

Electronic Plan Review Guide
Building & Public Works Applicant



333 Broadalbin St SW, Albany, OR 97321 / 541-917-7553 / www.cityofalbany.net/eplans

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Electronic Review Process (ePlans)

#1 Submit Application

Applicant submits **application only** for review.



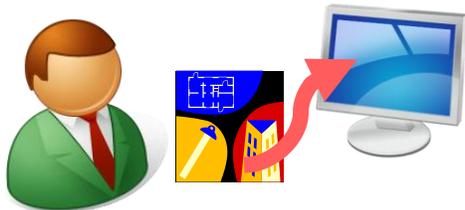
#2 Assign Permit Number, Fees, Access

City staff assigns a permit number, collects plan review fees and grants applicant rights to upload plans.



#3 Upload Plans

Applicant uploads plans into ePlan review system.



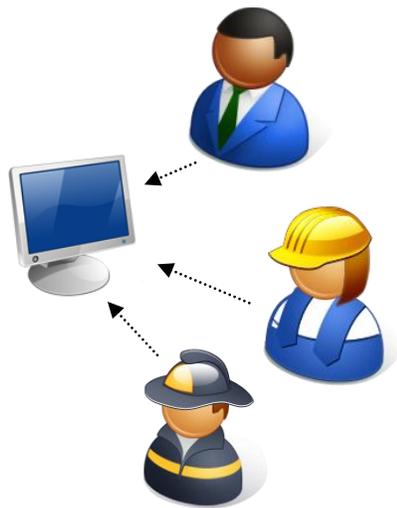
#4 Pre Screen Review

Staff performs pre-screen review, working with applicant to assure proper plan submittal.



#5 Perform Plan Review

City staff performs simultaneous plan review.



#6 Download Plans

Applicant pays any remaining fees, and downloads plans after final approval.



Electronic Plan Review

Electronic Plan Review (ePlans) is a web-based solution that will allow building and development plans to be submitted electronically, shorten the plan review cycle, reduce printing and travel costs, and support sustainability initiatives. Electronic plan review is performed using the ProjectDox program. The ProjectDox program allows city staff to perform simultaneous reviews on plans. Staff may insert review comments on electronic drawings but ProjectDox will not allow users to alter plans. 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.

Submittal Process

1. Complete Planning or Building application at: www.cityofalbany.net/drc-forms.
2. E-mail the completed application to eplans@cityofalbany.net.
3. Wait for a Permit Technician reply. Pay fees. Invitation to upload is sent to you. If you have not received notification within 4 business hours, call 541-917-7553 to ensure the application has been received.
4. Upload plans following instructions in the ePlans invitation.
5. Submit corrections, if needed.
6. After the plans have been approved and all fees paid, we will e-mail notice that the plans are ready for download.

If an applicant does not have the resources required to use electronic plan review, City staff will scan the drawing(s) and supporting document(s) at City Hall and review will be completed electronically. In this case, paper copies of review comments will be provided to the applicant.

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.

Maintenance

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.

