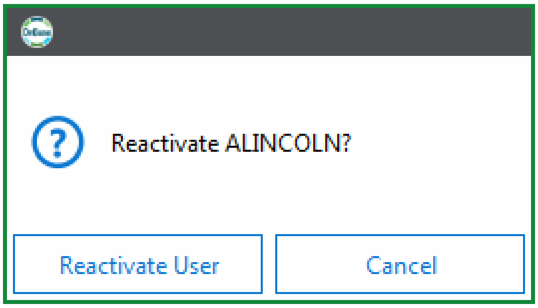
2. From the **Portal Users** pane, select the **Inactive Users** tab.



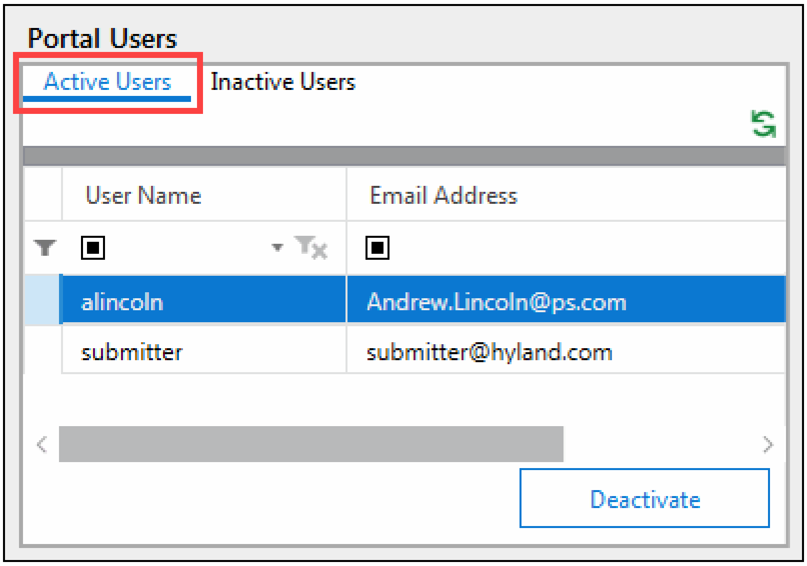
3. Select a user to reactivate.

Note: You cannot reactivate multiple users at one time.

4. Click **Reactivate**. The **Reactivate User** dialog box is displayed.



5. Click **Reactivate User**. The reactivated user is removed from the **Inactive Users** tab and is moved to the **Active Users** tab.

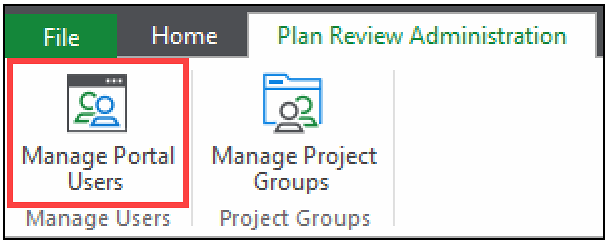


Reassigning a Project to Another User

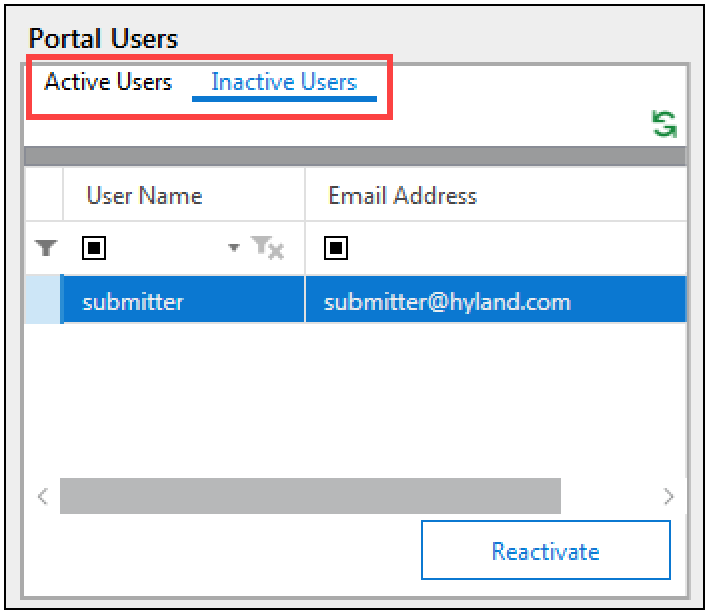
A Plan Review project owned by a user may need to be reassigned to another user if the previous user who owned the project is an inactive user or needs to be removed from the current project.

To reassign a project to another user:

