

# DigEplan: Setup & Navigation

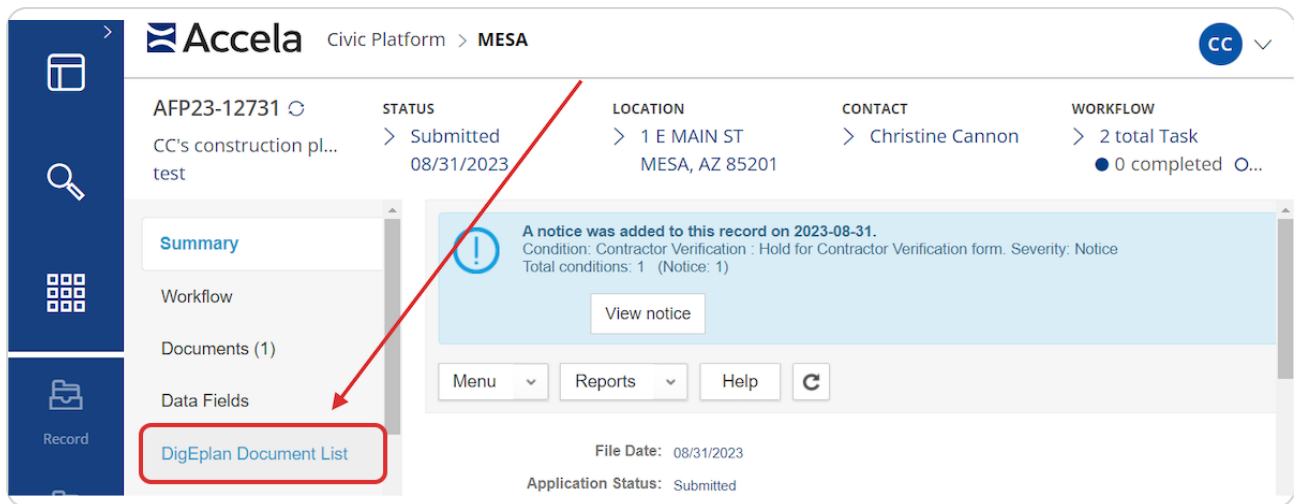
39 Steps

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## STEP 1

### From within the Accela Record Click on DigEplan Document List



The screenshot shows the Accela Civic Platform interface for a record with ID AFP23-12731. The record title is "CC's construction pl... test". The status is "Submitted" with a date of 08/31/2023. The location is "1 E MAIN ST, MESA, AZ 85201". The contact is "Christine Cannon". The workflow shows "2 total Task" with "0 completed". A notification banner indicates a notice was added on 2023-08-31 regarding a Contractor Verification form. The left sidebar menu is open, and the "DigEplan Document List" option is highlighted with a red box. A red arrow points from the notification banner to the "DigEplan Document List" option.

AFP23-12731	STATUS	LOCATION	CONTACT	WORKFLOW
CC's construction pl... test	Submitted 08/31/2023	1 E MAIN ST MESA, AZ 85201	Christine Cannon	2 total Task 0 completed

**Summary**

- Workflow
- Documents (1)
- Data Fields
- DigEplan Document List**

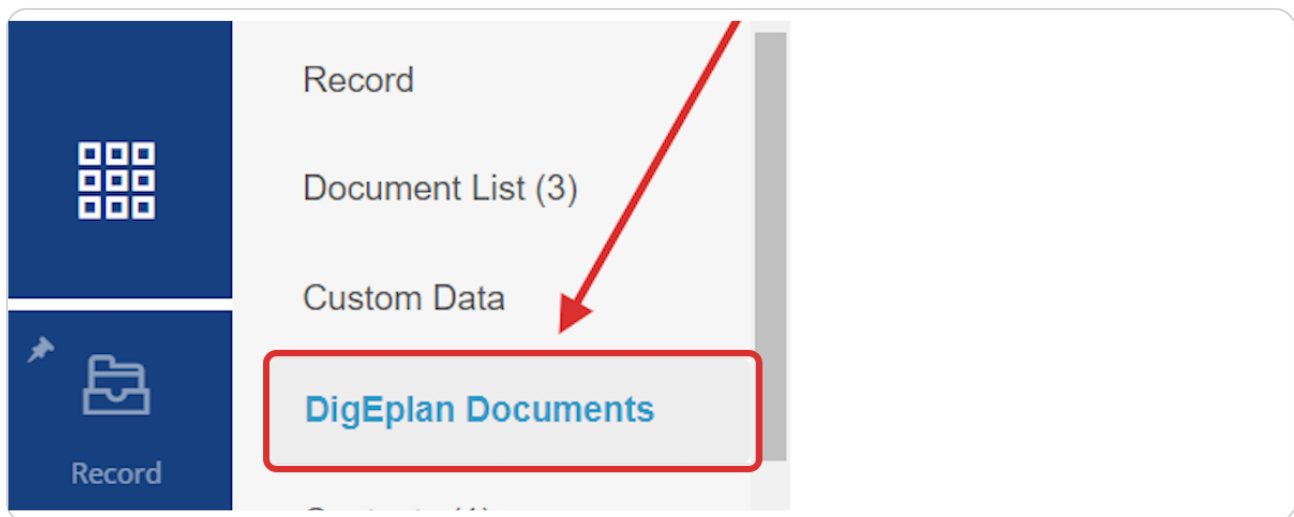
**Notice:** A notice was added to this record on 2023-08-31. Condition: Contractor Verification : Hold for Contractor Verification form. Severity: Notice. Total conditions: 1 (Notice: 1). [View notice](#)

Menu | Reports | Help | C

File Date: 08/31/2023  
Application Status: Submitted

## STEP 2

### Click on DigEplan Documents



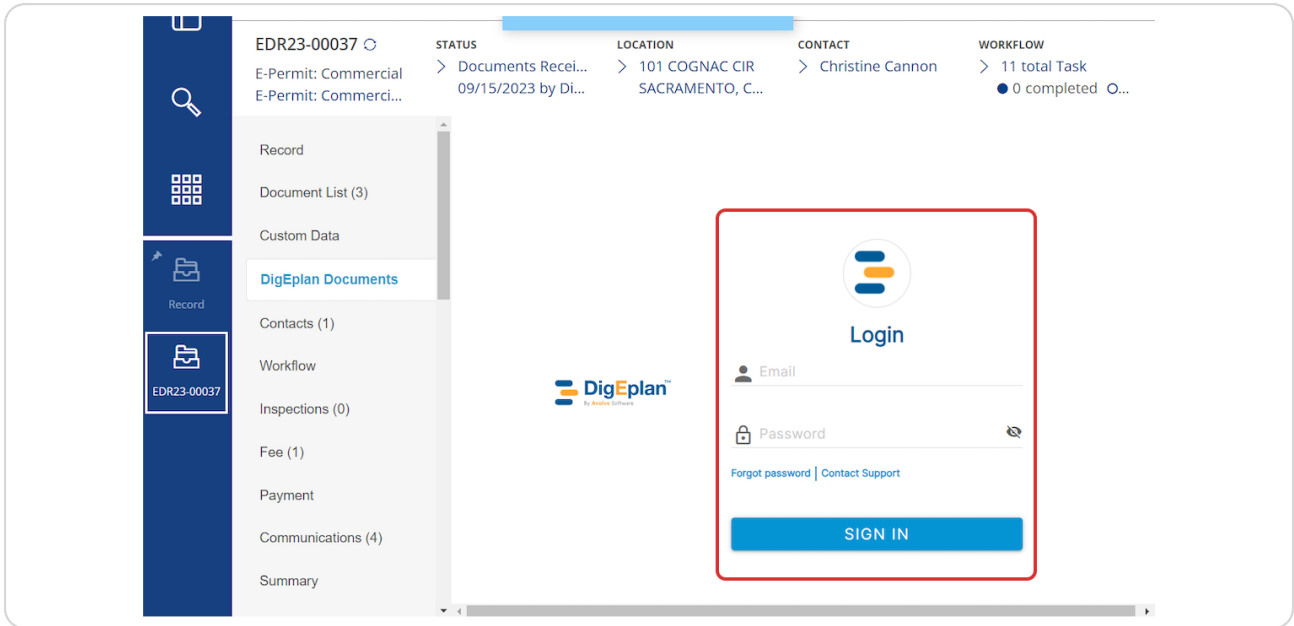
The screenshot shows the Accela Record detail page. The left sidebar menu is open, and the "DigEplan Documents" option is highlighted with a red box. A red arrow points from the top right of the page to the "DigEplan Documents" option.

- Record
- Document List (3)
- Custom Data
- DigEplan Documents**

### STEP 3

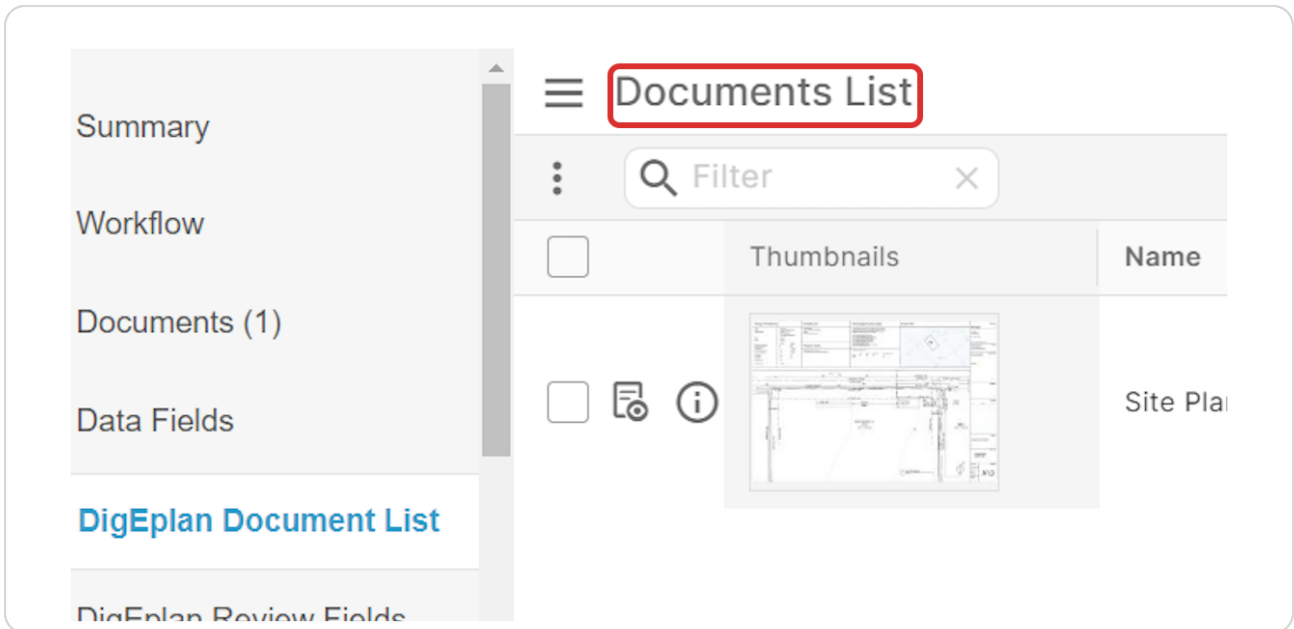
## Login to DigEplan

The first time you access DigEplan you will need to login. After that you should remain logged in as long as you've accessed DigEplan in the last 48 hours.



