

ePLANS

Applicant User Guide



City of Ormond Beach, Florida

Version 4 - September 1, 2016

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Introduction to ePlans

This manual provides basic documentation on the steps involved in the Electronic Plan Review (ePlan) process. It has been prepared as a general reference guide and is not designed to present every detail or situations on every element of the process. There are text descriptions and screen images of the step-by-step tasks necessary to complete a submittal and review using ePlan.

If at any time in the process you have questions or concerns, do not hesitate to give us a call. Be sure to ask to speak to a ProjectDox System Administrator in one of the following divisions:

Building: 386-676-3234

Engineering: 386-615-7078

Planning: 386-676-3311

Getting Started

Upon submitting an application for a permit or project, you will receive an email invitation to our electronic plan review system, ePlans. That email will contain your login information and project information, along with a “Login to ePlans” access link. You must use Internet Explorer v6.0 or higher to access ProjectDox.

Before using ePlans for the first time, please complete the following steps:

1. Disable your Pop-Up Blocker—ePlans uses pop-up windows (browser windows with no toolbars). Please disable pop-up blocking for the ePlans site. Here’s how:

On the ePlans login page, open the Tools menu from the menu bar. Select the Pop-up Blocker option, and select the Turn Off Pop-up Blocker option.

2. The log-in page has a link to install all the necessary ProjectDox controls. If you encounter additional problems, please refer to the System Use Requirements manual link on our web site.
3. Log into City of Ormond Beach ePlans

Enter your email address and temporary password from your invitation email. A User Profile screen will display. The email address you provide on the initial application for electronic plan submittal will be your User ID for all future ePlans submittals.

You must create a permanent password upon your initial login to the system. Passwords are case sensitive and must be at least 8 to 10 characters, include one numerical digit and contain no special characters.

Enter your password Reset Question & Answer; the additional shaded fields are required. You cannot proceed until all required fields are filled in.

Click Save when finished.

If you forget your password, enter your email address and click the “Forgot your password?” link on the login screen. This will bring up a screen and you will need to fill in your first and last name and then click the button “Display security question.” Once you have answered your security question, a new temporary password will be sent to you to login and create a new permanent password.

Once logged in, the Projects screen will display all projects to which you have access. Your Profile can be accessed at any time by clicking the “Profile” button from the main ePlans button bar.

Standards

Plan File Naming Standards

Standards allow for easy identification of drawings. When preparing to upload your drawings / plan pages to the ePlan system, please follow the guidelines shown below. ***File names can be no more than 70 characters long.***

ALL FILES MUST BE IN THE CORRECT ORIENTATION FOR READING. SUBMITTED DOCUMENTS SHOULD NOT BE UPSIDE DOWN, OR SIDEWAYS, OR THEY WILL BE REJECTED.

Required Files

1. Drawing Files—all required drawings, as well as an index page, following City standards for submission (along with other information required by the City’s checklist). **Each drawing of the project should be uploaded as a separate file.** ePlans provide overlay and comparison functions for plan drawings, but only if the plans are provided as single sheets, so **no multi-page plans or drawings can be accepted.**
2. Supporting Document Files—all other files that are required as part of the application submission, but are not drawing files (i.e. Drainage calculations, easement letter, certifications, etc.) shall be uploaded as a separate file.

Border Standards—All drawing files

- The top right corner of all drawings must be reserved for the City of Ormond Beach electronic approval stamps. Please leave the top right corner completely blank on all drawings (with the exception of the border).

Digital Signatures

- All drawings to be uploaded, that would normally be professionally signed and sealed, must contain a 3rd Party Authenticated digital seal and signature (see our web site for suggestions on companies that offer this service).

Folder Structure

- All Documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the “Documents” folder for each project. These files can be multi-page documents.
- All drawings should be uploaded to the “Drawings” folder for each project, as **single page files**.
 - ◆ The Site Plan layout for building plans should be uploaded into the drawings folder.

Building Plans (Residential & Commercial):

Filenames for drawings submitted through ePlans Review should include the first character(s) of the discipline name, followed by a sheet number and drawing type. File names for both drawings and documents shall remain the same for all submittals. Please **do not** version files when uploading resubmitted files.

- **Correct File Names** – A001 - Cover, A002 - Wall Detail, A003 - Front Elevation, P001 - Plumbing, E001 - Electrical.
- **Incorrect File Names** – ~~J. Doe—123 Elm St—E1 Electrical Plan~~, ~~J. Doe—123 Elm St—P1 Plumbing Plan~~ (Please **do not** include the name or address of the home owner or business in the file name).

File Type Standards

Only DWG, DWF, DGN, DXF or vector PDF files will be accepted for drawings. AutoCAD software is commonly used to create drawing files. If PDF is the preferred file type, it is recommended that drawings created in AutoCAD are converted to Vector PDF by using the Autodesk Vector Graphic Converter “DWG to PDF.pc3 plotter driver.”

