

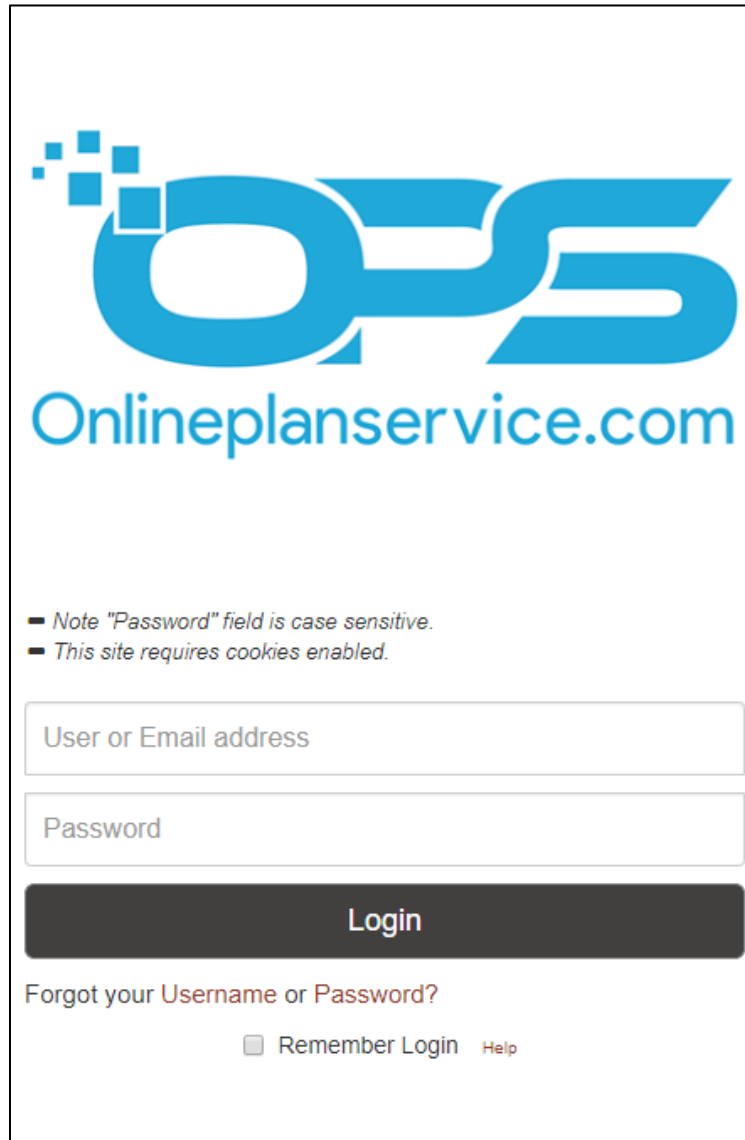


# Online Plan Service User's Manual

The Online Plan Service is a helpful tool that allows users to access real-time information and construction documents on any device.

To log into the Online Plan Service the URL is as follows and enter in the acquired username and password.

<https://login.onlineplanservice.com/>



The screenshot shows the login interface for Online Plans Service. At the top is the logo, which consists of the letters 'OPS' in a stylized blue font with a cluster of small blue squares to the left. Below the logo is the text 'Onlineplanservice.com'. Underneath are two bullet points: '- Note "Password" field is case sensitive.' and '- This site requires cookies enabled.' There are two input fields: 'User or Email address' and 'Password'. A dark grey 'Login' button is positioned below the fields. At the bottom, there is a link for 'Forgot your Username or Password?' and a checkbox labeled 'Remember Login' with a 'Help' link next to it.

**OPS**  
Onlineplanservice.com

- Note "Password" field is case sensitive.
- This site requires cookies enabled.

User or Email address

Password

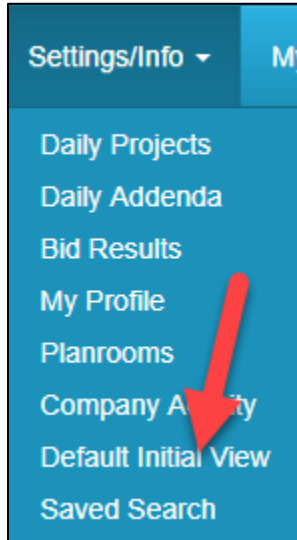
**Login**

[Forgot your Username or Password?](#)

Remember Login [Help](#)

After logging into the Online Plan Service, it will be prompted to accept terms and conditions for use. After accepting it will direct the user to the **Bidding Projects Grid**.