Existing Users

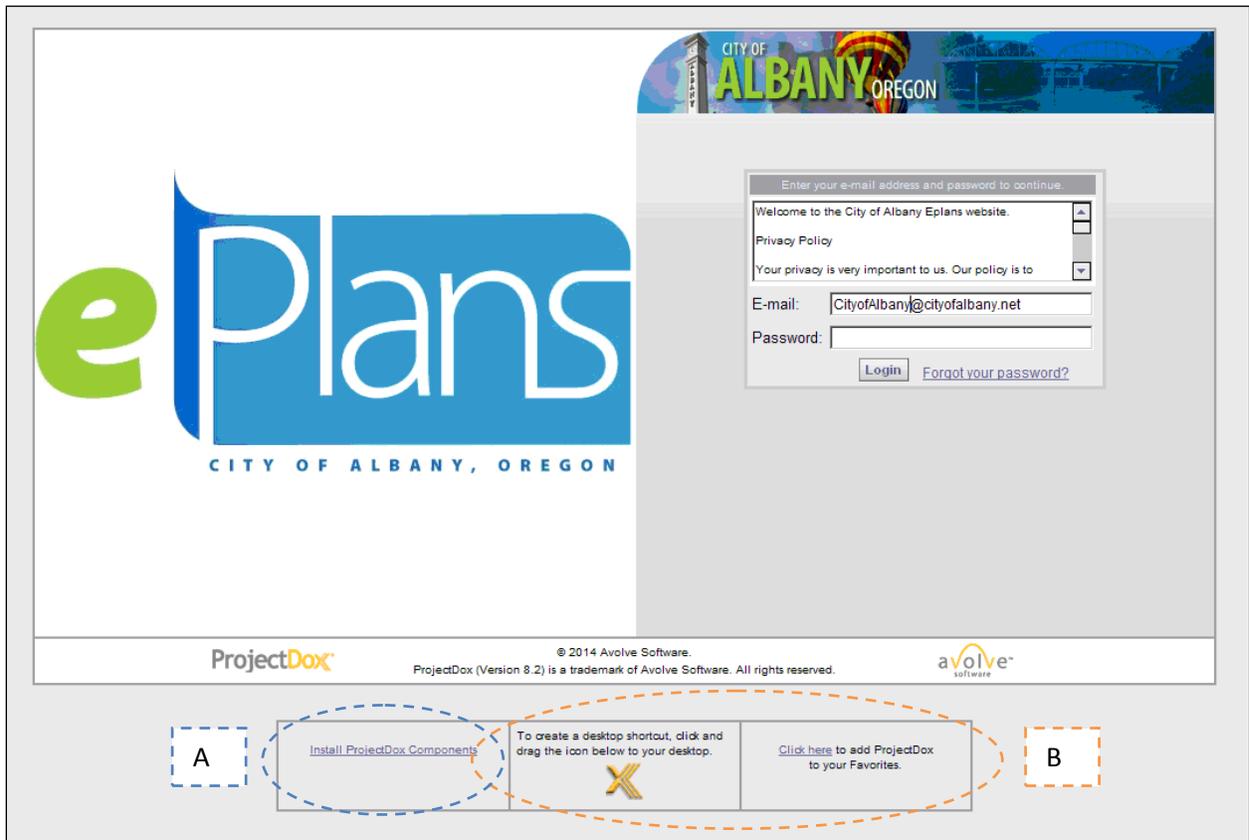
If you are a returning user, login to ePlans with your full e-mail address and password. If you have forgotten your password, click on the “Forgot Password” button so it can be e-mailed to you. This will work only if you have logged in once and added a security question and answer.

New Users

1. You must use Internet Explorer v6.0 or higher to access the ePlans/ProjectDox website.
2. Prior to logging into the ePlans (ProjectDox) application, the following actions must be completed:
 - 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>). The indicator that this has not been done will occur when you type in your login and password, then hit the Login button and the page

immediately disappears. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc.). When 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 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 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.



4. Enter your new password; create your reset question, 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.

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
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Save

*** Required field**

First Name: *	Albany	Last Name: *	Customer
Email: *	albanycustomertesting@gmail.com <input checked="" type="checkbox"/> HTML format <i>i</i>		
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:	<i>i</i>		
Language: *	en		

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

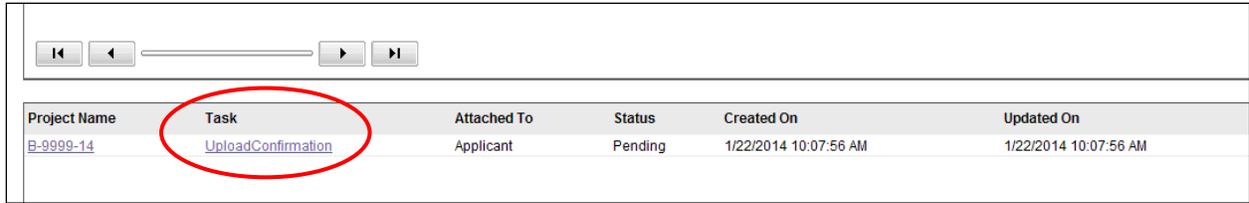


Tasks

The project's workflow is triggered by automated tasks. Each step of the process is marked by a task that must be completed to trigger the next step.

