Cad Cam Services / User Guide/ Enterprise

Cad/Cam Services, Inc.

Plan Room Enterprise

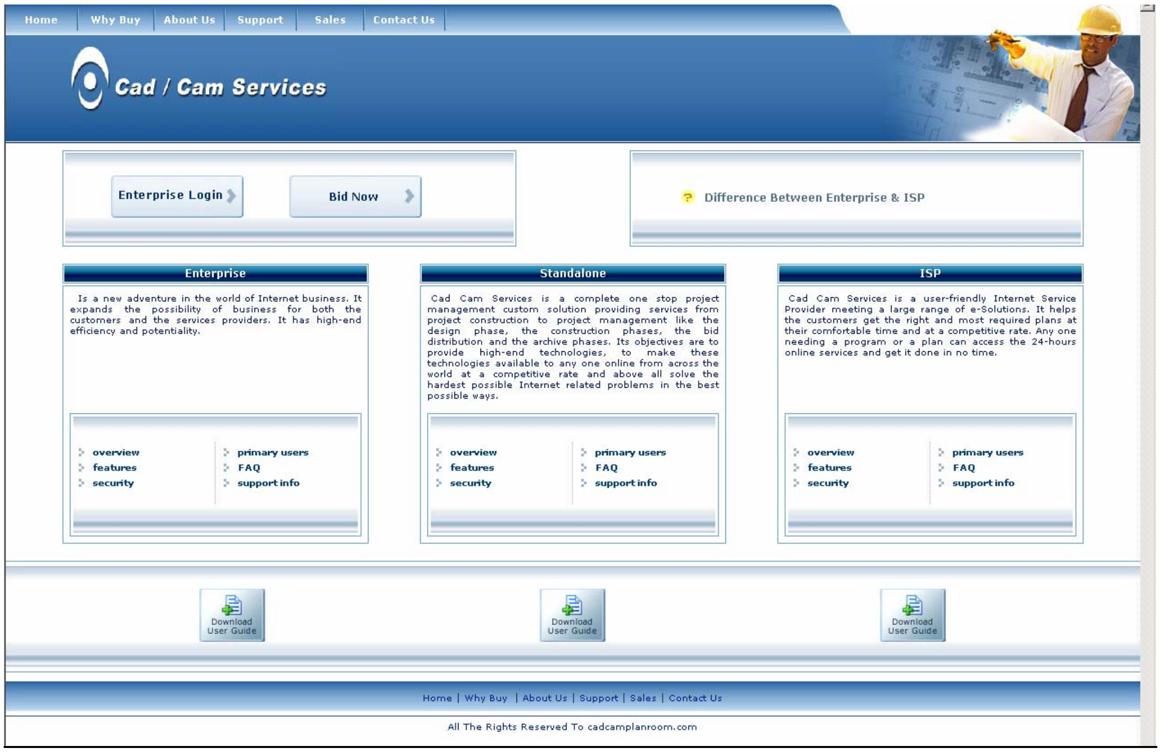
Online Digital Document Creation, Management and Distribution

USER MANUAL

Table of Contents

What is Cad / Cam Services’ Plan Room?

Cad/Cam Services' Plan Room enables a user to use it for maximum purposes to make, create, manage, distribute and order prints online. Its function is instant and quick. To operate this system no special software is required just Microsoft Internet Explorer (v: 5.5 or higher) or Firefox (v: 7.0 or higher).



How to search Plan Room?

To search Plan Room in Cad/Cam Services you need to go to the link for Reprographer and then enter Plan Room. Fill in the **log-in** and you are in the Public Room. To enter your personal room you need to enter through **passwords** along with **log-in**. Once in you can view all projects and then can handle as you like.

How to work in Plan Room?

To work in Plan Room you need to have valid **log-in** and **passwords** otherwise you cannot get access to the projects available. In Plan Room you have popular links on specific details and can easily work on your chosen fields.

What is Public Plan Room?

Public Plan Room is for all common people meaning that any one can access to this room. The users can view all the listings in this group. However reworking is not allowed here. Importantly you need not use **log-in/username** and **passwords** for this room.

What are Public Projects?

