

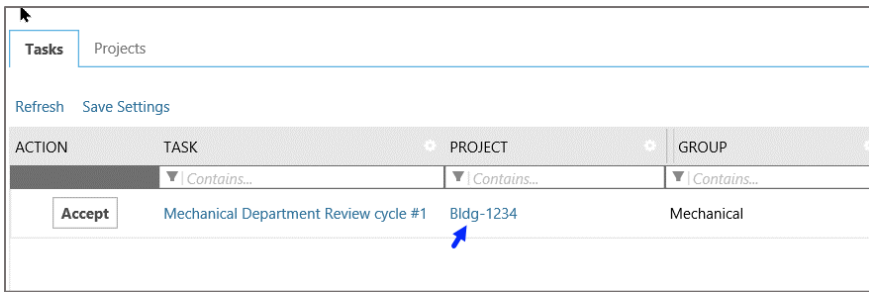
PLAN REVIEWER FIRST REVIEW QUICK GUIDE

This document is a high-level quick reference guide. It is not intended to replace training or provide in-depth instruction.

Seven Steps to Complete Your Review

Step 1: View Task/Navigate to Project

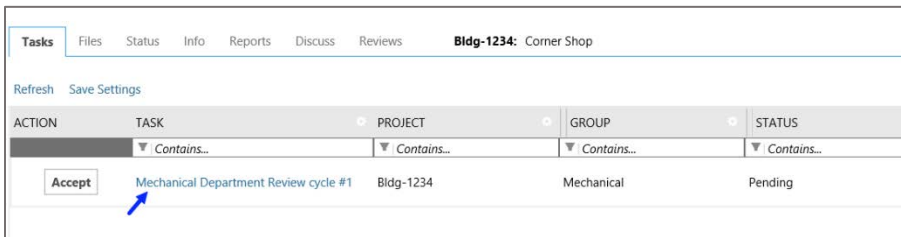
In the Home Page Tasks tab, view your pending and accepted tasks. Locate the desired task, then click on the project name to the right of the task name.



The project window will open.

Step 2: Accept Task

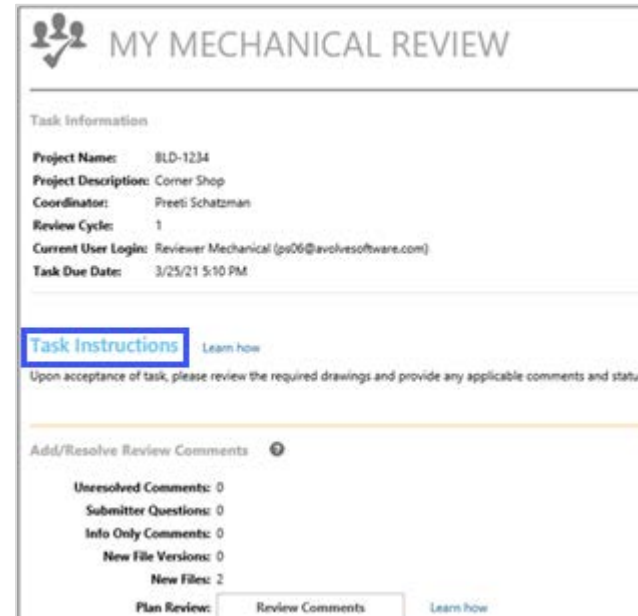
In the Tasks tab of the project, click the name of the desired task to accept the task and open the eForm.



Note: When the first reviewer accepts the task, it is removed from the task list of others in their group/department.