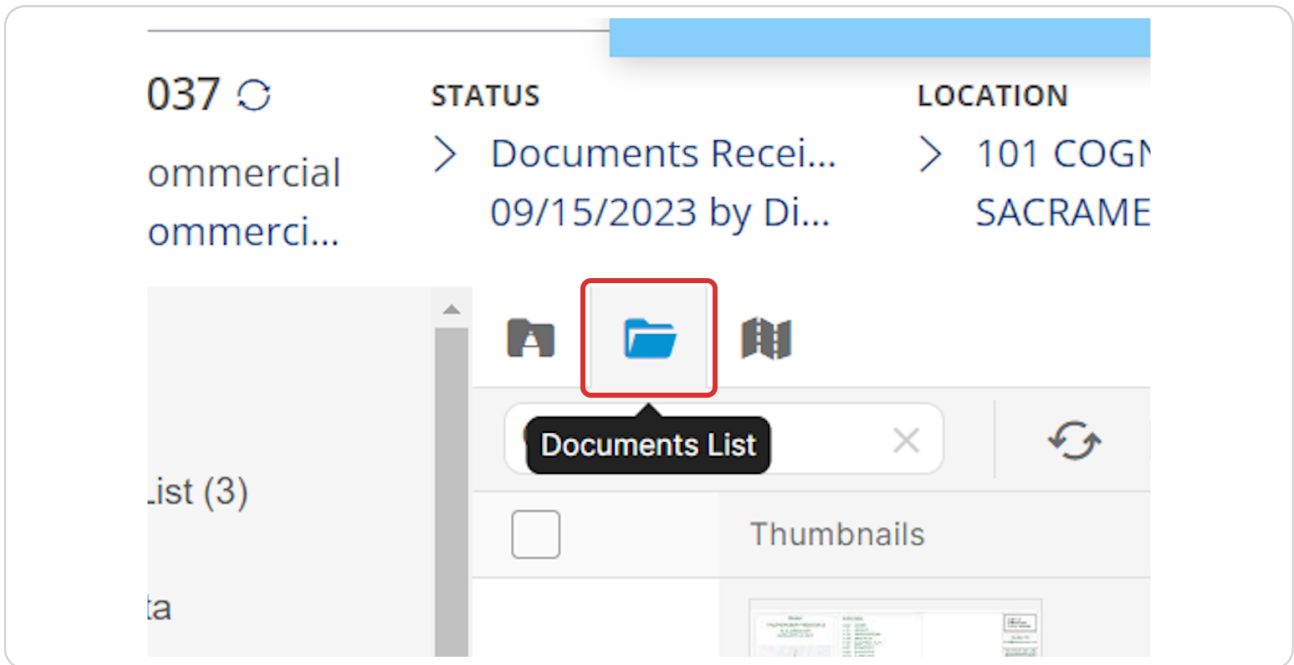
### STEP 4

## The display window will open to the DigEplan Documents List



STEP 5

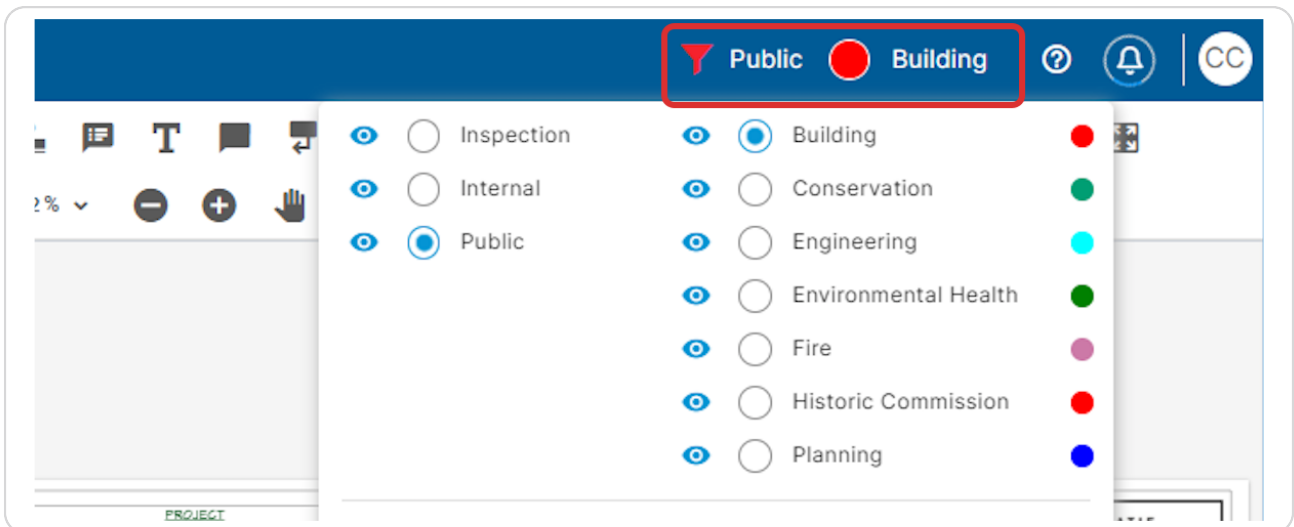
Depending on your display window it may also appear like this with the folder icon



STEP 6

Verify User Settings: "Public" & Correct Department

It is advised that reviewers leave the default as Public and for internal markups change that setting on the individual markup.



## STEP 7

**TO OPEN IN A NEW TAB: Select a document from the list below**

The screenshot shows the Accela Civic Platform interface. At the top, there is a navigation bar with the Accela logo, 'Civic Platform', and a notification 'This is a non-production environment.' Below the navigation bar, there is a breadcrumb trail: 'E-Permit: Commercial' > 'Documents Recei...' > '101 COGNAC CIR' > 'Christine Cannon'. The main content area displays a table of documents. The first document is '942 Dorado Plans C 1.pdf', which is highlighted with a red box. A red arrow points to the 'Cached' checkbox in the first column of this row. Below the highlighted document, there is another document 'Site Plan.pdf'. The interface also includes a sidebar on the left with various navigation options like 'Record', 'Document List (3)', 'Custom Data', 'DigEplan Documents', 'Contacts (1)', 'Workflow', and 'Inspections (0)'. A top toolbar contains various action icons, including a filter icon.

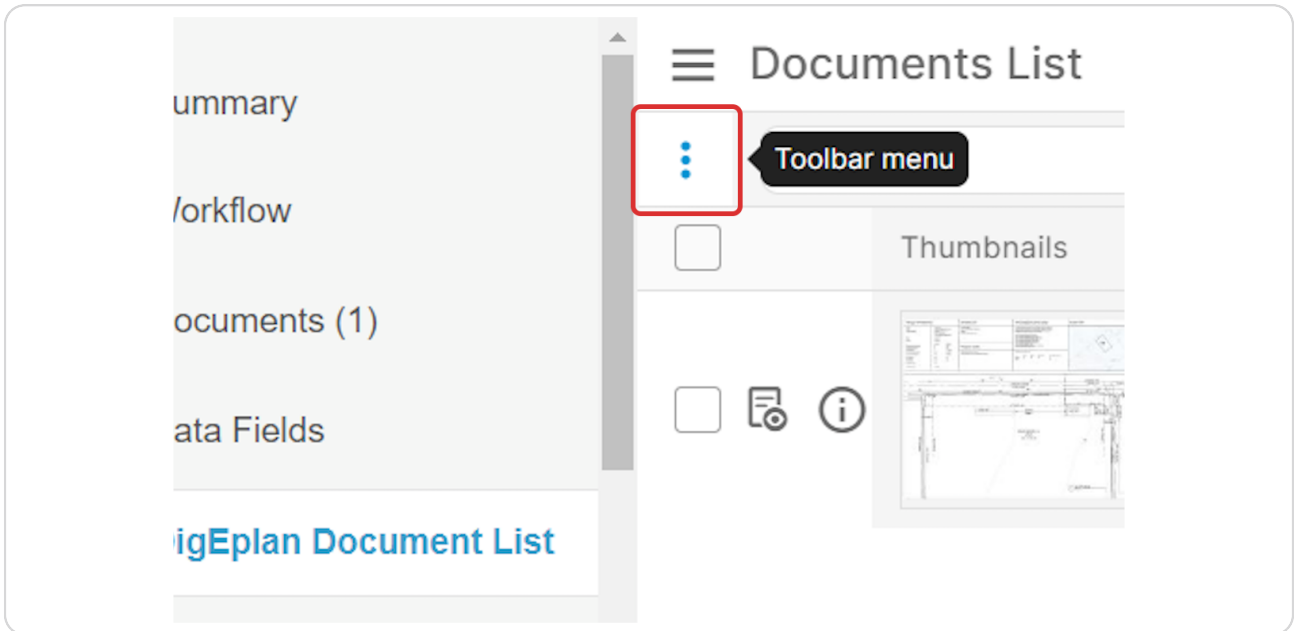
## STEP 8

**TO OPEN IN A NEW TAB: Click on Open document in new tab**

This screenshot is a closer view of the document list from Step 7. It shows the same table with '942 Dorado Plans C 1.pdf' and 'Site Plan.pdf'. A red box highlights the 'Open Document In New Tab' icon in the top toolbar, which is a blue square with a white document icon and a plus sign. A red arrow points from this icon to the '942 Dorado Plans C 1.pdf' document row. The interface elements are consistent with the previous screenshot, including the sidebar and the top navigation bar.

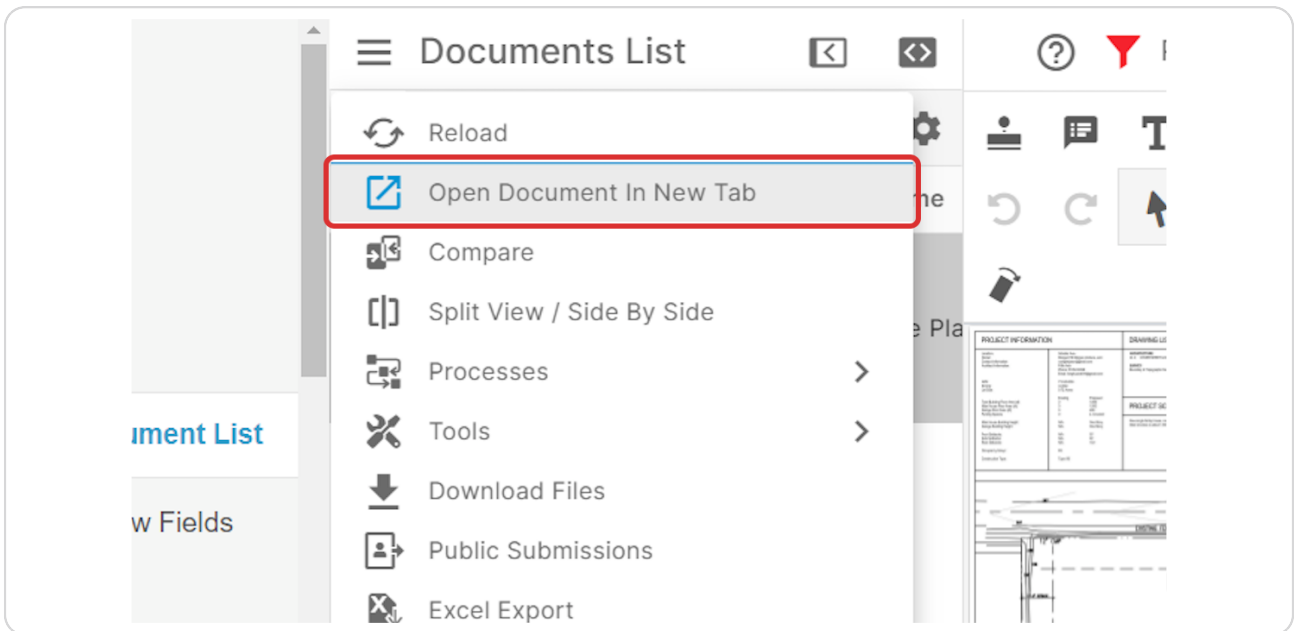
STEP 9

**TO OPEN IN A NEW TAB: Depending on your display window instead of the icons you may see the 3 dots for the Toolbar menu. If so click on the Toolbar menu.**