If drawings are electrical, mechanical, plumbing/gas, etc, confirm that only the trade lines are dark by changing the background to grayscale prior to saving as a vector PDF file.

Supporting documents may be saved in the following formats: PDF, DOC, DOCX, XLS, XLSX, PPT, PPS, PPTX, TIF, TIFF, JPG, PNG, IMG, or BMP. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-drawing files).

Digital Signatures

All drawings to be uploaded must contain an electronic 3rd Party Authenticated digital seal and signature. (Visit our web page for suggestions of companies that offer this service.) Effective October 1, 2016, all licensed design professionals must submit their digital signature on the Digital Signature Form, for verification of 3rd Party Authentication. The form can be found on the City web site.

Folder Structure

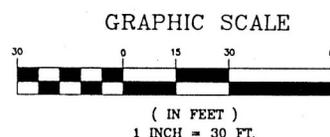
- All Building Permit or Development Project *application forms* must be uploaded into the “Documents” folder for each project.
- All documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the “Documents” folder for each project.
- All drawings should be uploaded to the “Drawings” folder for each project.
 - ◆ The Site Plan layout for building plans should be uploaded into the drawings folder.

File Sheet Size and Orientation Standards

- For Development Projects, all drawing files must be drawn and formatted for a minimum landscape 24” x 36” sheet file, except Plats which are drawn to a 20” x 24” sheet file.
- For Building Permits, all drawing files must be drawn and formatted for a minimum landscape 24” x 36” sheet file, or landscape 11” x 17” sheet file for smaller scale jobs (pool enclosures, pools, termite repairs, etc.)
- Plan pages shall be saved and uploaded in landscape orientation.
- Documents shall be saved and uploaded in portrait orientation.

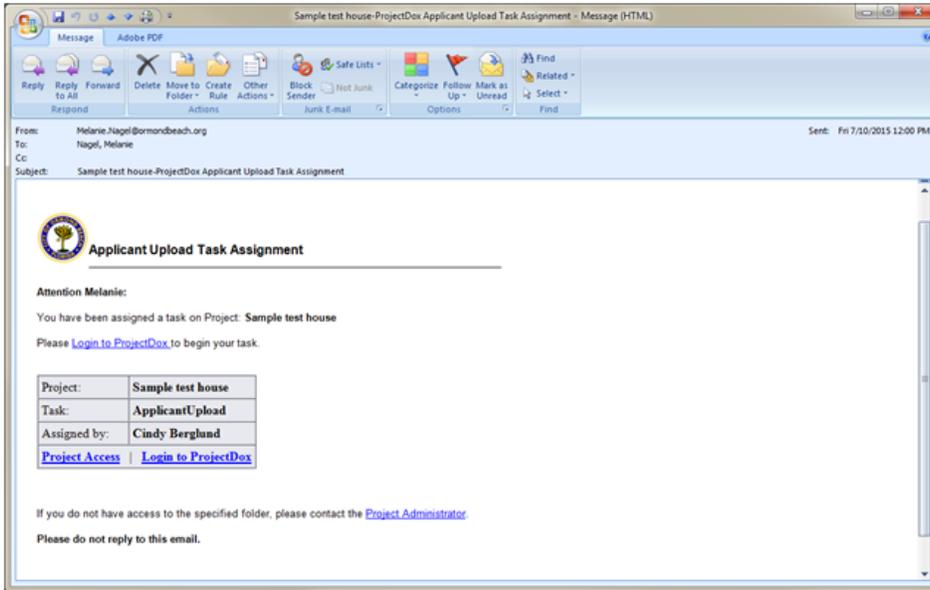
Graphic Scale Standards

- DWF, DWG and PDF plan pages should be properly oriented in landscape mode for efficient review.
- Each sheet must have a typical graphic scale as shown in the image below.
- When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
- All plans must be drawn to scale.