You can accept tasks a number of ways:

1. Through the task bar at the bottom of the Projects Page.

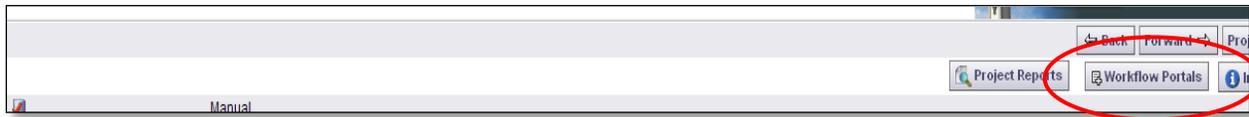


Project Name	Task	Attached To	Status	Created On	Updated On
B-9999-14	UploadConfirmation	Applicant	Pending	1/22/2014 10:07:56 AM	1/22/2014 10:07:56 AM

2. Through Task List icon on the top of the Projects Page.

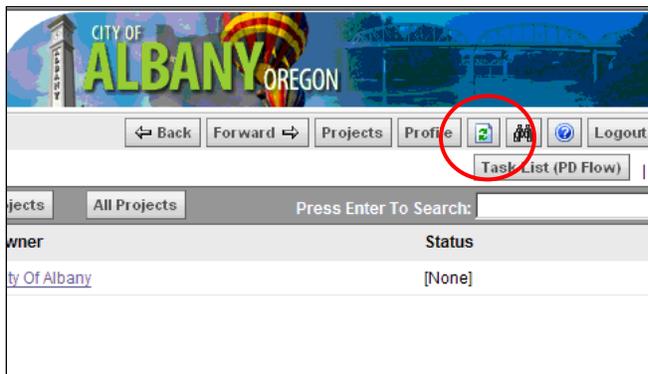


3. If you are inside a project, you can click on the Workflow Portals button at the top of the page.



Refresh

If you have difficulty finding a project or task, please click the refresh button before calling customer support. It is good practice to use the refresh button after most steps in the system.



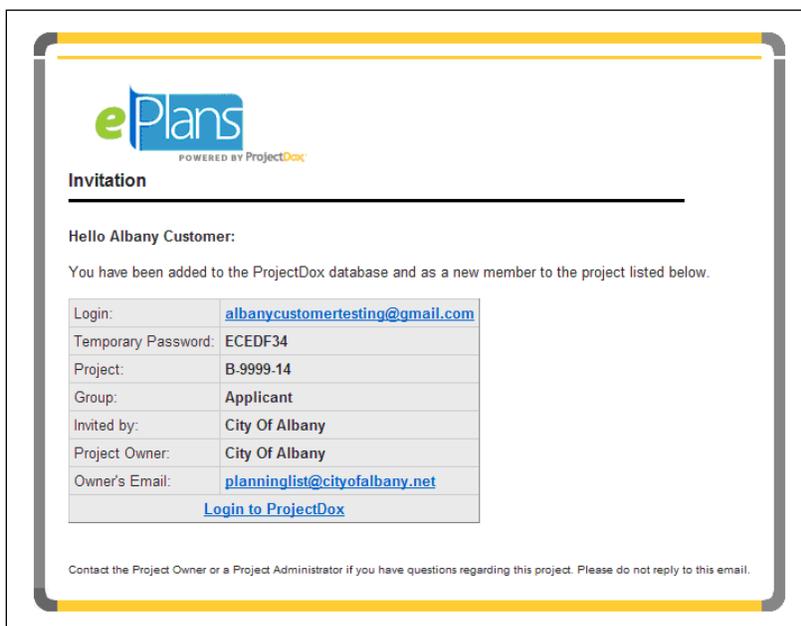
Electronic Plan Review Workflow

#1 - Submit Application

Select the appropriate application link on the City's website www.cityofalbany.net/drc-forms. Fill out the application and be sure to mark yourself (or appropriate person) as the Primary Contact. Submit an application at ePlans@cityofalbany.net or visit us at City Hall at 333 Broadalbin Street SW in downtown Albany.

