

Electronic Plan Review Guide  
**Agency Review**



333 Broadalbin St SW, Albany, OR 97321 / 541-917-7550 / [www.cityofalbany.net/eplans](http://www.cityofalbany.net/eplans)



## Agency Electronic Review Process



### #1 Agency Receives ePlans Invitation

Invited to review land use application materials.



### #2 Agency Reviews Application Materials

Invited agency staff review documents, drawings, and project review information.



### #3 Agency Uploads Comments

Agency uploads comments into Agency Comments folder in ePlans.



### #4 Agency exits ePlans

Electronic Plan Review (ePlans) is a web-based solution that allows electronic submittal of building and development plans, shortens the plan review cycle, reduces printing and travel costs, and supports sustainability initiatives. EPlans review is performed using the ProjectDox program. The ePlans review website is a secured server where data is not accessible to the general public. Only those invited to review and comment on a set of plans will be able to access the plans. Please contact [ePlans@cityofalbany.net](mailto:ePlans@cityofalbany.net) if your agencu contact changes.

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## EPlans Access:

**NOTE: You must use Internet Explorer v6.0 or higher to access ePlans. Google Chrome and Firefox are NOT supported at this time.**

**City shall have the right to perform weekly maintenance on the site the last Thursday of every month between 5 PM - 9 PM, Pacific Time, without prior notification to User.**

When you have been invited to review a land use application for the City of Albany, you will receive an e-mail invitation from [ePlans@cityofalbany.net](mailto:ePlans@cityofalbany.net).

1. Through the Project Access link in the e-mail, log into your ePlans account. The site address for the City of Albany ePlans program is <https://eplans.cityofalbany.net>.

**Project Review Invitation**

POWERED BY ProjectDocx

**Hello Reviewer:**

The Planning division has received the following application (s) and you have been invited by the City of Albany to review project-CU-0003--17.

To access your project follow the instructions below:

1. Click on the Project Access link below.
2. Choose this project from the projects listed.
3. Items to be reviewed may be in the Documents, Drawings, and Project Review folders. Click on each folder to view the individual pages.
4. Please load your project comments to the appropriate comments folder (Agency or City Staff).

**You have 2 weeks to complete your review.**

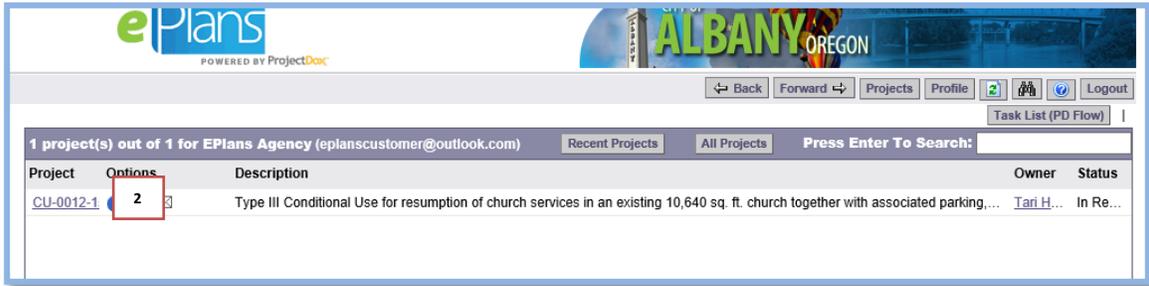
Project #:	CU-0003-17
Project Location:	620 SE 4TH AVE - 11S03W07AB04700
Applicant:	CITY OF ALBANY
Description:	Requesting conditional use of a residential home for daycare.
Task:	notifyAgency
<a href="#">Project Access</a>	

Please visit our Development Resource Page to review and download our **ePlans Agency Guide** for additional information on the ePlans process: [www.cityofalbany.net/drc](http://www.cityofalbany.net/drc)

Contact the Planning Division 541-917-7550, with the project number, if you have questions regarding this project.