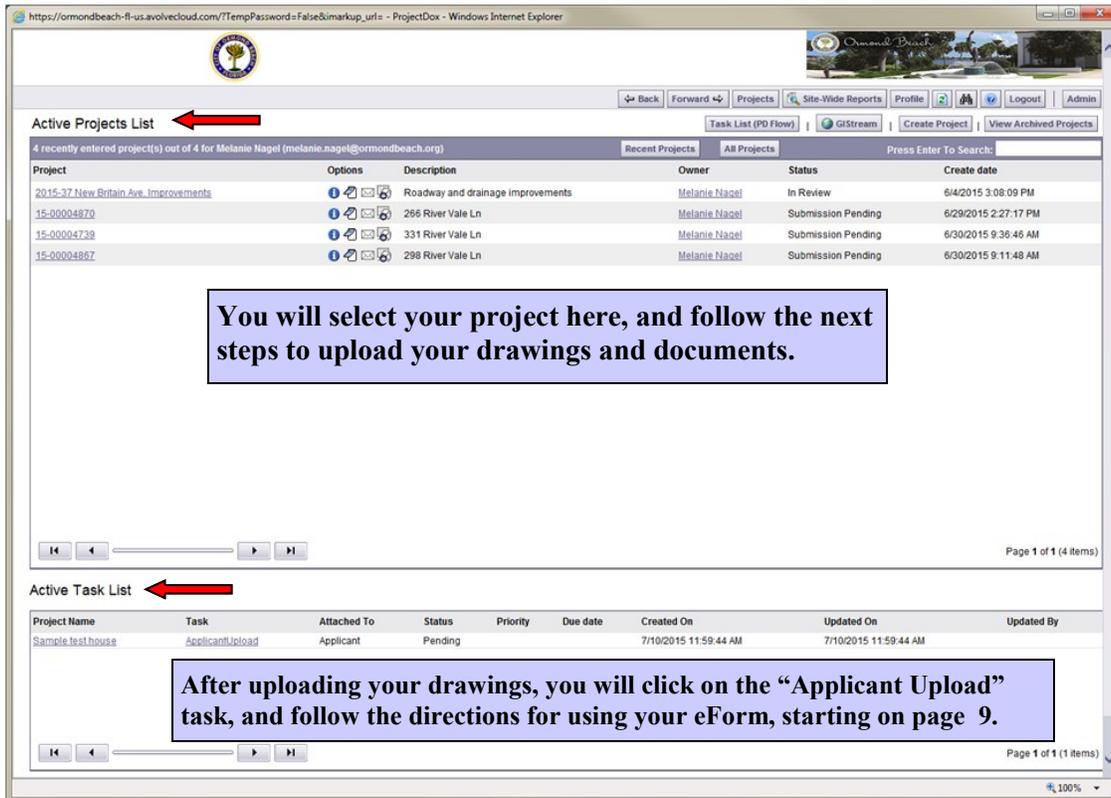
ePlans Applicant Upload Task Assignment

When your application is processed and input into the City permitting system, an ePlans Applicant Upload Task Assignment will be sent to your e-mail address. The e-mail will contain your Project information, including a link to log into ProjectDox to access the project.

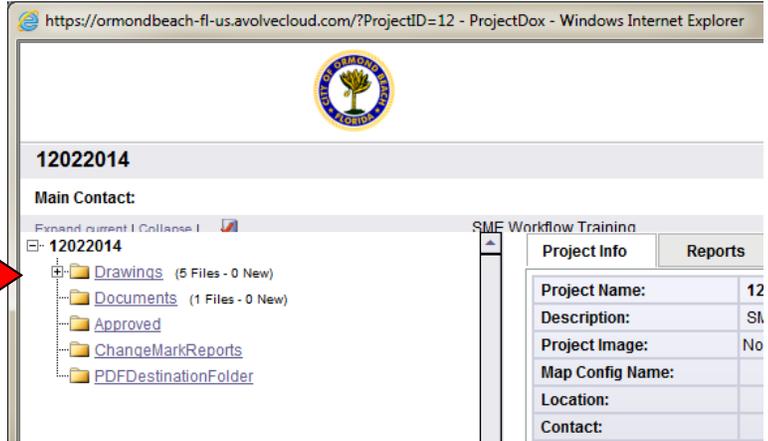


Uploading Files

When you have successfully logged into ePlans (ProjectDox), the projects screen will display. Any projects for which you have access will display in the Active Projects List at the top of the page. Any outstanding tasks that require your action are displayed in the Active Task List area at the bottom of the screen. Select the specific project that corresponds to the plans you will be uploading. The projects are listed in order by Project number, but can be sorted by clicking on any header field name.



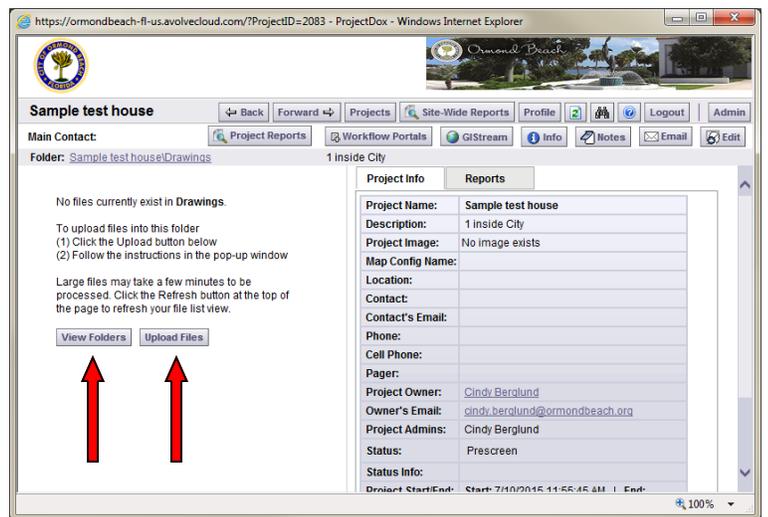
After clicking on your permit/project under the Active Projects List, you will see a list of folders at the left side of the screen. Click the “Drawings” folder to upload your plan drawings, or the “Documents” folder to upload supporting project documentation.



