

PlanWell
Collaborate™

Log In

 Remember Me!
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PlanWell Collaborate accelerates AEC project team coordination and document sharing.

[More about PlanWell Collaborate](#)

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Overall	★★★★★
Ease of use.....	★★★★★
Price.....	★★★★★
Documentation	★★★★
Browser Compatibility	★★★★★
Scalability	★★★★★
Workflow Integration.....	★★★★★
Setup and Configuration	★★★★★
Performance	★★★★★
File Management	★★★★★
Training and Support.....	★★★★

BERTL
EXCEPTIONAL



Project team coordination and document sharing software for architecture, engineering and construction organizations

PlanWell Collaborate™ is an easy-to-use cloud collaboration solution specifically AEC market to raise efficiencies, project coordination, communication, and improve client services as well as free time to focus on design, engineering and construction. PlanWell Collaborate™ provides access to project contacts and editable project documents capabilities. The solution is easy to implement and quick to learn, PlanWell Collaborate™ is the AEC industry's most seamless project collaboration solution in the market today. With PlanWell Collaborate, projects start rapidly and stay on the right track with current project documentation and information. PlanWell Collaborate does not require the user to install or manage complicated software and features a cost-effective software-as-a-service (SaaS) pricing model, users can be added or removed from the project as their participation is required.

Key Buyer Benefits

- 100% web-based, anytime and anywhere access
- Microsoft Outlook integration
- Simple to use, secure, and highly flexible
- Accelerate knowledge transfer by sharing documents, project schedules, and task assignments with remote participants
- Increases project team productivity and shorten project delivery at reduced costs
- Utilizes resources in best possible way to maximize team's efficiency
- Users can organize and find project information, documents, and emails for all projects
- Share and track published project information with external team members across all projects
- Streamline project execution processes, including design review, contract administration and more
- Users can effectively manage communications and raise accountability

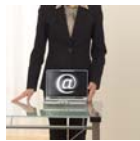
Today's AEC Challenges

PlanWell Collaborate effectively replaces FTP, emails and spreadsheets and efficiently automates team tasks, document collaboration, and project communication. PlanWell Collaborate addresses the following major AEC project and traditional technology challenges:

- Email Management
- Comprehensive Search
- External Communication
- Document Review Process
- Project Tracking and Monitoring
- Contact Administration
- LEED Administration
- Integrated Project Delivery

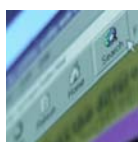
The sections below describe how PlanWell Collaborate addresses these different needs and challenges.

Email Management



Email has become an increasingly important source of project information and the established medium for decision making. However, email is disconnected from project files, and is often hard to organize. The PlanWell Collaborate solution stores email within the project files in just a few clicks, and makes searches easy and quick. This solution ensures that all email communication concerning the project is organized and team members can find and open and refer to relevant emails with ease.

Comprehensive Search



Increasingly complex projects, geographically dispersed virtual teams, and large volumes of email can make finding a critical document or piece of information a time consuming endeavor. The PlanWell Collaborate solution records all project notes, document markup changes, meetings, emails and task summaries, allowing for searches that take mere seconds to locate documents in which the search terms appear. The software keeps all project data organized and in one place thereby reducing the effort and time needed to locate valuable project information. This helps eliminate communication delays and minimize project stress.

External Communication



Emailing large electronic files often encounters problems due to file size limitations, and FTP sites tend to be inconvenient and insecure. The PlanWell Collaborate solution overcomes these hurdles with PlanWell Collaborate's Document Repository, a

simple yet secure alternative to FTP servers and project extranets. PlanWell Collaborate's solution has logging, tracking, notifications and document expiration management built right in. With PlanWell Collaborate, documents can be shared with external team members, even those without access to the service. Both project packages and individual files can be made accessible to anyone via a URL generated by the software.

Document Review Process



The process of going through document reviews early in a project's lifecycle often times means more collaboration from all team members, but the byproduct is a proliferation of revisions that need to be shared, compared and reviewed by team members who are not always working with the same design authoring tools. PlanWell Collaborate's Document Repository captures file markups for easy tracking, reviewing and sharing. The process of marking up CAD renderings is easy to do and lets users add comments so that they can easily track the exact design changes applied. Project teams share, access and manage project documentation in a secure online environment. Virtual project teams will be on the same page as all project information is stored in a central repository. Files are automatically tracked, and team members are notified in real-time as documents are updated.

Project Tracking and Monitoring



In the midst of executing a project, with the reality of unanticipated changes in design, scope, field conditions and regulatory revisions, it is hard to foresee which challenges threaten to take a project off track. PlanWell Collaborate helps busy architects and engineers monitor everything about their projects – from the individual action items to overall activity against the project timeline and milestones as a whole. The software features a built-in system for setting up meetings, project communications, task details, summaries, and tracking actual effort spent on tasks. All of these tools help project managers quickly identify when project processes threaten to deviate from the plan, and they can take corrective action. By improving project coordination, AEC project managers can manage more projects with less effort. The software enables team collaboration to be more efficient by automating the tracking of project tasks and deadlines. This leads to less stress for the project manager.

Contact Administration



Contact Administration is considered one of the most difficult stages of project execution and can overwhelm the best project managers with the

manual tasks of logging, tracking, routing and reviewing hundreds of documents. Most traditional tools used to keep track of documents are currently limited to working with spreadsheets or other elementary tools. The PlanWell Collaborate solution automates manual tasks right from your email inbox. This ensures less time is wasted logging and tracking information and leaves more time to handle more productive tasks. PlanWell Collaborate eliminates time-consuming project administration, and with features like Outlook integration users can work entirely in their email. Users can import their Outlook contacts directly into the software by synchronizing their email or via a CSV file. All emails generated for a given project are logged within the specific project automatically.

LEED Certification



Leadership in Energy & Environmental Design (LEED) is an internationally recognized green building certification system, providing third-party verification that a building or community was designed and built using strategies intended to improve performance in metrics such as energy savings, water efficiency, CO₂ emissions reduction, improved indoor environmental quality, and stewardship of resources and sensitivity to their impacts. The administration of documents required to certify that a project as a sustainable design is a massive task of project information management for the internal and external project team.

The PlanWell Collaborate solution automates the logging and reporting of documents required for LEED certification, manages the assignment and tracking of action items on certification checklists and enables the dispersed project team to function as a tight knit unit.

Integrated Project Delivery



Integrated project collaboration generates more input from more team members during more phases of the project. The resulting increase in project emails, transmittals, submittals, markups and action items demands specialized software to manage them effectively and efficiently. PlanWell Collaborate software for project information management streamlines logging, filing, delegating, marking up, and tracking design changes. In addition, the software helps reduce project costs as project plans and designs can be reviewed and evaluated in the early stages of the project by team members who can offer suggestions and recommendations. The later in the construction process that a design change is introduced the more costly it will be to implement. PlanWell Collaborate helps reduce costly change

orders early in the process.

PlanWell Collaborate also offers the following features:

- Organized email communications incorporated with all other project documents
- Document Repository makes finding project files a simple task
- Locate every email associated with a project with ease as each email is logged to an individual project
- Reduce and eliminate mistakes early in the design process
- Assign, track and resolve action items
- Log and manage all written project communications
- Schedule project meetings with each team member
- A single point to access project files, project calendars and communications
- The Document Viewer lets users view drawings and graphics for many common AEC-specific file formats, negating the need to have the original software on each computer or laptop
- The Project Album lets users take pictures of the work site and upload them to the system to share with all members of the project team
- Mark up, add comments and manage drawings and documents using the Document Viewer
- Check project files in and out of the system with ease
- Document and identify changes in iterative sets of drawings
- Create, delegate, manage and report on assigned action items
- Files too large to email can be shared without the set-up hassles and security limitations of FTP sites
- Create and distribute project packages containing files and project documents relevant per project phase
- Provide secure web-based access to shared information for external team members

Getting Started

PlanWell Collaborate offers a 30 day free trial where users can register and experience the solution for themselves without any restrictions. Users are given the ability to add as many as 50 users to a project during the trial period. All users added to the project are listed as trial users and their access will expire at the same time as the trial expires. Users who purchase the solution at the end of the trial are then able to pick and choose which users to upgrade.

PlanWell Collaborate features three types of user license designation that can be assigned to a list of contacts in the system. These include the following options: Hosting User,

Collaborative User and Free User. The Hosting User is the most comprehensive user available in the system. This type of user is capable of creating projects, creating contacts, tasks and is responsible for defining the different aspects of the project. Collaborative Users have some restrictions which prevent them from being able to create a project or add contacts to an existing project. The Free User is created by the Hosting User when they add new project contacts.

Configure your Browser to work with PlanWell Collaborate

In order to get most out of your 30 day(s) trial, we recommend that you follow the recommendations on our software configuration page in order to verify that your browser is optimally configured for Planwell Collaborate.

While you're there, please download and install our productivity enhancing MS Outlook 2007 plug-in and our speed enhancing ARC Turbo Accelerator for blazing fast file transfers.

Please do not show this wizard again Previous Next Not Yet

After registering, users are guided via a wizard through the initial project setup process.

The wizard provides the Hosting User with useful information designed to educate the user on how to configure their web browser, create a project, add contacts and project teams, and upload project files.

Edit Project

Project Information Invitation Message **Settings** Project Contact info

* Project Number: 0001
* Project Name: BERTL
* Project Start Date: 10/7/2010
* Project End Date: 10/28/2010
Project Description: ARC PlanWell Collaborate Review
* Project Address: 353 Route 46 West
Project Address2: Suite 100
* City: Fairfield
State: New Jersey
Country: USA
* Postal Code: 07006

Save Changes & Close Close

The wizard walks the Hosting User through the process of creating a project in the system.

Creating a project in the system is very simple to accomplish. The Hosting User adds a project number, project name, start and end dates, description, and the address of the project. The wizard also has a section where the user can create an invitation message, set project settings, and add the project owner's contact information.

Edit Project

Project Information **Invitation Message** Settings Project Contact info

Project Invitation Message :

Please join me on this project.
Thank you,
Hugo Palacios

Save Changes & Close Close

The Hosting User can create an invitation message which is sent out to contacts automatically as they are invited to participate in the project.

Edit Project

Project Information Invitation Message **Settings** Project Contact info

Reimbursable
 Add to Favorite Projects

Save Changes & Close Close

Projects can be set to reimbursable and users can add a project to their favorites from the Settings screen.