**PLEASE DO NOT REPLY TO THIS EMAIL.** PL\_notifyOutsideAgencies.html

2. Click on the Project number on the ePlans home page.

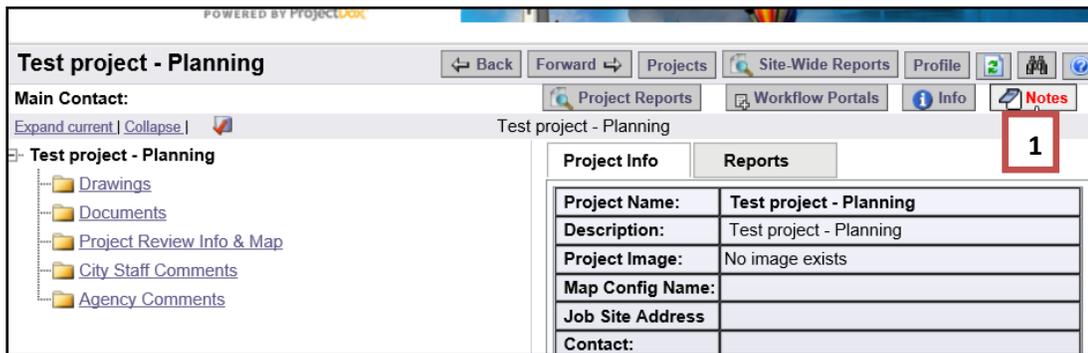


3. Click on each folder to view the applicant’s Drawings, Documents, and the Project Review and Map information provided by the Assigned Planner.
4. There are two ways to leave commentary on the project, A.) If you have no comment you can leave a quick comment in the project. Or B.) If you have commentary you can upload your comments to the Agency/City Staff Comments folder.

### Adding Quick Comments Through the Note Pad

**PLEASE NOTE:** These comments are able to be viewed by everyone in the system. This includes the applicant, city and agency staff, and the assigned planner.

1. From inside the project screen, click on the **Notes** icon on the toolbar.



2. Click on **Add Topic** on the screen that pops up.



3. Choose **FYI** for Category type.
4. Fill in the **Subject** line with your department name
5. Add your message for the Assigned Planner in the **Description** box.
6. Choose **Save**
7. **DO NOT** choose Save & Prepare email (not active in system).

POWERED BY ProjectGOL

Attach a Topic to: Test project - Planning  
Owner: Tari Hayes

Author: Tari Hayes    Category: **FYI**    Date: 8/3/2015

**4** Subject: Public Works - Transportation

Description:  
I have no comment on this project.  
John Doe

**6** Save    Save & Prepare Email

8. The note pad now turns yellow to show the activity. You can access the notes by clicking on the yellow note pad at any point in the review.
  - A. View from inside project folders

Test project - Planning

Main Contact:

Test project - Planning

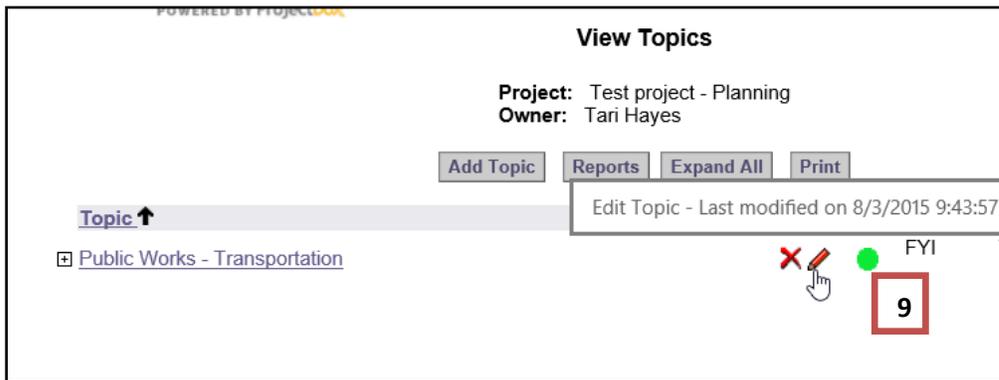
Project Info    Reports    **8. A** Notes

Project Name:	Test project - Planning
Description:	Test project - Planning
Project Image:	No image exists