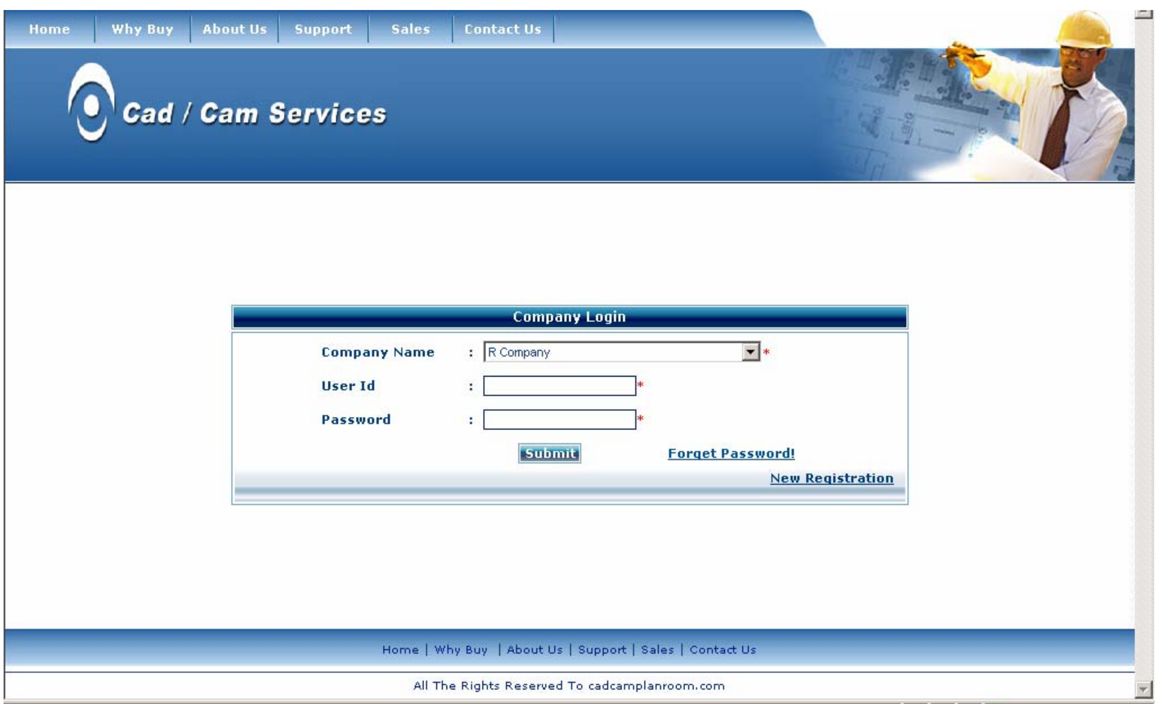
Public projects are those projects which are saved in the Public Plan Room for open display to all. Any one can get access to this Plan Room and view all the Public Projects. You can choose a designed project and place an order by selecting the project number of the desired project. But once you choose to place an order you have to use **log-in** and **passwords**. Both registered and non-registered users can make an order

Follow these steps:

- Select Public Plan Room
- Click "GO" button
- Click "View"