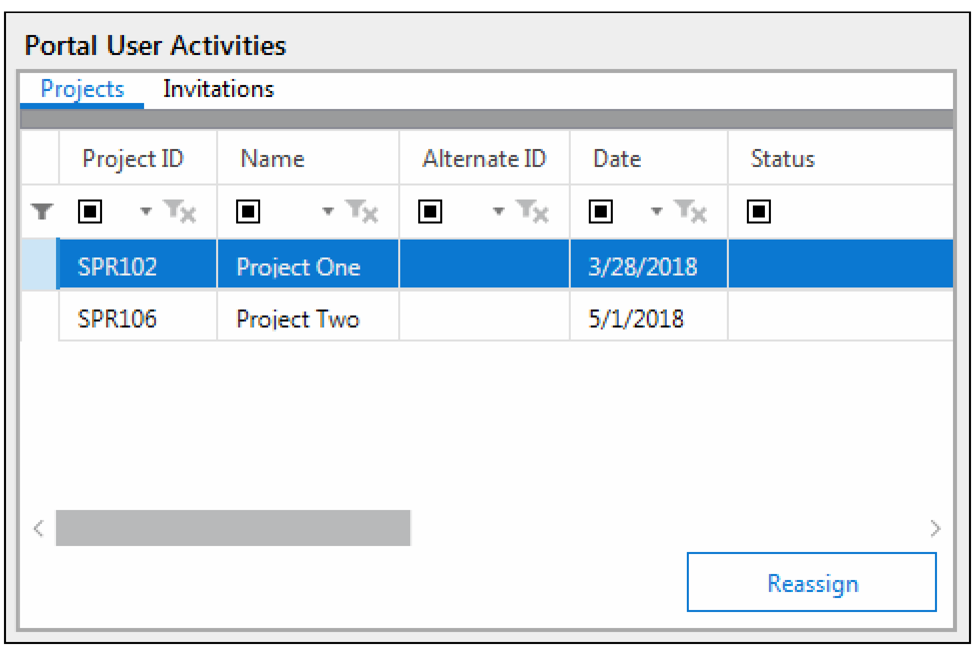
1. From the **Plan Review Administration** tab, click **Manage Portal Users**.



2. From the **Portal Users** pane, if the user who owned the project is an active user, select the **Active Users** tab. If the user who owned the project is an inactive user, select the **Inactive Users** tab.

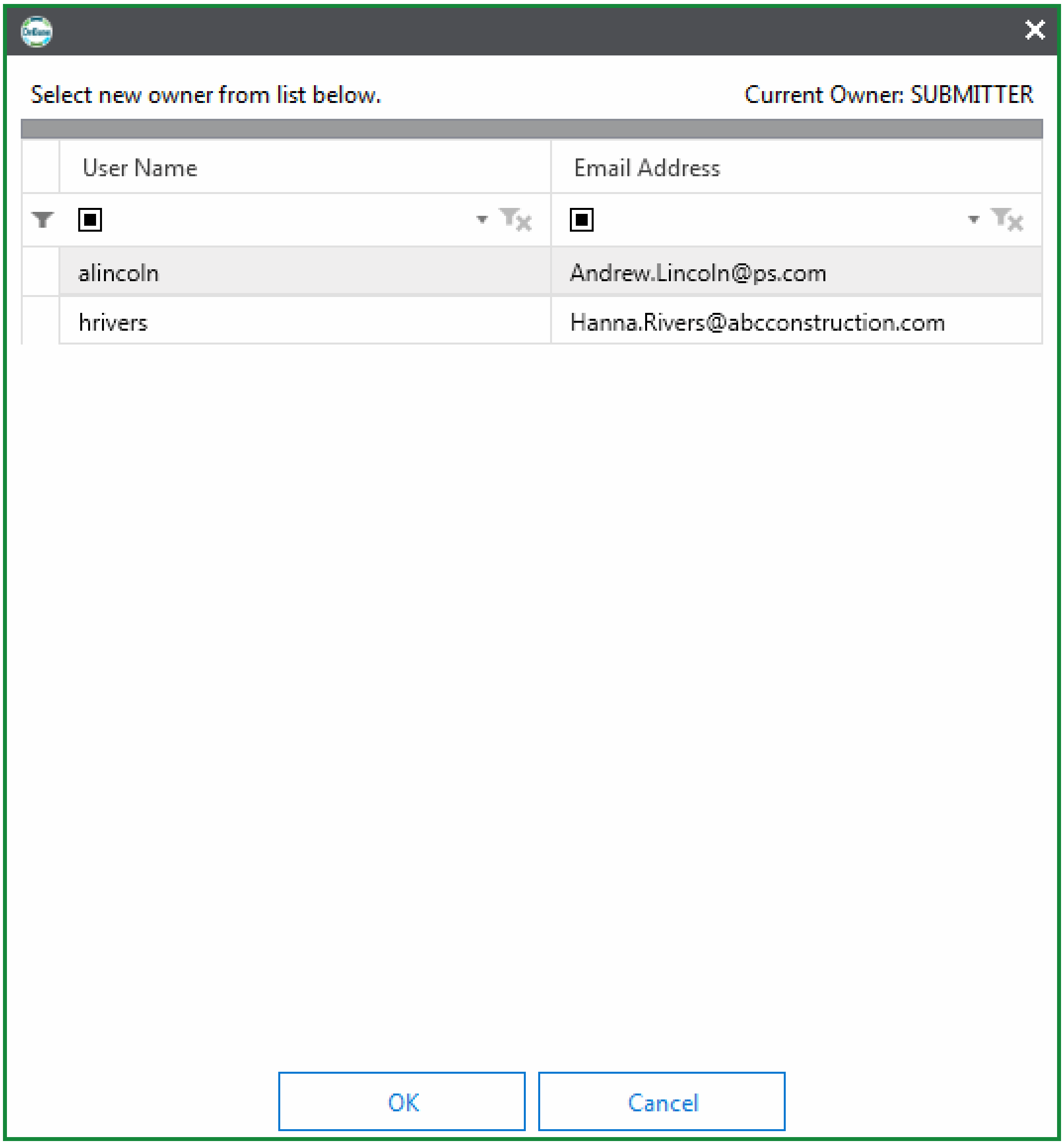


3. Select a user from the list of users. Projects owned by the selected user are displayed in the **Portal User Activities** pane on the **Projects** tab.