To change the initial view upon login is as follows, **Settings/ Info > Default Initial View**



## Bidding Projects View

The screenshot shows the 'Bidding Projects' grid interface. At the top, there is a search bar and a 'Sorted By: Bid Date' dropdown. The table below contains the following data:

		BID DATE	PROJECT NAME (Click Here To Sort)	LOCATION
	49	02/20/2019	OPSUP Test	Chico
	13	02/20/2019	test upload	
	52	02/21/2019	testing bid date (View Addenda)	
	30	02/27/2019	testing bid date	
	2	02/28/2019	cops19-00165	
	2	02/28/2019	vops19-00403	
	2	02/28/2019	vops19-00403 edited	
	2	02/28/2019	cops19-00165 edited	
	52	03/13/2019	Testing bid date	
	54	03/15/2019	antother test	
	54	03/20/2019	antother new test (View Addenda)	
	54	03/28/2019	New project test for upload	
	54	04/17/2019	18-00187 test new number	

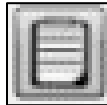
The grid display throughout the Online Plan Service offers links to facilitate quick access to Project information relevant to its users.

# Overview of Project Grid Icons

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**Project Preview:** Displays the basic detail and description of the Project, as well as quick links to rate your interest, (**Yes, No, Maybe**). There is also the option to add the Project to your **Calendar, Save/ Track** the Project and viewing the **Project location**.



**Documents Available:** Offers a quick link to view the **Project's documents** in the **QuickEye Lite** html viewer. A red plus sign (+) will appear on this icon if addenda has been received for the Project.



**Days Since Received:** Displays how many days the Project has been in the **Online Plan Service** database.

**BID DATE:** **Bid Dates** that are underlined have a **Prebid Meeting**. To display the **Prebid Meeting** information hover over the **Bid Date**. This icon (\*) indicates a **Bid Date** change.

**PROJECT NAME:** Projects in **Blue Font** have not been viewed. Projects in **Purple Font** have been viewed. There are also quick links to "**View Addenda**".

**LOCATION:** Displays the city the Project is located in.



**Show Map:** This option plots all the listed Projects on a map for quick location reference.



**Show Calendar:** This option plots the listed Projects on a Calendar. Each Project is represented by a color code.

- Tracking Project
- Interested? Yes.
- Interested? Maybe
- Interested? No.



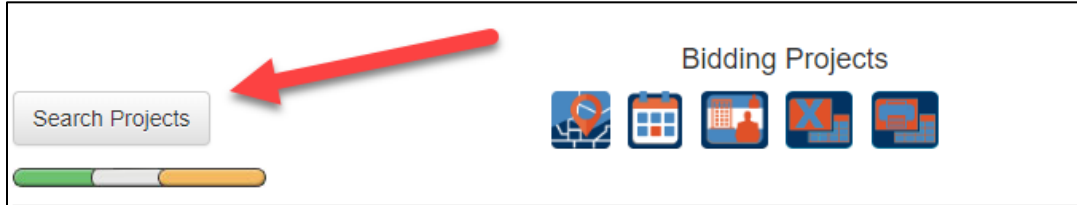
**Show Contact Watch List:** This option will display the companies the user is watching. It allows the user to view the Projects they are listed on and search for companies to add to their **Watch List**.



**Export Grid:** This option will export the displayed grid to a .CSV file and will include **Project Name, Bid Date, Location** and **Plan Number**.

# Search Projects and Saved Searches

**Search Projects** is located on the left corner of the **Bidding Projects** page.



By clicking the **Search Projects** icon, a pop-up screen will open giving options to search the Project by **City, County, Keyword** or **Project Name**.

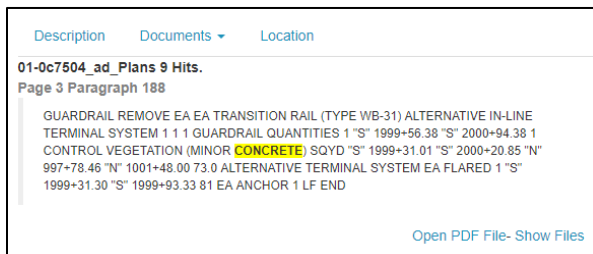
A screenshot of the 'Search Projects' pop-up window. It has a title bar with a close button. Below the title bar are two tabs: 'Search' (selected) and 'Watch List'. The search criteria section includes: 'City: (ex: "Chico")' with an input field; 'Keyword: (ex: "Concrete")' with an input field and an 'Add' button; 'County:' with an input field; 'Project Name:' with an input field labeled 'Project Name (Optional)'; and a 'Description' dropdown menu. At the bottom of the criteria section are three buttons: 'Close', 'Save', and 'Run Search'. Below this is a table with search results. The table has three columns: 'Search', 'Run / Edit / Delete', and an icon column. The results are: 'river', 'San Benito', and 'test'. At the bottom right of the pop-up is an 'Advanced Search' button.