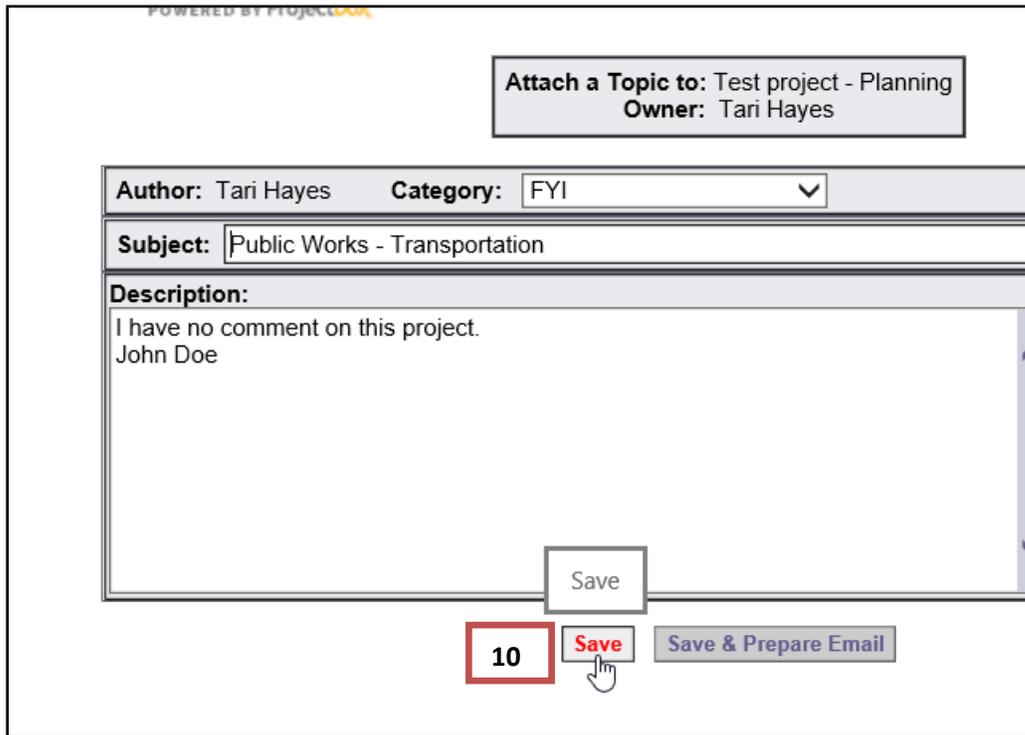
- B. View from projects home page.

Project	Options	Description
<a href="#">Test project - Pla</a>		Test project - Planning
<a href="#">RL-0005-15</a>	<b>8.B</b>	Replat part of property at 1800 Valley View to 1860 Va
<a href="#">SP-0010-15</a>		Hickory Station III 5400 NCOM structure, Coffee Kiosk,

9. To edit your comment, click on the notepad then on the red pencil to edit.



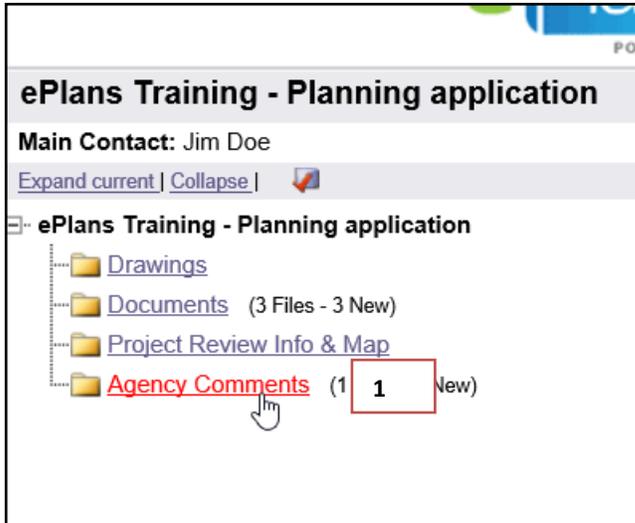
10. Make your edits, save and close.



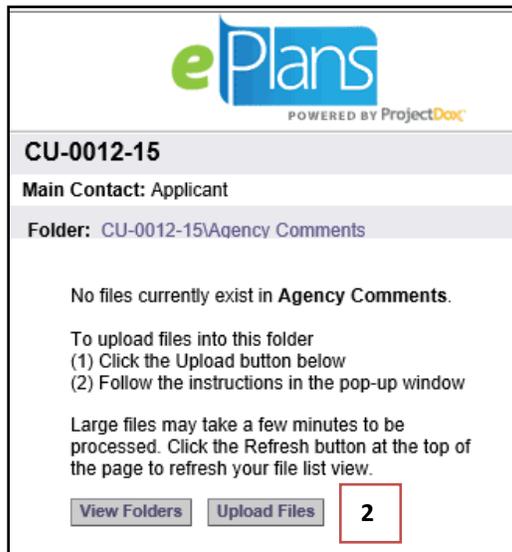
**DO NOT** choose Save & Prepare Email, this function is not operational in the system.