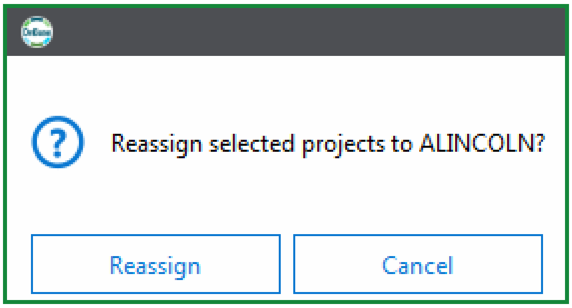
4. Select a project from the list of projects.

5. Click **Reassign**. The **New Owner** dialog box is displayed with a list of active, available users the project can be reassigned to.



6. Select the user to transfer ownership of the project to from the list of users.

7. Click **OK**. The **Reassign Project** dialog box is displayed.



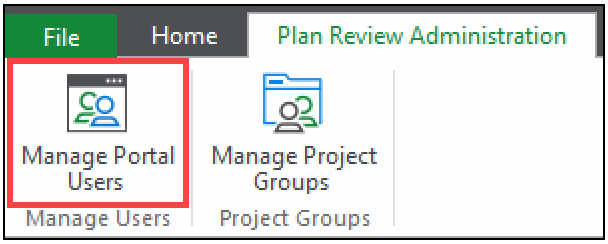
8. Click **Reassign**. The selected project is removed from the previously assigned user's **Projects** tab and is moved to the newly assigned user's **Projects** tab.

Revoking Invitations to Projects

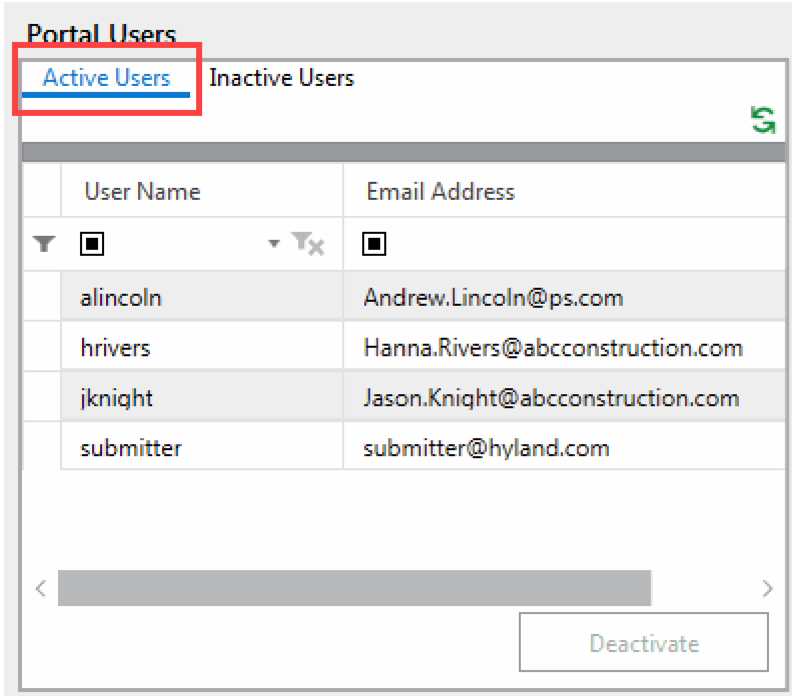
As a Plan Review administrator, you may need to revoke invitations to projects from users who have invited the wrong user or selected the wrong project to invite another user to.

To revoke a project invitation:

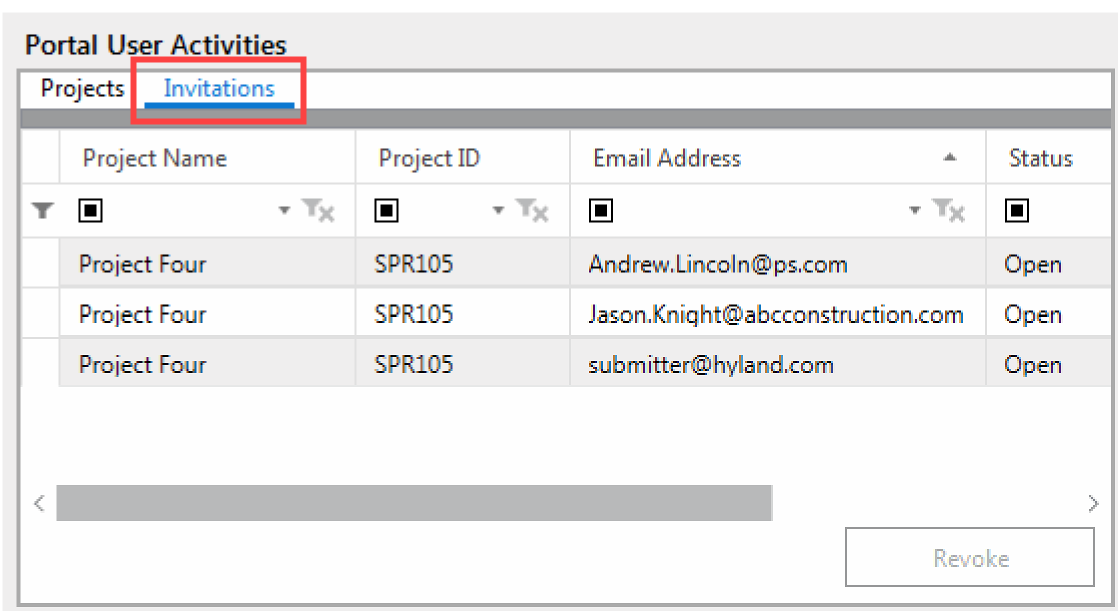
1. From the **Plan Review Administration** tab, click **Manage Portal Users**.



