

# Dataflow

*Document Management & Digital Printing*

## PDM USER GUIDE



ReproMAX



McGraw Hill  
CONSTRUCTION

# Receiving a Notification from LeChase

LeChase will notify you when a document, bid package, and/or other vital information is available on the PDM web vault. You will receive this information via email from [pdmupdates@kalblue.com](mailto:pdmupdates@kalblue.com).

An example of a notification you may receive is an "Invitation To Bid" (ITB) like the one below.

☆ [pdmupdates@kalblue.com](mailto:pdmupdates@kalblue.com) to me [show de](#)

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**INVITATION TO BID**

**Dear Stan Subcontractor,**

LeChase Construction Services would like to invite you to bid on the following project:

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Project Name:           **University of Rochester - CTSB**

Bid Due Date:           **1/7/2010 2:00:00 PM**

[Click Here For More Information](#)

**Quick Response**

Click on one of the links to the right  
to quickly respond to this ITB.

[Yes, I want to bid](#)

[No, I do NOT want to bid](#)

[Maybe, I am undecided at this time](#)

Your username is: [thebiddingcontractor@gmail.com](mailto:thebiddingcontractor@gmail.com)

Your password is: **XXXXXXXX**

Please contact me with any questions you might have.

Regards,  
Brian Bellaire  
585-276-5220

# Invitation to Bid Options

The ITB email will give you two options:

## OPTION ONE: MORE INFORMATION

- Follow the **Click Here for More Information** link to the portal provided to get more information and continue to the login page.  
NOTE: Your username and password are provided for easy access.
- Below is an example of the **Click Here for More Information** link which has links to **Click Here to View the Bid Package**.

## Invitation to Bid

<b>To:</b> <a href="#">Stan Subcontractor</a>	<b>From:</b> <a href="#">LeChase Construction Services</a>
<b>Office:</b> <a href="#">Stan Subcontractor</a>	<b>RE:</b> <a href="#">University of Rochester - CTSB</a>
<b>Fax:</b>	<b>Date:</b> 12/9/2009 12:00:00 AM
<b>Phone:</b>	

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### Project Information

[Click Here to View the Bid Package](#)

<b>University of Rochester - CTSB</b>	<b>Project Owner:</b>	<b>Construction Start Date:</b>
<b>Project Number:</b> LeChase Job# 490328	University of Rochester	
<b>Project Description:</b> University of Rochester		

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### Bid Information

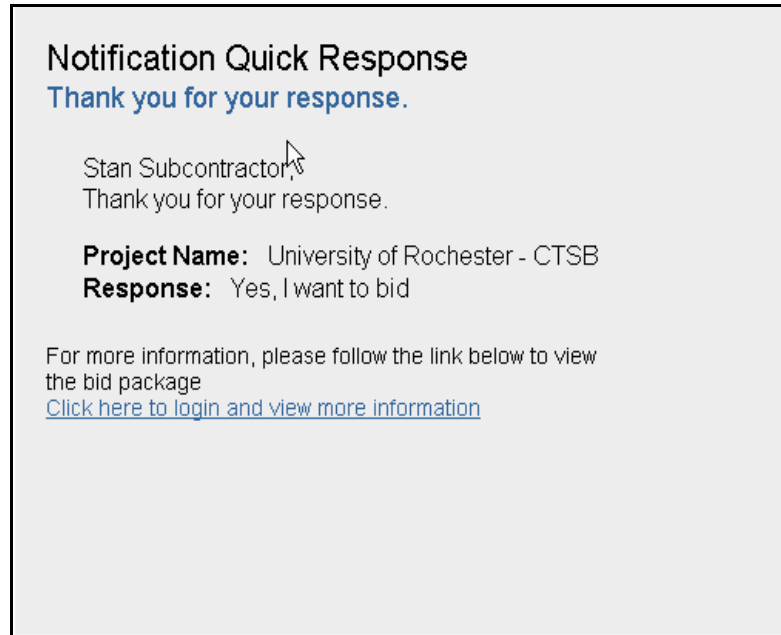
[Click Here to View the Bid Package](#)

<b>Bid Package 3.2 - Metal Studs, GWB, and Ceilings</b>	<b>Bid Contact Name:</b> Brian Bellaire
<b>Bid Package Number:</b>	<b>Bid Contact Address:</b> 300 Trolley Blvd. Rochester, NY 14606 USA
<b>Bid Due Date:</b> 1/7/2010 2:00:00 PM Eastern Standard Time	<b>Bid Contact Phone:</b> 585-276-5220
<b>Bid Package Description:</b>	<b>Bid Contact Email:</b> brian.bellaire@lechase.com
<b>Bid Instructions:</b> Please use the attached user name and password to access the bid documents.	