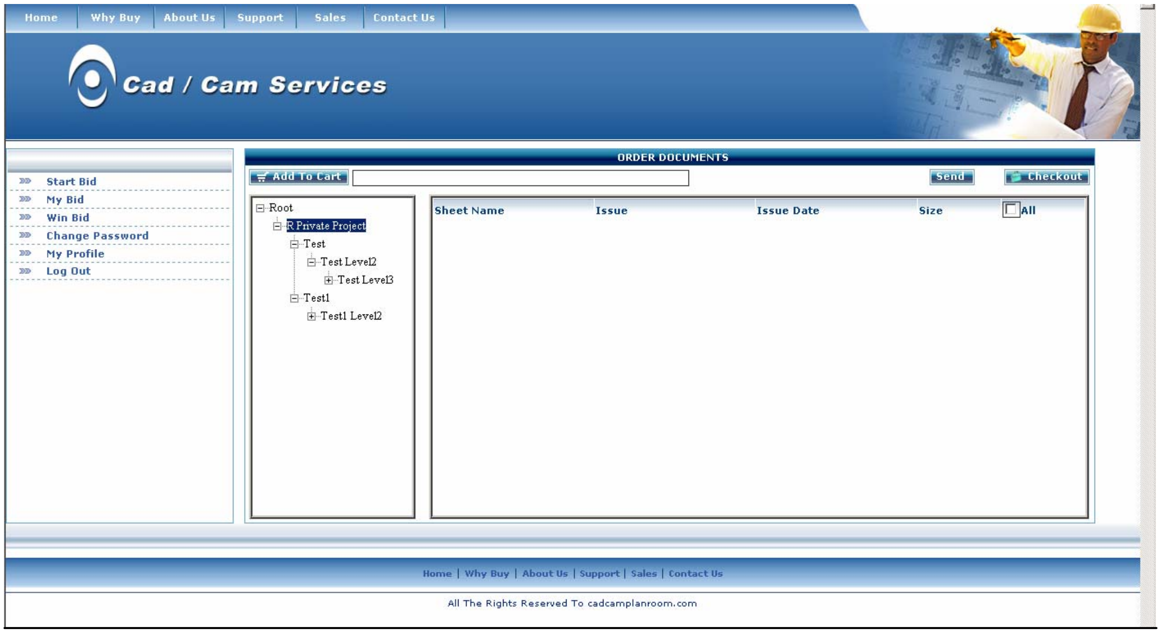
Guest Portal

This is the place reserved for the guests. Generally the guests are provided with a project number and case sensitive passwords to enter the Guest Portal. Here the users can view the chosen projects and not all the projects and can simultaneously place an order. But once again to order a project the user long-in window will appear and you have to log in only through valid username and passwords.



Shopping Cart

Shopping Cart is the place where the users can place order for their selective projects. It is essential to enter this place through username and passwords. All the designed projects are listed to the Shopping Cart and the users can search, view and place orders as required.



Current set

The **Current Set** is the most sought after link for viewing current works. Click on the link and the most current drawings will populate into the Item Browser Window. Clicking on the [+] which is next to "Most Current Set" will enable you to see the most currently uploaded drawings and thus you can place the order is you like.

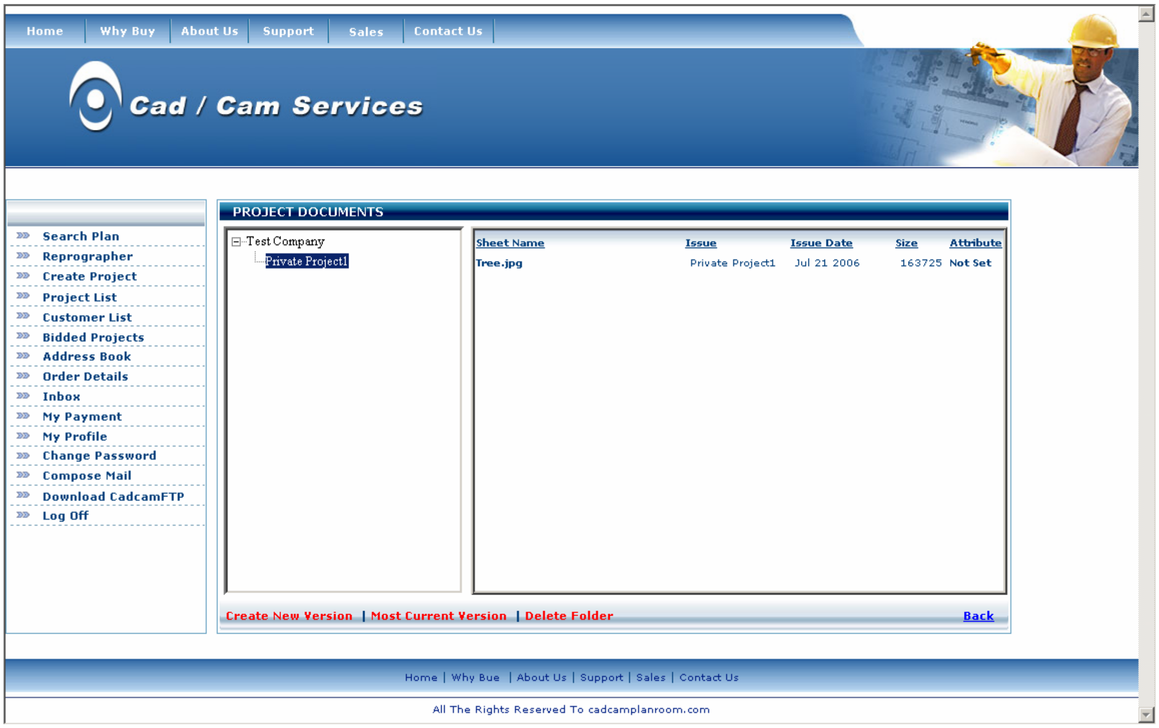
Custom Packages

Custom package is a package of works in a bundle. Certain types of works and drawings are saved on the basis of some categories if the link is clicked on the package of those types of works appear. You can also manage the documents in the package as per your requirement.