#2 - Assign Project Number

When your application is processed into the City's permitting system, City staff will contact you to collect plan review fees (if applicable). An ePlans **Invitation** e-mail will be sent to the Primary Contact's e-mail address with login information, project number, and a link to the project. The site address for the City of Albany ePlans program is <https://eplans.cityofalbany.net>.



#3 Uploading Files

1. Please review the Standards Section included at the end of this guide for accepted file types, how to name your plan sheets and documents files, where to reserve space for City approval stamps, etc.
2. Once you have located the project to which you have been assigned, you will need to accept the **Upload Confirmation** task in order to gain permission to load plans and documents for Pre-screen review. If you do not see your project, click on the All Projects button to refresh the screen.

The screenshot shows a web application interface for project management. At the top, there is a header with the text "1 project(s) out of 1 for Albany Customer (albanycustomertesting@gmail.com)". Below this, there are two tabs: "Recent Projects" and "All Projects". A search bar is located on the right with the text "Press Enter To Search:". The main content area displays a table with the following columns: Project, Options, Description, Owner, and Status. The first row contains the project ID "B-9999-14", a link icon, the description "City of Albany", the owner "City of Albany" (circled in red), and the status "[None]". Below this table, there are navigation controls and the text "Page 1 of 1 (1 Items)".

Below the project details, there is another table with the following columns: Project Name, Task, Attached To, Status, Created On, Updated On, and Updated By. The first row contains the project ID "B-9999-14", the task "UploadConfirmation" (circled in red), the attached to "Applicant", the status "Pending", the created on date "1/22/2014 10:07:56 AM", the updated on date "1/22/2014 10:07:56 AM", and the updated by field is empty. Below this table, there are navigation controls and the text "Page 1 of 1 (1 Items)".

An eForm will open with instructions. Save and Close this form to be granted access for uploading documents. You will come back to this after upload.

The screenshot shows an eForm interface for the City of Albany. At the top, there is a header with the text "CITY OF ALBANY OREGON" and a logo. Below this, there is a link "Click Here to Save Eform as PDF...". The main content area displays a form with the following tabs: "Review Information", "Permit Information", "Resources", and "Routing Slip". The form contains the following fields:

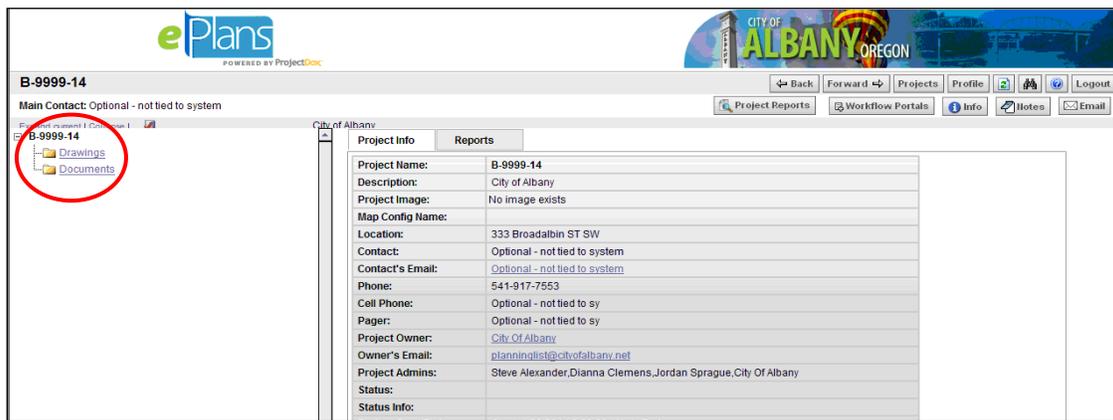
Intake	City Of Albany (planninglist@cityofalbany.net)
Review Cycle	1
Workflow/Activity Name	Start_Plan_Review_Workflow_v1 / UploadConfirmation
Current User Logon	Albany Customer (albanycustomertesting@gmail.com)

Below the form, there is a message: "Please complete this activity when you have successfully uploaded all required plans/documents." At the bottom right, there are two buttons: "Upload Complete" and "Save & Close for Later" (circled in red). At the bottom right, there is the text "Best in Class Version 1.0".

