



## e-Builder Plan Room Setup

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# About the Plan Room

The plan room is more than a document repository. Viewing documents in the plan room gives you quick and easy access to related files. In the plan room, files are indexed according to various attributes, which facilitates the accessibility of similar documents, reducing search efforts.

For example, files may be indexed by the document type *drawings* with the following attributes:

- Trade = Architectural
- Floor = Basement
- Division = 01 General Requirements

This gives you multiple ways to find the file: by document type, trade, floor or division.

In the plan room, documents with similar attributes are grouped together, further reducing search efforts. Once a document is selected it opens in the plan room viewer where related files with similar attributes can also be found in the Related Documents sections and Jump-To menus. For more information about the plan room viewer, see Plan Room Viewer Overview.

## Related Topics:

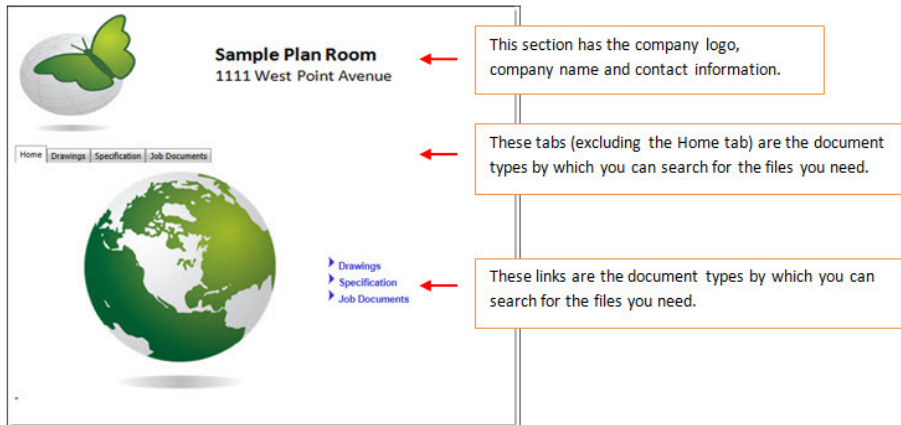
- Plan Room Overview
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- Plan Room Viewer Overview

## Plan Room Overview

By default the Home tab is selected when you log in to the plan room. Company information and logo are located at the top of the page. The tabs are document types by which you can search for the files you need. These same document types reappear as links along the side of the picture in the illustration below.

Click the document type to see a list of all available files. If groupings are defined, you are able to expand categories and view groupings that will help you further narrow your options. Drill down to the file name and click the link to open the document in the plan room viewer.

**Note:** The data in this illustration is provided as an example of how a plan room may be setup. Actual content may differ from the illustration below.

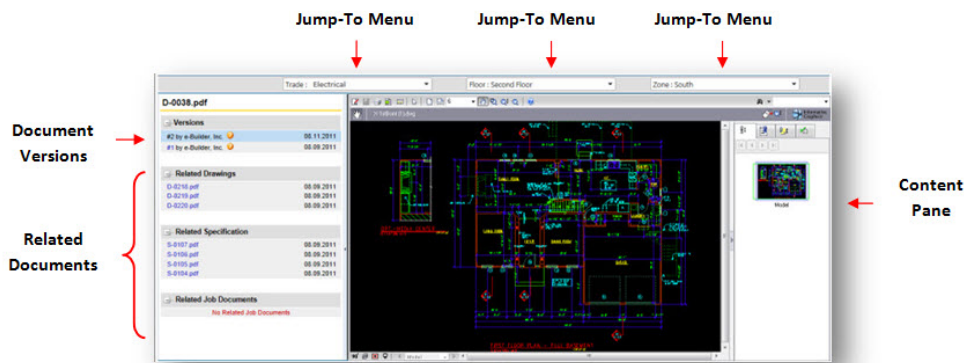


**Related Topics:**

- About the Plan Room

## Plan Room Viewer Overview

Documents selected in the plan room open in the plan room viewer.