Issue Tree

Issue Tree means the documents are kept safe in different categories so as to make it easy to search and view the documents. Example is

Bid Set Addenda 1 Addenda 2
Addenda 3 Addenda 4 Specifications

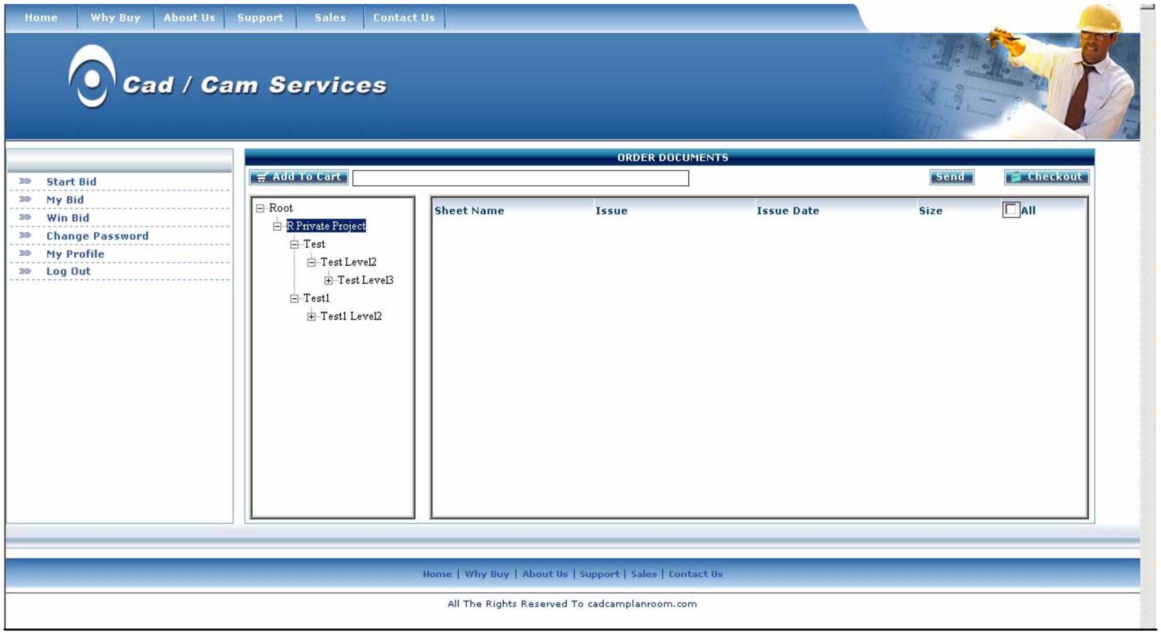


Build Your Custom Set

"Build Your Custom Set" is absolutely your own portal in the Cad / Cam Services. You can build a set of your own on the basis of the criteria decided by you. For example you can build a set on the basis of date, discipline, issues or types. You can adjust the set with the Current Set or Historical Set so that you can match the current drawings only or all the drawings in the archive as per your requirement.

How to place a Standard Order?

It is an easy task indeed! You can place an order any time you like. While in the process the "breadcrumbs" will be shown to indicate where you are currently and you can move to anywhere either "Back" or "Next".



But placing a standard order is half the job done. First click on the "Start My Order" and then follow these:

Step 1: Order Print Option

This option allows you to view all the projects and place an order online. While making an order you have to give the detailed specs about your order like process media, size, binding, bind all documents (if order is multiple), copy (if you are reordering) etc. For your convenience you have links "Ordered By", "Job Name" and "Charge To" in addition you can add up a Job No, PO No, or nay other special instruction for ordering.

Step 2: Delivery Option

Delivery option is a well managed system with Cad / Cam Services. You have all details regarding how many projects you are ordering, to whom you would like to distribute them in a simple matrix so that every one can work with much convenience. In the illustration the recipients are shown on the left, shopping cart items in the center, delivery option on the right and all transmittals at the bottom.