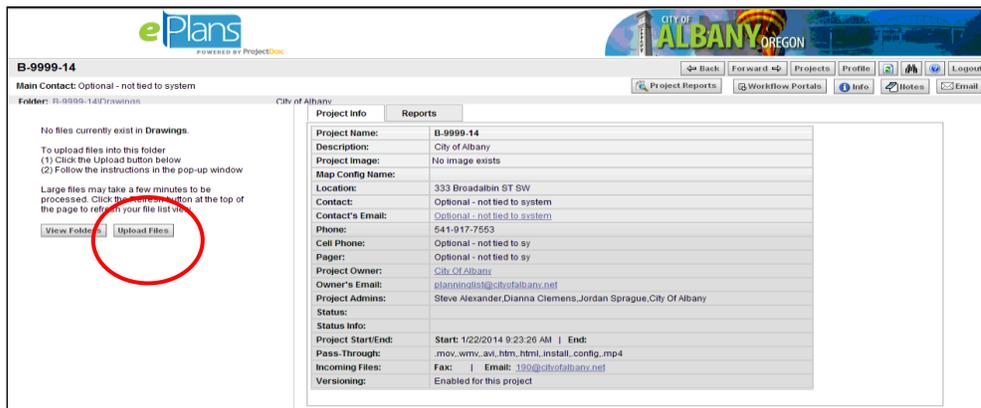
3. Select the specific project that corresponds to the plans you will be uploading. The projects are listed in order by Project number, but can be sorted by clicking on any header field name.



4. Click on your permit/project, and then click the “Drawings” folder to upload your plan drawings or “Documents” folder to upload supporting project documents.

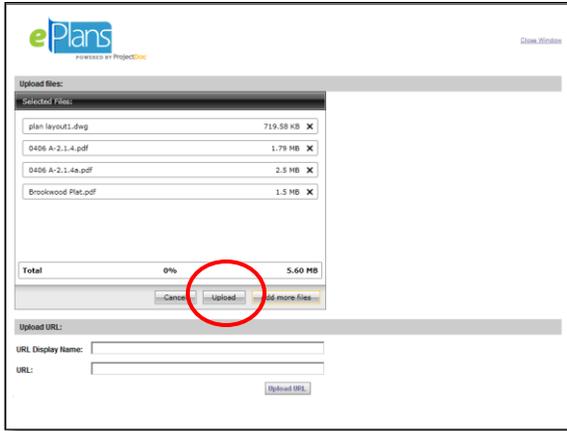


5. Upon entering either folder, you will be presented with two buttons, “View Folders” and “Upload Files.” Click the “Upload Files” box.

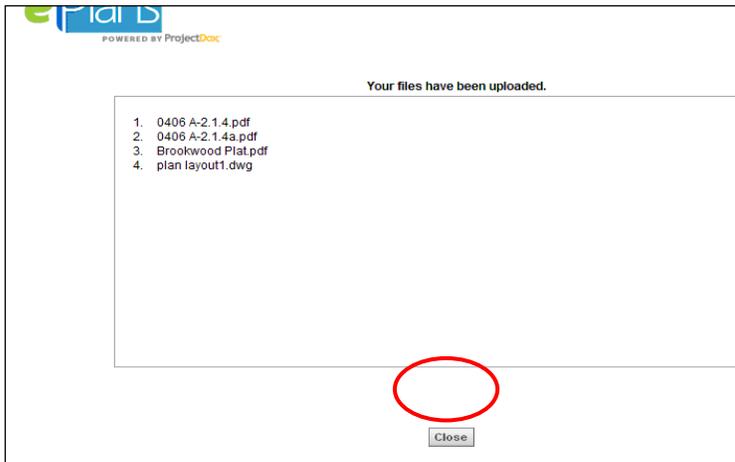


6. “Select Files for Uploading” box will automatically display. Go to the file location on your computer and select or highlight files you want to upload; multiple files can be selected by using your Ctrl keys. Click the “Open” button and the files selected will then be copied to the upload window.