Edit Project

Project Information Invitation Message Settings **Project Contact info**

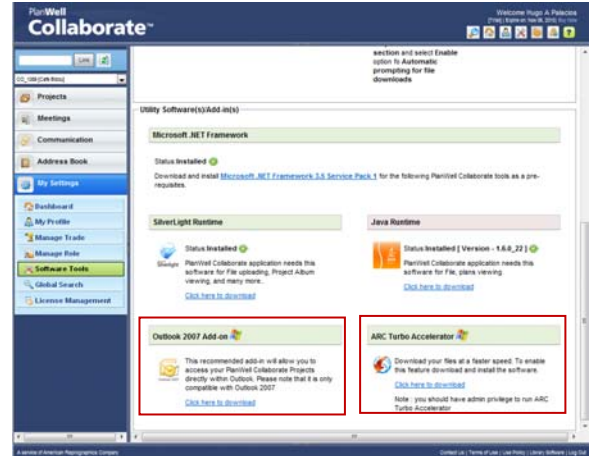
Project Owner: Hugo A. Palacios
Company: BERTL
Work Phone: 973-882-7801
Cell Phone: 973-670-7046
Email: hugo@bertl.com

Save Changes & Close Close

The Project Contact information can be set within this tab. The information entered in this tab is then made visible to all of the members in the project team.



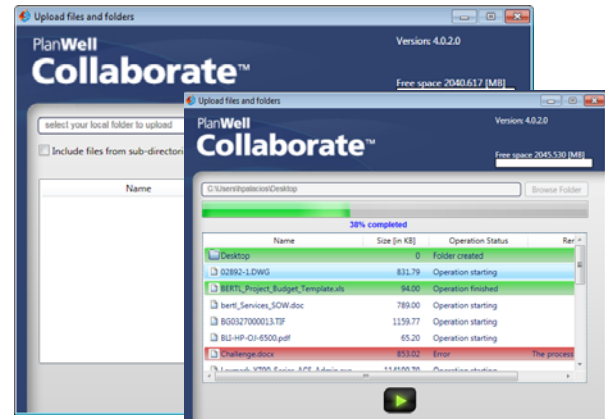
A user's web browser also needs to undergo a browser compatibility review to ensure that the browser is optimally configured to work with PlanWell Collaborate.



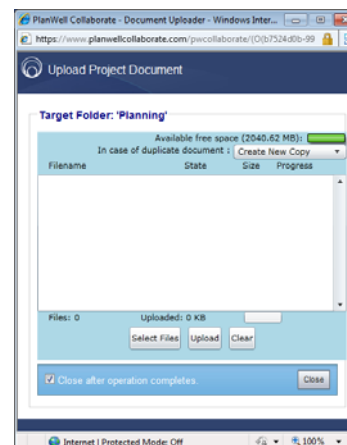
Users can enhance their experience with this application by installing a plug-in for MS Outlook 2007 which enables the user to access PlanWell Collaborate directly within Outlook.



Helpful tips in the Software Tools section help the user through the process of setting the browser security settings which will enable several functions of the software to work without interruption.



The Upload Files and Folders option utilizes the ARC Turbo Accelerator plug-in to speed up the file transfers. This tool is especially useful when uploading a large number of folders and sub-folders directly onto PlanWell Collaborate's Project Files repository.



Users can upload folders and sub-folders directly into the document repository while retaining their original folder structure. The document repository system is flexible and allows the project administrator to set restrictions to a folder along with any sub-folders it contains. Additionally, the project administrator can set specific restrictions to sub-folders allowing some users to

SOFTWARE SOLUTIONS REPORT

see all of the main folders contents while limiting access to other users for some sub-folders. Users can also upload documents using the web-based Document Uploader found in the Document Repository for each project.

After installing the pre-requisite software, the user can then start working on the following tasks:

- Create a project
- Create a project team
- Manage roles and permissions
- Create an address book
- Create and upload folders and files
- Send out project invitations
- Schedule project meetings
- Create and assign tasks to team members

Screen Area	Purpose
	users quickly navigate to frequently used pages such as Global Search, Home, My Profile, Tools, My Blog, Log Out and the online Help screens.
Main Menu	From the Main Menu users can easily get to the following pages: Projects Meetings, Communications and Address Book.
Sub-Menu	The Sub-Menu displays the options below the selected Main Menu page.
Dashboard	The Dashboard displays all the important project information related to the Main and Sub-Menus chosen.

My Project Lists (All)– All Projects provides a single point of access to a list of projects that a user belongs to. **Favorite Projects** provides a customized list of a user's favorite projects. Favorite Projects works much like a bookmark. Users can select specific projects as their favorites and then quickly access them from the Favorite Projects tab.

Above and below: The “My Project List” page of PlanWell Collaborate’s software solution gives users a single point of access to all projects in the system. When users select a project, the “Project Home” summarizes the project’s recent tasks, action items, recent files, email communications and other project details. The “My Project List” also provides access to a firm’s complete portfolio of active projects.

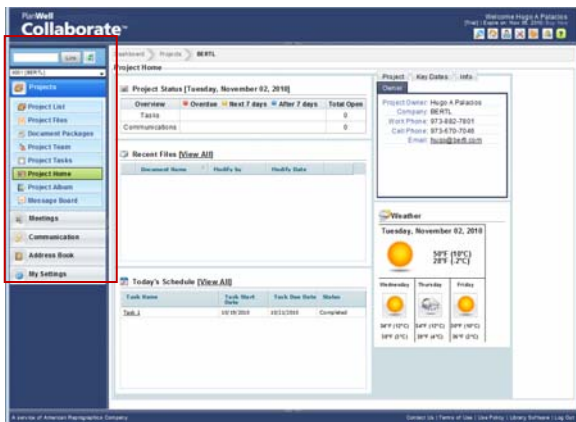
Users can access PlanWell Collaborate within Microsoft Outlook. The image above shows the “My Project List” page.

Screen Area	Purpose
Quick Links	The Quick Links on the top right of the page lets

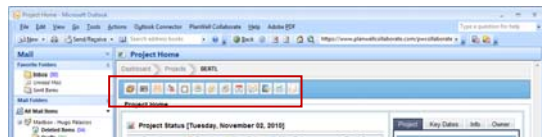
The Project Home as shown in Outlook 2007, lets users quickly see tasks assigned to them, recent files worked on, and shows project details, key project dates, project information, and project owner contact details.

Each project user has a Personal Dashboard, which displays at a glance all the activities and messages that refer to the user. The Dashboard consists of the following: My Checked Out Files, My To Do List, My Projects, Message, Task, and Meetings.

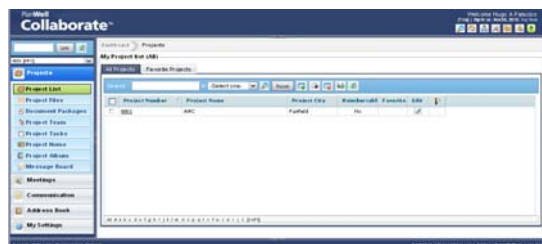
Project Home –displays Project Status as a summary of tasks and communications assigned to the user and contains a color coded indicator letting the user know if the task is on target or overdue. The Project Home also contains a section called Recent Files which displays a list of the most recently viewed and modified files. Today's Schedule also shows the user a list of current tasks along with their start and due dates and current status.



The same project details as shown within Outlook can be accessed via a web browser. When viewing projects via a web browser, a helpful menu is shown on the left side of the screen.



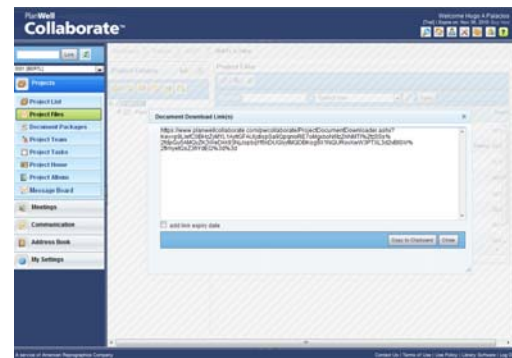
When viewing a project within Microsoft Outlook, a more condense menu is shown so that the user has access to the same options.



The Project Lists shows all of the projects created by the

Hosting User. Users can select projects as their favorite. In large organizations with dozens or hundreds of projects running at the same time, the Favorite Projects feature enables users to quickly sift through their Favorites to help them be more productive.

Project Files – In this is a section users can access project files and documents uploaded to the system. This section is designed to overcome the file size limitations encountered when transferring files via email and FTP. Users can subscribe to receive a notification anytime a project file is added, deleted, or modified. Those opting for the notification then receive an email notification when a change is made. Project files can also be made available to external project participants who are not part of the project.



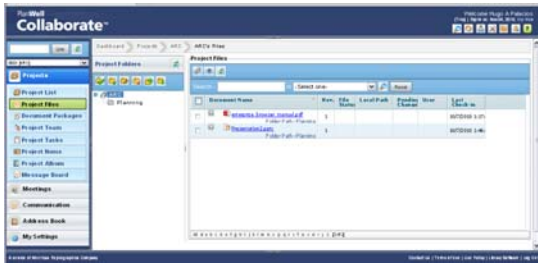
Users can create an email containing a URL link to specific files or project packages stored in the document repository, from which the recipient can download the file(s). External project team members can download the files without any special software.

This feature within PlanWell Collaborate's Project Files helps users overcome the file size limitations encountered when transferring large files via email to external team members. By providing users with a simple URL, users can simply click on the link and instantly download the file directly on their PC.

PlanWell Collaborate utilizes Hypertext Transfer Protocol Secure (HTTPS) which is a combination of the Hypertext Transfer Protocol with the SSL/TLS protocol to provide encrypted communication and secure identification. HTTPS connections are often used for payment transactions on the World Wide Web and for sensitive transactions in corporate information systems.

PlanWell Collaborate's Project Files are hosted in the cloud and project files stored in the document Repository can be made available via email by adding the system generated link in the body of the email. Project Team members with direct

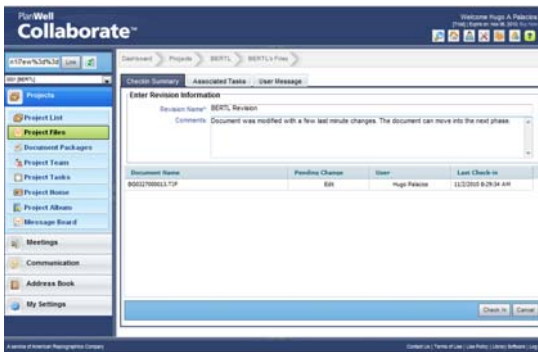
access to the Document Repository can access the same project files, view them using the Document Viewer and download the files directly to their PC or laptop.



