ePlan Review (ProjectDox 9.1) Quick Reference Guide
New Version of ePlan Review (ProjectDox 9.1) Effective 3/7/2020

This version of ePlan Review (**ProjectDox 9.1**) incorporates *ProjectFlow (PF)* and *ProjectDox (PD)* components (which are essentially two separate types of workflows). We currently only use only *ProjectDox (PD)* but, will be working towards moving our projects toward *ProjectFlow (PF)*.

After you have successfully logged into ePlan Review (**ProjectDox 9.1**) you will see the **Home** screen displayed. The **Home** screen contains three tabs: "Tasks (PF)", "Tasks (PD)" and "**Projects**".

- **Tasks (PF)** – we currently do not use this portion of the application.
- **Tasks (PD)** – this tab is where you are able to search for and access all of your projects.
- **Projects** – this tab is to access all records (new and old) through the project link.

1. Any outstanding tasks that require your action using ProjectDox (PD) workflow will be located under the **Tasks (PD)** tab.

2. Any projects for which you have access (new and old) will display under the **Projects** tab.
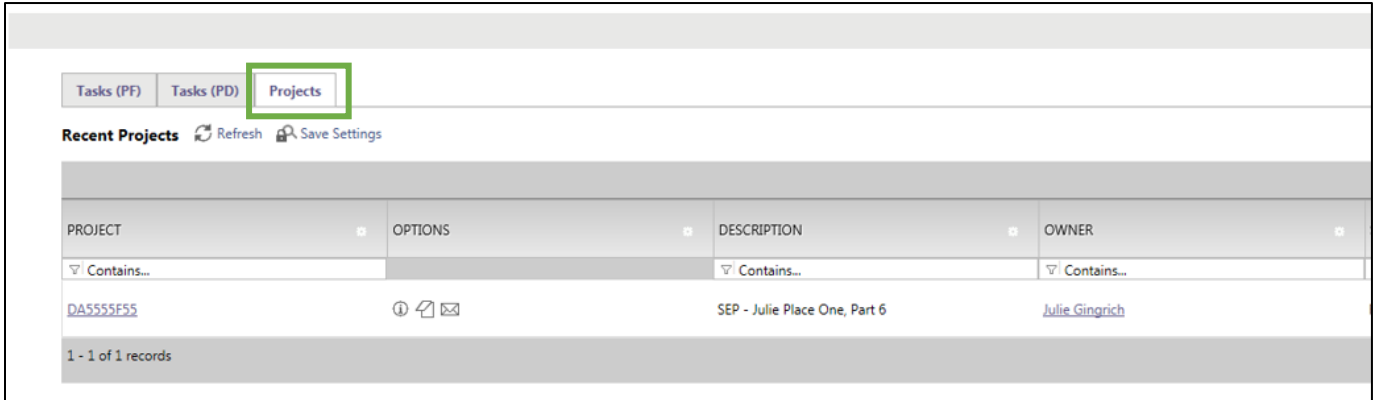
- The Projects tab defaults to Recent Projects. The Recent Projects button will list the last 15 projects you have entered. Click on the **All Projects** button and all projects for which you have access will display.
- The buttons **'Recent Projects'** or **'All Projects'** will display blue as indicator of the project list displayed.
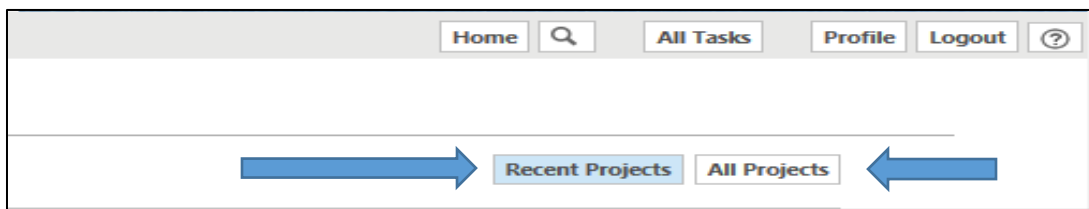