If the search is one the user would like to run in the future or to receive nightly emails for. Press **Save** and name the **Saved Search**.

After running the search, results will be returned. The options available are to **View the Projects, Edit** or **Clear** the search.



If keywords were entered in the search, a number will be displayed in the first column indicating how many times the keywords were found in the project.



To view the relevancy of the results, click on the number to open the **Project Preview**. Then, click on the **Documents** tab to display the sections that contain the searched terms. These terms will be highlighted.


To create **New Saved Searches**, go to **Settings/ Info > Saved Search > New Search**.

You are logged in as Online Plan Service. E-mail updates will be sent to amy@barryhund.com.

No.	Name	✉	Count	Last Run	Edit	Delete
1	<a href="#">river</a>	No	0	6/27/2018 8:35:19 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
2	<a href="#">San Benito</a>	No	0	6/26/2018 3:50:01 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
3	<a href="#">test</a>	No	0	12/18/2015 11:52:36 AM	<a href="#">Edit</a>	<a href="#">Delete</a>

Company Searches [[Show](#)]

[New Search](#) [Preview Email](#)




Enter the name of the **New Search** and then select the desired **State(s)** or **Counties**, **Project Types** and enter **Keywords** or **CSI codes**. When done click **Save Search**.

Name:

Projects:

Counties:  ALL



Project Types:  ALL

- Building
- Residential
- Commercial
- Institutional
- Industrial
- Civil

Keywords: (ex: Concrete)

CSI: (ex: 03050 or 03100)

## Project Details

**Project Names** throughout the Online Plan Service are hyperlinked. To get detailed information about a Project, click on the **Project Name** to be directed to the **Project Details**.


	54	02/20/2019	<a href="#">OPSUP Test</a> 	Chico
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Many of the tools found on the **Project Preview** can also be accessed in the **Project Details** including: **Add to Calendar, Select Interest** and **Track Project**.

The screenshot shows the 'Project Details' page for 'OPSUP TEST'. At the top left, it displays 'FEB 20' and the location '12019 Merlin Lane Chico Butte CA 95928' with a bid time of '2:00 PM'. Below this, the status is 'Rebid' and 'Postponed: No'. A 'Show Location (Map)' link is present. The project type is 'Building', and 'Bid Packages' are 'No'. It also shows 'Estimate Low', 'Estimate High', and 'Published Date' fields. Further down, 'Plan Status' is 'Online', 'No of Plans' is '0', 'Plans Cost' is blank, 'Spec Status' is 'Online', and 'No of Specs' is '0'. A 'Description' field is empty. On the right side, there is a 'Documents' section with options like 'View Project Docs', 'File Downloader', and 'Order Prints'. Below that is 'ANCHOROCK - Project Management' with a 'Launch TakeOff Application' button. The 'Project Actions' section includes 'View Activity', 'Email Project Info', 'Add Me To Bidders List', 'Track Project', 'Add Note', 'Search Spec Books', and 'Import to ITB.io'. At the bottom right, there is a 'Select Interest' section with three buttons: 'Yes' (green), 'No' (grey), and 'Maybe' (orange). At the bottom left, there is a 'Bid Date Information' table.

Description	Bid Date	Bid Time	Extended	Bid Date Change
	2/20/2019	2:00 PM	No	No

**Add to Calendar:** This option will add the **Project Name** and **Bid Date** to the user’s personal calendar. Options include Outlook, Google, Yahoo, Hotmail and iCal.

**Show Location (Map):** This option will open Google Maps to give the user the option to plot the **Project Location**. The interactive map also supports street view. Click on the person icon  and drag it to the map for a 360-degree view of the **Project Location**.

At the bottom of the **Project Details** is a list of **Bidders**. **Send Email to Bidders** will allow the user to select the **Bidders** they would like to send an email to.

Interest will color code the **Project Grid** and will also display the user’s interest level on the Company view and activity lists.