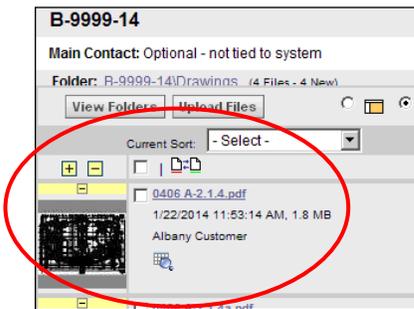
7. Click the "Upload" button.



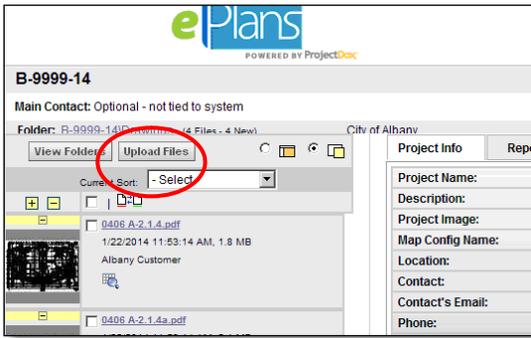
The window will reload, stating at the top that your files have been uploaded, with a list of those files. Select the "Close" button underneath the upload window and this will complete the file upload for this cycle.



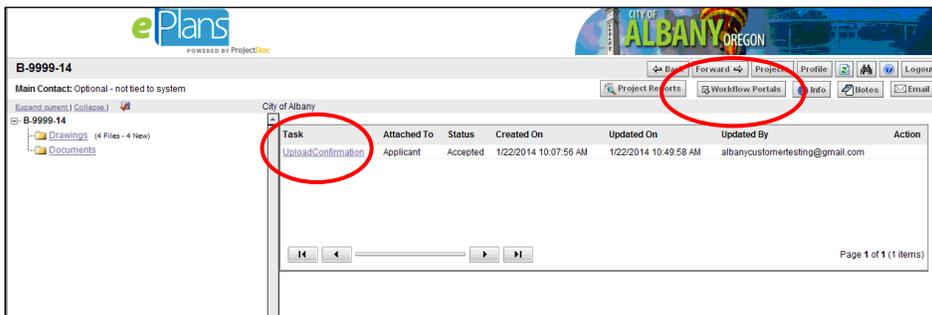
8. When the files are uploaded to the folder, a thumbnail image of each file is produced. Next to each thumbnail, the file name, author, date uploaded, file size, and history icon displays.



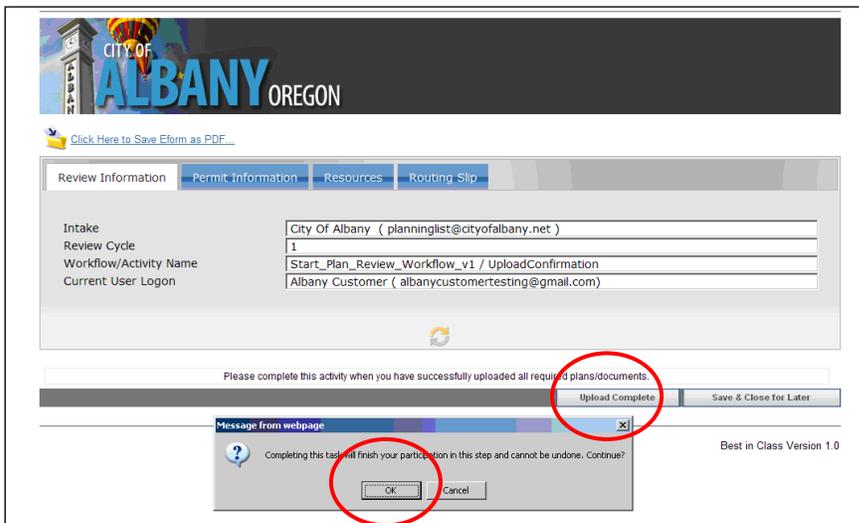
9. To upload additional files , click on the “Upload Files” button and repeat step 8.