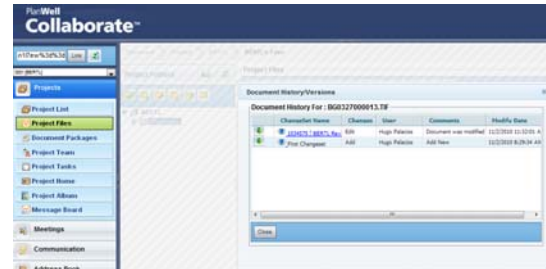
Users can check files in and out of the system from this location. Clicking on any of the files will cause the Document Viewer to launch making the file visible to the user.



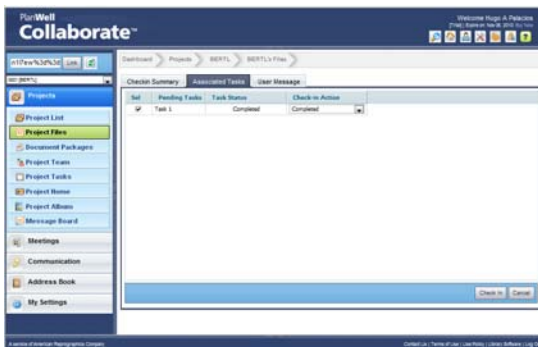
Messages can be associated with specific files and a message can be generated and emailed to project recipients.



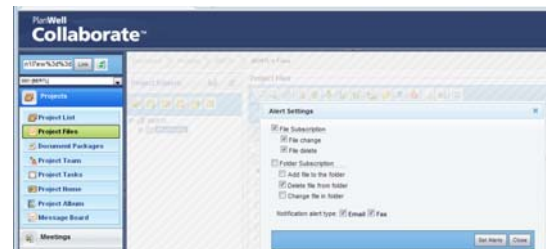
When checking files back into the system, users are required to enter revision information which is linked with the specific file. In the image above, the user must enter a revision name, and comments indicating the changes made to the file.



The system keeps a log of changes made to documents stored in the Document Repository.

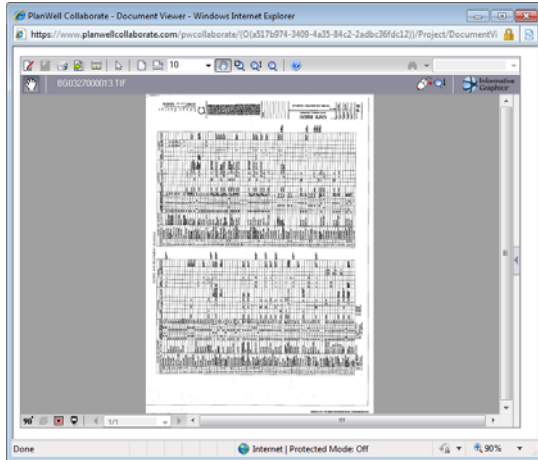


Changes made to a file can be associated with specific project tasks.



Users can also set up Alerts within the Project Files section of the service.

The Alert Settings allow the user to subscribe to specific files and file folders. Users can indicate if they want to be notified of changes made to the file or if the file is deleted. Users who subscribe to receive folder alerts, can select to be alerted any time a file is added, deleted or changed within the folder. As work progresses, team members can seamlessly republish and receive future revisions, ensuring that all project team members are working from a common, up-to-date set of coordinated reference drawings and models.



PlanWell Collaborate's Document Viewer makes project files accessible to all project team members.

Document Viewer – PlanWell Collaborate's Document Viewer supports a large list of file formats allowing users to view the files and mark them up with easy-to-use annotation and drawing tools. Users do not need to have the native application used to create the file in order to view them. The Document Viewer provides flexibility and offers users cost and time savings as they are not required to learn or purchase software in order to view the project files. PlanWell Collaborate's Document Viewer opens all types of file types, including BMP, DGN, DWF, DWG, DXF, GIF, JPEG, PDF, PLT, PNG and TIFF, and raster images. PlanWell Collaborate's Document Viewer contains markup tools that do not alter the original source file; instead, they create a new layer which contains the markup using the underlying source file as a background. Additional supported file types include the following:

Neutral Formats

Portable Document Format
Content Sealed Format
Tagged Image Format

CAD Formats

000 HPGL Plot File
906/907 Plot File
AutoCAD Drawing (2D) (through version 2011)
AutoCAD DXF (through version 2011)
AutoCAD Web Format (through version 2011)
Auto-trol Raster
Auto-trol Vector
CADKEY

Extension

(PDF)
(CSF)
(TIFF/TIF)

Extension

(000)
(906/907)
(DWG)
(DXF)
(DWF)
(DX)
(DG)
(PRT)

CAD Overlay (RLC)
Computer Graphics Metafile (CGM)
EDMICS (EDM)
GTX Group III, IV (G3, G4, CG4)
GTX Runlength (RNL)
HP CAD ME10 (through version 13) (CMI, MI)
HPGL Plot File (PLT)
IGES (2D) (version 5.2) (IGS, IGES)
Inventor (2D) (versions 5.3 - 2008) ** (IDW)
MicroStation Drawing (through version 8.1) (DGN)
MicroStation Group IV (CIT)
MicroStation Runlength (RLE)
MYRIAD 3D View Sets (MVS)
OrCad (version 10) (DSN)
Solid Edge Drawings (2D) (versions 8 - 18) (DFT)
SolidWorks Drawings (2D) (versions 97 - 2009) (SLDDRW)
Wavesoft (MOT)

Imaging Formats

CALS (Group IV) (CAL, CG4, GP4, MIL)
DCX (multipage) (DCX)
EDCARS (EDC)
Formtek Raster (FTK)
GIF (GIF)
ISO 8613/CALS (ISO, CAL)
JPEG Compressed Image (JPG, JPEG, JP2)
PC Paintbrush (PCX)
Portable Network Graphic (PNG)
Raytheon G4 / Navy DIF (DIF)
Tagged Image File (TIF, TIFF)
(BMP)

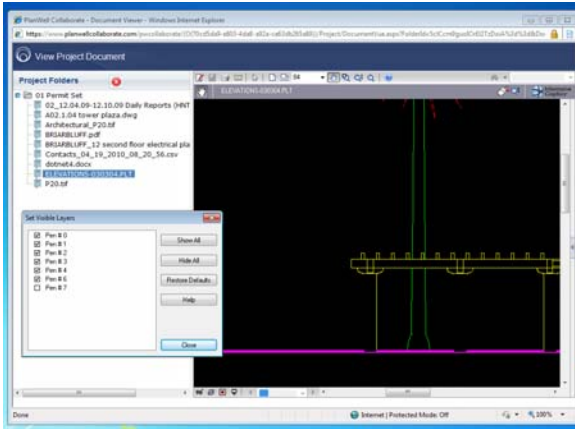
Windows Bitmap

Document and Image Formats

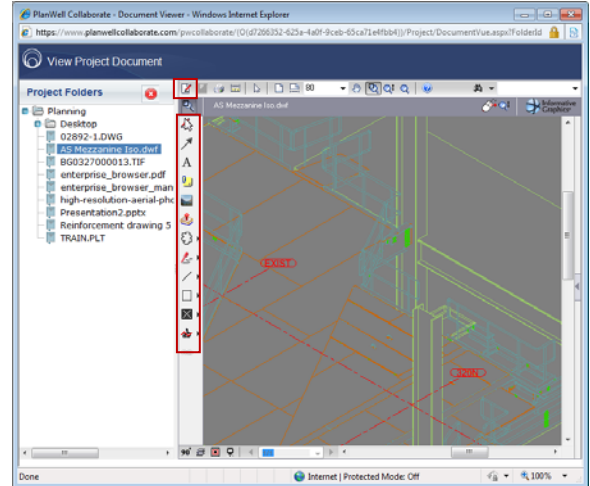
Corel Draw (CDR)
Corel Presentations (SHW)
DataBase Formats (DBF)
DocuWorks (XDW)
FAX CITT Group 3 Fax (FAX)
Hyper Text Markup Language (HTML, HTM)
Microsoft Open Office XML (DOCX)
Microsoft Excel (XLS, XLSX)
Microsoft PowerPoint (PPS, PPT, PPTX)
Microsoft Visio (VSD)
Microsoft Word (DOC, DOCX)
Microsoft Works (WDB)
PageMaker (P65)

Extension

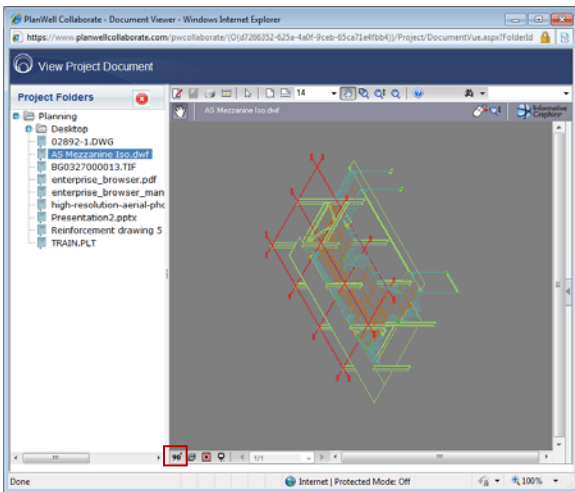
(CDR)
(SHW)
(DBF)
(XDW)
(FAX)
(HTML, HTM)
(DOCX)
(XLS, XLSX)
(PPS, PPT, PPTX)
(VSD)
(DOC, DOCX)
(WDB)
(P65)



Within the Document Viewer users working with PLT files can indicate which Pen number they want to view or hide. This enables users to focus in on specific areas of a rendering pertinent to their knowledge.



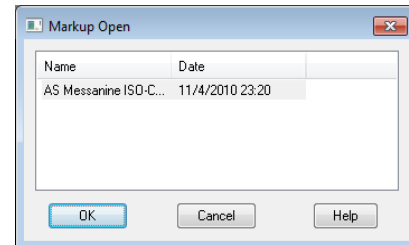
Within the Document Viewer users can add markups to individual files. The Markup toolbar contains related groups of markup tools. To invoke the Markup Toolbar, the user clicks on the Standard Toolbar and selects New.