3. Search is available on each column. Enter your search criteria (partial or full) in the *'Contains...'* field located immediately under the column header name. **Sort** is available on each column. The column data can be sorted ascending or descending order by toggling your clicks on the column header.
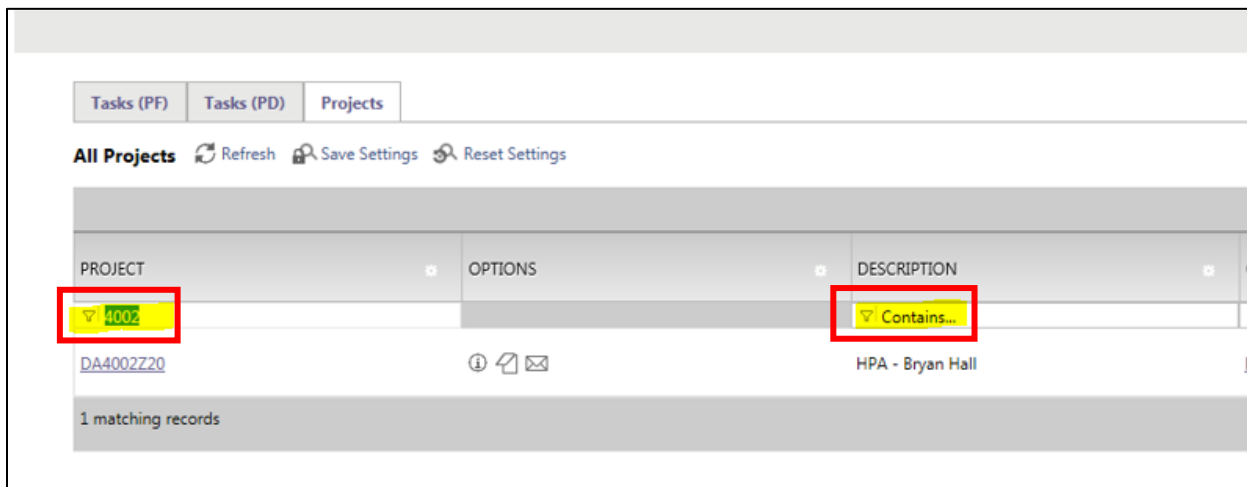
4. Click on the *Project Number* to enter the project information. The specific project screen will display.
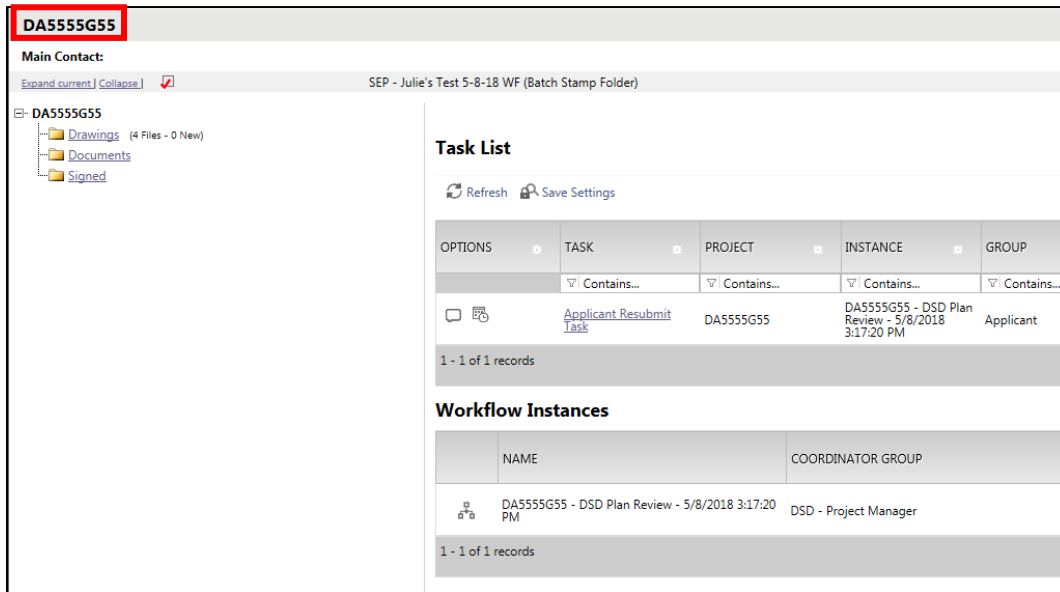
5a. Click on the *Project Reports* button towards the top right of the screen.
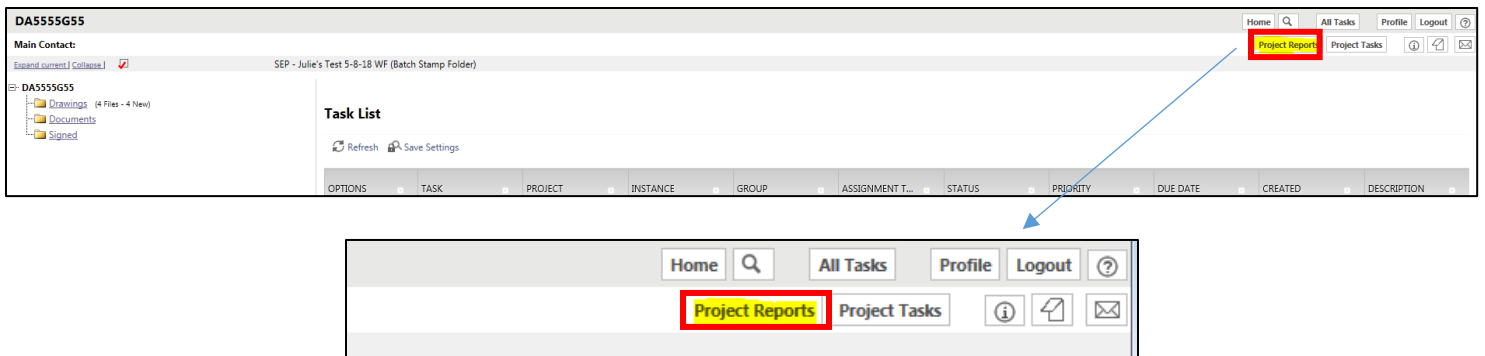
5b. Click on the View icon for *Workflow_ -_Consolidated_ Routing_ Slip* report to view the project log.