2. From the **Portal Users** pane, select the **Active Users** tab.

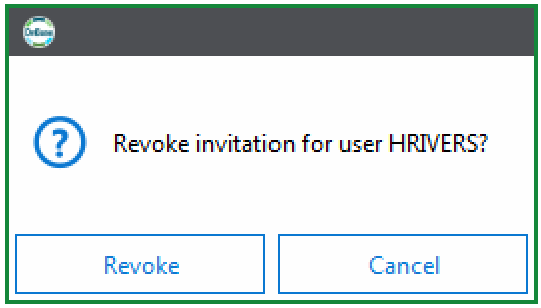


3. Select the user from the list who sent the invitation you want to revoke.
4. From the **Portal User Activities** pane, select the **Invitations** tab. The list of sent invitations is displayed.

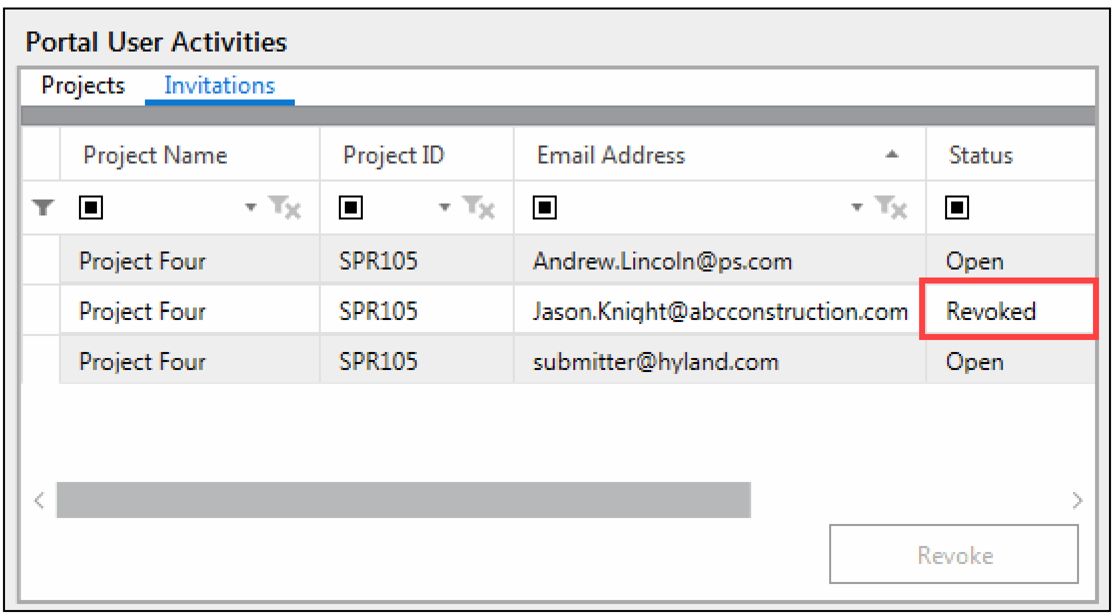


5. Select the invitation you want to revoke from the list.

6. Click **Revoke**. The **Revoke Invitation** dialog box is displayed.



7. Click **Revoke**. The invitation to the project is revoked and the **Revoked** status is displayed in the **Status** column.



Managing Project Groups

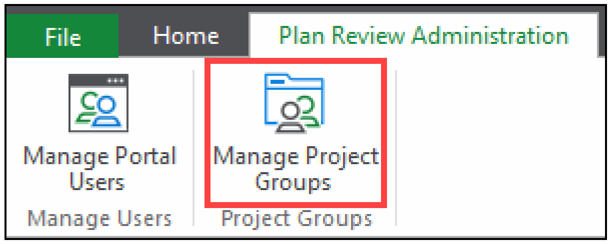
Plan Review project groups can be managed from the **Manage Project Groups** option on the **Plan Review Administration** tab. Project groups can be added to a user's list of project groups, deleted from a user's list of project groups if no projects are assigned to the project group, or edited to update the name of the project group. Changes made to project groups in the Unity Client are reflected on the Plan Review website.

Adding a New Project Group

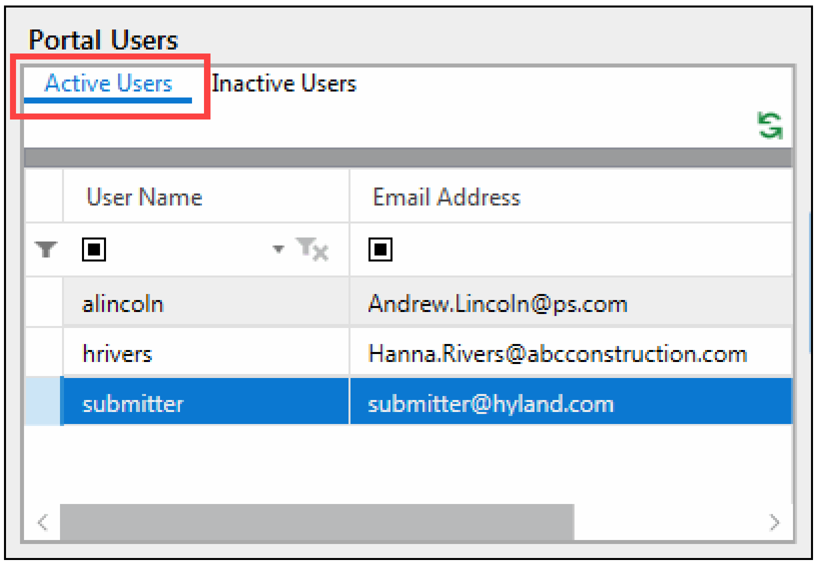
New project groups can be added to a user's list of project groups. This option creates new project groups and does not add existing project groups.