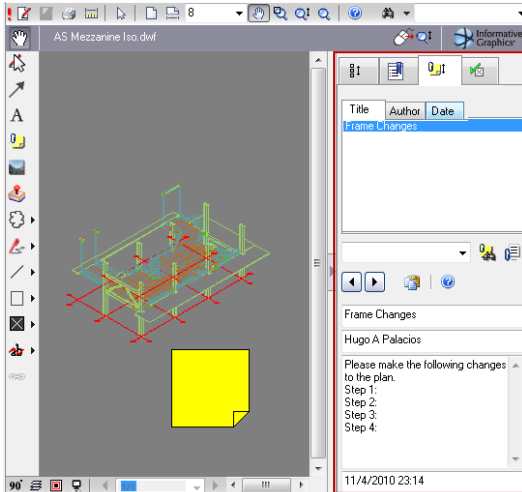
Users can rotate images at 90 degree intervals within the viewer.

Additional features of the Document Viewer include the ability to print the file, measure lengths between different elements in the file, and view the file under different zoom options.

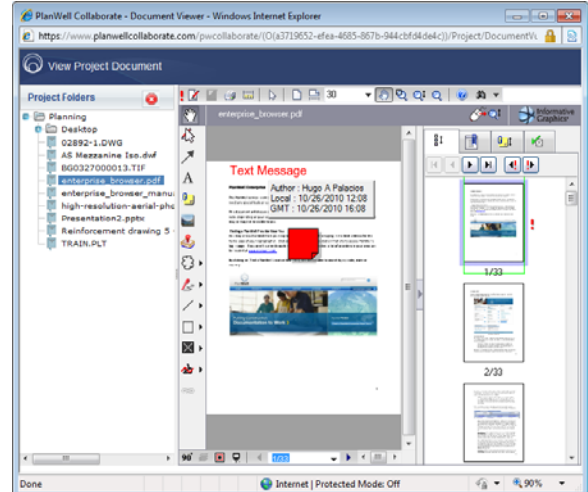
Document Viewer/Markup – PlanWell Collaborate users can review, mark up and comment upon project drawings and documents just as you do in a physical redlining process. Users can quickly create multiple markups for a CAD drawing or any of the supported file formats, link them to action items, stamp them as part of a design or review process and then email or transmit them within the solution to all project team members. Markups allow users to annotate documents without altering the document itself. Users can create new markups, open an existing markup for editing, overlay one or more markups on the source document for review, and permanently publish markups.



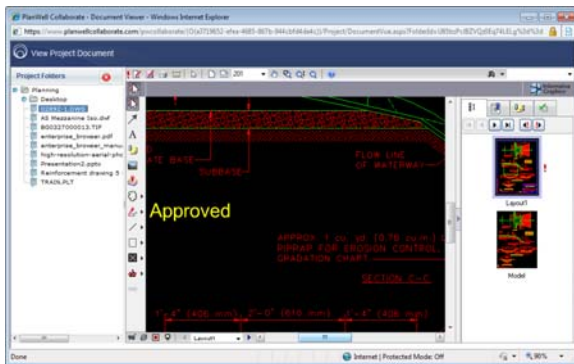
All markup entities are saved in a markup file, which is associated and overlaid on the image. There can be multiple markups per file.



A new layer is automatically created for each new markup, allowing users to see other author's markups, but not edit them.



After a markup session is completed, automated emails can be sent out to users monitoring specific files letting them know that the document has been updated and needs to be reviewed and commented on by members of the project team.

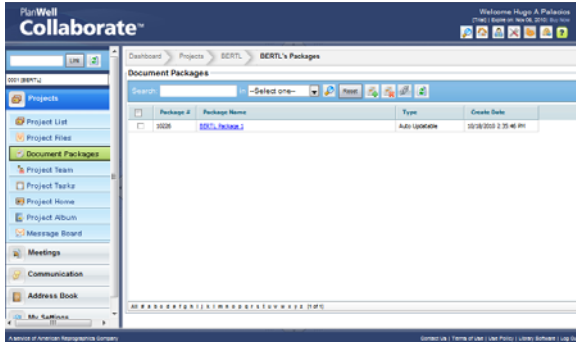


Above and next column: Within the Document Viewer users can markup the document by adding comments, stamps, arrows, lines, shapes, bubbles, redact options, and highlight, underline, and cross out text. All changes made within the document are tracked and a stamp is added to the document automatically.

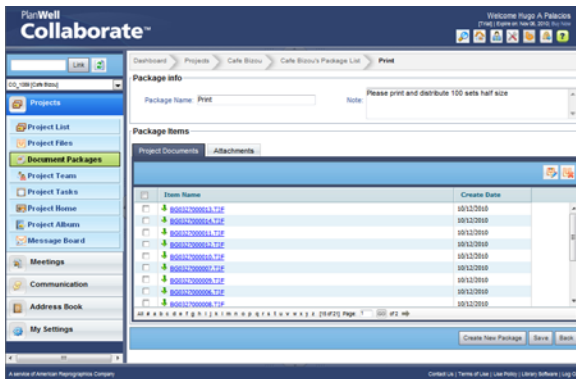
Using the markup tools, PlanWell Collaborate users can browse, preview and add comments to each and every file in the project's Document Repository, providing an audit trail of the decisions in the design, construction and delivery phases of the project. After markups have been reviewed and corrections incorporated into the underlying source drawings and models, document markups remain a permanent part of the project record. Several iterations of the design documents can be published and put through the markup/review process in a simple project. The Document Repository helps the user to keep track of all the changes in each phase of the project.

Document Packages - PlanWell Collaborate lets users create packages from selected project files uploaded into the Document Repository. The system stores these packages in the Document Packages section of the service. The files posted in this section can be accessed via the PlanWell Collaborate website or within Microsoft Outlook. Team members can view, markup and review the Document Package contents, send them to other project team members, create record copies of document sets at key project milestones, and compare their contents with recorded copies or updated versions. Document Packages can also be used to store and archive project files at the conclusion of different project phases. In addition, Document Packages can be made accessible to external team members and downloaded from the Document Repository via a URL. Document Packages are very helpful especially when transmitting document changes to both internal and external team members. This feature is also helpful during the process regulatory and permit process.

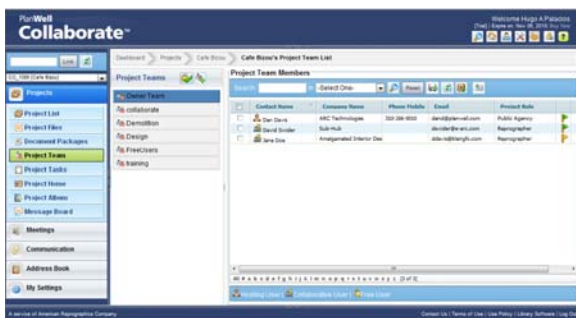
A large number of files can be made available to them electronically during their review process.



Above and below: Project team members can create document packages from files stored in the Document Repository.

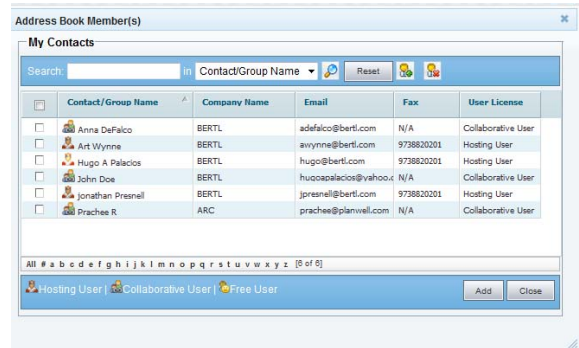


Document Packages provide a source for the latest project information, helping distributed teams coordinate revisions of CAD or BIM files. As work evolves, internal and external team members can seamlessly republish and receive future revisions, ensuring that all members of the design team are working from a common, up-to-date set of drawings and models.

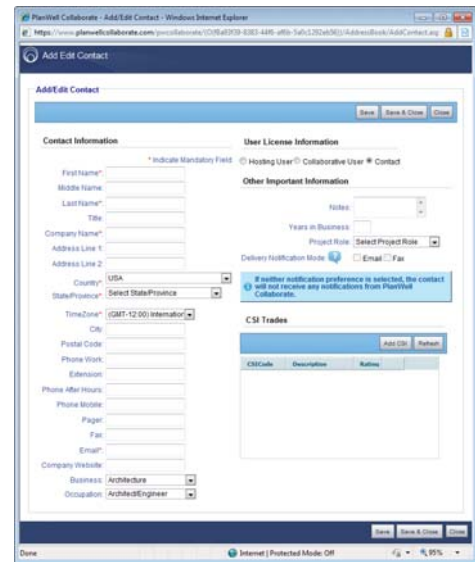


The Hosting User has the ability to view, add and edit each of the project teams and their members using the Project Team List.

Project Team – The **Project Team** section of the service is used to assemble, manage, and group project team members. The Hosting User can add, delete, and assign project roles to all project team members. The process of adding a team member to a project requires a few simple steps. Project team members can be added to the system manually or synchronized from Microsoft Outlook Contacts.

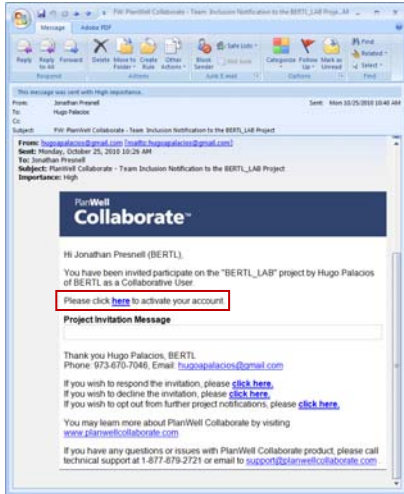


Users can be added to teams within the Project Team section of the service.



New project team members are added as a contact into the system and are then sent an email invitation to join a project.

Contacts invited to participate in a project can activate their account and join the project by clicking on a link provided in the email. If the user has questions about the project they can contact the Project Owner using the contact information provided in the email. Within PlanWell Collaborate project invitation messages can be created and then automatically sent to all contacts invited to participate in a given project.



The contact invited to participate in a project receives an email notification to join the project.

Invited users who are new to PlanWell Collaborate and accept an invitation to join a project are taken to the PlanWell Collaborate website where they must login, register a username and password and verify their contact information is accurate. By default, these users will be automatically enrolled in the project and have access to view project tasks, calendars and files stored in the document repository provided they have been given the proper access rights.