## Loading Comments and/or Documents

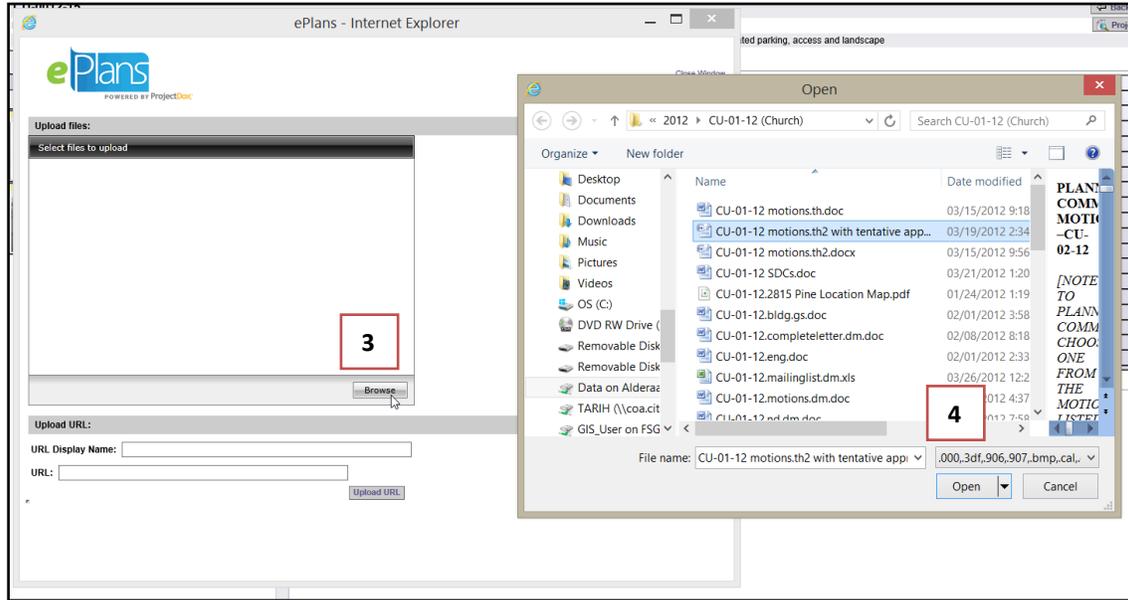
1. To provide your comments in document form, click on the Agency Comments folder to load your comments for the Assigned Planner.



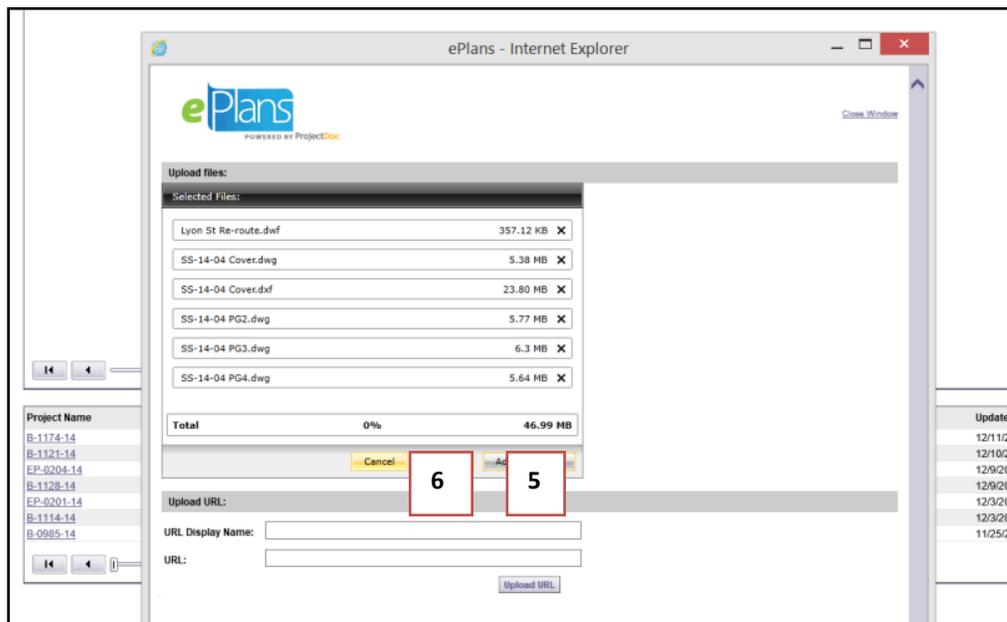
2. Click on the "Upload Files" button.