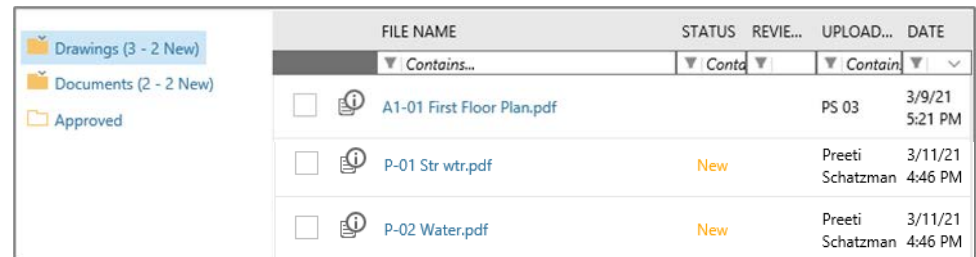
Step 3: Follow instructions in the eForm

The eForm in the Department Review is broken into several sections to give reviewers access to a robust set of features to perform the plan review.

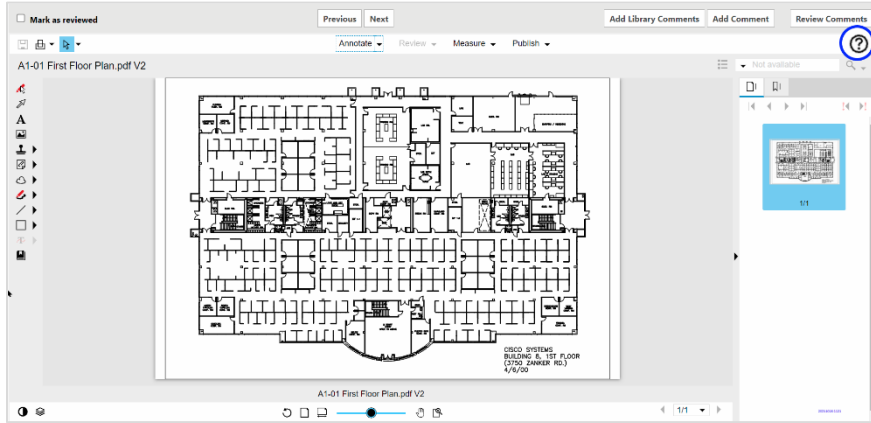



Step 4: Perform Review

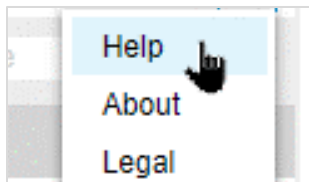
To access the Viewer, click the Files tab and select the folder to access the uploaded files.



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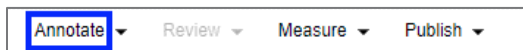
The **Viewer** has its own online help. You can access the help by clicking on the  button in the upper right corner of the Viewer window and selecting **Help**:



The Help window will appear.

Step 5: Add Changemarks and Review Comments:


If you don't see the Markup tools along the left side of the window, select **Annotate** on the Viewer task bar:



Select the Zoom tool (at bottom of window).

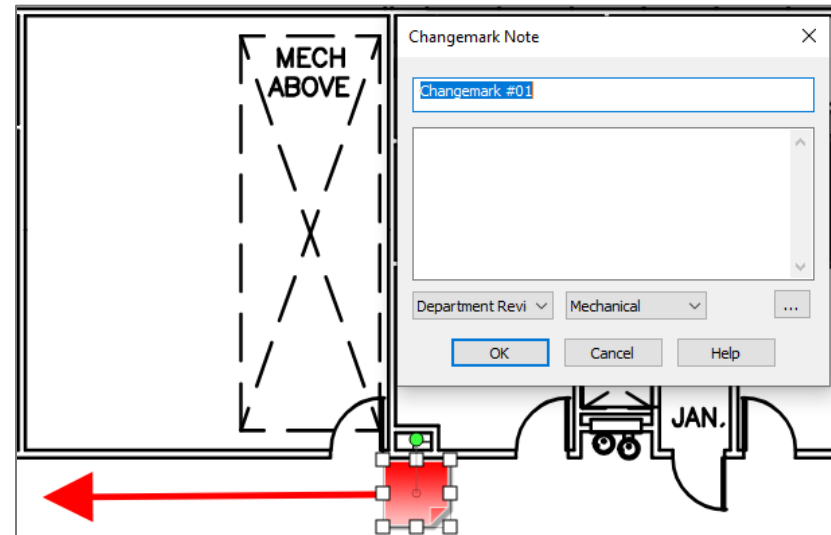


Click and drag to zoom in to the area of the drawing or document where you would like to apply the changemark.