New Project Invitations

	Project #	Project Name	Start Time	Invited By
<input type="checkbox"/>	CO_1089	Cafe Bizou	5/10/2010	Dan Davis

Accept Selected Projects Close

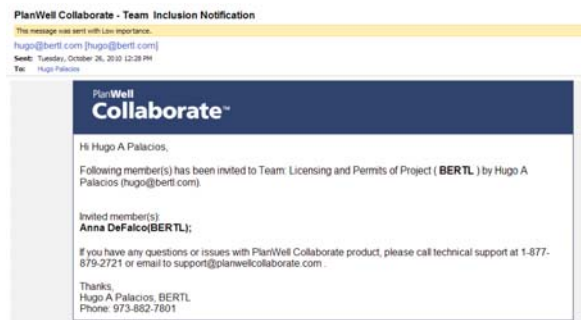
Users who are already enrolled in the PlanWell Collaborate solution receive a new project invitation and can accept their invitation directly within the system.

Project Owners can create teams and assign them specific permissions within the specific project they are working on. Users working on multiple projects can have different restrictions and permission settings assigned to them. The system is very flexible and also gives the Project Owner the ability to set policies to specific project folders and files stored in the Document Repository.

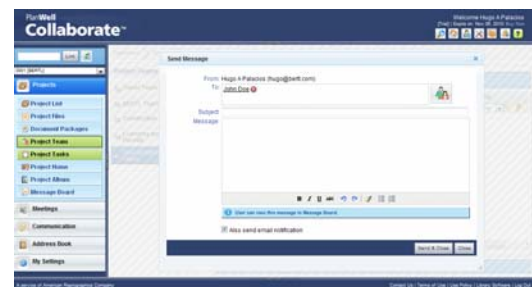
Permission of BERTL Team

Permission	Allow	Deny
Full Control	<input type="checkbox"/>	<input type="checkbox"/>
Read Folder	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Download Files	<input type="checkbox"/>	<input type="checkbox"/>
Upload Files	<input type="checkbox"/>	<input type="checkbox"/>
Create/Update Folder	<input type="checkbox"/>	<input type="checkbox"/>
Create/Update Task	<input type="checkbox"/>	<input type="checkbox"/>
Create/Update Meeting	<input type="checkbox"/>	<input type="checkbox"/>
Manage Permission	<input type="checkbox"/>	<input type="checkbox"/>
Create Team	<input type="checkbox"/>	<input type="checkbox"/>
Create/Update Package	<input type="checkbox"/>	<input type="checkbox"/>
Delete Package	<input type="checkbox"/>	<input type="checkbox"/>

Users' permissions options within the system are flexible, comprehensive and provide an added layer of security.

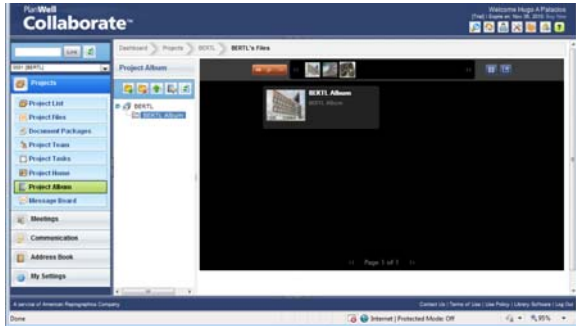


Whenever a new team is created in the project and a member is added, the system automatically notifies the Project Owner and sends out a Team Inclusion Notification.

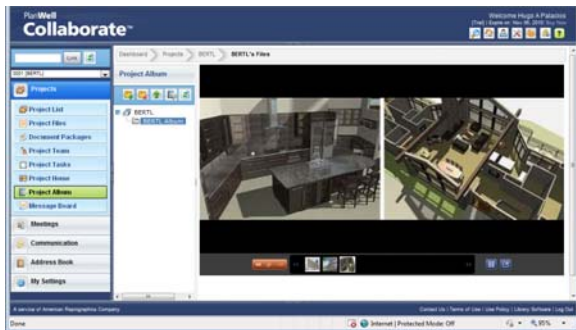


Users can send email messages from the Project Team List to all team members or specific individuals on the team. All communications created in the system are stored automatically and provide organization for users working on multiple projects.

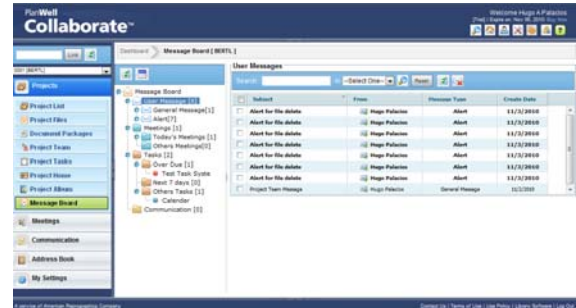
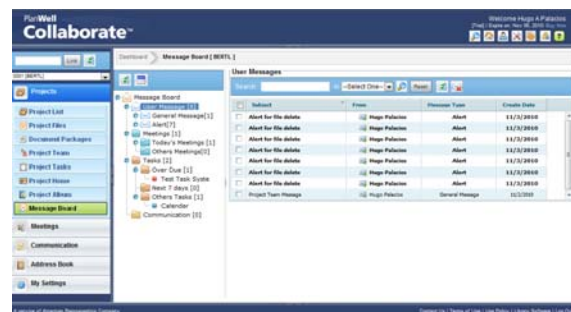
Project Album – The Project Album feature allows users to organize images into albums. The feature looks and feels like Flickr®. The Project Album lets users share and embed photographs, JPEGs, TIFFs, BIM and CAD renderings.



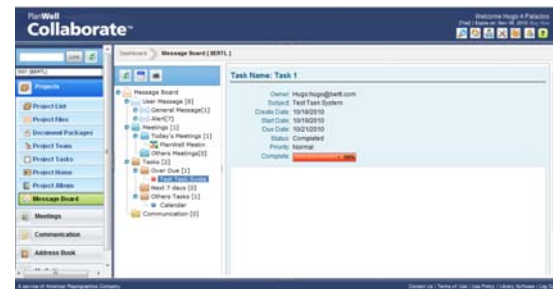
Above and next column: Users can browse photos with small thumbnails and create a slide show.



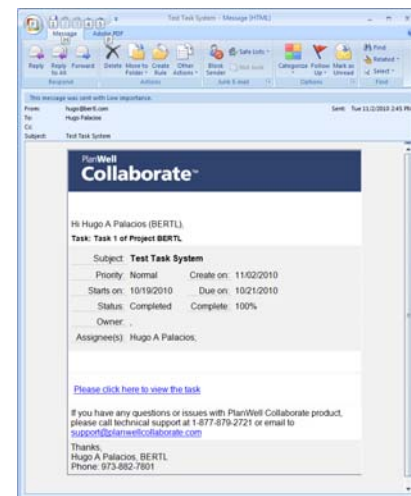
The Photo Album slide show can be viewed in full screen mode so that users can see a larger version of the images in the album.

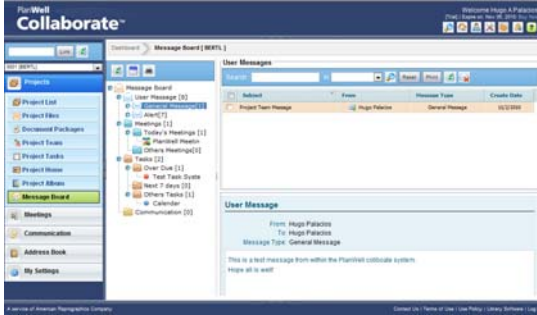


Message Board – The Message Board is structured as a tree menu which enables the user to view detailed information related to user messages, meetings, tasks and communications generated for a specific project. The Message Board stores meeting invitations and information related to previous and future meetings the user is slated to participate in.



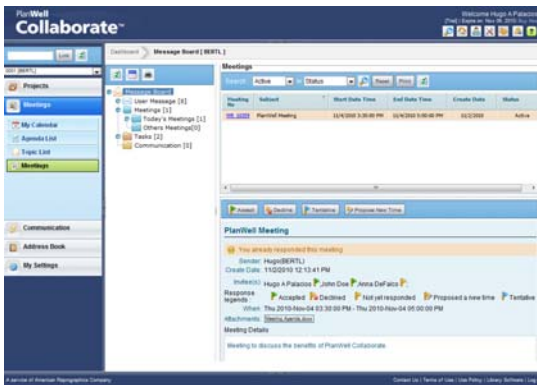
Above and below: After a user within the project finishes a task, a log of the task activity is automatically generated and stored in the system. A notification is then sent to all team members and is displayed in the User Message folder.



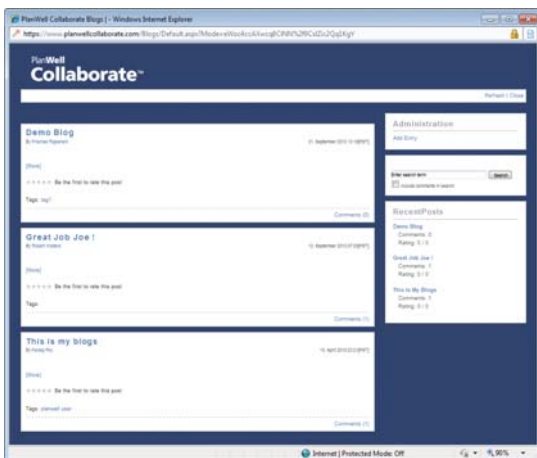


Users can view all project related messages sent through e-mail within the User Message folder.

All project correspondence is captured by the system and is accessible through the user's Dashboard. E-mail can be viewed, and replied to from within this frame. The user can also compose new messages to send to other project users or groups.

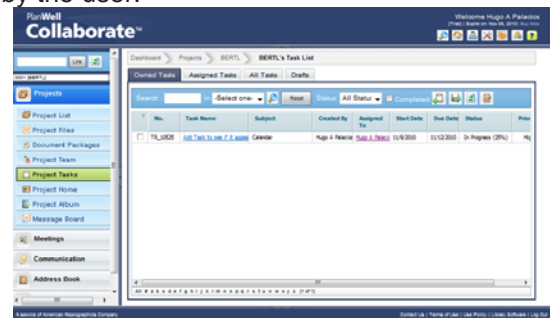


Today's Meeting (shown above) displays the meeting number, start and end time, created date and status. Within the selected meeting, users can see specific details associated with the meeting.