### Sections and Fields

The sections and fields on this page are:

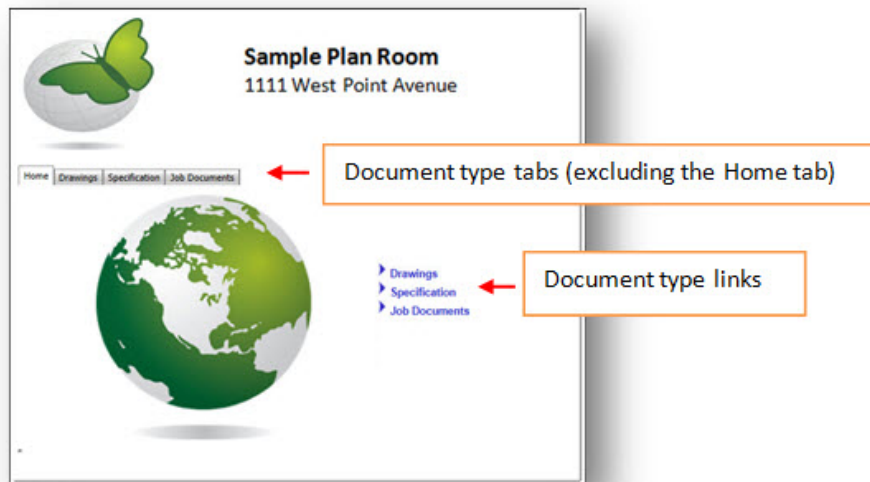
- **Jump-To Menu:** Jump-to menus allow you to quickly and easily jump to documents that share similar jump-to menu options of the file you are viewing. For example, if you are looking at an electrical drawing for the second floor, south zone, the jump-to menus allows you to easily switch to the drawings for another trade, but for the same position in the building (i.e. architectural, second floor, south zone).

Trade	File Name	Floor	Zone
Architectural	<a href="#">D-0218.PDF</a>	Second Floor	South
Architectural	<a href="#">D-0219.pdf</a>	Second Floor	South
Architectural	<a href="#">D-0220.PDF</a>	Second Floor	South
Architectural	<a href="#">D-0221.PDF</a>	Second Floor	South
Architectural	<a href="#">D-0222.PDF</a>	Second Floor	South

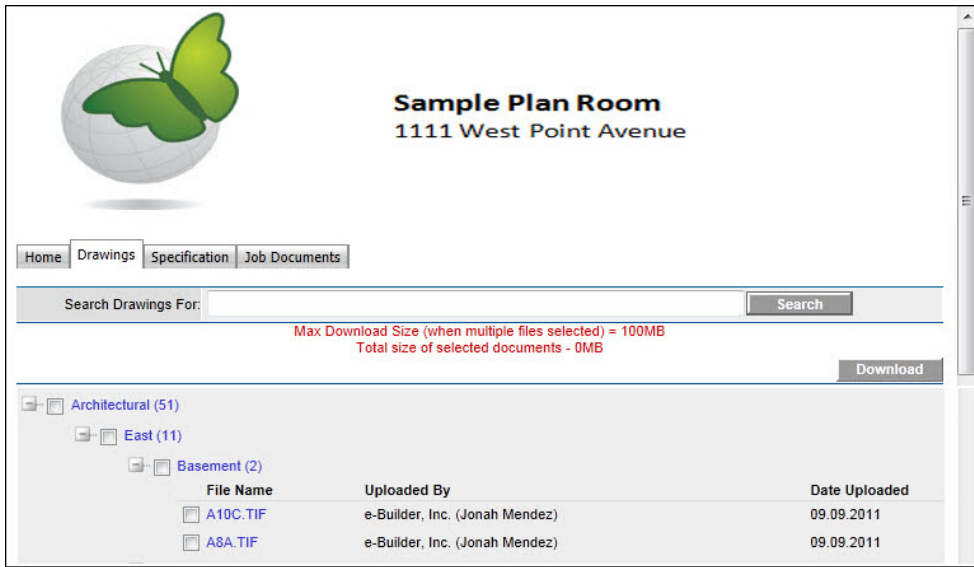
- **Document Versions:** This section lists all versions of the file you are viewing. Click the version # link to open the file in the content pane. Hover over the question mark icon to see the name of the person that created the version.
- **Related Documents:** This section lists related files for all the document types defined in the plan room. Expand any of the Related [Document Types] to view related files, i.e. related drawings, related specifications, related job documents etc.
- **Content Pane:** The document selected in the plan room displays in the content pane.

## Open Files in the Plan Room

1. Click the document type (tab or link) of the file you want to open.



2. Choose the appropriate categories, and then click the file name.



The file opens up in the plan room viewer.

**Note:** To download the file select the check box next to the file and click **Download**.