Add a Changemark by clicking the arrow to the right of the Changemark icon  and selecting the Changemark tool that best suits your needs.

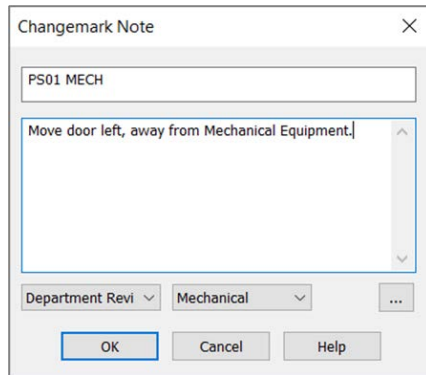


With the Changemark tool selected, click and drag the mouse to add your changemark and the dialog box will appear:



Update the subject and provide any details you would like the applicant to see in the body.

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Changemark Note

PS01 MECH

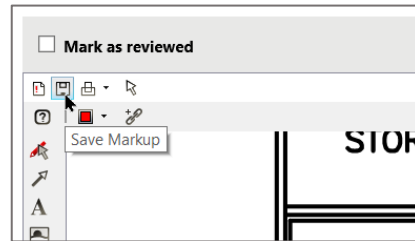
Move door left, away from Mechanical Equipment.

Department Revi Mechanical

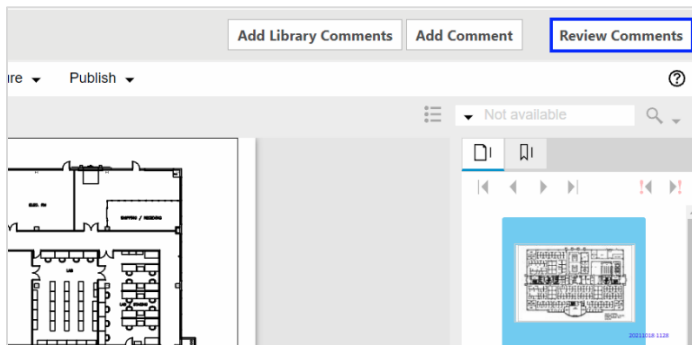
OK Cancel Help

Click **OK**.

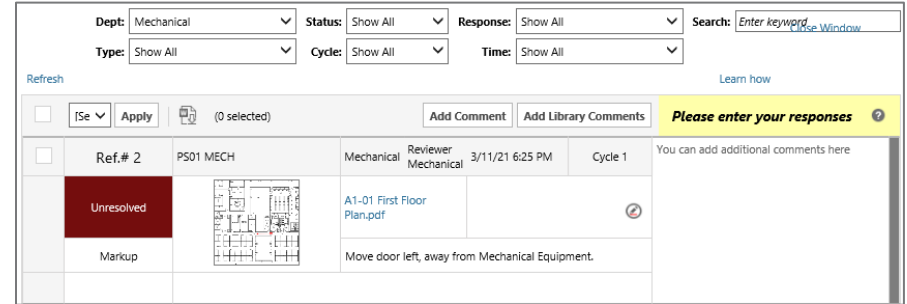
Save the Markup layer here:



Select the **Review Comments** button to view.