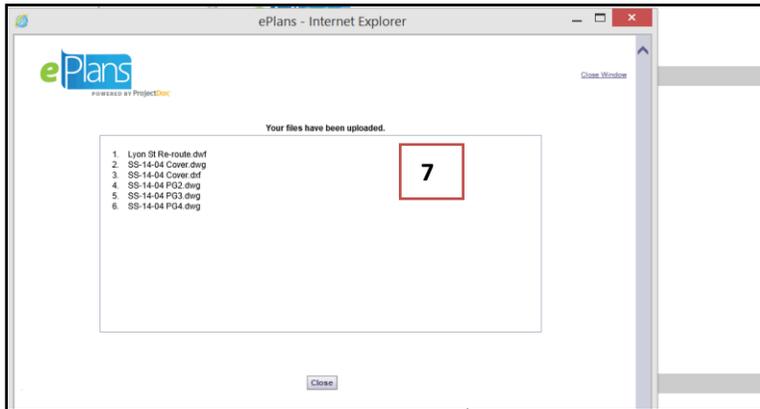
- Browse to your response in your system. You can load multiple-page MS documents, drawings, saved email responses; over 60 different file formats are accepted.
- You can load multiple documents at once by dragging and dropping or Shift/Ctrl and “Open.”



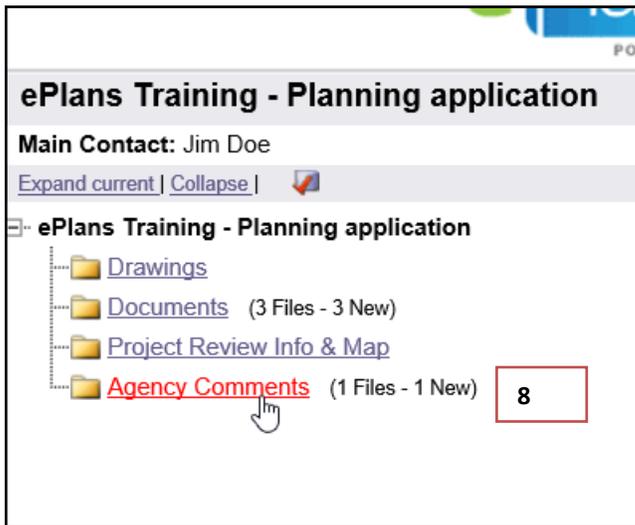
- If you need to add files, click on the “Add More Files” button.
- When you’ve added all of your files for that folder, click the “Upload” button.



7. You will see a confirmation when all of your files are uploaded. Close the window.



8. You should now see a quantity of new files. In the example below, there is 1 new file in the Agency Comments folder.



9. When you are done uploading you can close out of the program by clicking the "Logout" button in the upper right corner of the program. You are done!

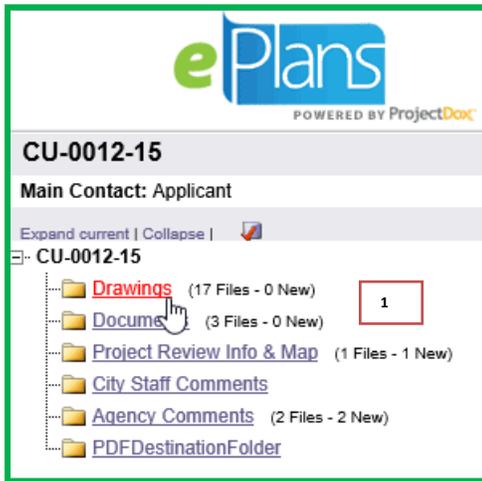
The Assigned planner will receive an email that new comments have arrived. You can also email them to let them know your review is complete.

5. When you are done uploading you can close out of the program by clicking the "Logout" button in the upper right corner of the program.