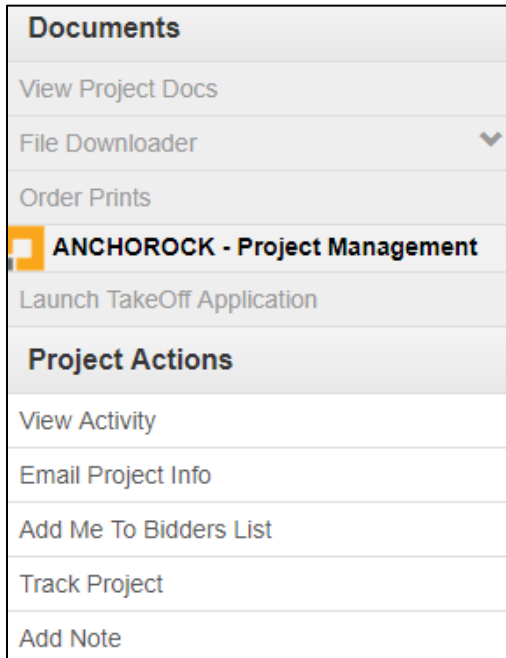
A close-up of the 'Select Interest' section showing three buttons: 'Yes' (green), 'No' (grey), and 'Maybe' (orange).

**Select Interest** is located at the bottom right of the **Project Details** page.

# Documents

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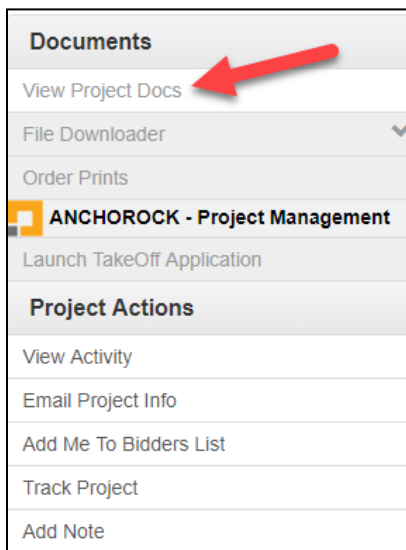
There are a number of ways to view plans, specs, and addenda within the Online Plan Service.



## Documents → View Project Docs

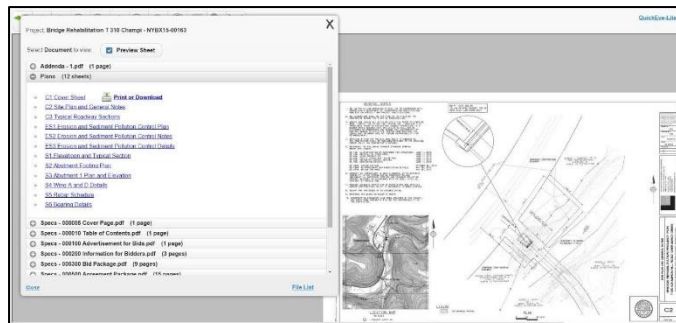
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The **View Project Docs** option is located on the right side of the **Project Details** page.



The html-based viewer can be accessed on any device. Once open, expand the main project folders (Addenda, Plans, Specs) to view a list of files the project contains.

Double click on the name of a file and it will proceed to download and open.





**Preview Sheet** will keep the list of files open in the foreground while navigating through the **Plan Sheets**.

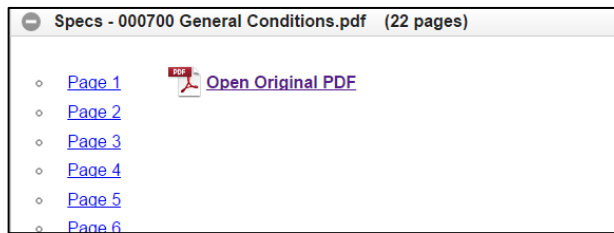
**Mouse Controls for QuickEye Lite** are as follows:



While viewing plans in **QuickEye Lite** the toolbar has tools available to **zoom in or out** and **rotating** the drawings.

Multi page .pdf files will open in your browsers default .pdf viewing program. Multi page .pdf files are listed as individual files, as well as a link to **Open Original PDF**. The Original PDF is the quickest way to access the .pdf section on a PC or Laptop.