In both the Drawings and Documents folders, there will be two buttons, “View Folders” and “Upload Files.”

The “View Folders” button will always take you back to the list of folders within the project.

To upload your files, click the “Upload Files” button.

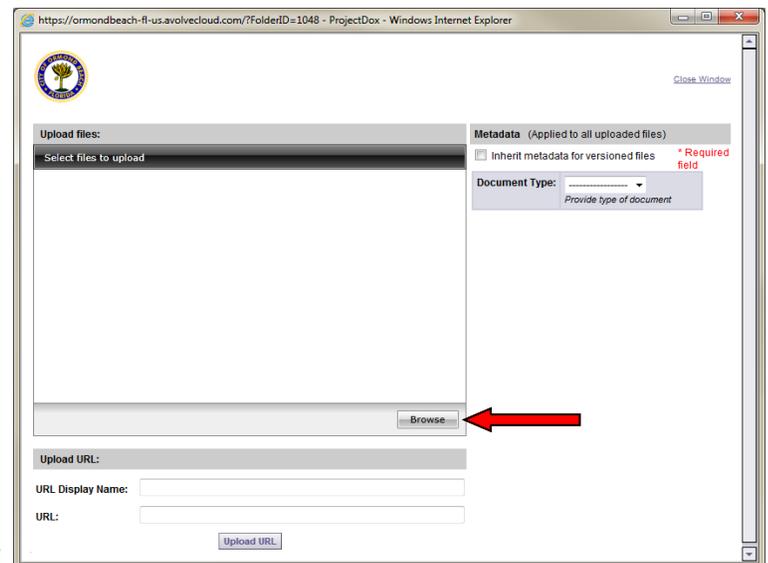


In the next screen that pops up, under the “Select files to upload” section, click on the “Browse” button.

Go to the file location on your computer and select or highlight the files you want to upload. Multiple files can be selected at a time, by one of two methods: (a) Select the first file, hold down the Shift key and select the last file—all files in between will be selected, or (b) hold down the Ctrl key and select random files. Click on the “Open” button and the selected files will be copied to the upload window.

Click the “Upload” button and the files will be copied into the selected folder.

A new window will open stating “Your files have been uploaded” with a list of those files. Select the “Close” button underneath the upload window and this will complete the file upload process.



Once the files are uploaded to the folder, there will be thumbnail images of each file contained in the folder. Next to each thumbnail is the file name, date and time the file was uploaded, the file size, and the name of the person who uploaded the file.



Congratulations! You have successfully finished part one of submitting your plans electronically. Please follow the next steps for submitting your eForm as notification to City employees that you have completed your upload.

Security Timeout

Due to security and resource concerns, the system will automatically sign you out after 60 minutes of inactivity. When you are ready to resume working with the system, click any button on the screen. The system automatically loads the login page for you. You can also close the web browser window and reload the login page manually in a new browser window.

eForms—A Way of Communicating

This next step is VERY IMPORTANT, since it notifies the City that you have completed your part of the process. If you do not complete this form, the City has no way of knowing that you have completed your task.

Once you have uploaded your drawings into ProjectDox, you are now ready to submit an Eform to the City, letting them know that you have completed this first step of the process. By clicking on the “Projects” button in the icons at the top right side of the page, you will go back to the Home page, which displays your Active Projects List at the top of the page, and in the lower portion of the screen, your Active Task List. Under the Task column, you should now click on “ApplicantUpload” for your current project. This will open an Eform like the one shown below.

The screenshot shows the ePlans interface for the City of Ormond Beach, Florida. The page title is "ePlans City of Ormond Beach, Florida". The URL in the browser is "https://ormondbeach-fl-us.avolvecloud.com/?LaunchMode=frame&FlowTaskID=9512 - ProjectDox Plan R - Windows Internet Explorer". The page features the City of Ormond Beach logo on both sides. A navigation bar includes tabs for "Review Information", "Permit Information", "Contact Information", "Resources", "Checklist Report (0)", and "Routing Slip". The "Review Information" tab is active, showing a form with the following fields:

Review Coordinator	Melanie Nagel (melanie.nagel@ormondbeach.org)
Review Cycle	1
Workflow/Activity Name	Start_Building_Plan_Review / ApplicantUpload
Activity Instructions	
Current User Logon	Melanie Nagel (melanie.nagel@ormondbeach.org)