The Review Comments window will open, showing any changemarks or other comments made thus far:



Dept: Mechanical Status: Show All Response: Show All Search: Enter keyword Use Window

Type: Show All Cycle: Show All Time: Show All

Refresh

Learn how

Refresh (0 selected) Add Comment Add Library Comments **Please enter your responses**

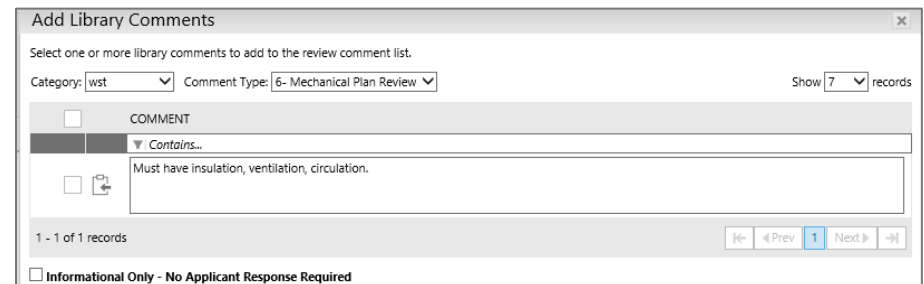
Ref.#	PS01 MECH	Mechanical	Reviewer Mechanical	3/11/21 6:25 PM	Cycle 1	You can add additional comments here
Unresolved						
Markup						

A1-01 First Floor Plan.pdf

Move door left, away from Mechanical Equipment.

Library Comments are pre-defined, often used comments that can be added as a general comment, or copied and pasted into the body of a changemark to refer to a specific area on a file.

To add Library Comments, click **Add Library Comments**. Select from the drop-down list:



Add Library Comments

Select one or more library comments to add to the review comment list.

Category: wst Comment Type: 6- Mechanical Plan Review Show 7 records

COMMENT

Contains...

Must have insulation, ventilation, circulation.

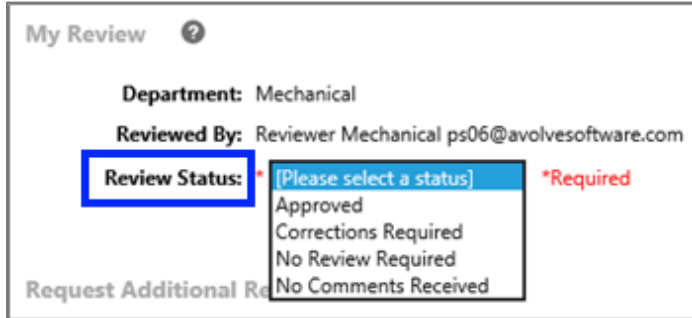
1 - 1 of 1 records

Informational Only - No Applicant Response Required

Step 6: Select Review Status

In the eForm, to complete your review, select a status from the Review Status dropdown:

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My Review ?

Department: Mechanical

Reviewed By: Reviewer Mechanical ps06@avolvesoftware.com

Review Status: * [Please select a status] *Required

- Approved
- Corrections Required
- No Review Required
- No Comments Received

Request Additional Re

Step 7: Complete Review

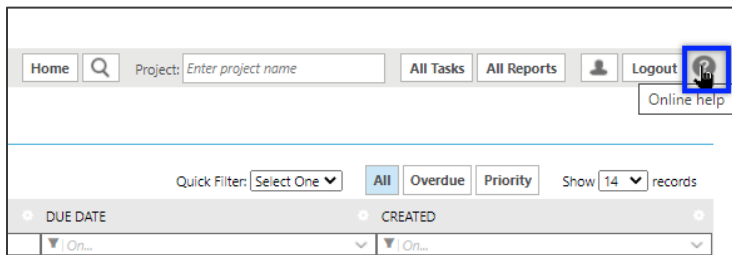
Click on the button **Complete Review** at the bottom of eForm to complete the review and close your task:



Complete Review Save for Later

Note: All department reviews must be completed before the review results can be sent back to the Applicant by the Coordinator.

REMINDER: The Online Help for ProjectDox is available here:



Home Search Project: Enter project name All Tasks All Reports Logout ?

Online help

Quick Filter: Select One All Overdue Priority Show 14 records

DUE DATE CREATED

▼ On... ▼ On...