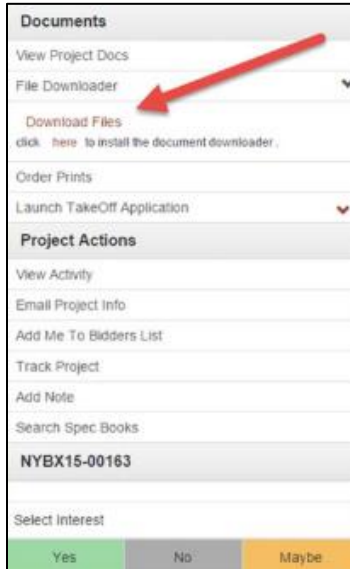
Users utilizing a mobile iOS device (such as iPhone or iPad), or other device that doesn't readily support a multi-page .pdf file, can open Page 1 in the **QuickEye Lite** program, then use the green forward and back arrows on the toolbar to scroll through subsequent pages.



## Documents ➡ File Downloader

**File Downloader** is an easy way to download an entire job or selected files to the user's computer.

To use this tool, it is necessary to install the **OPS Downloader Tool**, once installed click **Download Files** to open the requested Project in the **OPS Downloader**.



**Step 1:** Choose a location to store files.

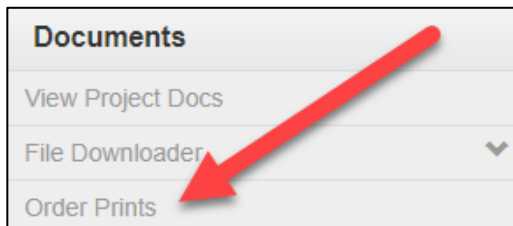
**Step 2:** Select the files to download. The user can select the entire job by selecting the **Main Project** folder, or select sub-folders, or individual files for a portion of the Project.

**Step 3:** Start Download. Optional features include; **“Convert Plan files to PDF”**, this will convert .jpg or .tif files to single page .pdf file(s). **“Bind Plan files to a Single PDF”**, will convert the aforementioned files and will merge them into a single pdf file within the folder structures. Finally, **“Bind PDF files to a Single PDF”** will also bind the individual Addenda and / or Spec sections that are posted as individual .pdf files, into a merged .pdf within the sub-folder structure.

Documents ➡ Order Prints

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To **Order Prints** from your home Plan Service, or their designated reprographics source, click **Order Prints** from the list of **Documents Controls**.



**Step 1:** Select the desired **Media Type** and **Reprographics Source**, and then click to **Proceed**.

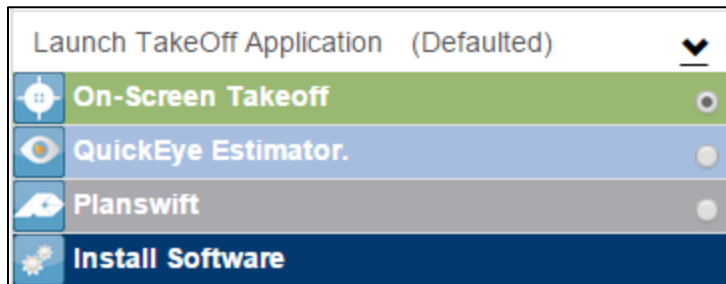
**Step 2:** Select the folders or files the user wishes to order. In most cases, a total price for your order will be calculated on the left side of the order screen. When finished, click **Send Order** at the bottom of the screen. A confirmation email detailing the order will be sent to the user’s email.

# Launch Takeoff Application

Project documents can be launched in Estimating Programs that include **On-Screen Takeoff, QuickEye Estimator, and Planswift.**

If the program the user wishes to use is not installed on their computer, they can download them from the **Online Plan Service** by clicking **Install Software link.**

To set the default **Takeoff Application**, select the **radio button** to the right of the **Application Name.**



# Project Actions ➔ View Activity

**View Activity** will list the companies who have **Viewed, Tracked, Rated Interest, Ordered Prints, Ordered a CD, or Emailed the Project.**

**Normal Log View** will list each action individually, while **User Log View** will list each action taken by a user, and list the number of times the action was taken.