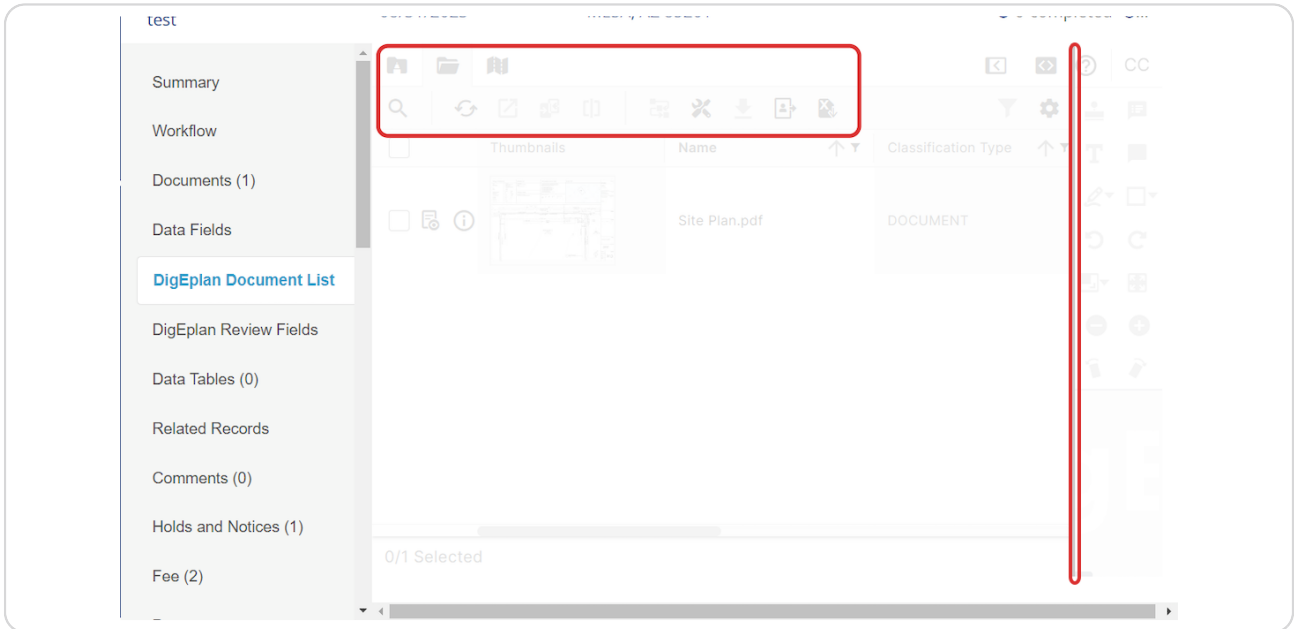
STEP 10

**TO OPEN IN A NEW TAB: Select Open Document in New Tab**



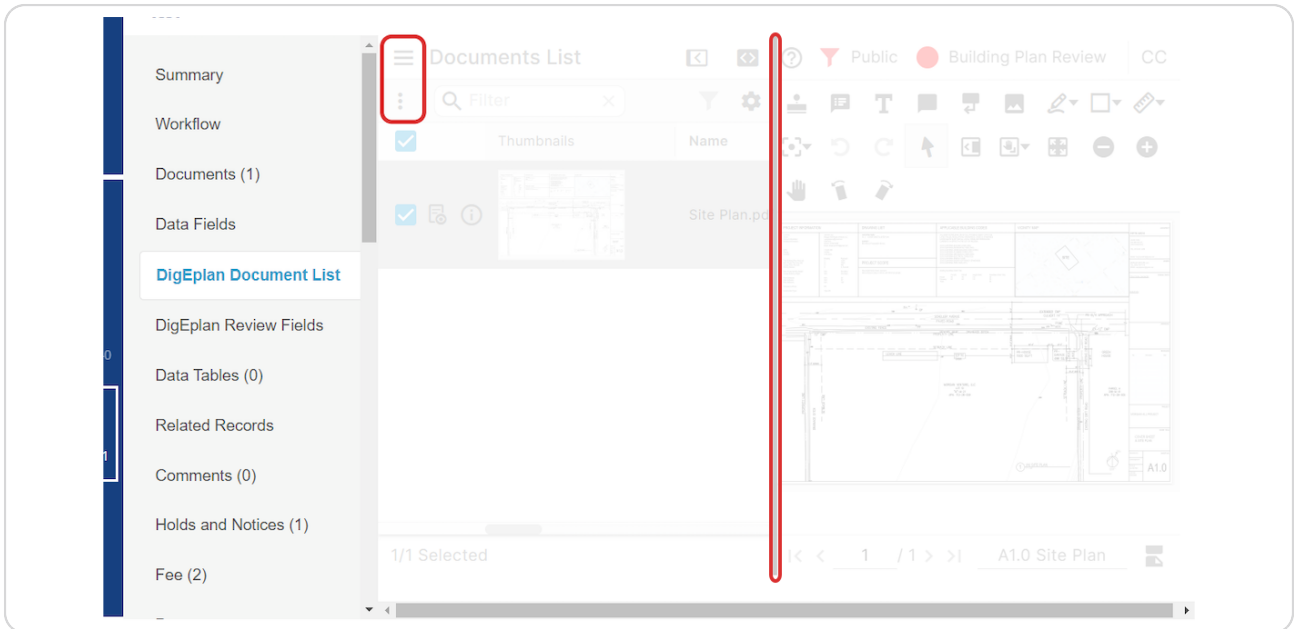
## STEP 11

**NOTE: Dragging the divider bar will change whether the view is the consolidated drop downs or icons across the top**



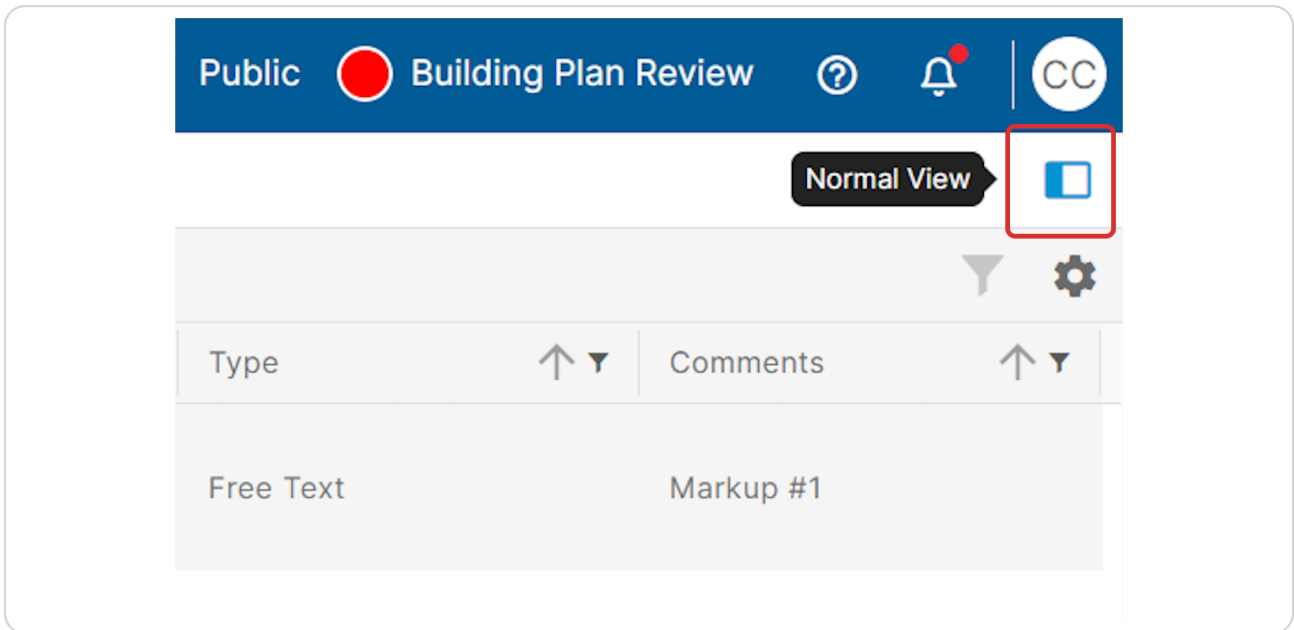
## STEP 12

**NOTE: Once the icons are not able to fit across the top the 3 bar and 3 dot menus will appear**



STEP 13

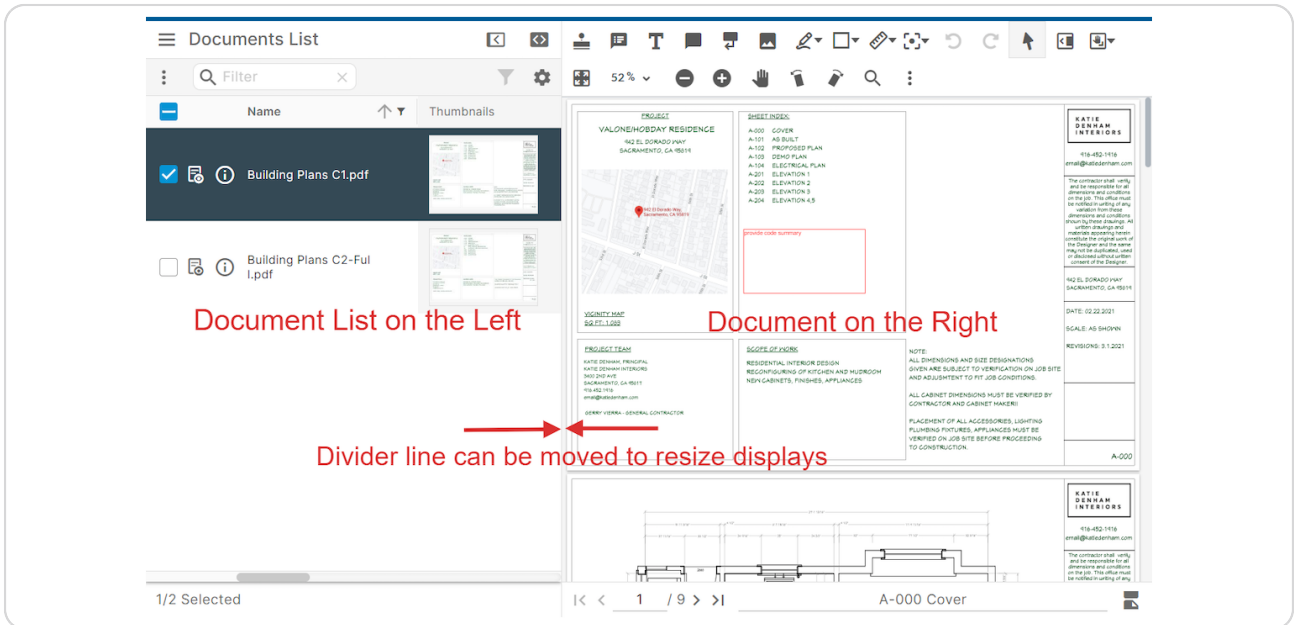
**UNDERSTANDING PANEL VIEWS: Normal View**