*Thank you!*

## OPTION TWO: QUICK RESPONSE

- Give LeChase a **Quick Response** by clicking one of the link responses.
  - Yes, I want to bid
  - No, I do NOT want to bid
  - Maybe, I am undecided at this time
- When you select one of these options you will receive confirmation of your response selection like the one below.



# Log In To A PDM Planroom

**University of Rochester - CTSB** is a private project so you will be sent a user name, password and link to the portal which comes via the Invitation to Bid email.

- Follow the hot link to the portal provided in the ITB email you receive from LeChase.
- Enter your user name and password.
- Click **Login**.

Global Sign In

Global User Name (case sensitive)

Global Password (case sensitive)

Login

Remember my user name on this machine

**Forgot Your Password?**  
Enter your email and have it sent to you

Forgot Password?

**Sign Up Today!**  
It's free and anyone can register

**I Received a Fax**  
I don't know my Sign In, but I have a fax key

[Click Here](#) [Click Here](#)

Do more with your PDM account

- Contact Management ✓
- Prequalification Process ✓
- Bid Management ✓
- Electronic Submittal Management ✓
- Electronic Closeout ✓
- Risk Mitigation & Accountability ✓

McGraw-Hill Construction Dodge · ReprqMAX

POWERED BY PDM

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Version 3.0.0.5 11/16/2010

You must agree to the LeChase Construction EULA service agreement:

**Service Agreement** Continue

Please read and agree to the following service agreement to continue

**Plan Room Terms of Use**

By accessing and/or using the LeChase website (the "Site"), You accept, without limitation or qualifications, the following **Terms of Use**:

1. LeChase maintains this Site for Your personal use, entertainment, information, education, and communication. LeChase grants You the permission to use and view the Site subject to these Terms of Use.
2. You may not modify, copy, transmit, display, reproduce, publish, license, create derivative works from, transfer, or sell any information, materials, software, designs, drawings, content, products or services from the Site (together "Content") in any form without LeChase's prior written permission. You may print out a copy or download Content solely for Your personal use. In doing so, You may not remove or alter, or cause to be removed or altered, any copyright, trademark, trade name, service mark, or any other proprietary notice or legend appearing on any of the Content.
3. LeChase has the right at any time to change or discontinue any aspect or feature of the Site.
4. You may use the Site for lawful purposes only. You may not post or transmit through the Site any material which violates or infringes in any way upon the rights of others, which is unlawful, threatening, abusive, defamatory, invasive of privacy or publicity rights, vulgar, obscene, profane or otherwise objectionable, which encourages conduct that would constitute a criminal offense, give rise to civil liability or otherwise violate any law. LeChase will fully cooperate with any law enforcement authorities or court order requesting or directing LeChase to disclose the identity of anyone posting such information or materials.
5. The trademarks, logos, and service marks (collectively the "Trademarks") displayed on the Site are registered and unregistered Trademarks of LeChase and others. Nothing contained on the Site should be construed as granting, by implication, estoppel, or otherwise, any license or right to use any Trademark displayed on the Site without the written permission of LeChase or such party that may own the Trademark. Your use of the Trademarks displayed on the Site, or any other content on the Site, except as provided in these Terms of Use, are strictly prohibited. LeChase will aggressively enforce its intellectual property rights to the fullest extent of the law.

# Confirm Identity

Once you have logged in you will be asked to update your information if need be.

**Is this you?**

**Stan Subcontractor**  
**Stan Houston Equipment Company**

**Contact Verification FAQ**

**What is Verification?**  
Verification is a simple way to insure that your contact information is correct. Your information is often entered by others who may not have current information for you.