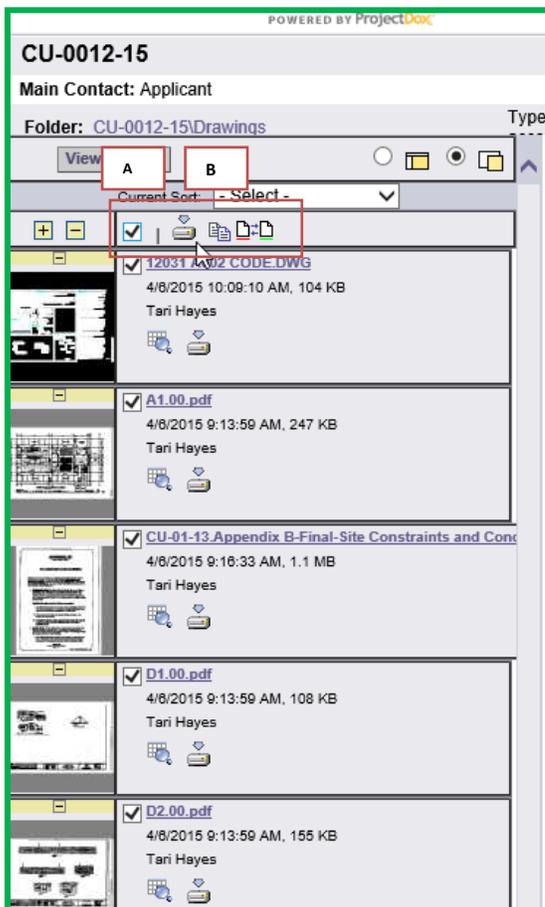


## To Download Material:

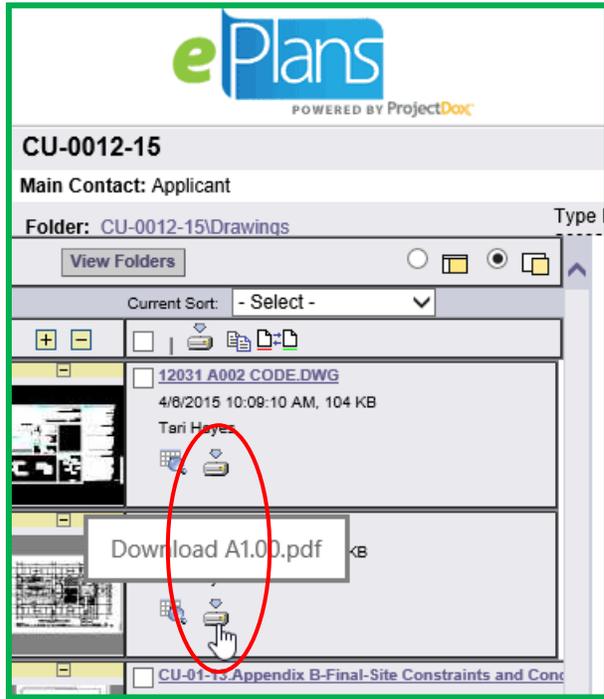
1. Click on applicable folder



2. To download multiple sheets:
  - a. Check "all" by checking the box in the toolbar
  - b. Then choose the download icon next to it.