Recipient Information: At this place you have a look on all the details about the recipients.

Add Recipients – You can add up any number of recipients you like and you work with from four address book options namely Master Address Book Users, Master Address Book Groups, Project Address Book and Planholders' List.

Master Address Book Users contains the list of all employees and their contact details, their companies and the works assigned to them.
Master Address Book Groups is the group of the users based on certain categories. This helps the users to search the users very easily.
Project Address Book is the list of the users who are engaged on some projects or are involved in the projects in some ways or the other. This is not a general group.

Planholders' List is the list of the users who have received works/projects etc. for example if you supplied someone with the project number & passwords and they receive the orders these users are listed to the Planholders' List.

Step 3: Review Your Projects

After creating all details, making orders and managing recipients you need to review the work details on and off. **Review Your Projects** is for this purpose. Here the price of each item ordered is quoted clearly; also that you can remove items if the work on them is either over or you do not like to buy any more.

Step 4: Submit

Submission is the final result you have come to. Here you are informed of all the successful submissions and you are provided with an order number and are allowed to print the distribution, print the complete order and/or return to project home.

Instant Package Order

If the users need is emergency and they want the projects instantly they can do this by surpassing those Four Steps of placing the orders in **Place a Standard Order**. Click on the "Instant Package Order" this is the fastest ordering system available. But it is to be noted that this system is not available for every option as it is facilitated according to user log-in and project specific information.

If the facility is available an **Instant Package Order** button will flash next to the Start My order button and then:

- **Select the user(s)**
- **Choose the Package(s)**
- **Select the recipients (whom you want to send the projects)**
- **Go to print and select delivery**
- **Click submit**
- **Review you choice in the Items in the Cart Window.**

Digital Download

Online Digital Download is done instantly but it should be noted that the download is case sensitive to user log-in and project specific information and hence all projects are not allowed to be downloaded online. Of course the orders are made online but the documents are shipped to the addresses of the recipients.

If download is allowed the “Digital Download” button will flash next to the “Start My Order” or “Instant Package Order”.

- Select items
- Preview the details
- Click on Digital Download

Helpful Features

To facilitate the works faster, more user friendly and instantly Cad / Cam Services has some special features to help the users in addition. On the top of the company Plan Room there are additional project management features for the purpose. At the same time it must be remembered that these facilities are not available with each project or to each user.

Plan Room

Projects Details

The details on the projects like name(s), numbers(s) and project description are generally available but in addition the users need to know about **Web Post Date**, **Bid Due Date**, **Issue Date** and **Project Phase/Version**. These are available in the “Project Details” link.

Bid Info

Bid Info has all typed bid instructions or links to bid instruction documents to be updated regularly on which the works are in progress or the bid to be made for future projects.

Planholders’ List

The Planholders’ List has the option to develop real time reports and updating on all activities of the projects while they are in progress. The planholders are those who receive project documents. There are four options with different functions and activities.

Option A: This option has a detailed summary of the Project Planholders like the individual planholders’ name(s), companies’ names and their contact info etc.
Option B: In addition of all information of Option A it has details on order like order number, order date, items on order, and who placed what orders etc.
Option C: This option helps you to view the reports who received a specific sheet, discipline or issue.
Option D: Facilitates the reprographer to upload customized planholder information as project attachment.

Projects Set-Up

Project settings has a list of employees, group categories, contact of the employees and non-registered users. However all users are would not get access to this portal.

Reports & Update

By clicking Report/Update link the users can view the project specific information with all details throughout the progress.

- Click Reports
- Select Current Set / Historical Set
- Select items

Project Address Book

Project Address Book is the address book where you will find all the selected users. In fact there are two main books in the Plan Room one Master Address Book and two Project Address Book. All the users are enlisted automatically in the Master Address Book but the users may add up or remove any number of users in a group on the basis of specific categories. This helps you in searching out the users in faster and easier ways.

- Go to Master Address Book
- Select users
- Click on [>>] to add up users
- Click on [<<] to remove users
- Click on “Show Group” to view the users.

Package Notifications

Package Notifications enables you to send current notifications regarding development on the projects to the Project Address Book while they are under way. You can send notices to any users at your convenient time. This is done by defining an identifiable notification name as you may need it later for work purpose.

How to Specify Notifications?