**Why Verify?**  
Security and Integrity are very important and verification helps keep both intact.

a) Trying to verify as someone else could disable their account and also change their information to something incorrect.  
b) Selecting NO allows you to create your own account in the system and allows you to be considered for future projects.

**If I select NO?**  
Will I be able to access the project information for an ITB?  
Selecting NO will require the project manager's approval before you can access project information

Click on the appropriate box:

- **Yes, this is me** to confirm your identity.
- **No** to update your information. Then enter the required information to update and click **Complete Verification**.

**Verify your contact information**

**Stan Subcontractor**  
Stan Subcontractor  
thebiddingcontractor@gmail.com

Title  
Lead Estimator

Address 1 \* 300 Trolley Blvd  
City \* Rochester  
State \* New York  
Zip Code \* 14606  
Country \* UNITED STATES

Work Number \* ((585) 254-3510  
Fax Number  
Mobile Number

Password \*  
Password (re-enter) \*

Share my info on the PDM Global Contact Directory

**Send me invitations for:**

- 01 General
- 02 Site Work
- 03 Concrete
- 04 Masonry
- 05 Metals
- 06 Wood & Plastic
- 07 Thermal/Moist
- 08 Doors/Windows
- 09 Finishes
- 10 Specialties
- 11 Equipment
- 12 Furnishings
- 13 Special Const
- 14 Conveying
- 15 Mechanical
- 16 Electrical
- 17 Data Com

\*Note: Additional edits to your account can be made after completing verification.

NOTE: This is a one-time request upon you first login to the site. In the future, you can edit your personal account information from the **Manage Account** link on the home page.

# Link McGraw Hill Construction Account

Link your existing McGraw Hill Construction account or create a FREE account.

NOTE: This is a one-time request upon you first login to the site.

**NO ACCOUNT FOUND TO LINK**

**McGraw Hill CONSTRUCTION**  
connecting people.projects.products

We checked [www.construction.com](http://www.construction.com) for an existing account registered with this email address and didn't find one.

**PLEASE CHOOSE ONE OPTION BELOW**

YES, I HAVE AN ACCOUNT	NO ACCOUNT
The email associated with my account is: <input type="text"/>	Create one with this email address: <a href="mailto:thebiddingcontractor@gmail.com">thebiddingcontractor@gmail.com</a>
<input type="button" value="Submit New Email"/>	<input type="button" value="Continue"/>

**Frequently Asked Questions**

**Why Check [www.Construction.com](http://www.Construction.com)?**  
Our integration with McGraw-Hill allows existing [www.Construction.com](http://www.Construction.com) users to utilize any subscription information associated with their account.

Linking to an existing account will allow you to benefit from this integration, while creating an additional account will not.

**YES, I HAVE AN ACCOUNT**  
It's not uncommon to have multiple email addresses, so you may have received an invitation to bid to an email address that isn't the same one you have associated with [www.Construction.com](http://www.Construction.com).

If you have an account on [www.construction.com](http://www.construction.com), linking that account on this portal allows you to benefit from our integration with McGraw-Hill.

**NO ACCOUNT**  
It's not a problem if you don't already have an account on McGraw-Hill's [www.Construction.com](http://www.Construction.com).

Click the Continue button to continue and we will automatically create one for you.

## If you have a McGraw Hill Construction account:

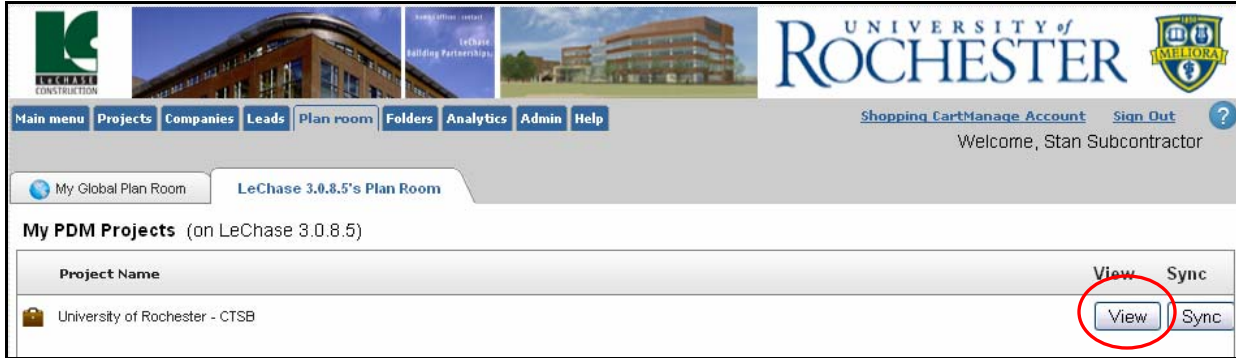
Enter your email address associated to your McGraw Hill Construction account and click **Submit New Email**. You will be asked to verify additional information about your account.