To add a new project group:

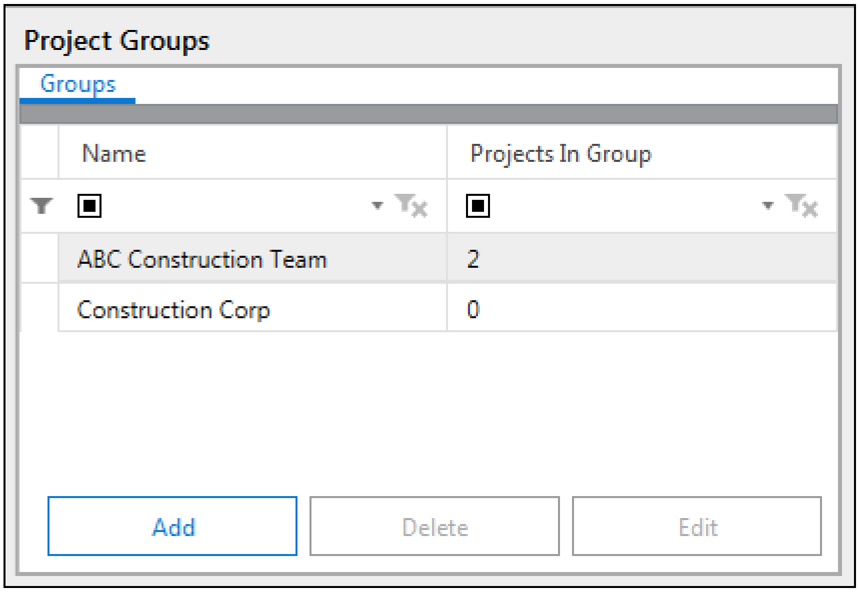
1. From the **Plan Review Administration** tab, click **Manage Project Groups**.



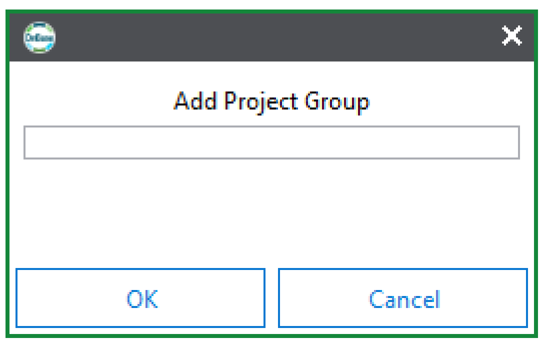
2. From the **Portal Users** pane, select the **Active Users** tab.



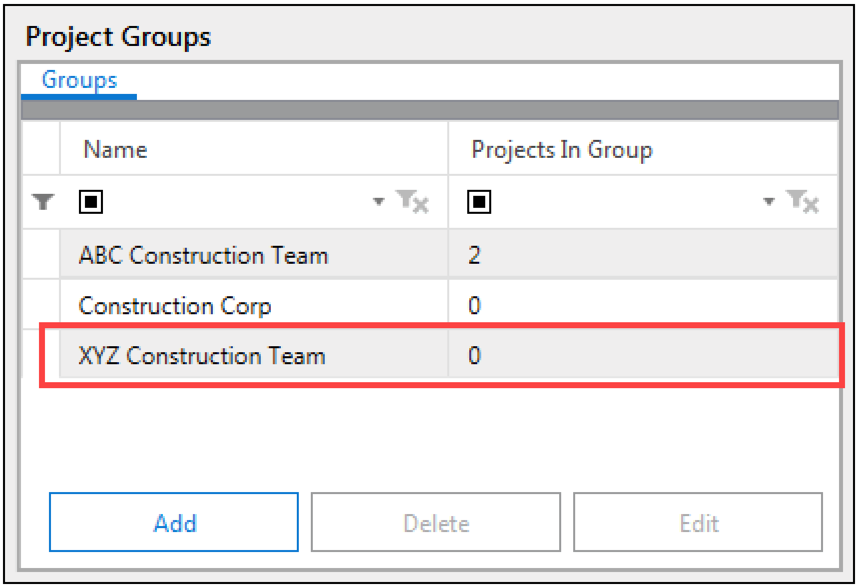
3. Select a user from the list of users. The list of project groups the selected user belongs to is displayed in the **Project Groups** pane.



4. Click **Add**. The **Add Project Group** dialog box is displayed.



5. Enter the name of the new project group in the field.
6. Click **OK**. The new project group is added to the **Project Groups** pane for the selected user.