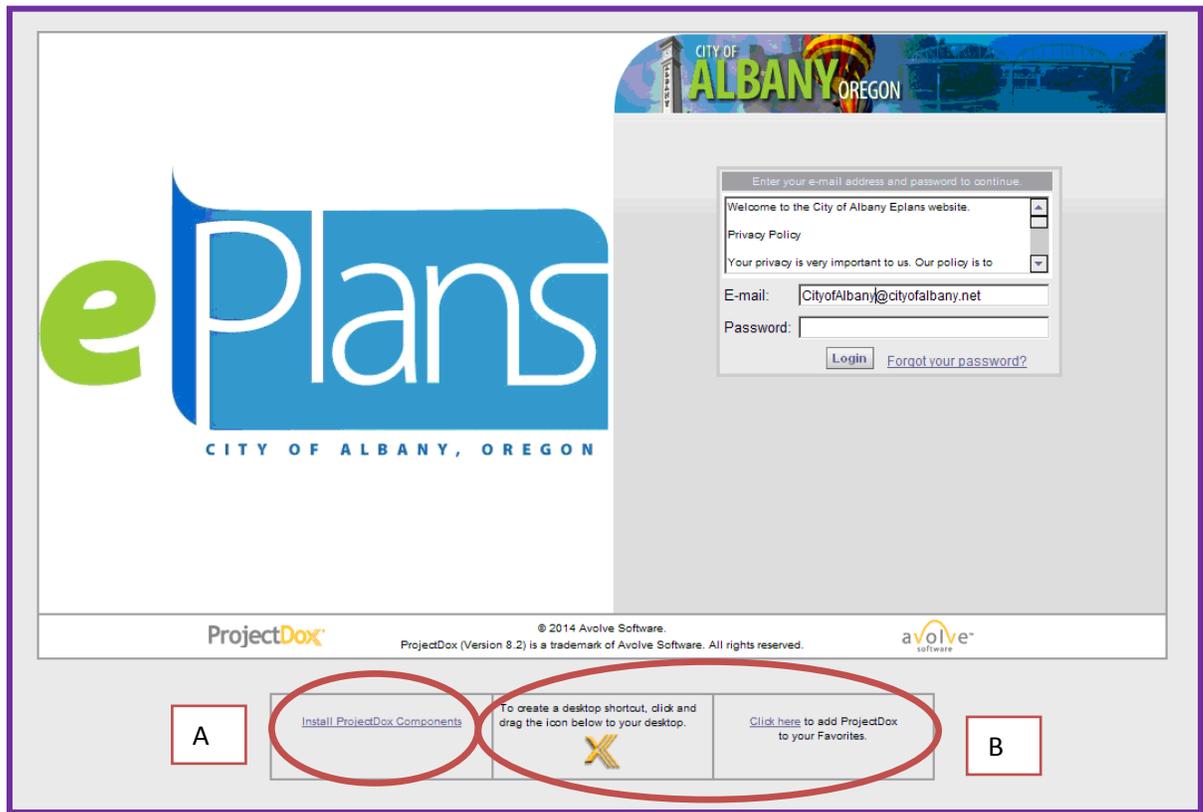


3. To download an individual page, click on the download icon for that page.



## New Users:

1. You must use Internet Explorer v6.0 or higher to access the ePlans/Project Dox website.
2. Prior to logging into the ePlans (ProjectDox) application, check the following:
  - If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the ePlans web address (<https://eplans.cityofalbany.net>). If you attempt to log in and the page immediately disappears, pop-up blocking is still active. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc.). Once the ePlans site is allowed, you will be able to use the application.
  - The login page has a MSI (Microsoft Silent Install) component that is required to install all the necessary ProjectDox ActiveX controls. This installation will need to be done once for each computer used to access the program. The link to the component install is shown below (A). The login page also provides a shortcut that you can drag and drop onto your desktop, as well as a link to save the EPlans web address to your favorites (B).
3. To sign in, enter your e-mail address and temporary password (first time use) and click the “Login” button.



If you forget your password, click on the “Forgot your password?” link and provide your security answer.

If you haven’t completed your profile, and need to reset your temporary password, email [eplans@cityofalbany.net](mailto:eplans@cityofalbany.net) for a new password. Use this email to request to be added as a new user as well.

4. Enter your new password, create your reset question and then reconfirm the new password. Update your personal account information then click the “Save” button. Remember, passwords are case sensitive and must be 8 to 10 characters in length with at least one number.

**ePlans**  
POWERED BY ProjectDox

Settings for **Albany Customer** (albanycustomertesting@gmail.com)

**Welcome to ProjectDox.**

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

After you have changed your password you will be taken to the main Projects View.

**Change Password:**  
 New password:\* [masked]  
 Confirm new password:\* [masked]

**Password Reset Question & Answer:**  
 Security question:\* What is your zipcode  
 Security answer:\* 97321

**Profile Information**

Contact Information | User Metadata | Project Membership | Group Membership

Save

\* Required field

First Name: *	Albany	Last Name: *	Customer
Email: *	albanycustomertesting@gmail.com <input checked="" type="checkbox"/> HTML format <a href="#">i</a>		
Title:	Customer		
Company:	Company Name		
Address 1:	Address 1		
Address 2:	Address 2		
City:	City		
State/Province:	OR	Postal Code:	97321
Phone:		Fax:	
Mobile:		Pager:	
Stamps:			
Language: *	en		

This Profile Information page can be accessed at anytime by selecting the “Profile” button at the top of the Home page.