## If you DO NOT have a McGraw Hill Construction account:

Select **Continue** under the **NO ACCOUNT** box and create a FREE McGraw Hill Construction account. The FREE account will give you access to future PDM features and limited access to McGraw Hill Construction site features. You can also upgrade your account to include additional subscriptions from McGraw Hill Construction.

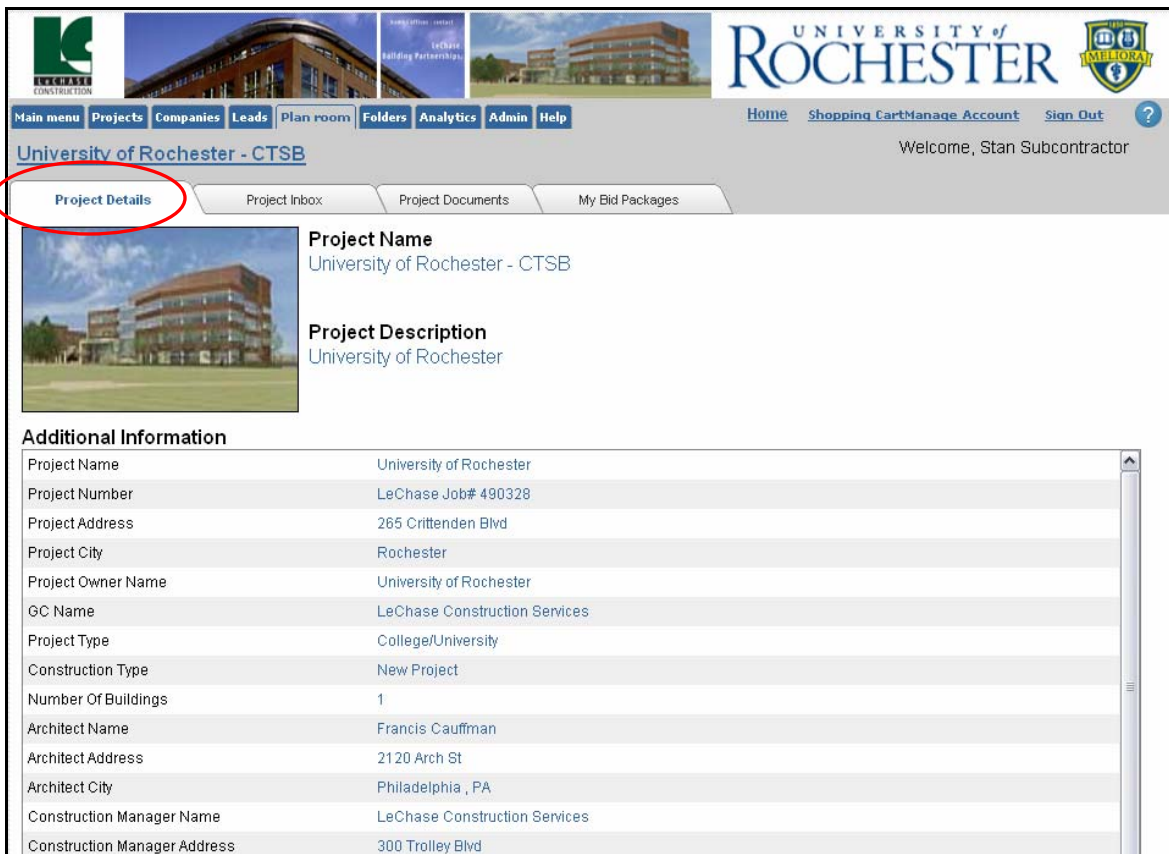
# View A Project

Upon logging into a portal, the active project(s) will be displayed under the **LeChase's Plan Room** tab. To view the project, click **View** to the right of the project name.