- Specify a subject/massage for emails.
- Apply notifications to the selected/all recipients.
- Type a specific information for the recipients.
- Chose who would pay for the packages by “Charge To”.
- Specify the number of sets you like to allow the recipients to order.
- Finally select “Send Notification”.

- Verify your details in the “View” link.

FAQs

FAQ is a bundle of questions of varying interests and purposes. If you have a doubt or want to know some thing about the projects you may post a question to have a response to your queries. But remember to mention the name of the employees concerned so that specific response is retrieved in the Plan Room. To port a new massage you may click on the “Post New Message”.

Manage Custom Package

If you require managing packaging your projects and products then go to “Manage”.
Here you can create new packages, save your works and send to the recipients. When you need to add some new packages click on the “Add New Package” link. Then create an identifiable name, content specific, so that it becomes easy for you to view and search later. After this you have two options “Yes” and “No” as per your requirement. If you need your drawings to be updated regularly and automatically then select “Yes”. Whenever a revision on the drawings will be available the newly revised will take place the old one thus by making the possibility of updating the version more regularly.

Again you can select “Yes” or “No” if you want your projects accessible to all users or “No” if like them to be accessible only to you. Then add the files to the packages which will always be in a “Most Current Set”. However you can change this selecting either of the links like “ Build a Set”, “Most Current Set” and “Issue Tree”.

Create Package

If you’ve selected all desired documents then click on the “Create Package” which will enlist to the available packages.

Save As New

It is very much similar to “Add New Package” but in addition it supports you to create a template for your packages. The processes are also similar to the “add new package” link to save and to allow whom you choose.

Delete

This link facilitates you to delete a package permanently.

Address Book

Address Book is a list of all users with complete details about what projects are with whom and other information like these. Click on the “View User Details” and you will get access to the details about the users.

Add Employee

As soon as a new employee is registered with your organization you need his/her information enlisted to the main database. You create log in/username, permission and order dollar limit etc. Also that you may add up specific trade information to the employees like trade(s) assigned to them, their deadline, rating etc.

Create Additional Info

You can easily create additional information regarding the trades going on. You can create trade codes, their specification and their description. This can be done with the link “Add New/Edit Trade”.

Add Contact

If you need to add some additional information for easier process clicking on the “Add Contact” button can do it for you. You can add information about contact of the employees. It is similar to Add Employee window.

Manage Groups

The link “Manage Groups” will take you to a window with detailed address book search. Here you can build a new group or even edit an existing one. Simply name the group related to specific criteria and save it with “Save as New Group”. To save edited groups click on “Save Changes”.

Import Contacts

Some times you need to add multiple number of users that can be done easily with the click button “Import Contacts”.

- Click “Import Contacts”
- Specify items to be selected
- Browse information
- Click “Next” to proceed
- Match the fields
- Click “Next” to complete

Export Contacts

In the same way as the Import Contact works the “Export Contact” too helps you to export the address book for review.

- Click “Export Contact”
- Select items from the window to be exported
- Choose “Export”
- Indicate location to save items
- Click “Save Changes”

Send Emails

You may require sending emails to users in your address book to make to and from communication. You can do this by “Send Emails” feature.

Select "Show All Employees" or "Show All Contacts" or "Show All Users"
Choose recipients
Click on the "To" button [To >>, CC >>, BCC >>]
Click "Send Emails"

User Permissions

Each time a new employee is added you define his/her permission from access to work specifications. At the same time you may update the permission option of the employees. "User Permission" link is what you want. In this link you have access to all users but the users could be categorized in groups by the "Groups Listing" link. Also that you can view, edit, add or delete any existing users from a group by using appropriate links such as View Groups, Delete Groups or Save Changes.

Editing Groups

You can edit group membership by either – Instant Edit or Advanced Edit. You can view the master address book and add the users you choose to a group. The users can be highlighted in the "Available Users"
Advanced Edit is the option that allows you to use the detailed address book and search criteria in the "Manage Groups".

Create New Groups (Instant) / Create New Group (Advanced)

For enabling easy search you may create either New Group (Instant) or New Group (Advanced). This helps you to select the users on the basis of some criteria that you define for easy function.

My Account

My Account has the detailed information on the type your membership, preferences and permission limit. After entering all information the users can view, update and/or upload logo and manage the account.

Account Preferences

This link allows you to set default ordering information for the services the reprographers would forward.