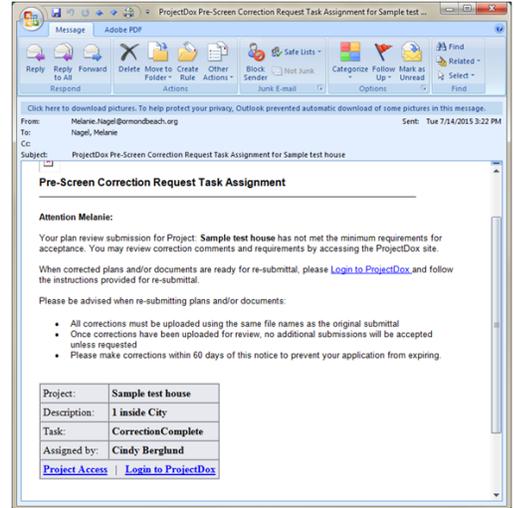
Below the form is a "Task Instructions" section with a green header. The instruction text reads: "After you have successfully uploaded all required plans/documents please select (Upload Complete) button." Below this text are two buttons: "Upload Complete - Notify Jurisdiction" and "Save And Close". A red arrow points to the "Upload Complete - Notify Jurisdiction" button. The text "Building Process V3" is visible in the bottom right corner of the form area.

Click on the “Upload Complete—Notify Jurisdiction” button, which will send notification to the City that your files have been uploaded and are ready for prescreen review. A notification has been sent to the Permit Clerks and Review Coordinator to start the prescreening process to determine if the submittal requirements have been met.

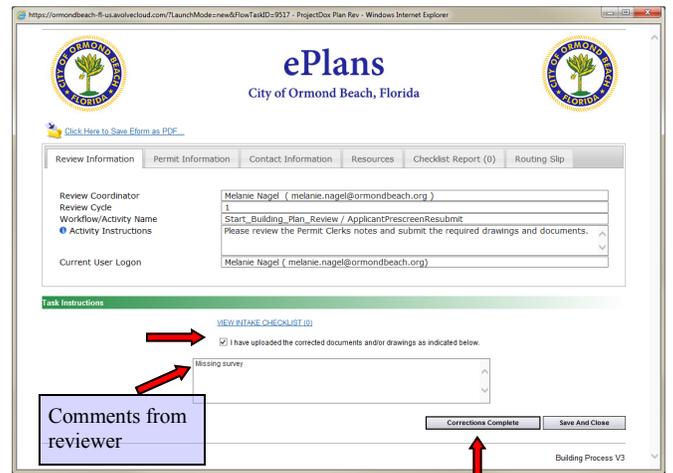
**** The “Save and Close” button is **only to be used** if you have not completed your uploads, but need to log off the system. This will save what you have done, and close the Eform. The Eform will still be available for you to send to the City. This button will **not** send notification to the City.**

Prescreening

Prescreening is a cursory review of your uploaded documents in preparation for formal review. This may be performed by the Permit Clerks or Review Coordinator for most types of permits/projects. If there are questions or missing items from your submittal, you will receive a “Pre-Screen Corrections Request” e-mail. There will be a link in the email to access ProjectDox and login to ePlans. Any corrections or missing items will be listed in the eForm. Follow the steps below to access comments and make corrections/additions.



1. The “ApplicantPrescreenResubmit” task will appear at the bottom of the Projects screen (Home Page). Click on this task and it will bring up the corrections eForm.
2. Review the Permit Clerk or Review Coordinator comments in the eForm to identify which requirements were noted as missing or not complete.
3. After you have identified the missing or corrected drawings and/or documents to upload, login to ProjectDox (if not already logged in) and enter the project.
4. Upload the missing and/or corrected drawings and documents (see the “Uploading Your Files” section for instructions on page 6).
5. Go back to the task assignment to open the eForm.
6. When the eForm opens, place a checkmark in the “I have uploaded the corrected...” and the Corrections Complete button will display for you to click to complete your task. Upon completion, the City will be notified that the files have been added or corrected and will continue with the Pre-screening process.
7. If your submittal is approved, it will immediately move into the formal review process.



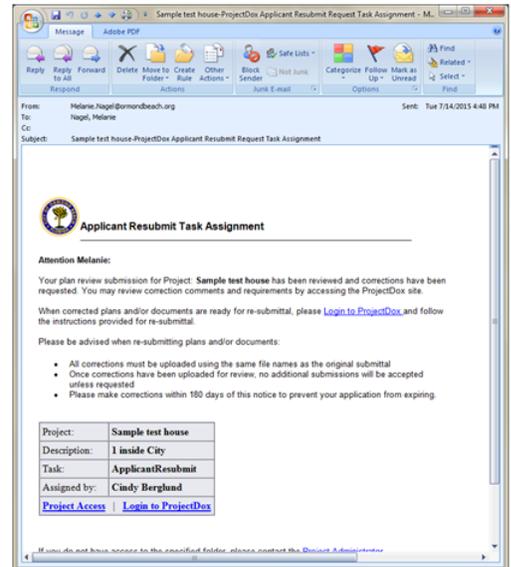
This button will be inactive (grayed out) until the checkbox is selected.