# Project Details

Once you have clicked on the project you would like to view, click the **Project Details** tab below the name of the project. This is where additional information about the project will be listed.



# Project Bid Package Documents

To view the Bid Documents, click **My Bid Packages**. Bid packages you have been invited to bid will appear in the folder tree structure on the left hand side of the screen.

The screenshot shows the University of Rochester CTSB web application interface. At the top, there is a navigation menu with options like 'Main menu', 'Projects', 'Companies', 'Leads', 'Plan room', 'Folders', 'Analytics', 'Admin', and 'Help'. The 'My Bid Packages' tab is highlighted and circled in red. Below the navigation, the 'Bid Package Name' is 'Bid Package 3.2 - Metal Studs, GWB, and Ceilings'. The 'Bid Due Date' is '1/7/2010 2:00:00 PM' and the 'Bid Response Due' is also '1/7/2010 2:00:00 PM'. The 'Bid Package Contact' is 'Brian Bellaire (LeChase)' with phone number '585-276-5220'. The 'My Response' dropdown menu is set to 'Bidding'. In the 'Bid Package Docs' section, a folder tree is shown with 'Bid Package 3.2 - Bid Documents' selected and circled in red. The main content area is currently empty, displaying 'No records to display.'

To view the contents of a folder, click on that folder. To expand a folder, click on the + sign. From here you have the option of **Downloading**, **Printing** or **Viewing** a document by clicking the corresponding button to the right of the document.

The screenshot shows the University of Rochester CTSB web application interface. At the top, there is a navigation menu with options like 'Main menu', 'Projects', 'Companies', 'Leads', 'Plan room', 'Folders', 'Analytics', 'Admin', and 'Help'. The 'My Bid Packages' tab is selected and highlighted. Below the navigation, the 'Bid Package Name' is 'Bid Package 3.3 - Interior Glass Modular Wall System'. The 'Bid Due Date' is '1/7/2010 2:00:00 PM' and the 'Bid Response Due' is also '1/7/2010 2:00:00 PM'. The 'Bid Package Contact' is 'Brian Bellaire (LeChase)' with phone number '585-276-5220'. The 'My Response' dropdown menu is set to 'No Response'. In the 'Bid Package Docs' section, a folder tree is shown with 'Bid Package 3.3 - Bid Documents' selected. The main content area displays a list of documents with columns for 'Document Name', 'Download', 'Print', and 'View'.

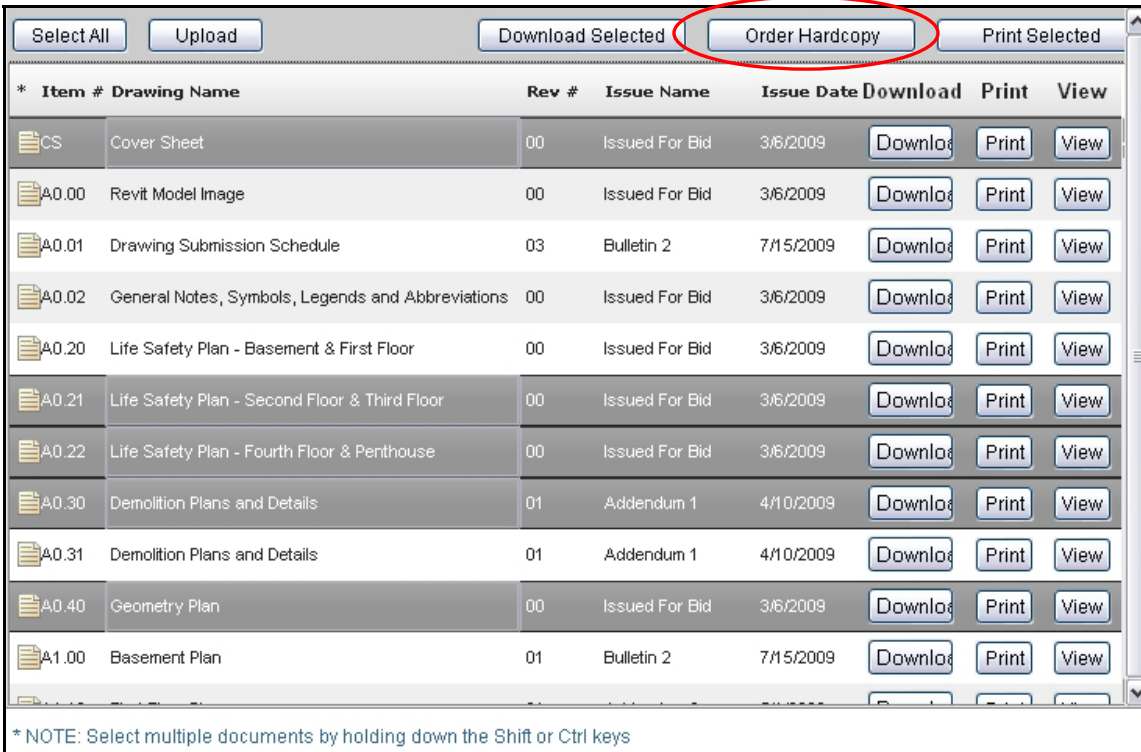
Document Name	Download	Print	View
100% CS Architectural - Architectural Cover - Issued For Construction - 3/6/2009 12:00:00 AM	Download	Print	View
CS - Cover Sheet - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	Download	Print	View
A0.00 - Revit Model Image - Issued For Bid	Download	Print	View
A0.01 - Drawing Submission Schedule - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	Download	Print	View
A0.02 - General Notes, Symbols, Legends and Abbreviations - Issued For Bid	Download	Print	View
A0.20 - Life Safety Plan Basement and First Floor - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	Download	Print	View