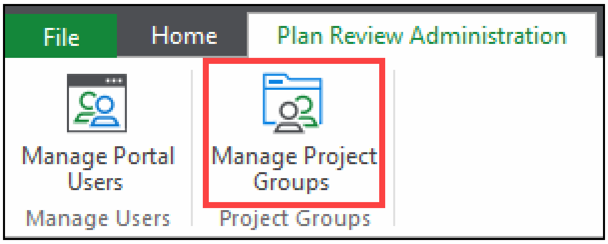
Tip: To assign the new project group to a project, see Assigning a Project Group to a Project on page 107.

Deleting a Project Group

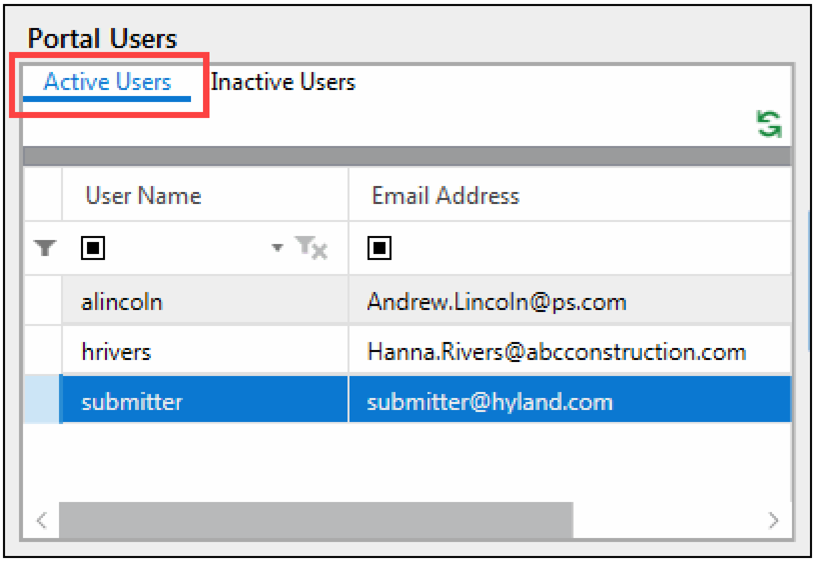
A project group that contains no assigned projects to the group can be deleted. If a project group contains an assigned project, remove the project from the project group first before attempting deletion. See Assigning a Project Group to a Project on page 107 for more information on removing an assigned project group from a project.

To delete a project group:

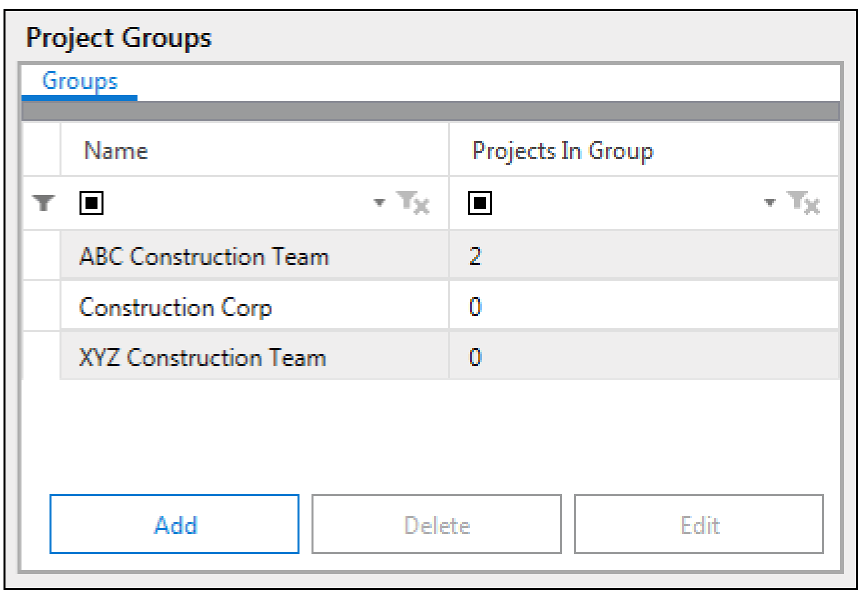
1. From the **Plan Review Administration** tab, click **Manage Project Groups**.



2. From the **Portal Users** pane, select the **Active Users** tab.

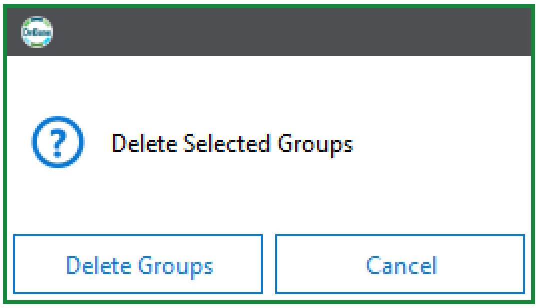


3. Select a user from the list whose project group is to be deleted. The list of project groups the selected user belongs to is displayed in the **Project Groups** pane.



4. Select the project group to be deleted from the list of project groups.

5. Click **Delete**. The **Delete Project Group** dialog box is displayed.



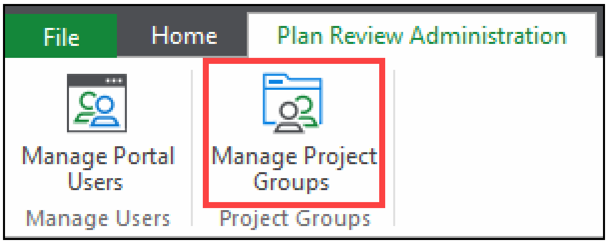
6. Click **Delete Groups**. The selected project group is deleted and removed from the list of project groups.