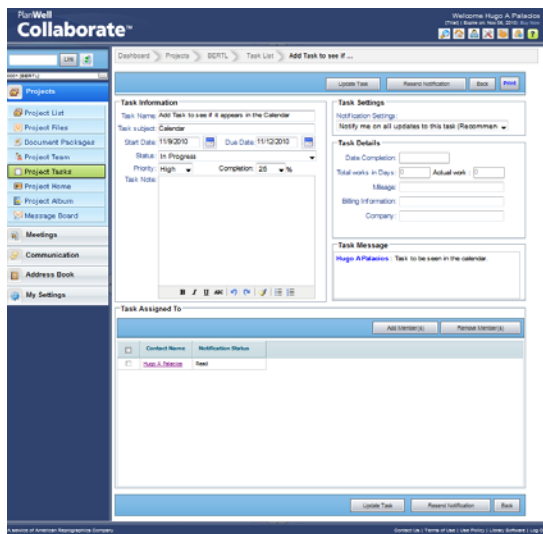
A Blog is available within the PlanWell Collaborate system. The Blog is global in nature where all PlanWell Collaborate users can interact with one another.

Project Tasks – The Project Tasks section engages the power of the project team to identify and manage critical issues, helping them keep projects on budget and on schedule. Team members can seamlessly create project tasks while reading and answering email in their email Inbox; while reviewing a drawing, BIM model or PDF in the PlanWell Collaborate Document Viewer; or, from the PlanWell Collaborate's Project Dashboard. All the tasks related to the selected project are captured by the system, and are accessible through the users dashboard. Four types of tasks lists are available in this module. The list of Owned Tasks displays the list of tasks created by the user.



The Project Tasks consists of four tabs each containing a list of tasks organized in different status modes.

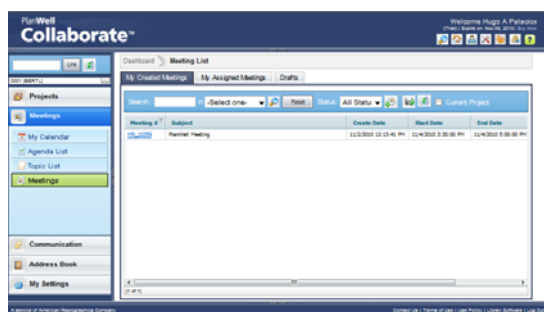
The Assigned Tasks tab displays the list of tasks assigned to the user. The All Tasks tab displays the list of all the tasks for the project irrespective of whether it is owned by or assigned to the user. The Drafts tab displays the list of tasks which are not yet complete and are saved as drafts within the system. All four tabs display a task number, task name, subject, created by, assigned to, start date, due date, status, and priority level. Users with proper access can update a task, resend notifications, print tasks and add or remove members to a given task.



By clicking on a task from the Project Tasks section, users are able to open and update the task details.

As project tasks are created and completed, the parties involved are notified via email. Any emails, markups or supporting documents associated with the task are automatically linked to it. This provides a permanent connection and audit trail of all related information.

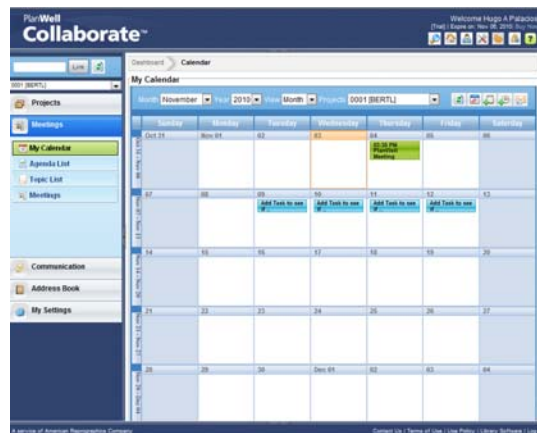
Meetings – All the meetings related to the selected project are captured by the system, and are accessible through the Meetings menu on the project dashboard. The Meetings menu enables the team to track and manage important project-specific events ranging from phases, meetings and tasks.



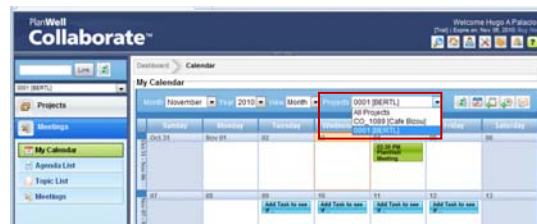
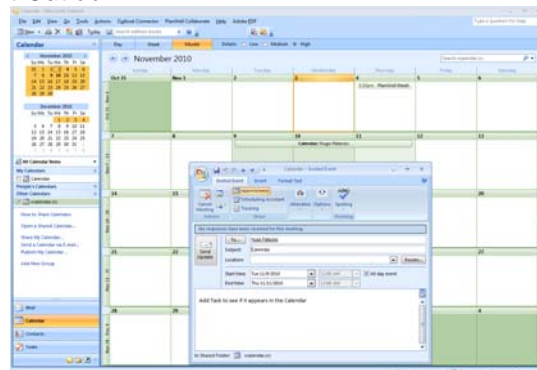
The Meetings subsection displays a list of meetings generated within the system. All meetings are logged and organized into three tabs which include My Created Meetings, My Assigned Meetings and Drafts.

My Calendar – The calendar view enables the team to track and manage important project-specific events ranging from phases, tasks, milestones, meetings, vacations and local holidays. Users may download the project calendar and view it

directly within Microsoft Outlook so that they can coordinate between the project calendar and their own personal calendar.

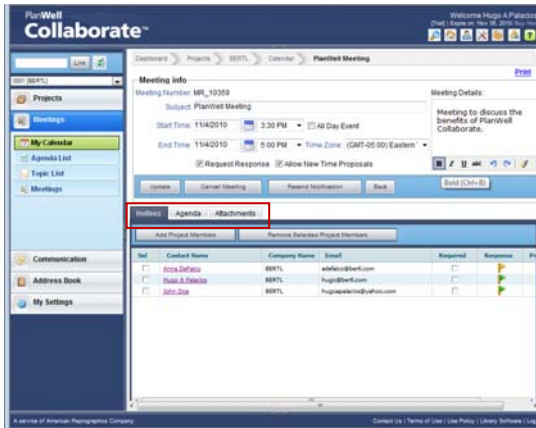


Above and next page: Users can access and view a project's calendar of events both via the web browser and within Microsoft Outlook.



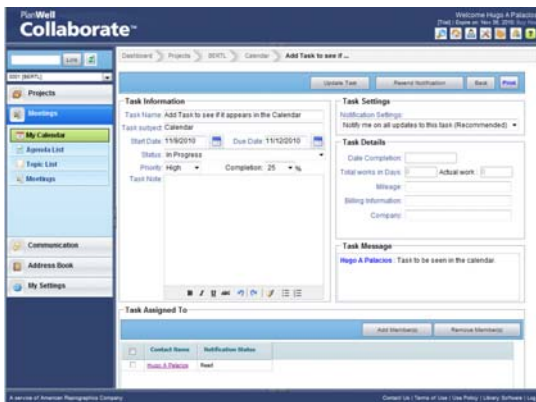
My Calendar lets users see assigned tasks and meetings they have been invited to attend.

Within the My Calendar screen, users can switch between multiple projects by simply clicking on the Projects dropdown list and selecting a project. This enables users working on multiple projects to easily and quickly see the calendars for other projects they are working on. Users can create tasks and meetings directly from within the calendar.



By clicking on an event shown in the calendar, users can see the details associated with the meeting they are attending, who sent the invitation and who has responded. Users can also view the meeting agenda and access any files associated with the meeting.

Project Tasks–Calendar View provides a view of project tasks and activities, helping align everyone on both the internal and external teams to a common set of events, tasks and milestones.

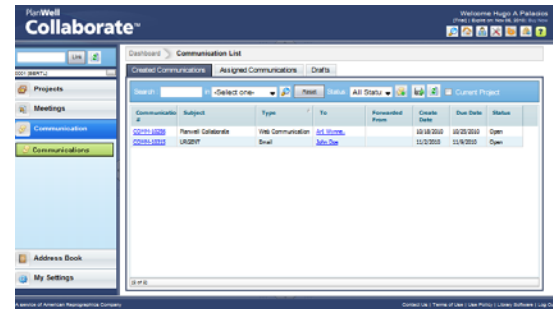


Within My Calendar, users can also view and access tasks assigned to them. By clicking on the task in the calendar view, they are able to open up the task and update the task details.

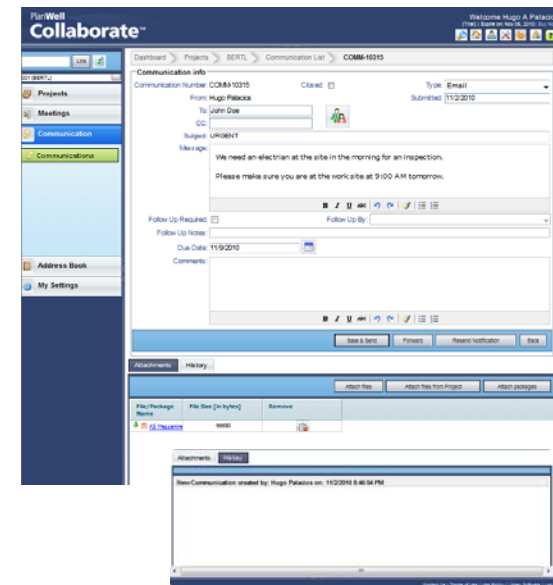
The project calendar can also be shared with external team members so that they can access and view the different project tasks, meeting dates, and project milestones. The project calendar can be sent as an email attachment to those members and opened using Microsoft Outlook.

Communication–Communications List displays all project communications whether they are created, assigned or drafted. Within each of the tabs is a list of comprehensive

communications generated during the life of the project. All project communications such as comments made to project files, emails generated, action items comments and any other activities are logged in the system. Users can filter the list by clicking on the communication number, subject, type, assignee, forwarded from, create date, due date, and status. Messages generated within the system generate a notification which is then sent to the recipients via e-mail.



The Communications List displays three tabs: Created Communications, Assigned Communications and Drafts.



Project Communications generated in the system can have Project Files attached to them. The system also keeps a log of the communications generated.

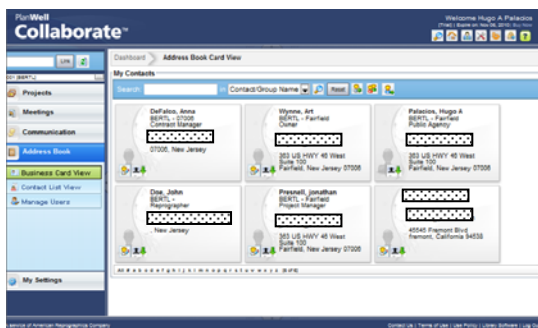
Address Book – The address book contains a list of all the project contacts manually entered or imported into the system. The Address Book displays all of the contacts in two views: Business Card View and Contact List View.