# Placing An Order

You can place an order to have documents printed at your local Dataflow office.

To add documents to your cart:

- Find the documents you want to order.
- Select the documents.
  - Click the **Select All** button to order all documents displaying in the folder.
  - Select multiple non-consecutive documents by holding the **Ctrl** button on your keyboard and clicking with your mouse on each of the documents.
  - Select multiple consecutive documents by holding the **Shift** button on your keyboard and clicking with your mouse on the range of documents.
- Click **Order Hardcopy** to add the selected items to your cart.



The screenshot shows a web interface for selecting documents. At the top, there are buttons for 'Select All', 'Upload', 'Download Selected', 'Order Hardcopy' (circled in red), and 'Print Selected'. Below these buttons is a table with columns: 'Item #', 'Drawing Name', 'Rev #', 'Issue Name', 'Issue Date', 'Download', 'Print', and 'View'. The table contains several rows of drawing information, including 'Cover Sheet', 'Revit Model Image', 'Drawing Submission Schedule', 'General Notes, Symbols, Legends and Abbreviations', 'Life Safety Plan - Basement & First Floor', 'Life Safety Plan - Second Floor & Third Floor', 'Life Safety Plan - Fourth Floor & Penthouse', 'Demolition Plans and Details', 'Geometry Plan', and 'Basement Plan'. Each row has corresponding 'Download', 'Print', and 'View' buttons. At the bottom of the interface, there is a note: '\* NOTE: Select multiple documents by holding down the Shift or Ctrl keys'.

* Item #	Drawing Name	Rev #	Issue Name	Issue Date	Download	Print	View
CS	Cover Sheet	00	Issued For Bid	3/6/2009	Download	Print	View
A0.00	Revit Model Image	00	Issued For Bid	3/6/2009	Download	Print	View
A0.01	Drawing Submission Schedule	03	Bulletin 2	7/15/2009	Download	Print	View
A0.02	General Notes, Symbols, Legends and Abbreviations	00	Issued For Bid	3/6/2009	Download	Print	View
A0.20	Life Safety Plan - Basement & First Floor	00	Issued For Bid	3/6/2009	Download	Print	View
A0.21	Life Safety Plan - Second Floor & Third Floor	00	Issued For Bid	3/6/2009	Download	Print	View
A0.22	Life Safety Plan - Fourth Floor & Penthouse	00	Issued For Bid	3/6/2009	Download	Print	View
A0.30	Demolition Plans and Details	01	Addendum 1	4/10/2009	Download	Print	View
A0.31	Demolition Plans and Details	01	Addendum 1	4/10/2009	Download	Print	View
A0.40	Geometry Plan	00	Issued For Bid	3/6/2009	Download	Print	View
A1.00	Basement Plan	01	Bulletin 2	7/15/2009	Download	Print	View

\* NOTE: Select multiple documents by holding down the Shift or Ctrl keys

- These selected documents have been added to your cart. If you have additional documents that you would like to order, please click the **Continue Shopping** button and repeat the steps above until you are ready to check out.