Editing the Name of a Project Group

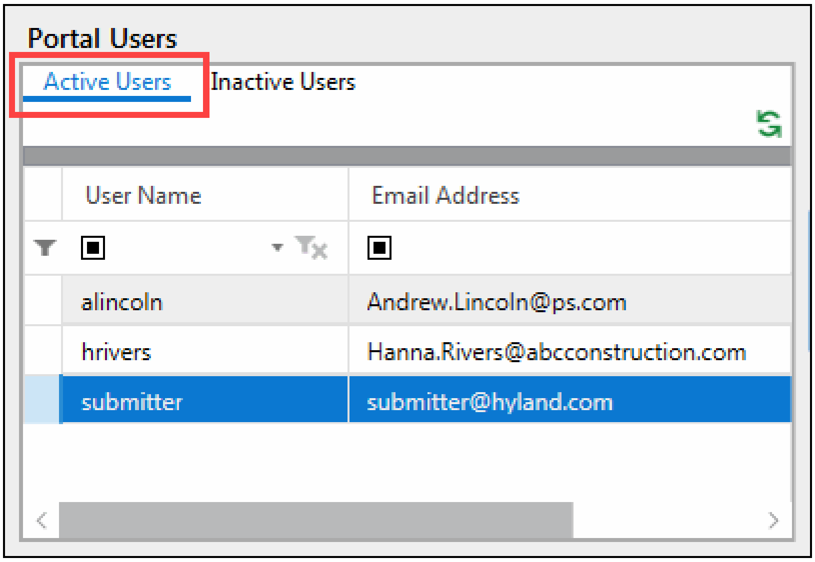
The name of a project group can be edited from the Unity Client, if needed. The new name is reflected on the Plan Review website.

To edit the name of a project group:

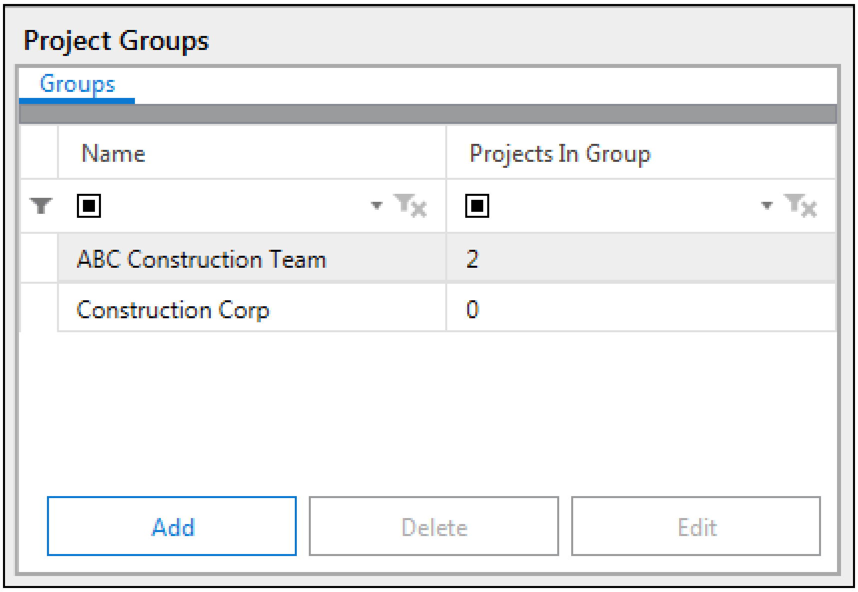
1. From the **Plan Review Administration** tab, click **Manage Project Groups**.



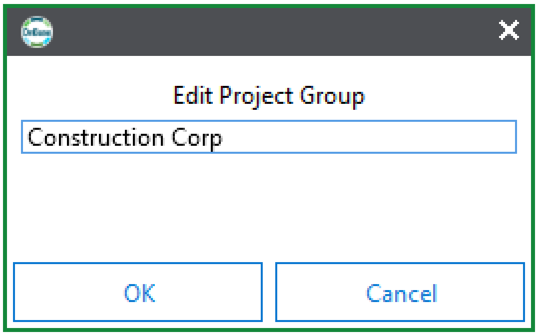
2. From the **Portal Users** pane, select the **Active Users** tab.



3. Select a user from the list whose project group's name is to be edited. The list of project groups the selected user belongs to is displayed in the **Project Groups** pane.



4. Select the project group to be edited from the **Project Groups** pane.
5. Click **Edit**. The **Edit Project Group** dialog box is displayed.



6. Edit the name of the project group in the field.
7. Click **OK**. The new name of the project group is displayed in the **Project Groups** pane.