**Specialty Log View** will list each view and will also list the specialty the user is listed under.


Normal User Specialty						
Viewed = 98	Saved = 1	Order Print = 0	Order CD = 0	Email = 0	Total = 109	
User ↑	Company Name	Email	Phone	Fax	#	
4068392993	Sylvan Site Services	tony@sylvansiteservices.com	(406) 628-7610	(406) 628-7627	1	
aceel	ACE Electric	rcrawford@aceelectricmt.com	(406) 248-1302	(406) 628-2128	1	
andersonmasonry	Anderson Masonry, Inc.	beckie@andersonmasonryinc.com	(406) 837-7730	(406) 837-7731	1	
Apexpainting	Apex Painting and Protective Coatings, Inc.	apexpainting@hotmail.com	(406) 228-9008	(000) 000-0000	2	
BBEXferguson	Ferguson Enterprises - Plumbing	michael.ryan@ferguson.com	(406) 252-4442	(406) 252-9822	2	
Biconcrete	Bi Concrete Design and Fabrication	bing@biconcrete.com	(406) 591-5596	(406) 655-4700	1	
billjohns	Summit Roofing	bill@summitroofing.info	(406) 829-9100	(406) 829-8450	1	
bruegseggar	Rain for Rent	bruegseggar@rainforrent.com	(406) 259-7216	(406) 259-7251	2	
ck2inc1	CK2 Construction, Inc.	chad@ck2construction.com	(406) 522-0300	(406) 585-5611	1	
clapper	Clapper Company	hsh@clapperco.com	(406) 252-9385	(406) 256-9588	1	
CondonJohnson	Condon-Johnson and Associates Inc	ljohn@ccondon-johnson.com	(425) 988-2150	(425) 988-2151	1	
Cosney	Cosney Corporation	dmcullen@cosney.com	(952) 249-0616	(952) 249-0615	1	
d9techrep	Division 9 Finishes	d9techrep@comcast.net	(509) 924-9411	(509) 924-9955	1	
davebrenden	Allied Control and Electric LLC	info@alliedcemt.com	(406) 969-6090	(406) 969-6089	1	
Dougl	Jackson Contractor Group, Inc.	dougl@jacksoncontractorgroup.com	(406) 542-9150	(406) 542-3515	5	

# Project Actions → Email Project Info

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Send other **Associates, Subcontractors, Architects** or **Suppliers** the **Project information** via email.

<b>Project Actions</b>
View Activity
Email Project Info



The **email function** is a powerful and effective tool for the users to quickly transmit Project information to others.

Fill in all known information and press **Send Project Email** to finish.

### Email Project Information

Fill in the recipient information and additional comments if needed then click "Send Project Email".

**To:**

**CC:**

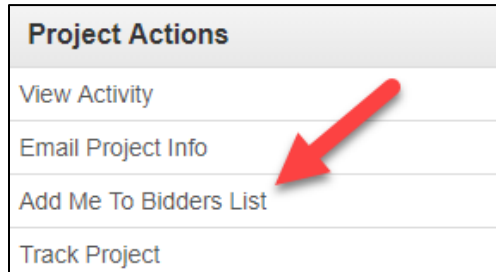
**From:**

**Subject:**

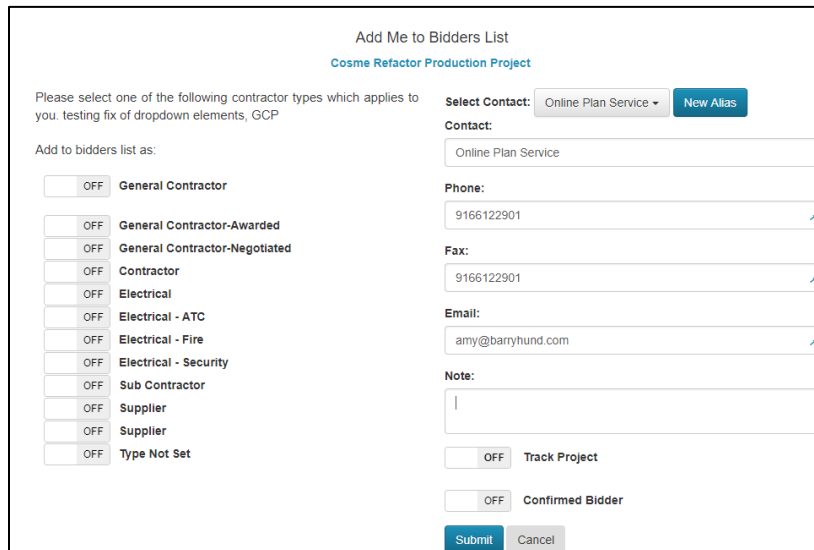
**Additional Comments:**

## Project Actions → Add to Bidders List

The user can quickly add their company to the **Bidders List** of any Project. With this feature users can select the trade they are bidding, select the contact within their company, and add notes if desired.