# Shopping Cart

Before checking out, make sure you have the correct number of full size and half size documents. You can change the number by clicking in the boxes to the right of the documents and typing the number you want.

The screenshot shows the University of Rochester Shopping Cart interface. At the top, there are navigation menus for 'Main menu', 'Projects', 'Companies', 'Leads', 'Plan room', 'Folders', 'Analytics', 'Admin', and 'Help'. The user is logged in as 'Stan Subcontractor'. The cart contains several documents, and the 'Full Size Qty' for the first document is highlighted with a red circle.

Document Name	Full Size Qty	Half Size Qty
100% CS Architectural - Architectural Cover - Issued For Construction - 3/6/2009 12:00:00 AM	2	0
CS - Cover Sheet - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	1	0
A0.00 - Revit Model Image - Issued For Bid	1	0
A0.01 - Drawing Submission Schedule - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	1	0
A0.02 - General Notes, Symbols, Legends and Abbreviations - Issued For Bid	1	0
A0.20 - Life Safety Plan Basement and First Floor - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	1	0
A0.21 - Life Safety Plan Second Floor and Third Floor - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	1	0
A0.22 - Life Safety Plan Fourth Floor and Penthouse - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	1	0
A0.30 - Demolition Plans and Details - Addendum 1	1	0

To change the quantity for all of the documents, place the correct number in the corresponding box at the top of the page then click **Update Cart**.

The screenshot shows the University of Rochester Shopping Cart interface. The 'Full Size Qty' input box at the top is now set to '3' and is circled in red. The 'Update Cart' button is also circled in red.

Document Name	Full Size Qty	Half Size Qty
100% CS Architectural - Architectural Cover - Issued For Construction - 3/6/2009 12:00:00 AM	3	0
CS - Cover Sheet - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	3	0
A0.00 - Revit Model Image - Issued For Bid	3	0
A0.01 - Drawing Submission Schedule - Bulletin 5 - Issued For Construction - 11/13/2009 12:00:00 AM	3	0

# Checkout

In your shopping cart click the **Check Out** button.

## Check Out (Step 1 of 2)

- Select how you would like your order shipped, or if you would prefer select **PICKUP** and check the “Dataflow Rochester” location box.
- Check the **Fill with my account information** box to ship to your account address or fill in all shipping information fields marked with a red asterisk.
- Type any additional information in the **Additional Order Info** box.
- When finished click the **Next** button.

### Check Out (Step 1 of 2)

#### Shipping Information

How would you like your order shipped? \*

PICKUP - Select a local shop to pickup your order

#### Order Information

Additional options to include in your order:

CD/DVDs (every document in your cart will be burned onto a CD or DVD)

1 Copies on DVD

#### Additional Order Info

Please bind and call 012-345-6789 when ready for pickup.

Local Shop Name	Hours of Operation
<input checked="" type="checkbox"/> Dataflow Rochester 320 North Goodman Street Suite 200 Rochester, NY 14607 585-271-5730	

Change page: < >      Displaying page 1 of 1, items 1 to 1 of 1.

[Back](#)   [Next](#)

## Check Out (Step 2 of 2)

Review your order.

- If you would like to change your order in any way, click the **Back** button.
- If your order is correct, click the **Place Order** button.

**Check Out (Step 2 of 2)**

**Pickup Information**  
You have selected to pickup your order from the local shop below.

**Shop Info**  
Dataflow Rochester  
320 North Goodman Street  
Suite 200  
Rochester, NY 14607  
585-271-5730

**Hours**

**Order Review**  
Please review the items below before placing your order

Document Name	Full Size	Half Size
CS - Cover Sheet - Issued For Bid	1	0
A0.21 - Life Safety Plan - Second Floor & Third Floor - Issued For Bid	1	0
A0.30 - Demolition Plans and Details - Addendum 1	1	0
A0.22 - Life Safety Plan - Fourth Floor & Penthouse - Issued For Bid	1	0
A0.40 - Geometry Plan - Issued For Bid	1	0

Change page: < >      Displaying page 1 of 1, items 1 to 5 of 5.