- Select the service name
- Select items form options
- Set defaults
- Click on "Save Changes"

My Profile

This link helps you manage standard user information, view the profile and edit it as and when required. Here you can change passwords, other information and update the profile.

Upload Account Logo

Logo is one of the important items that you would like to create for your company or organization. This can be done with "Upload Logo" link. Simply click on the upload logo link, then browse logo from files, choose a logo and then upload. You can delete, edit or upload a new logo again later by using different links.

Order History

Order History is in fact a detailed history on all previous works. The orders are displayed with appropriate order number, job name, service ordered by details, date ordered, current status from the reprographers. In addition the order in history link may be viewed, reordered or deleted.

View Your Orders

This option facilitates order details like items ordered, any instructions, details about distribution, billing information, delivery date & time and place print order.

Reorder

Reorder is a simple link through which you can reorder the previously projected orders.

Delete Order(s)

This allows you to delete an order that you would not possibly like in future.

Non-Registered Users

Like registered users non-registered users can also do a lot of works on their services. They can view the available documents and place an order as well. But as soon as an order is placed a log-in & password prompt will appear and you require to enter them to move ahead. This is however easy to do by choosing the methods of payments of your order. Once you clear the due payment you will be provided with a username and passwords.

Plan Room BidCaster Start Guide

The plan room BidCaster is a starter guide on detailing the instructions on all the functions, systems and how to manage your BidCaster etc. It is ideal both for new users and old users as it supports all programs and whenever a user requires any information it is always available with this manual guide. So it is recommend for every user to work fine.

Bid Caster Functionality within an Existing Project

The users may request the reprographer to send the required BidCatser functionality suitable to the specific projects in the Plan Room. After you are provided with permissions you can log-in into the plan room to access the projects you like to work on. You will be provided with three options Project Details, Start a Broadcast and Broadcast History to works on all specs without any disturbance.

Project Details

Project Details has a detailed report on the projects in text used by BidCaster throughout the broadcast process. These details can be edited as and when required.

Start a Broadcast

Start a Broadcast is used to send updated reports to the users, reprographers and programmers.

Step 1

The first step is to begin by defining a broadcast name so as you get the result instantly. You can choose to send documents as attachment or link to certain documents to the recipients.

- Click Edit
- Browse documents
- Choose documents
- Choose “add”
- Send

Step 2

After uploading the documents you would need to add recipients whom you are sending the documents. Here is a list of all users but you can narrow down your search by applying the users by specifications through “Execute Search” either in a single preference or may combine the criteria by opting “General Requirements”, “WBE” and “No Union”. You may also select either a single recipient or may combine multiple numbers of recipients.

Step 3

In third step you define optional BidCaster settings with clarifications from the reprographer. This setting is chargeable so it is advised to note about this. You can use “Invitation to Bid” or “Information Acknowledgement” for managing the changes. Select a template with the “Turn on Email Response Template”, a template is very much editable.

Select “Forward Bid Acknowledgement to my Emails” to receive all “Yes” and/or “No” bid acknowledgment in the Broadcast Status Report. to receive a reply from a recipient you must respond.
Broadcast massages via emails or fax may be sent automatically to the non-responding recipients if the “Check to Set Auto Reminder On” is opted to run on. You may also choose the “Select to Include APO (Assign Print Order)” to place the order to be automatically placed for any broadcast recipients who may have indicated option “Yes” to your broadcast.

Broadcast History

Broadcast History keeps a file of the records of all complete and incomplete broadcasts since the very beginning of a program. Any one can access it to see the developments of the works.

Complete Broadcast

A broadcast started and launched is found in the “Completed Broadcast” with details like day, time, plans view, plans ordered etc on the projects. To view a broadcast you may choose a non-specific name and soon you are connected to the list of them.

Incomplete Broadcast

A broadcast started but not launched yet is enlisted in the “Incomplete Broadcast”. Other processes are same as that of “Complete Broadcast”.

Create a New ITB Project

To create a new ITB project you need to ask permission from your reprographer. After he/she sends permission an option “Create a New ITB Project” appears. Choosing this link you are connected to project details where you may edit any information as per requirement. This edition is recorded in all BidCaster broadcasts along with the reprographer’s list. On typing in all the information you need to select “Create New Project” afterwards you have to manage other broadcast setting options. To select a template click on the “Manage ITB Templates” and save one.