The Business Card View shows the contact information for all

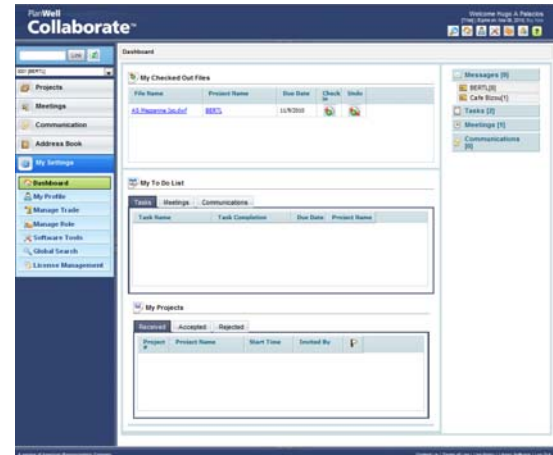
project team members in the same manner as seen within Microsoft Outlook's Business Card View. Just as the name suggests, the contact information is shown as one would expect to see it in a business card.

The Contact List View is a simple listing of all contacts and pertinent information in a table format. Within both views offered by the system, users can be added, modified, grouped, removed, imported and exported.

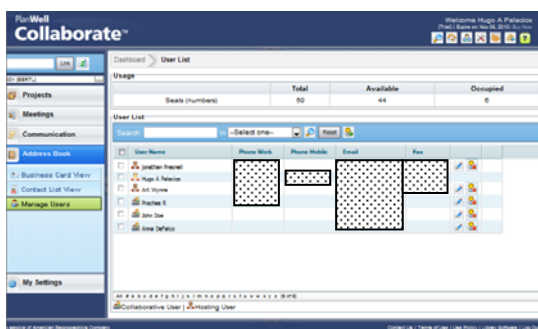
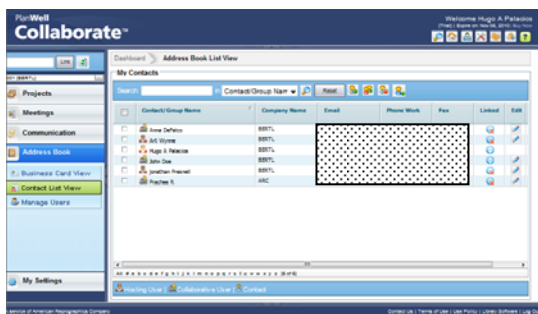
administrative functions are grouped in the My Settings sub-menu. Users can edit their profile, manage CSI trades, manage project roles, verify browser compatibility, perform a global search, and manage their license and online document storage needs.



Above and below: Project Contact information shown in Business Card View (above) and Contact List View (below).

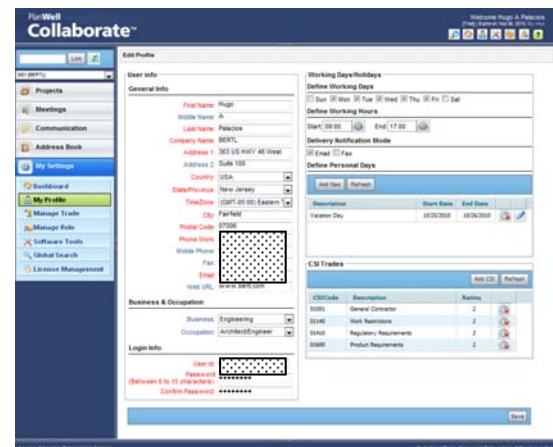


Each project user has a Personal Dashboard, which displays at a glance all the activities and messages that refer to the user. The Dashboard consists of My Checked Out Files, My To Do List, My Projects, Messages, Tasks, and Meetings.



The User List found within the Manage Users sub menu, displays a lists all users on a given project. The Hosting User can manage, add, edit and delete users from the project.

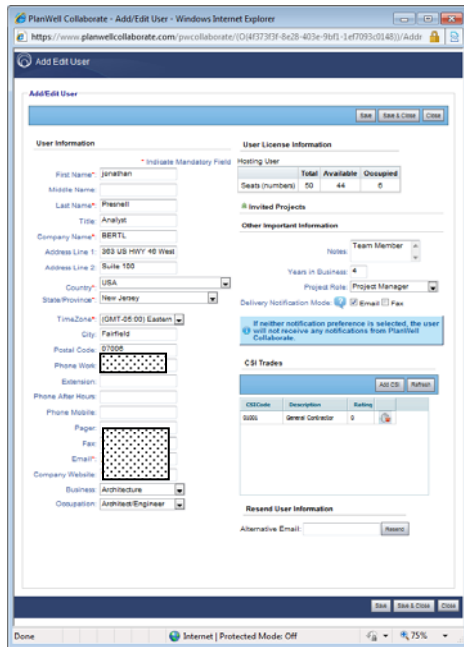
My Settings – Several of PlanWell Collaborate's key



During the registration process, the user has to enter all their profile information. The user can modify their profile by using the Edit Profile screen.

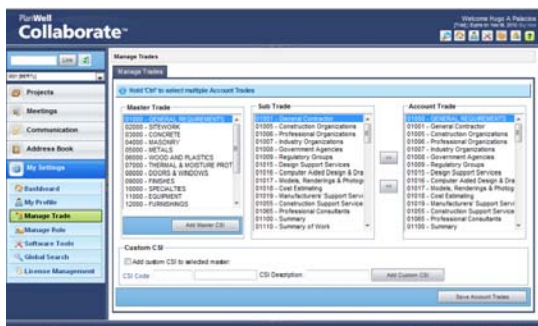
The user profile information is divided into three sections: User Info, Working Days/Holidays, and Construction Specifications Institute (CSI) Trades. The user can make any changes needed in using this screen and then save it. PlanWell Collaborate utilizes the Profile information throughout the system. For example, when sending notifications or creating project tasks, the system uses the e-mail address stored in the

Profile for sending emails.



All contacts added into PlanWell Collaborate can be assigned a CSI trade.

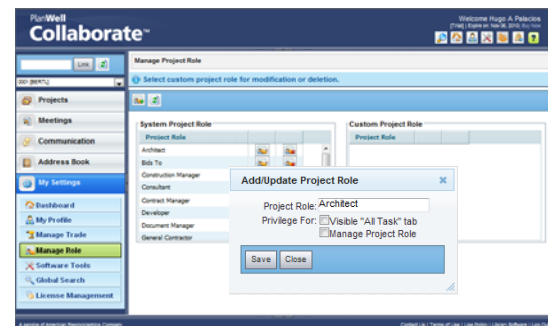
The **Construction Specifications Institute (CSI)** is an organization that maintains and advances the standardization of construction language as it pertains to building specifications. CSI authored MasterFormat, which is an indexing system for organizing construction data, particularly construction specifications. MasterFormat is the most widely used standard for organizing specifications and other written information for commercial and institutional building projects in the U.S. and Canada. It provides a master list of divisions, as well as section numbers and titles within each division, to follow in organizing information about a facility's construction requirements and associated activities.



The CSI Trades are used to manage and assign Master Trade, Sub Trade and Account Trade skill sets to users added to the project.

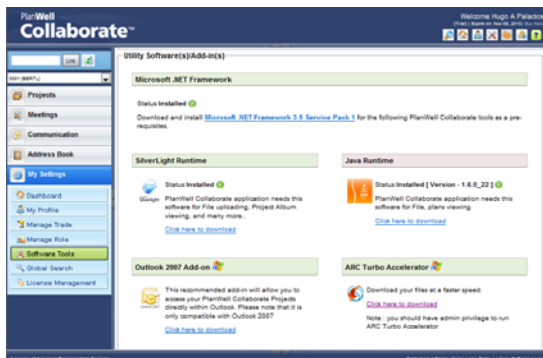
PlanWell Collaborate incorporates the most commonly used trades used by MasterFormat into the system. PlanWell Collaborate incorporates all 16 divisions developed by MasterFormat and consist of construction divisions, such as Masonry, Electrical, Finishes, or Mechanical. In addition, the PlanWell Collaborate system has two additional divisions defined as Project Summary Overview and CSI Not Defined. Following is the complete list of divisions:

- Division 01 — General Requirements
- Division 02 — Site Construction
- Division 03 — Concrete
- Division 04 — Masonry
- Division 05 — Metals
- Division 06 — Wood and Plastics
- Division 07 — Thermal and Moisture Protection
- Division 08 — Doors and Windows
- Division 09 — Finishes
- Division 10 — Specialties
- Division 11 — Equipment
- Division 12 — Furnishings
- Division 13 — Special Construction
- Division 14 — Conveying Systems
- Division 15 — Mechanical
- Division 16 — Electrical
- Division 17 — Project Summary Overview
- Division 18 — CSI Not Defined



The Manage Role section of the My Settings module enables the Hosting User to manage the different roles related to the project.

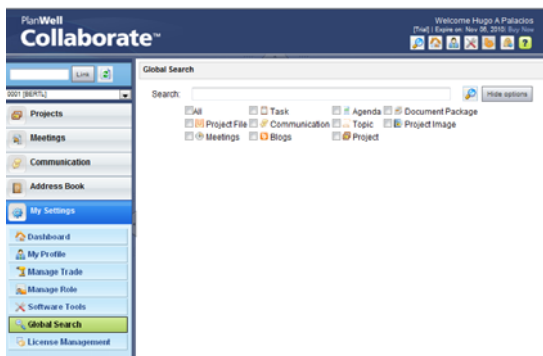
Manage Project Role – The Manage Project Role screen is divided into two sections: System Project Role and Custom Project Role. The System Project Role section consists of list of roles that cannot be modified or changed from that project. The Custom Project Role section enables the Hosting User to customize or modify the role as per a project's requirement.



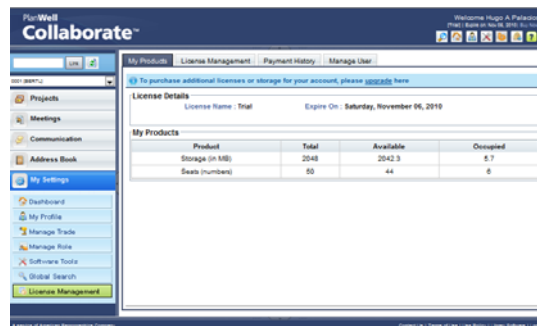
Software Tools ensures that the user's computer has all of the required components installed to ensure the application provides the user with the proper functionality.