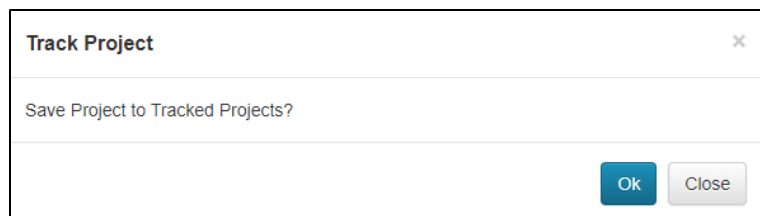
Fill in all known information and click **Submit** when done.

A screenshot of the 'Add Me to Bidders List' form. The form title is 'Add Me to Bidders List' and the project name is 'Cosme Refactor Production Project'. It includes a dropdown for 'Select Contact' (Online Plan Service) and a 'New Alias' button. Below this are fields for 'Contact', 'Phone', 'Fax', and 'Email'. A 'Note' field is also present. On the left, there is a list of contractor types with 'OFF' checkboxes: General Contractor, General Contractor-Awarded, General Contractor-Negotiated, Contractor, Electrical, Electrical - ATC, Electrical - Fire, Electrical - Security, Sub Contractor, Supplier, Supplier, and Type Not Set. At the bottom, there are checkboxes for 'Track Project' and 'Confirmed Bidder', and 'Submit' and 'Cancel' buttons.

## Project Actions → Track Project

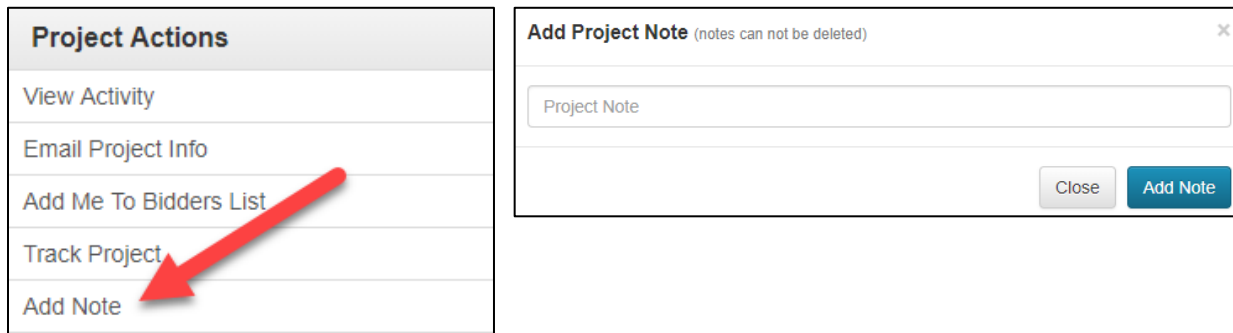
To track a Project, click **Track Project**, this will add the selected Project to **My Projects Tracked**.

To untrack the Project, click **Untrack Project** from the **Project Details** page or click the trash can icon  from the **My Projects Tracked** grid.

A screenshot of a 'Track Project' dialog box. The title is 'Track Project' with a close button (X). The main text asks 'Save Project to Tracked Projects?'. At the bottom right, there are 'Ok' and 'Close' buttons.

## Project Actions ➔ Add Note

**User Notes** can be added to a Project by clicking **Add Note**. Once added, **User Notes** will be listed at the top of the **Project Details** page, and will display notes from all users within a company, noting the **date** the note was added, the **user's name**, and the **note text**.



The image shows two screenshots. On the left is a 'Project Actions' menu with options: View Activity, Email Project Info, Add Me To Bidders List, Track Project, and Add Note. A red arrow points to 'Add Note'. On the right is a modal dialog titled 'Add Project Note (notes can not be deleted)'. It contains a text input field labeled 'Project Note' and two buttons: 'Close' and 'Add Note'.

**Project Notes** can also be viewed from the Project grids by clicking the enabled **Notes link** after a note has been added.



The image shows a row from a project grid. It includes an information icon, a number '6', a red arrow pointing to a 'Notes' link, the date '03/28/2019', and the text 'New project test for upload'.

## Settings / Info

User tools and settings can be found under the **Settings / Info** menu.

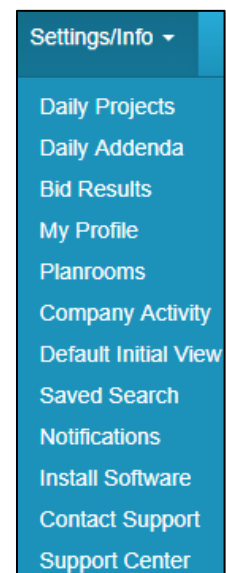
**Daily Projects:** Displays a grid view of new jobs as they are being entered into the **Plan Service Database**, sorted newest to oldest, received within the last 3 days.