STEP 14

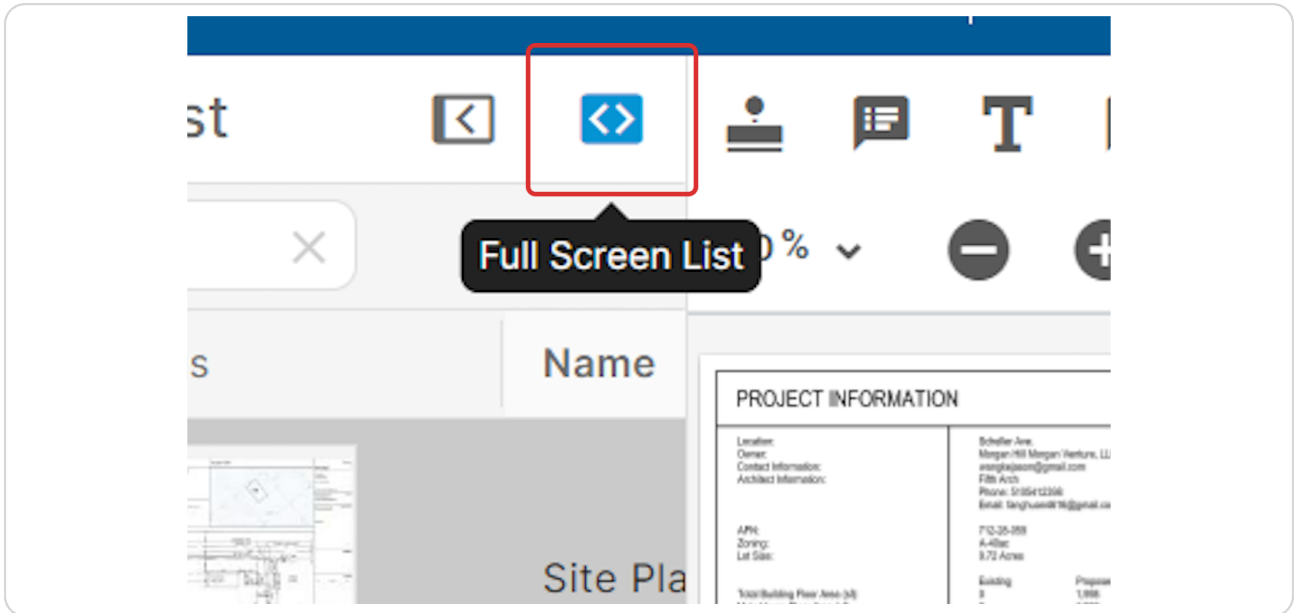
**UNDERSTANDING PANEL VIEWS: Normal View**

In normal view the list of all documents and columns will be displayed on the left and the selected document will display on the right



## STEP 15

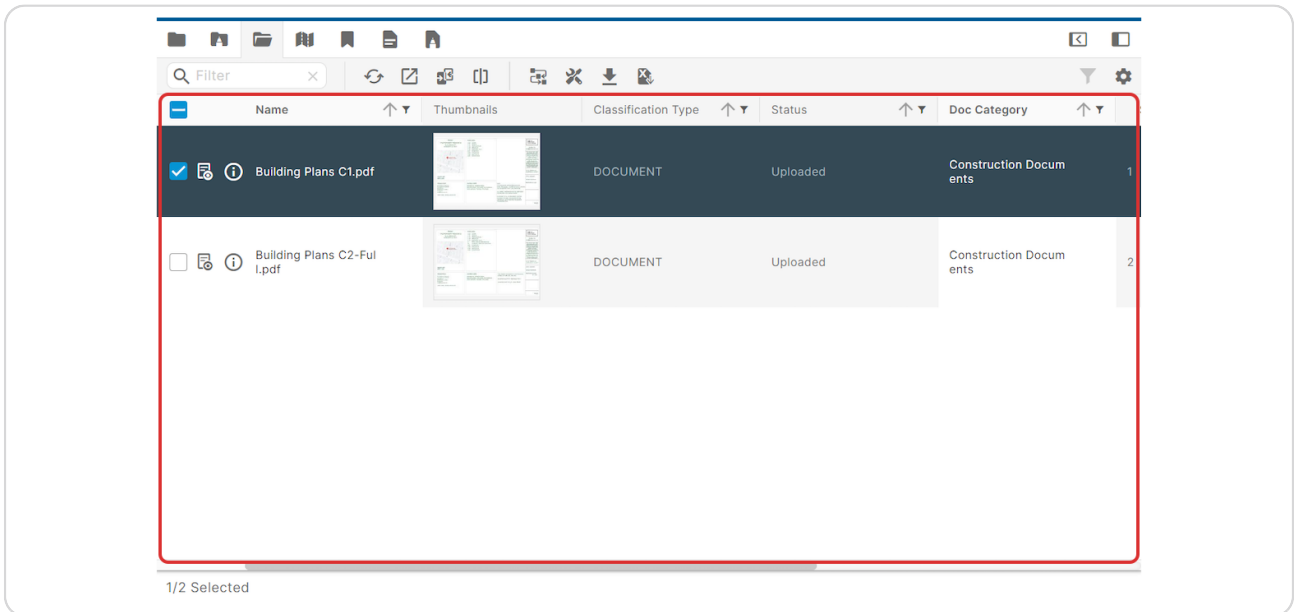
### UNDERSTANDING PANEL VIEWS: Full Screen List



## STEP 16

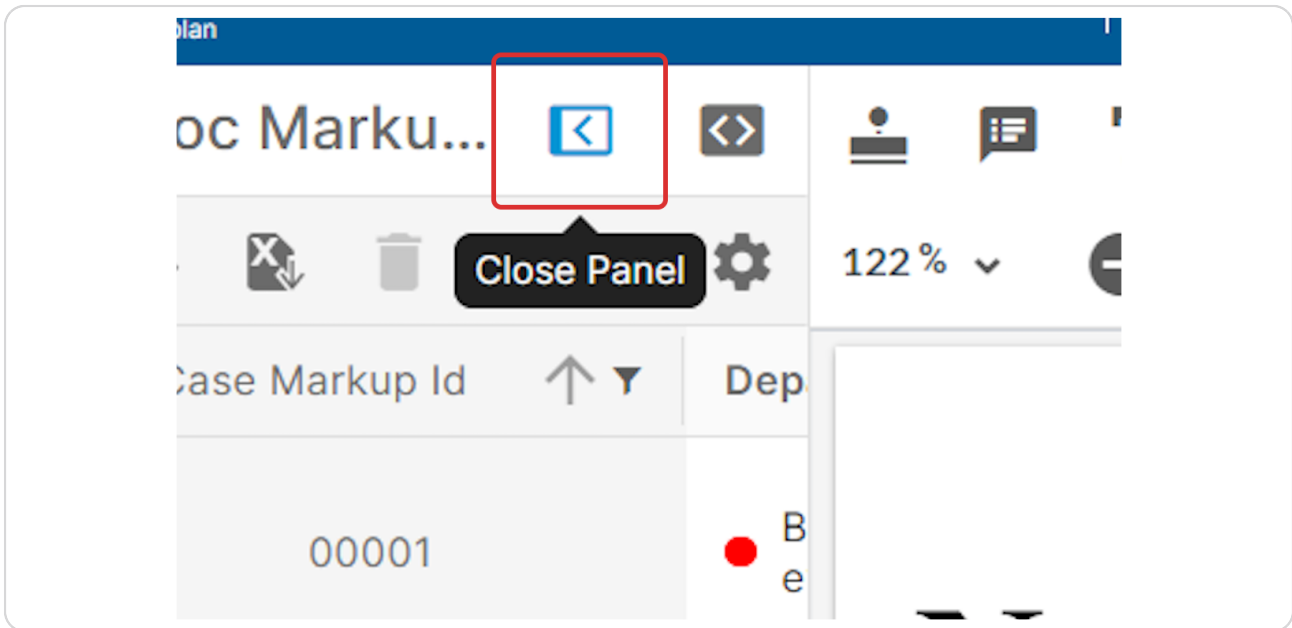
### UNDERSTANDING PANEL VIEWS: Full Screen List

The view window only shows the document list and the informational columns. NOTE: Clicking on the documents will not open the document display window. You must switch the view to do so.



## STEP 17

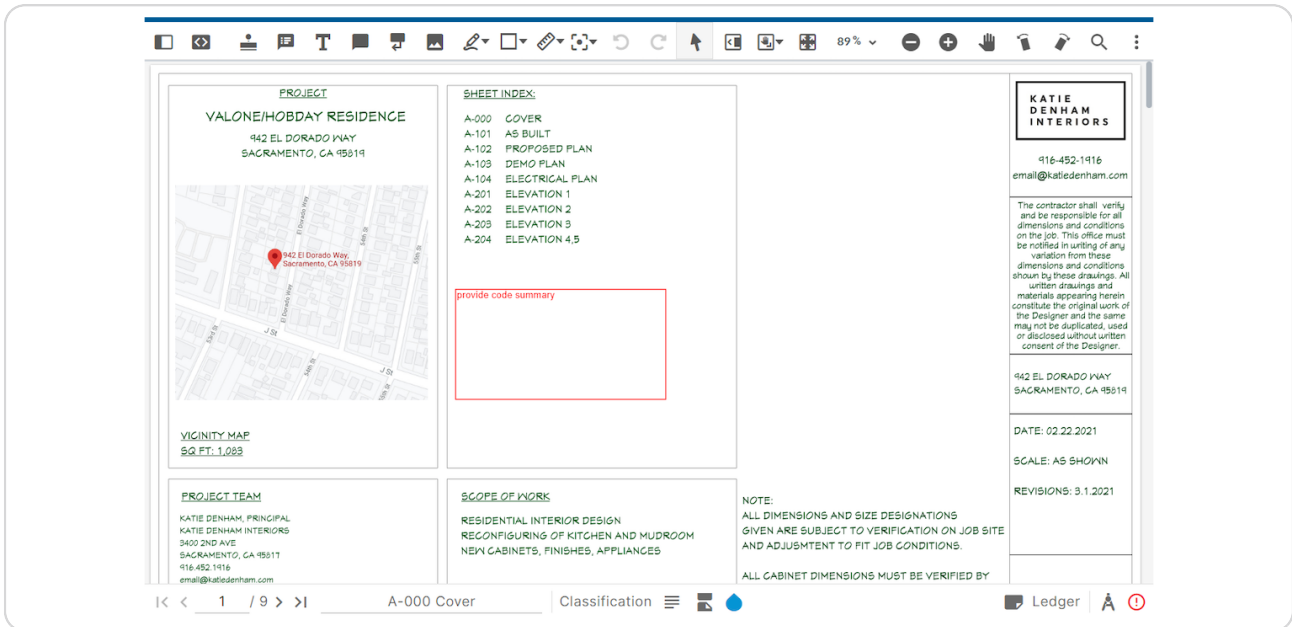
### UNDERSTANDING PANEL VIEWS: Close Panel