5c. The report provides the task name, the task status, the review cycle, when the task was assigned, accepted and completed, created, the group name (who has responsibility for the task - applicant or WSSC), who the user was who completed the task, and how much time the task user has spent on the task. The Review Cycle indicates how many formal reviews were performed on the project.

Browser Compatibility

The DPS ePlans System (9.1 version ProjectDox) is compatible with all browsers:

Internet Explorer 11 (must turn off 'Compatibility Mode'), Edge, Chrome, Firefox, Safari.

External users (engineers/stakeholders) can use all browser types. Internal DPS reviewers are advised to use Internet Explorer 11 (with Compatibility Mode turned off) which offers more robust markup/changemark capabilities (i.e., measurement tool, edit of existing markup/changemark comments) for reviewers.
Using Internet Explorer 11:

- If using Internet Explorer 11 browser, you must install ProjectDox Components for v. 9.1. This installation will only need to be done once; if you utilize a different computer it will require another installation for each unique computer.

NOTE: Other browsers do not need ProjectDox Components installed.

- You must turn off 'Compatibility Mode' with Internet Explorer v11.

Using **ALL** browsers:

Prior to logging into the ePlan Review (ProjectDox) application, the following actions must be completed:

1. If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the ePlan Review (ProjectDox) web address (https://eplans.montgomerycountymd.gov/projectdox/).The indicator that this has not been done will occur when you type in your login and password,