**Daily Addenda:** Displays a grid view of addenda as they are being entered into the **Plan Service Database**. Sorted newest to oldest, received within the last 3 days.

**Bid Results:** Displays a grid view of Projects that have had bid results entered into the **Plan Service Database**, sorted newest to oldest, entered within the last 14 days.

**My Profile:** Will display the **user's information**, also allows them to update their account, add **specialties** and designate a **default specialty**.

**Company Activity:** Will display what Projects other users within a company have been looking at. The actions tracked include **Viewed, Rate Interest (Yes, No, or Maybe)**, and **Saved or Tracked**.



The image shows a dropdown menu for 'Settings/Info'. The menu items are: Daily Projects, Daily Addenda, Bid Results, My Profile, Planrooms, Company Activity, Default Initial View, Saved Search, Notifications, Install Software, Contact Support, and Support Center.

**Default Initial View:** Will allow users to choose what page they are directed to within the **Online Plan Service** upon login.

**Saved Search:** Will list the **Saved Searches** for the user, as well as allow them to enter a **New Saved Search**.

**Notifications:** Users can choose to receive a nightly email of **New Projects** and **New Addenda** received by the **Plan Service**.

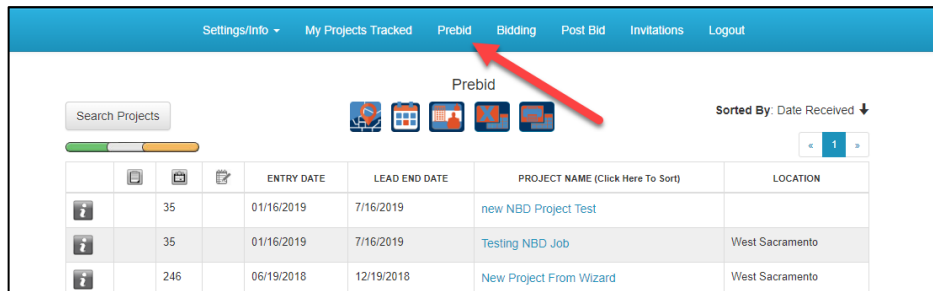
**Install Software:** Will provide links to download and install **On-Screen Takeoff**, **Planswift**, **QuickEye** and the **Plan Room Downloader**.

**Contact Support:** Will list the user's home **Plan Service** contact information.

**Support Center:** Will provide user guides and manuals.

## Pre-Bid Projects

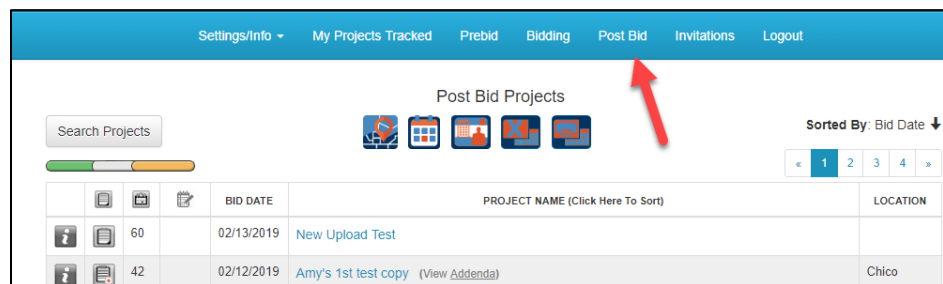
**Pre-Bid Projects** will list the data records for jobs in all **Pre-Bid stages**, sorted by date received.



	ENTRY DATE	LEAD END DATE	PROJECT NAME (Click Here To Sort)	LOCATION
35	01/16/2019	7/16/2019	<a href="#">new NBD Project Test</a>	
35	01/16/2019	7/16/2019	<a href="#">Testing NBD Job</a>	West Sacramento
246	06/19/2018	12/19/2018	<a href="#">New Project From Wizard</a>	West Sacramento

## Post Bid Projects

Utilizing the same functionality as the **Bidding Projects** grid, **Post Bid Projects** will list all Projects that bid before today.



BID DATE	PROJECT NAME (Click Here To Sort)	LOCATION
02/13/2019	<a href="#">New Upload Test</a>	
02/12/2019	<a href="#">Amy's 1st test copy</a> (View Addenda)	Chico