## STEP 18

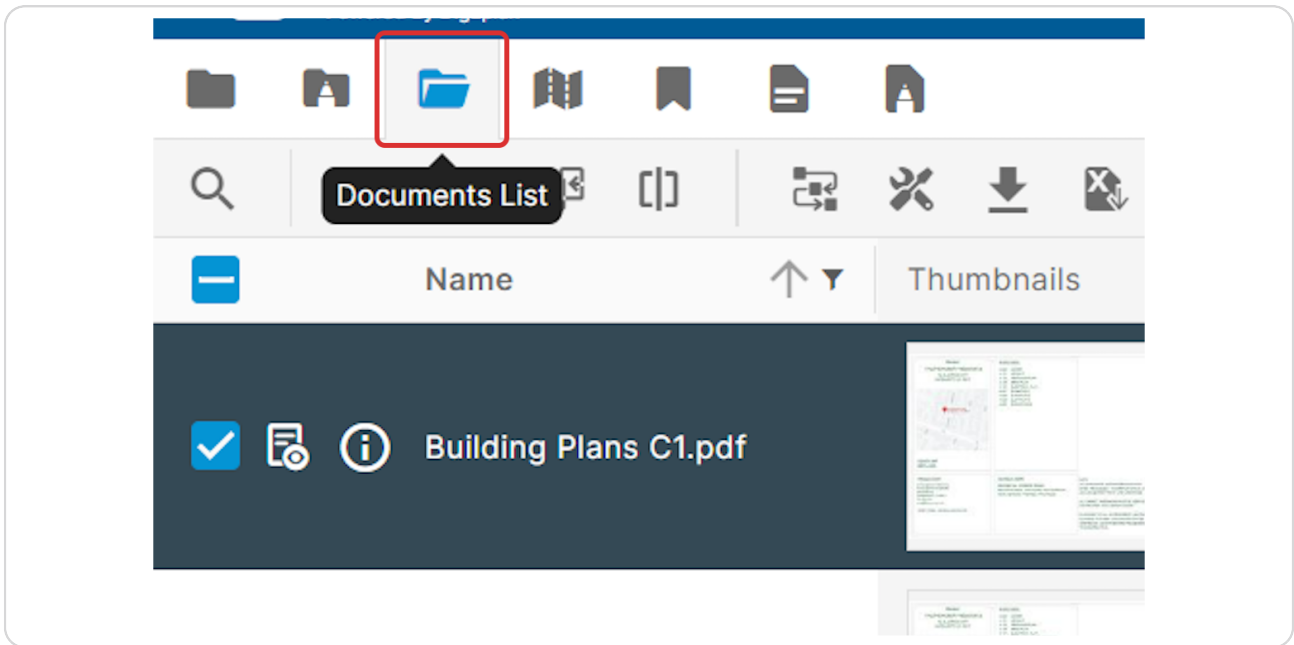
### UNDERSTANDING PANEL VIEWS: Close Panel

In this view only the document is displayed. To switch to a different document the panel view will need to be changed back to either normal view or full screen list



STEP 19

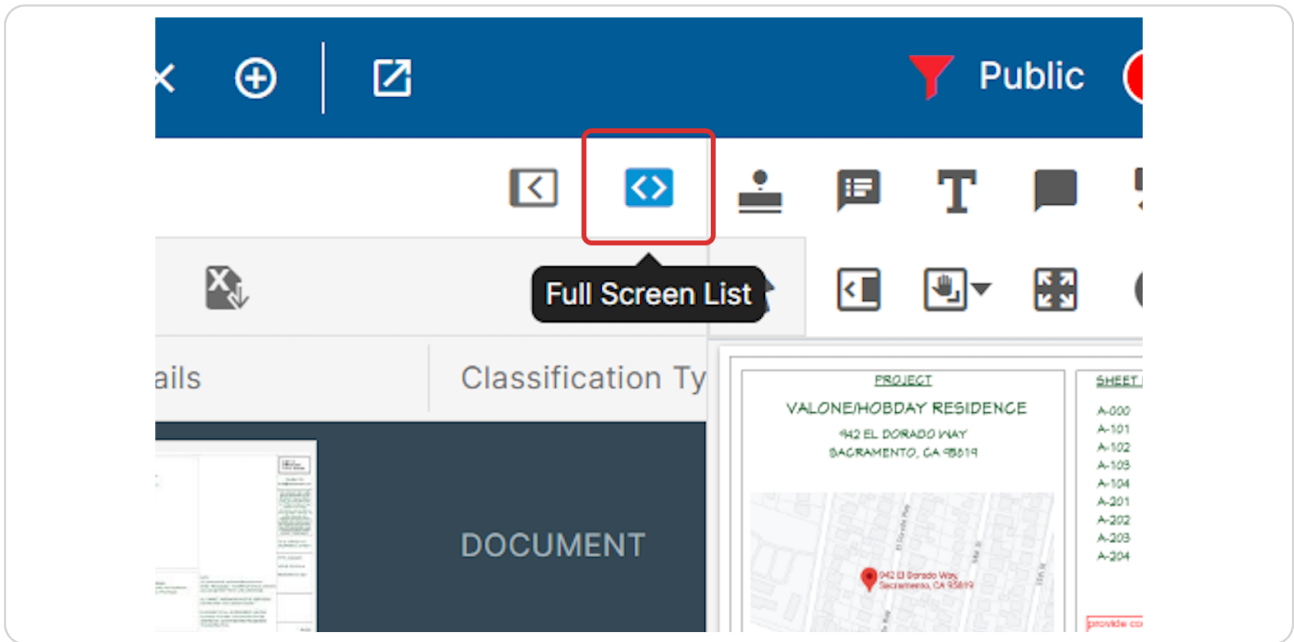
**SETTING UP TAB DISPLAY COLUMNS: Documents List**



STEP 20

**SETTING UP TAB DISPLAY COLUMNS: Documents List**

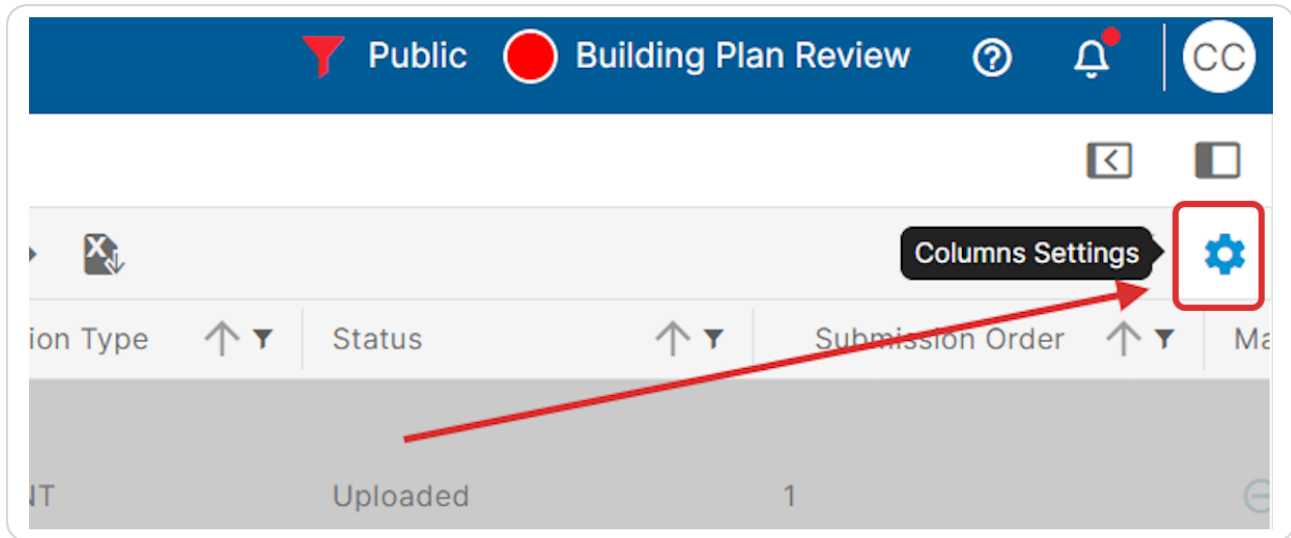
Switching to Full Screen List will make this customization setup easier