User Option Settings

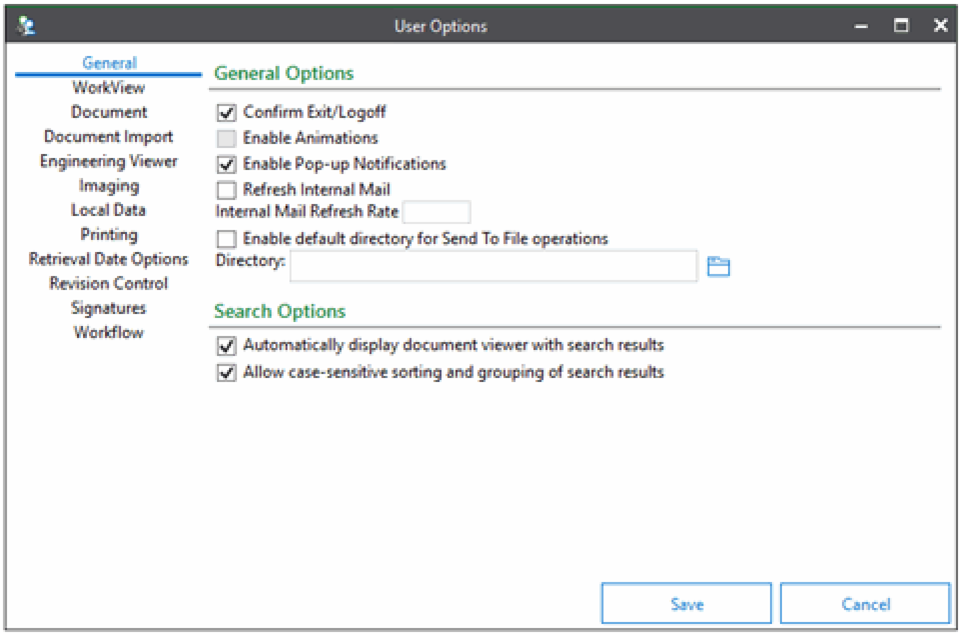
In the **User Options** dialog box, you can customize the appearance and system functionality for each user. Since settings are assigned per user, they remain in effect at any workstation.

Note: If you do not have the proper licensing, you may not be able to see these options.

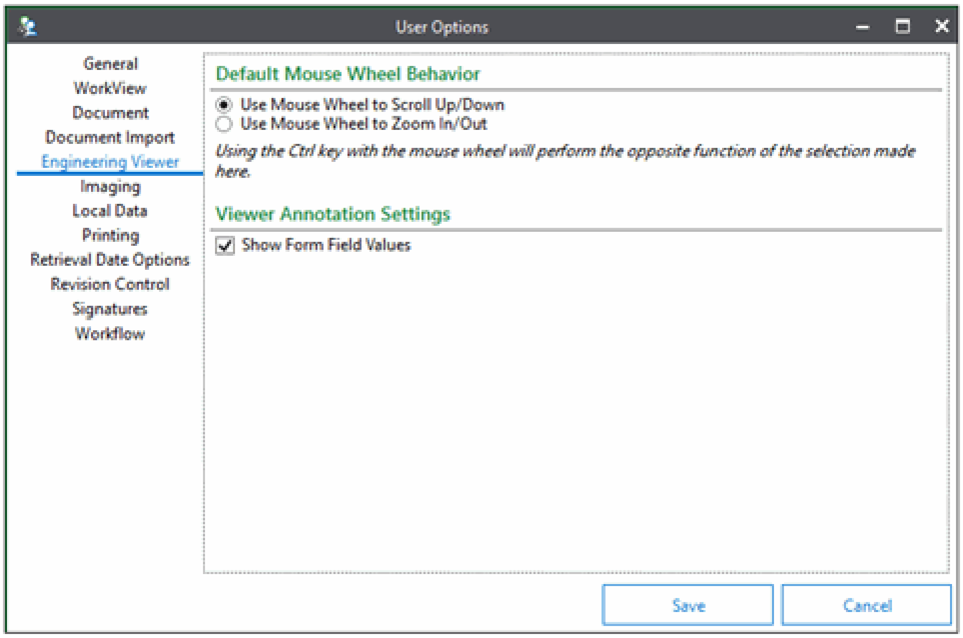
One user option that can be set for Plan Review is the option to configure the behavior of the mouse wheel as you navigate through a project.

To configure the mouse wheel behavior:

1. In the Unity Client, select **File | User Options**. The **User Options** dialog box is displayed.



2. Select the **Engineering Viewer** option. The engineering options are displayed in the dialog box.



3. Select one of the following options from the **Default Mouse Wheel Behavior** section:
   - **Use Mouse Wheel to Scroll Up/Down**. Mouse wheel use will scroll up and down in a Plan Review project.
   - **Use Mouse Wheel to Zoom In/Out**. Mouse wheel use will zoom in and out of a project.
4. In the **Viewer Annotation Settings section**, if you want to display form field values, select the **Show Form Field Values** check box.
5. Click **Save**.

Using the System Assessment Tool

To run the System Assessment Tool:

1. Navigate to the **SAT** folder of your OnBase Client or OnBase Core Services build.
2. Double-click **System Assessment Tool.exe**.
3. The System Assessment Results page is opened in a web browser.
4. Results are returned in two sections:
   - **Client Report** - This section checks the workstation's components against the OnBase Client and Unity Client minimum requirements. It contains the following results:

Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.
Free Hard Disk Space	The amount of free hard disk space on the workstation.
Video Memory	The amount of video memory on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

   - **Server Report** - This section checks the workstation's components against the OnBase Web/Application Server minimum requirements. It contains the following results:

Component	Description
Operating System	The operating system installed on the workstation.
CPU	The speed of the workstation's CPU.
RAM	The amount of RAM on the workstation.

Component	Description
Free Hard Disk Space	The amount of free hard disk space on the workstation.
.NET Framework	Whether or not the required Microsoft .NET Framework is installed on the workstation.
Internet Browser	The Internet browser installed on the workstation.
Visual C++ Redistributable	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

5. One of the following statuses is displayed next to each component:

Status	Description
PASS	This component meets or exceeds the minimum requirement.
FAIL	This component does not meet the minimum requirement.

Note: The description for each **PASS** component indicates whether the component meets the minimum requirement or the recommended requirement.