Change Notification and Plan Resubmit Review Requested Corrections

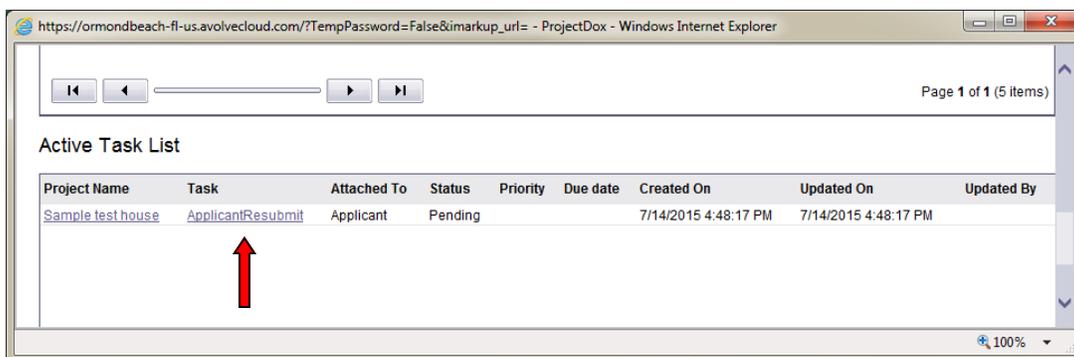
If corrections are requested following the formal review cycle of your drawings, you will receive an e-mail notification from the Permit Clerks/Review Coordinator requesting revised documents.

Click the link in your e-mail to access the ProjectDox site.

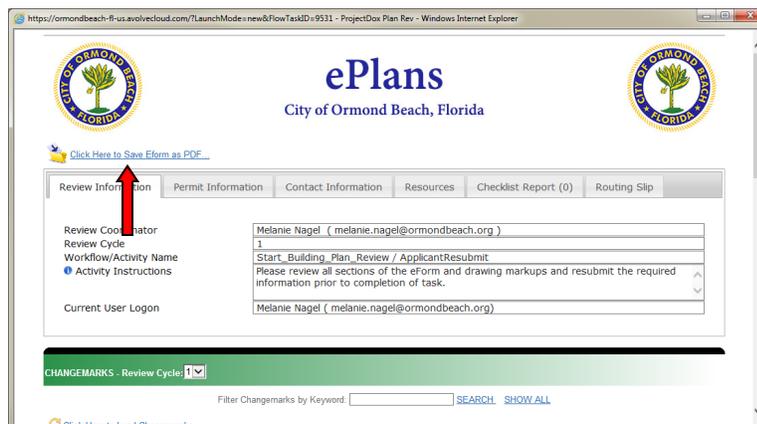
**** Please note: While the project is in the Review cycle, you will not be able to upload any drawings or documents into the project.**