## STEP 21

### SETTING UP TAB DISPLAY COLUMNS: Documents List

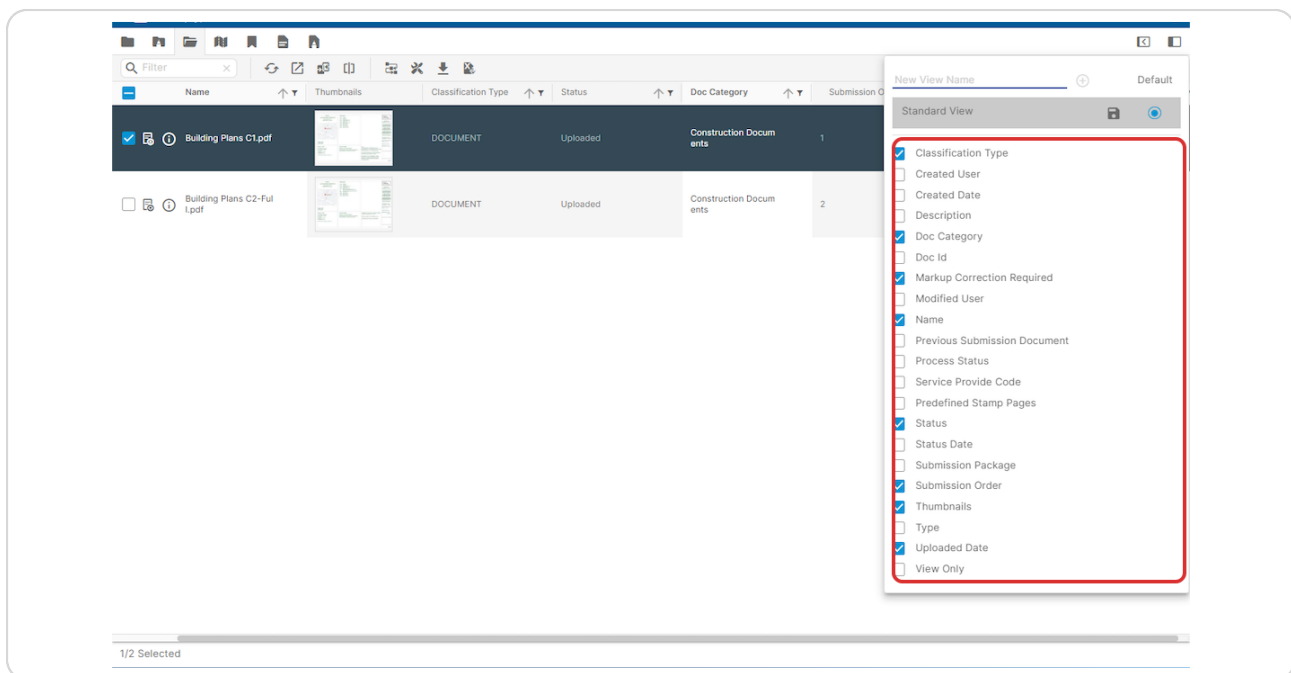
Click on Columns Settings



## STEP 22

### SETTING UP TAB DISPLAY COLUMNS: Documents List

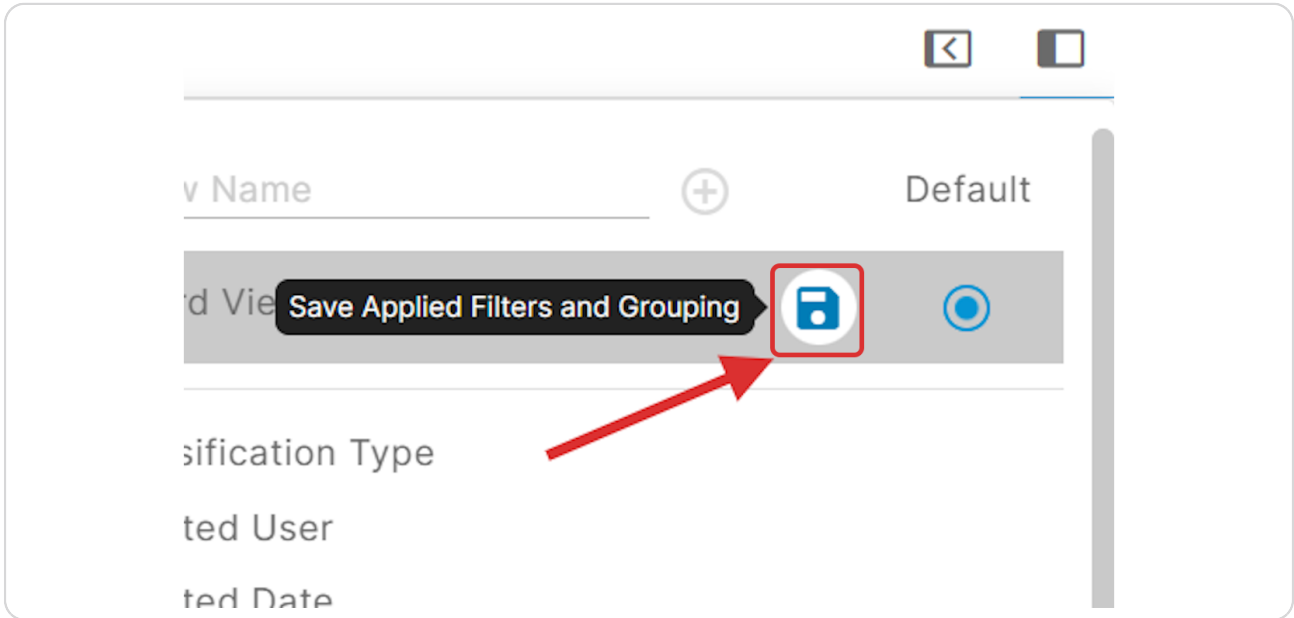
Check the following items



**STEP 23**

**SETTING UP TAB DISPLAY COLUMNS: Documents List**

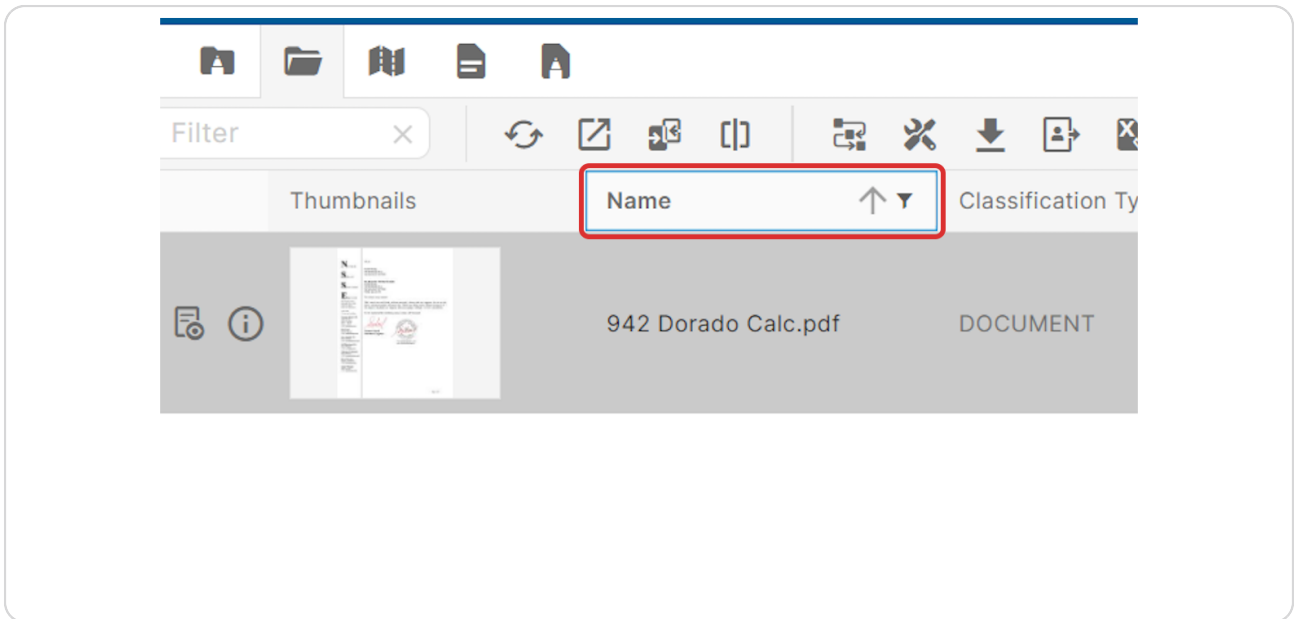
SAVE - Click on Save Applied Filters and Grouping



**STEP 24**

**SETTING UP TAB DISPLAY COLUMNS: Documents List**

Re-order the columns by clicking and dragging to the desired spot



## STEP 25

### SETTING UP TAB DISPLAY COLUMNS: Documents List

Below is an example arrangement: Name, Thumbnails, Classification Type, Status, Doc Category, Submission Order, Markup Correction, Uploaded Date

Name	Thumbnails	Classification Type	Status	Doc Category	Submission Order	Markup Correction ...	Uploaded Date
<input checked="" type="checkbox"/> Building Plans C1.pdf		DOCUMENT	Uploaded	Construction Documents	1	Revision Required	08/25/2023
<input type="checkbox"/> Building Plans C2-Full.pdf		DOCUMENT	Uploaded	Construction Documents	2	None	08/25/2023

## STEP 26

### SETTING UP TAB DISPLAY COLUMNS: Documents List

Once columns are arranged click on Columns Settings

Public Building Plan Review ? | CC

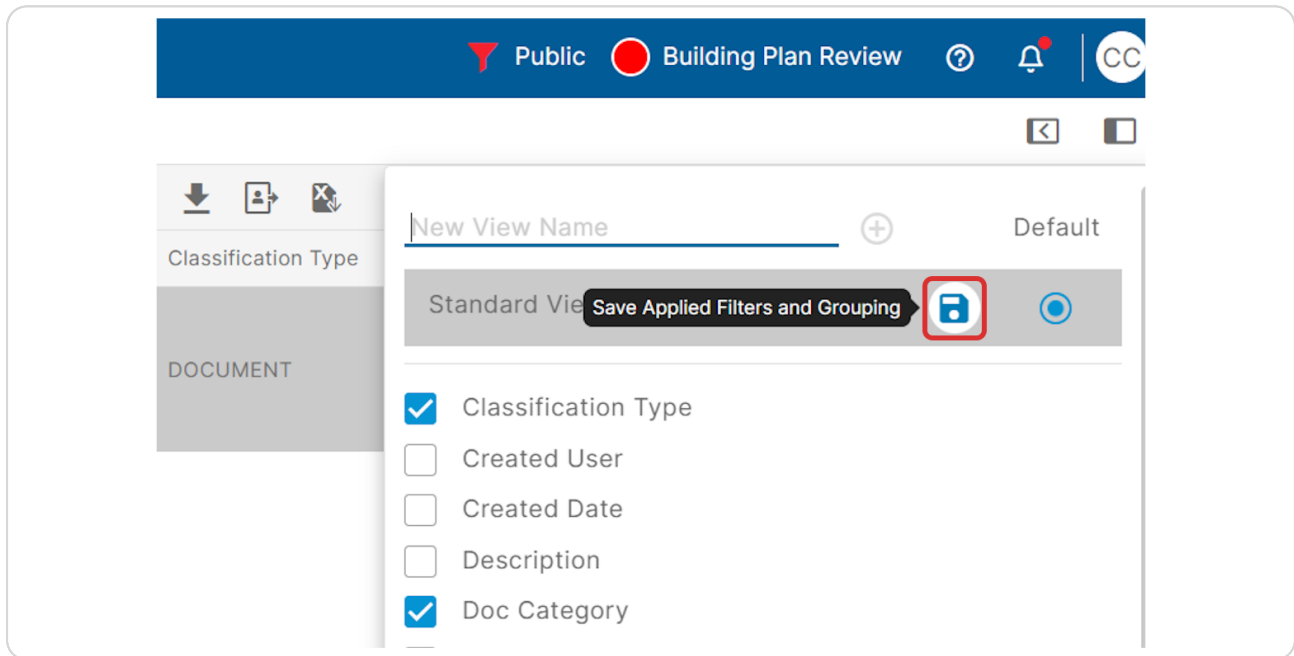
Columns Settings

Name	Thumbnails	Classification Type	Status	Doc Category	Submission Order	Markup Correction ...	Uploaded Date
<input checked="" type="checkbox"/> Building Plans C1.pdf		DOCUMENT	Uploaded	Construction Documents	1	Revision Required	08/25/2023
<input type="checkbox"/> Building Plans C2-Full.pdf		DOCUMENT	Uploaded	Construction Documents	2	None	08/25/2023