\* Review the information above before completing your order

When the order has been successfully placed, you will see the **Order Confirmation** screen.

**Order Confirmation**

**Order Complete!**

Thank You for your Order

To review your order, please visit the [Manage Account page](#) and click on the [Orders tab](#).

PLEASE NOTE: Our normal turn-around time for orders is 24 hours. We will make every effort to have your order ready, but please call in advance if your required pick up is less than 24 hours to avoid an unnecessary trip.

# Order Details

To view details associated with the order you just placed (or view information about any previously placed orders), click on the **Manage Account** link.

Then click on the **My Orders** tab.

Public Information	Codes & Service Areas	Private Information	My Orders	My Queue
<b>My Orders</b>				<a href="#">View Details</a>
Order #	Order Name	Order Date	Status	
<input type="checkbox"/>	18 ABC Building (Pickup From: Dataflow Rochester - Shop # 585-271-5730)	10/23/2009 2:25:46 PM	Created	
<input type="checkbox"/>	17 ABC Building (Pickup From: Dataflow Rochester - Shop # 585-271-5730)	10/23/2009 1:06:05 PM	Created	

Check the box next to any orders you would like to view and then click on the **View Details** button. You will see the associated Order Number, Order Date and Time, and the additional information you entered. All of your Ordered Items are also listed.

Order Details Information	
<b>Order Number:</b> 18	<b>Order Date:</b> 10/23/2009 2:25:46 PM
<b>PICKUP ORDER</b> ABC Building (Pickup From: Dataflow Rochester #585-271-5730)	
<b>Order Comments</b> CD/DVD Copies: 1 on DVD	
Additional Order Info: Please bind and call 012-345-6789 when ready for pickup.	
You have chosen to pickup your order at the shop below:	
<b>Shop Info</b>	<b>Hours</b>
Dataflow Rochester 320 North Goodman Street Suite 200 Rochester, NY 14607 Phone: 585-271-5730	
<b>Ordered Items</b>	
Document Name	Quantity
CS - Cover Sheet - Issued For Bid (Printable Format)	1
A0.21 - Life Safety Plan - Second Floor & Third Floor - Issued For Bid (Printable Format)	1
A0.30 - Demolition Plans and Details - Addendum 1 (Printable Format)	1
A0.22 - Life Safety Plan - Fourth Floor & Penthouse - Issued For Bid (Printable Format)	1
A0.40 - Geometry Plan - Issued For Bid (Printable Format)	1
Change page: < >      Displaying page 1 of 1, Items 1 to 5 of 5.	

If you are unsure of what you need to order, please call Brian Bellaire at LeChase Construction.

If you need help placing an order, please email [dat\\_team@godataflow.com](mailto:dat_team@godataflow.com) or call 866-829-2821 and ask to speak to a DAT member.

For on-site assistance, please contact Greg Kuebel at 607-759-4842.



**Albany**  
71 Fuller Road  
Albany, NY 12205  
518.463.2192  
albany@godataflow.com

**Utica**  
318-320 Columbia Street  
Utica, NY 13502  
315.735.6131  
utica@godataflow.com

**Binghamton**  
221 Washington Street  
Binghamton, NY 13901  
607.772.2001  
binghamton@godataflow.com

**Rotterdam**  
2601 Guilderland Avenue  
Schenectady, NY 12306  
518.372.3995  
rotterdam@godataflow.com

**Corning**  
Airport Corporate Park  
100 Hunt Center  
Horseheads, NY 14845  
607.562.2196  
corning@godataflow.com

**Rochester**  
320 N. Goodman Street  
Suite 200  
Rochester, NY 14607  
585.271.5730  
rochester@godataflow.com

**Ithaca**  
306 S Meadow Street  
Ithaca, NY 14850  
607.272.8589  
ithaca@godataflow.com

**Syracuse**  
117 Metropolitan Drive  
Liverpool, NY 13088-3337  
315.457.0472  
liverpool@godataflow.com