Software Tools – This section of the My Settings module displays the software tools required to run PlanWell Collaborate. It also informs users whether the required tools are installed on their system. If the required tools are not available or installed on the system, the user can download the tools by clicking on the links provided in this section.

Global Search – The **Global Search** function of PlanWell Collaborate software conducts an indexed search of all project information. It is accessible from the My Settings module and enables users to search various modules of PlanWell Collaborate.

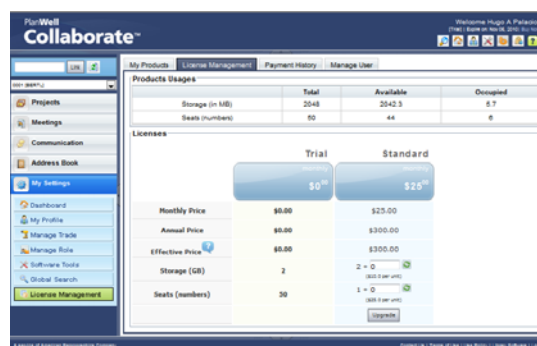


The Global Search function has a filter function which lets users conduct a search within project files, meetings, tasks, communications, agendas, blogs, topics, project, document packages, and project images.

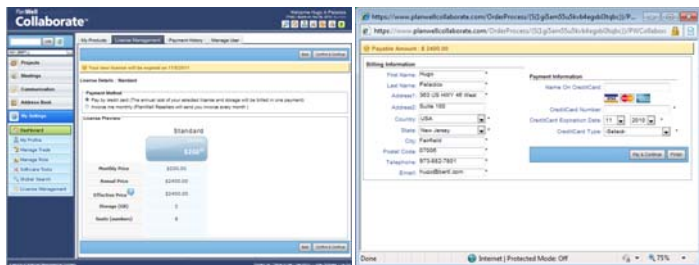


License Management is the area where Project Owners and Hosting Users can visit to monitor their storage space usage and project licenses.

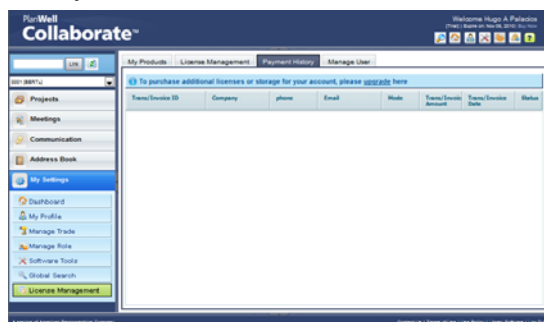
License Management – The License Management section contains four tabs which include My Products, License Management, Payment History and Manage User. The first tab, My Products, displays the storage space used and lets the user know how much space remains. In addition, users can view the number of licenses applied to the projects in the system. The License Management tab lets users purchase additional storage and increase the number of seats in the system. The Payment History tab keeps a record of the transactions executed within the system. An Invoice ID, Company Name, Phone, Email, Mode, Amount, Transaction Date, and Status is recorded within the system. The last tab, Manage Users contains a list of all the project users and allows the Hosting User to modify, add or delete them from this location. This allows the Hosting User to change a users license on the fly and leverage the licenses across other users. PlanWell Collaborate costs \$25.00 dollars per month or \$300.00 dollars a year for every license. Each license comes with 2 Gigabyte's of online storage and users can purchase additional space for only \$10.00 dollars a Gigabyte.



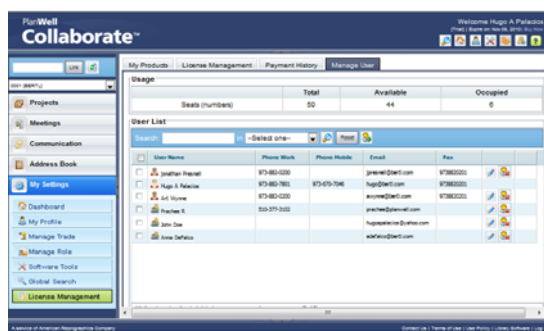
License Management provides the detailed information about the types being used and available storage space. Users can purchase additional licenses and storage space from this screen.



Users can process their purchases by paying with a credit card or by a monthly invoice.



Payment History is neatly organized within the system allowing the project users to easily track project costs associated with online document storage and the number of licenses applied within a given project.



Manage User lists all of the users assigned to a given project and allows the Hosting User to manage their licenses from a convenient and easy to use location.

Support – PlanWell Collaborate Support offers a broad set of customer support resources. Users can email or call a toll free number where they can receive assistance regarding using the system, technical questions or billing inquiries. The system also contains a comprehensive online help tool which provides users with tips, procedures, and other resources designed to help answer most technical questions. The support center offers free remote assistance to users allowing PlanWell Collaborate agents to log onto a user's computer and assist them with their technical issues as well as answer questions

for those users requiring personal attention. Customer support can be reached by calling (877) 879-2721 or sending an email to support@planwellcollaborate.com.

Summing Up

PlanWell Collaborate software is a comprehensive solution designed to address the most common project process challenges faced by AEC firms. Issues most commonly seen in AEC firms include the following:

- Scattered project files
- Disconnected project email
- Hard-to-find changes
- Inept markup processes
- Time-consuming information searches
- Project issues and resolutions are uncoordinated
- Inefficient records maintenance
- Lacking audit trails

The software helps avoid problems before they arise. For instance, the Markup function ensures that changes made to documents are tracked and logged within the system ensuring that when sending plans to a jobsite, users can be confident that they have not introduced any conflicts which could cause change orders or delays for which AEC firms might be held liable.

For project tasks, calendars, milestones, and embedded email, PlanWell Collaborate enables everyone on a project team to quickly and easily:

- Organize and find all types of project-related information, turning that information into a valuable resource. External team members can be invited to participate in project phases earlier in the process ensuring mistakes are caught and fixed earlier in a project phase. This type of early communication can help AEC firms save time and money.
- Communicate and share project information more effectively among project team members both inside and outside of an organization. The system helps break down traditional barriers that previously limited information, project files and documentation access to external team members.
- Streamline and standardize common project work processes, such as transmittals, action items, and design and construction review.

- PlanWell Collaborate works with existing software applications and work processes, is quick to implement, and is easy to learn and use.
- PlanWell Collaborate allows users to generate email with other project documents directly within the application. Users can easily find all project information and communications generated within the system. The PlanWell Collaborate application can be integrated into Microsoft Outlook with a plug-in, making the application easier for users who are accustomed to Microsoft Outlook.
- The Document Repository and the flexibility of the system makes large file transmissions as easy as sending an email without any size limitations.
- PlanWell Collaborate software automatically logs and provides users with the ability to track markup sessions and file revisions.
- PlanWell Collaborate's ability to track and log emails, project tasks, project files, and meetings further supports quality assurance by showing that all changes have been completed and makes the process of reaching LEED certification a smoother and simpler process.
- PlanWell Collaborate software has built-in capability to help users monitor project activity, from specific action items to overall activity between all project team members.
- PlanWell Collaborate software supports key AEC work processes, and integrates easily into a firm's existing work flow. Users do not need to change the way they work to fit the program into their organization.
- PlanWell Collaborate software streamlines project information management and provides safeguards against details slipping through the cracks.
- The Global Search function built into the system offers users a convenient and efficient method of finding all types of project information based on search terms entered into the system.
- PlanWell Collaborate is a Software as a Service (SaaS) solution. This means that the solution is deployed over the Internet and/or is deployed to run behind a firewall on a local network or personal computer.
- The solution is 100% cloud-based and does not require an IT infrastructure to manage. The user does not need to administer any aspect of the solution within their organization. All of the maintenance and management behind the solution is handled by PlanWell Collaborate. This provides AEC firms with the freedom to focus on the areas that matter the most: designing and managing their projects.
- The system features flexible security options built into the system. Restrictions can be set to individual and project folders.

BERTL analysts tested the PlanWell Collaborate solution over a one month period. During our evaluation, our analysts evaluated the system's ease of use, functionality, performance and built-in integration with Microsoft Outlook and the application's security functions.

ARC has designed and delivered one of the best web-based project collaboration and document sharing solutions currently in the market. With its exceptional price plan, flexible document storage options, ease of use, and enhanced information tracking options, this collaborative solution stands out from the competition.

Equally as impressive is the solution's integration into Microsoft Outlook. This level of integration into a core business application provides for a smoother implementation and adaption by end users.

Considering the solution's great overall performance in testing, exceptional ease of use, integration, pricing structure, and communication tracking functions, BERTL awards ARC's PlanWell Collaborate its Five-Star Exceptional rating and highly recommends this solution for AEC firms that require flexible and scalable project collaboration and document sharing solutions.

BERTL

EXCEPTIONAL



PlanWell Collaborate

About BERTL

The success of an organization depends on its ability to manage its information and assets. An effective workflow process requires the complex integration of information, devices, software and people.

IT managers, office managers, and other knowledge management professionals need to know what digital imaging devices would best serve their specialized workflow processes.

BERTL's services are designed around this real-world framework, delivering business consumers the independent analysis and insight needed to make critical decisions about digital imaging's role in their organization.

Independent Analysis and Insight

BERTL's reports, comparative data and strategic guides look at digital imaging through the eyes of the business user. The research examines not only the technical features, but also vertical market applications, and business benefits. The impact on worker productivity is a primary concern.

BERTL is 100 percent independent. It receives no funding from manufacturers and all product evaluations and reports are published at BERTL's own expense for its subscribers. Business users worldwide trust BERTL for objective, unbiased analysis of digital imaging systems.

BERTL Services (Reports and Star Ratings)

BERTL analysts provide detailed reports on the technical and practical benefits of thousands of color and monochrome workgroup, office, graphic arts, and production devices.

Product Specifications

DataCheck provides the most current competitive data on printers, copiers, MFPs, fax devices, wide format printers, scanners, and more.

News, Interviews and Analysis

The iTchat online magazine provides insight into the dynamics and trends of the digital imaging marketplace through interviews, feature articles and software reviews.

BERTL Awards

BERTL analysts recognize the leading devices and software solutions in the annual BERTL's Best awards. BERTL also honors the performance of manufacturers in the annual Readers' Choice selections.