## STEP 27

### SETTING UP TAB DISPLAY COLUMNS: Documents List

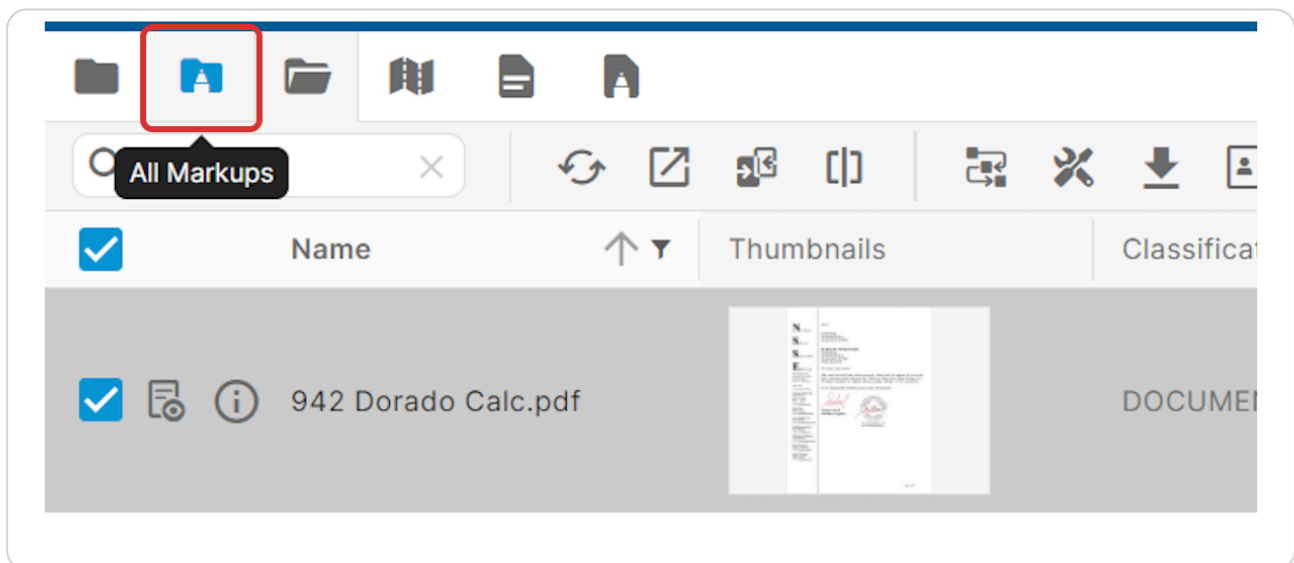
Click on Save



## STEP 28

### SETTING UP TAB DISPLAY COLUMNS: All Markups

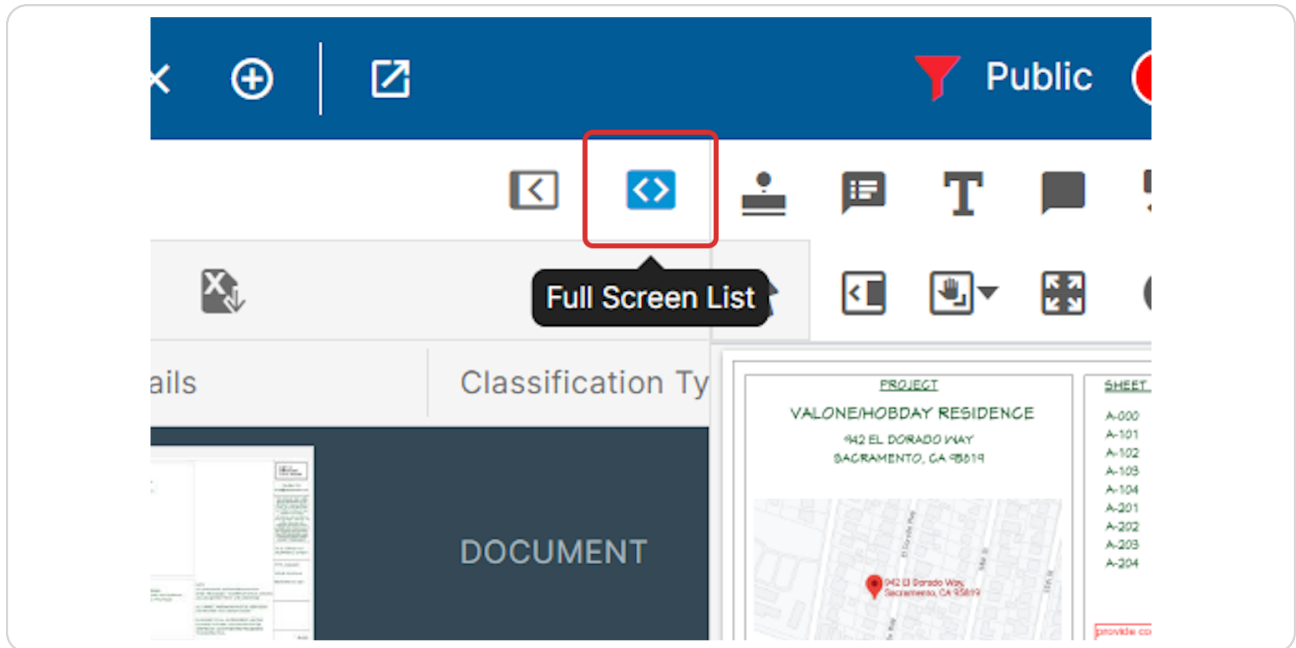
Click on the All Markups Icon



STEP 29

**SETTING UP TAB DISPLAY COLUMNS: All Markups**

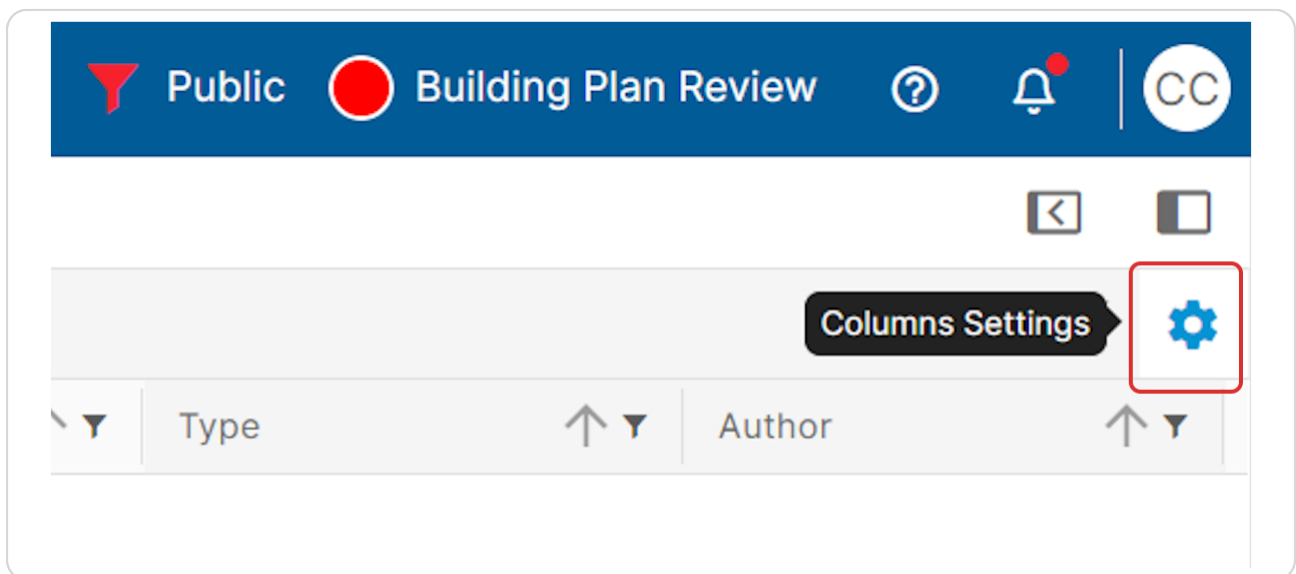
Switching to Full Screen List will make this customization setup easier



STEP 30

**SETTING UP TAB DISPLAY COLUMNS: All Markups**

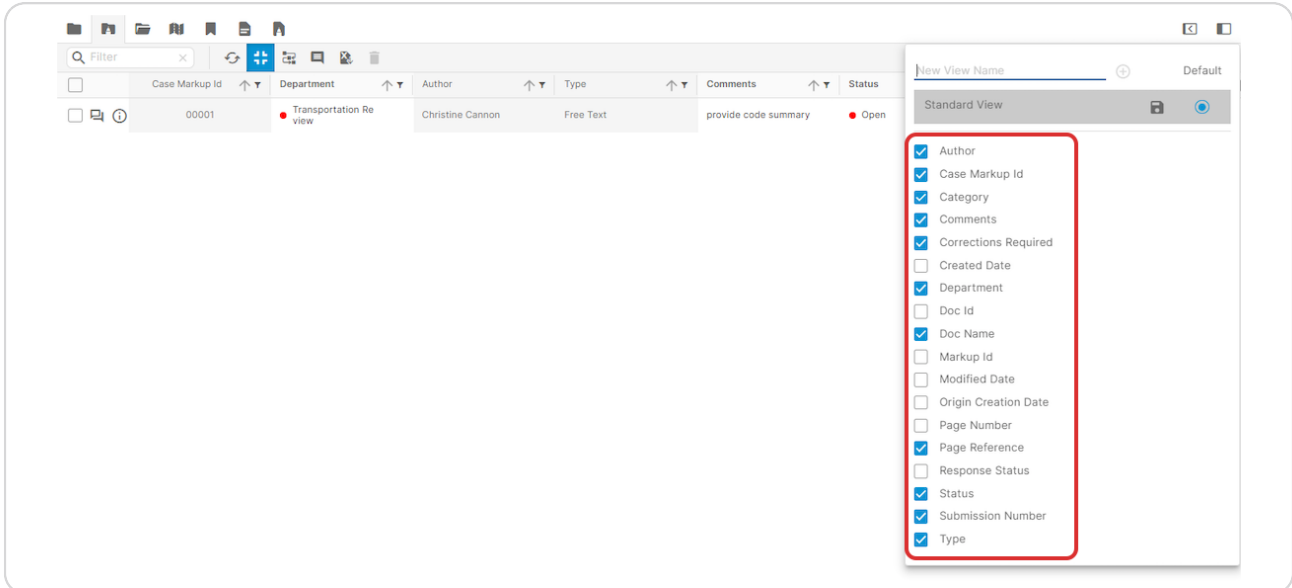
Click on Columns Settings



## STEP 31

### SETTING UP TAB DISPLAY COLUMNS: All Markups

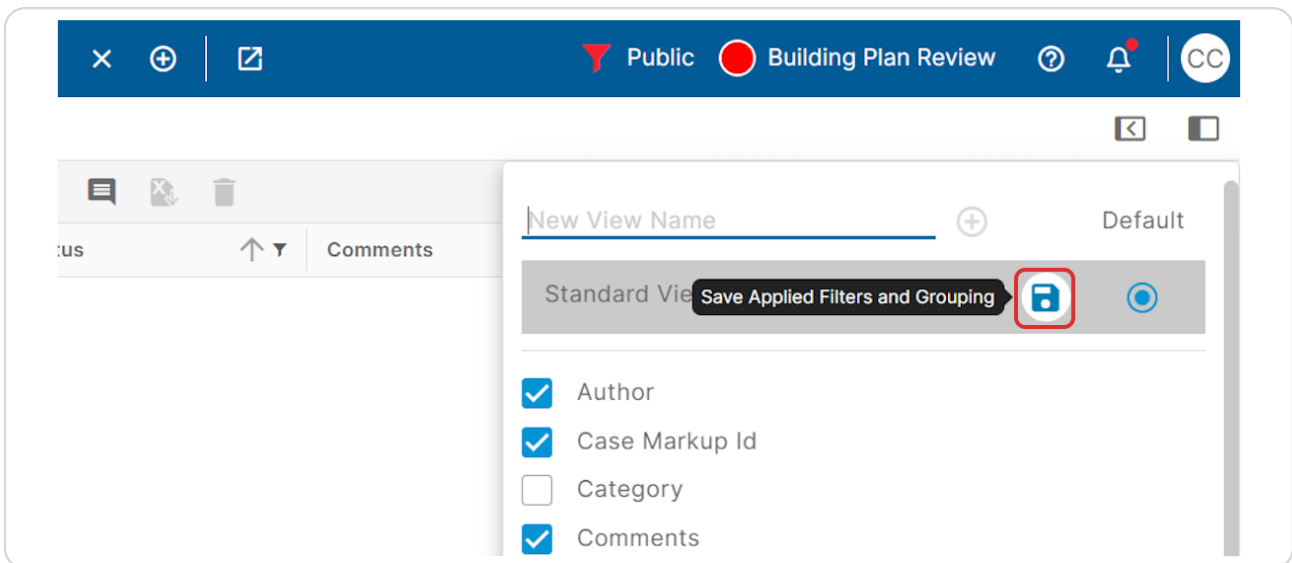
Check the items as shown below: Author, Case Markup ID, Category, Comments, Corrections Required, Department, Doc Name, Page Reference, Status, Submission Number, Type