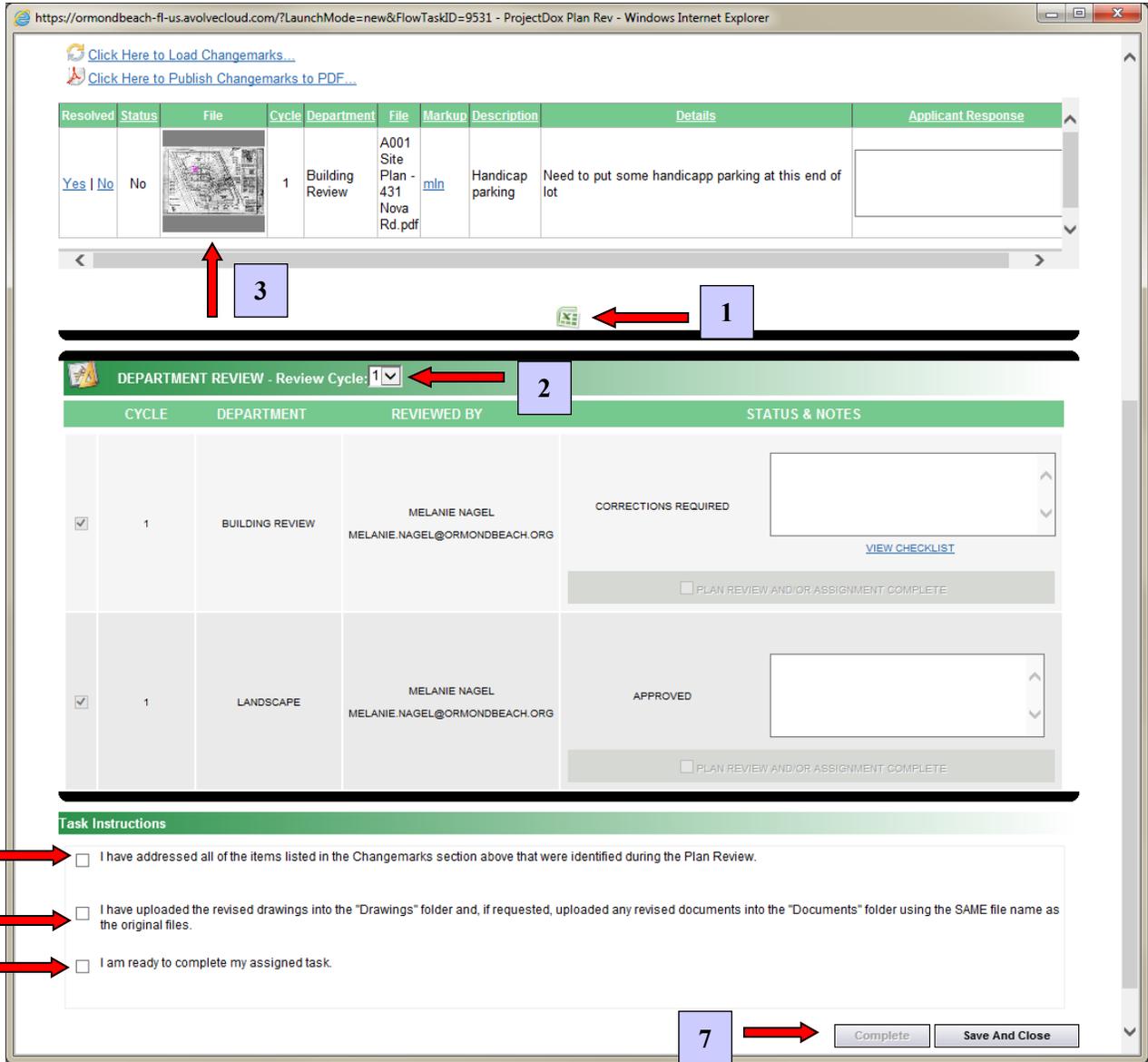
Login to ProjectDox. The Applicant Resubmit task will display at the bottom of the main page under your Active Task List. Click on “Applicant/Resubmit” to access the eForm with comments and mark-ups.



The eForm, with drawing markups information, provides a complete correction package from all reviewing departments. You can save the eForm as a PDF file by clicking the statement at the top of the form (shown below). This will save the PDF file in the folder titled “PDF Destination Folder” within the project.



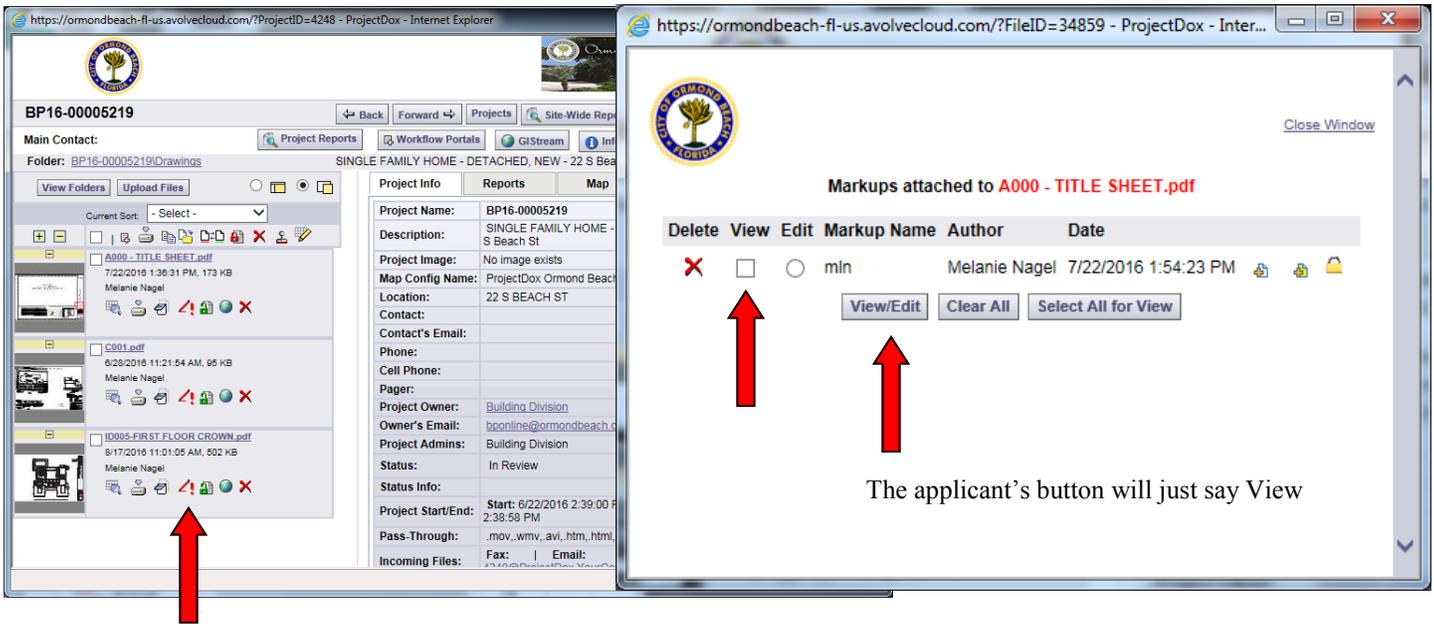
This is a screen shot of the lower half of the eForm:



- 1) Export to Excel: You can click on the Excel icon, and all of the comments will be exported to a spreadsheet.
- 2) Review Cycle drop-down list, lets you choose which cycle you want to view.
- 3) Review Markups—Clicking on the thumbnail will show you a somewhat larger thumbnail that you might be able to see the location of a markup (we advise going to the actual drawing in the Drawings folder).
- 4) First checkbox is to confirm that the changemarks and comments have been reviewed.
- 5) The second checkbox confirms that plans and/or documents have been corrected and uploaded.
- 6) The third checkbox confirms that you are ready to complete your task.
- 7) Once you have verified and **checked all three boxes** that these three steps have been done, the “Complete” button will now be available to click to submit the eForm back to the City.

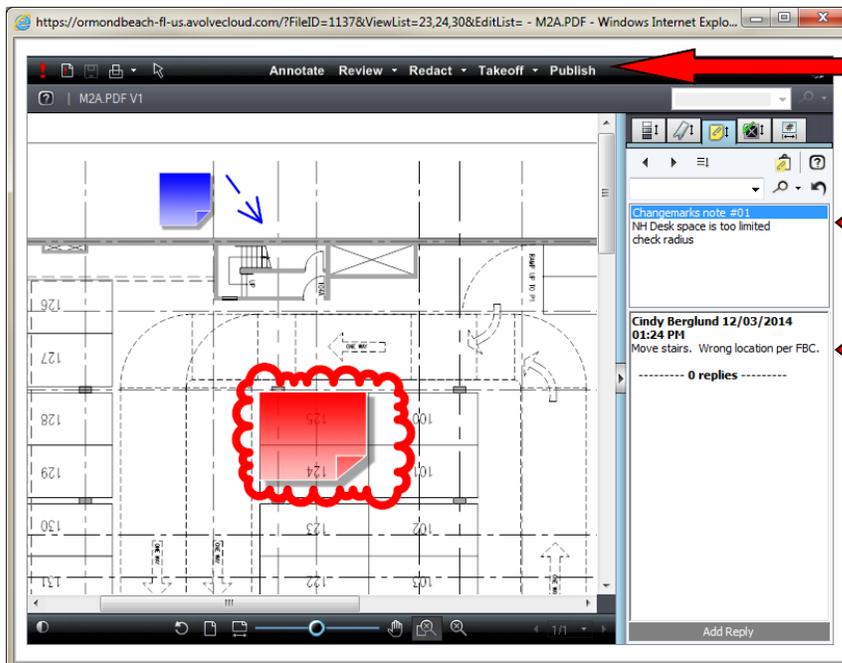
How to View Markups on a Drawing.

Click directly on the red exclamation mark (!). On the next screen that pops up, put a check mark in the box in front of the markup, then click on the View button.



Sample of Markups on a drawing.

The text associated with each changemark will display in the right-hand panel of the page. You can progress sequentially through the changemarks by clicking on each markup in the top pane and see the associated text in the lower pane.



Select Publish— then Publish to PDF to save the file and send it to someone.

Click on each changemark to see the associated text in the lower screen.

Approval, Printing Plans, Fees & Permit

When the project has been approved by all reviewers, the plans will be electronically stamped by the City, and you will be notified by email that your approved plans are ready to be downloaded. At this time, the permit department will also be notified that your project is approved. Fees will then be assessed, and you will be notified by email within 24-48 hours what the amount due is for the project. Once the fees are paid, the permit placard will be placed in the Approved folder for downloading. You will be required to print a copy of the stamped and approved plans for use on the job site for inspections. Plans must be printed in their original size format.

Congratulations on completing the online ePlan review of your project!!

Please remember that there is also online help, within ProjectDox, which is excellent and easy to use. Just click on the blue question mark icon in the upper right portion of your screen, and it will bring up the ProjectDox Help Screen, where you can find a lot of valuable information at your fingertips!!