## STEP 32

### SETTING UP TAB DISPLAY COLUMNS: All Markups

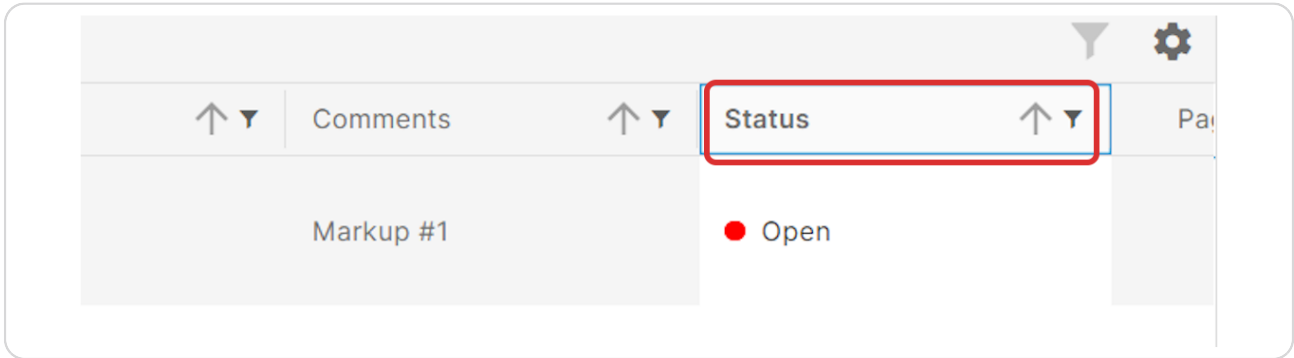
Click on Save Applied Filters and Grouping



### STEP 33

#### SETTING UP TAB DISPLAY COLUMNS: All Markups

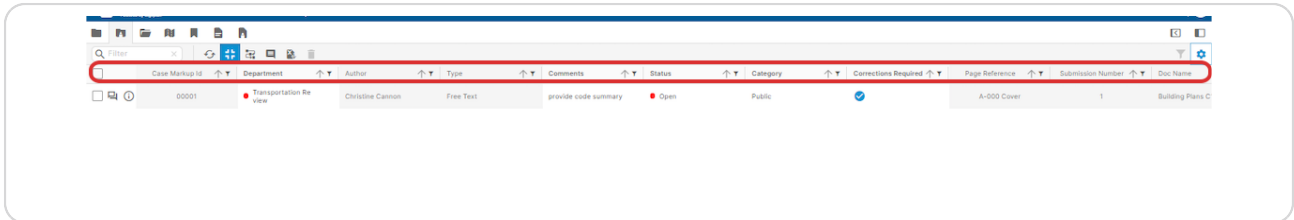
Re-order the columns by clicking and dragging to the desired spot



### STEP 34

#### SETTING UP TAB DISPLAY COLUMNS: All Markups

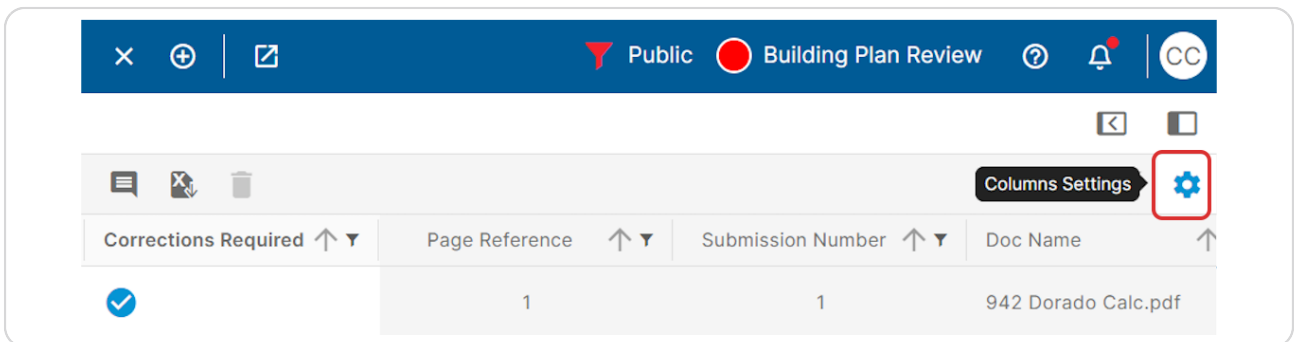
Below is an example arrangement: Case Markup ID, Department, Author, Type, Comments, Status, Category, Corrections Required, Page Reference, Submission Order, Doc Name



### STEP 35

#### SETTING UP TAB DISPLAY COLUMNS: All Markups

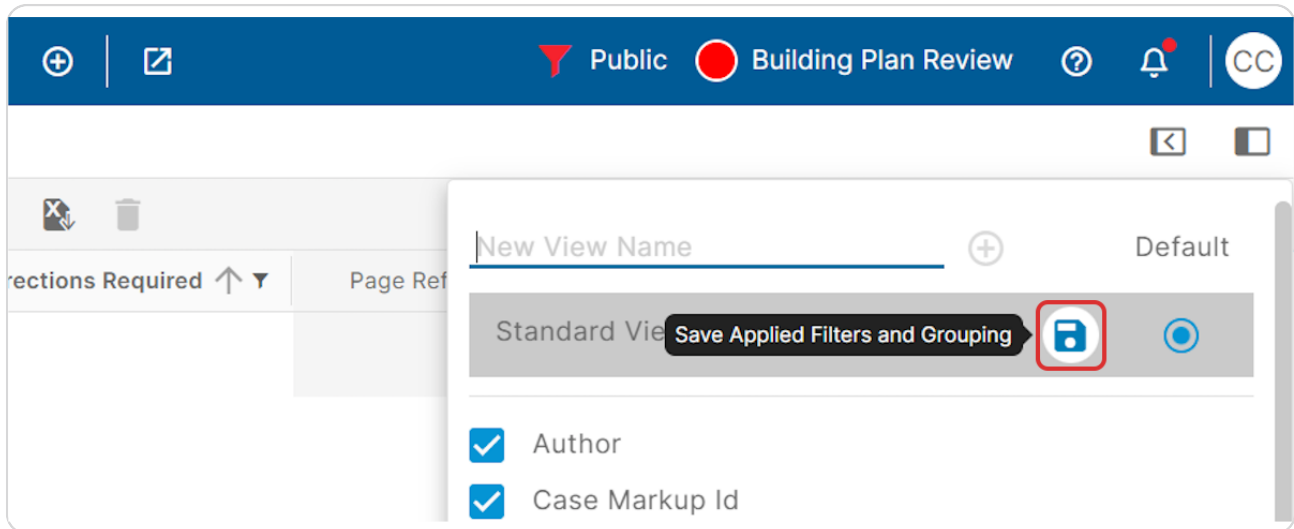
Click on Columns Settings



## STEP 36

### SETTING UP TAB DISPLAY COLUMNS: All Markups

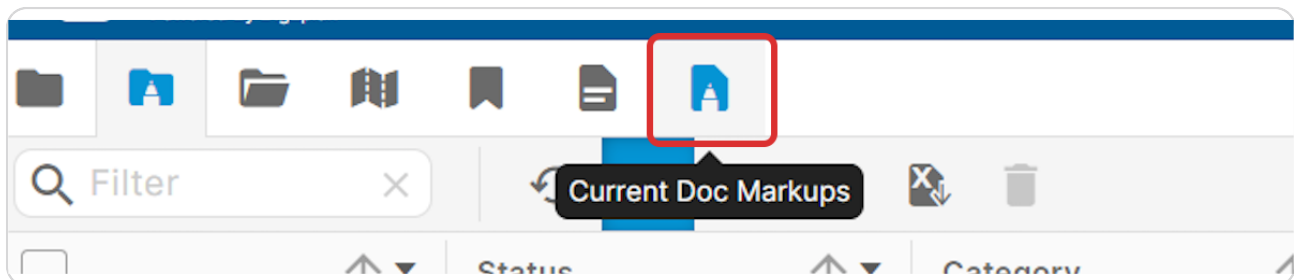
Click on Save Applied Filters and Grouping



## STEP 37

### SETTING UP TAB DISPLAY COLUMNS: Current Doc Markups

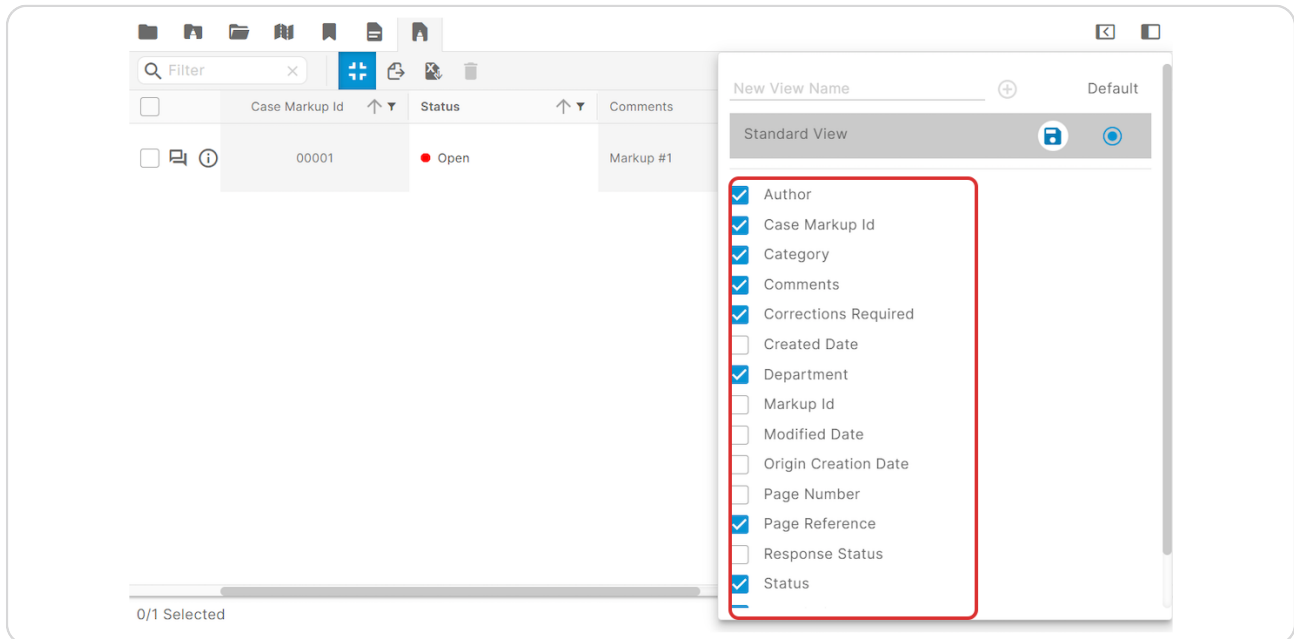
Click on the Current Doc Markups Icon



## STEP 38

### SETTING UP TAB DISPLAY COLUMNS: Current Doc Markups

Follow the same steps as above for All Markups



## STEP 39

### Remember to Save Applied Filters and Grouping