10. When you have loaded all your documents, return to the workflow portals page and click on the **Upload Confirmation** task again to bring up the eForm.



11. If all documents are uploaded, click on Upload Complete and OK.



12. Congratulations! You have successfully finished part one of submitting your plans electronically. Please logout after your session is complete.

#4 Pre Screen Review and Correction Requests

Prescreening is a cursory review of your uploaded documents in preparation for formal review. This will be performed by a Permit Technician for most types of permits/projects. If there are questions or missing items from your submittal, you will receive a **Prescreen Correction Request** task e-mail with instructions on the changes requested and how to resubmit. Click the link in the e-mail to access the ePlans site and login into ePlans.

The screenshot shows an email from ePlans with the subject "Pre-Screen Correction Request". The email content includes a greeting, instructions for reviewing and correcting deficiencies, a list of 10 steps, and a table with project details.

Project: B-9999-14
Description: City Of Albany
Task: CorrectionComplete
Assigned by: City Of Albany

[Project Access](#) | [Login to ePlans](#)

Contact the Community Development Department [541-917-7553](tel:541-917-7553) if you have questions regarding this project.
PLEASE DO NOT REPLY TO THIS EMAIL.

1. The **Corrections Complete** task will appear at the bottom of the Projects screen. Click on this task and this will launch the eForm.

The screenshot shows the ePlans web application interface. At the top, there is a navigation bar with "Back", "Forward", "Projects", "Profile", and "Logout" buttons. Below this is a search bar and a "Task List (PDF Flow)" button. The main content area displays a table of projects. The table has columns for Project, Options, Description, Owner, and Status. The project listed is B-9999-14, City of Albany, with a status of Prescreen. At the bottom of the page, there is a table with columns for Project Name, Task, Attached To, Status, Created On, Updated On, and Updated By. The task "CorrectionComplete" is circled in red.

Project Name	Task	Attached To	Status	Created On	Updated On	Updated By
B-9999-14	CorrectionComplete	Applicant	Pending	1/22/2014 12:35:50 PM	1/22/2014 12:35:50 PM	

2. Review the Permit Technician's comments to identify which requirements were noted as missing – Save and Close, you will come back to this form.

City Of Albany (planninglist@cityofalbany.net)

1

Start_Plan_Review_Workflow_v1 / CorrectionComplete

Albany Customer (albanycustomertesting@gmail.com)

[VIEW INTAKE CHECKLIST \(0\)](#)

I have uploaded the corrected documents and/or drawings as indicated below.

Please include a revised checklist.

Corrections Complete

Save And Close

Best in Class version 1.0

3. Return to your project. Identify and upload the missing or corrected drawings and/or documents needing correction. Corrected files should always be re-submitted with the **SAME FILE NAME** as the original submittal. Please **do not** version files when uploading resubmitted files; ePlans will automatically version when upload is complete.
4. You will receive an upload confirmation message; notice the versioning information in blue.

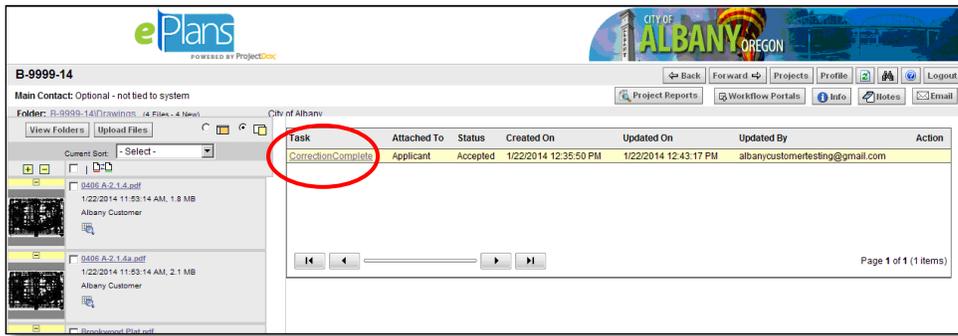
Your files have been uploaded.

1. 0406 A-2.1.4.pdf

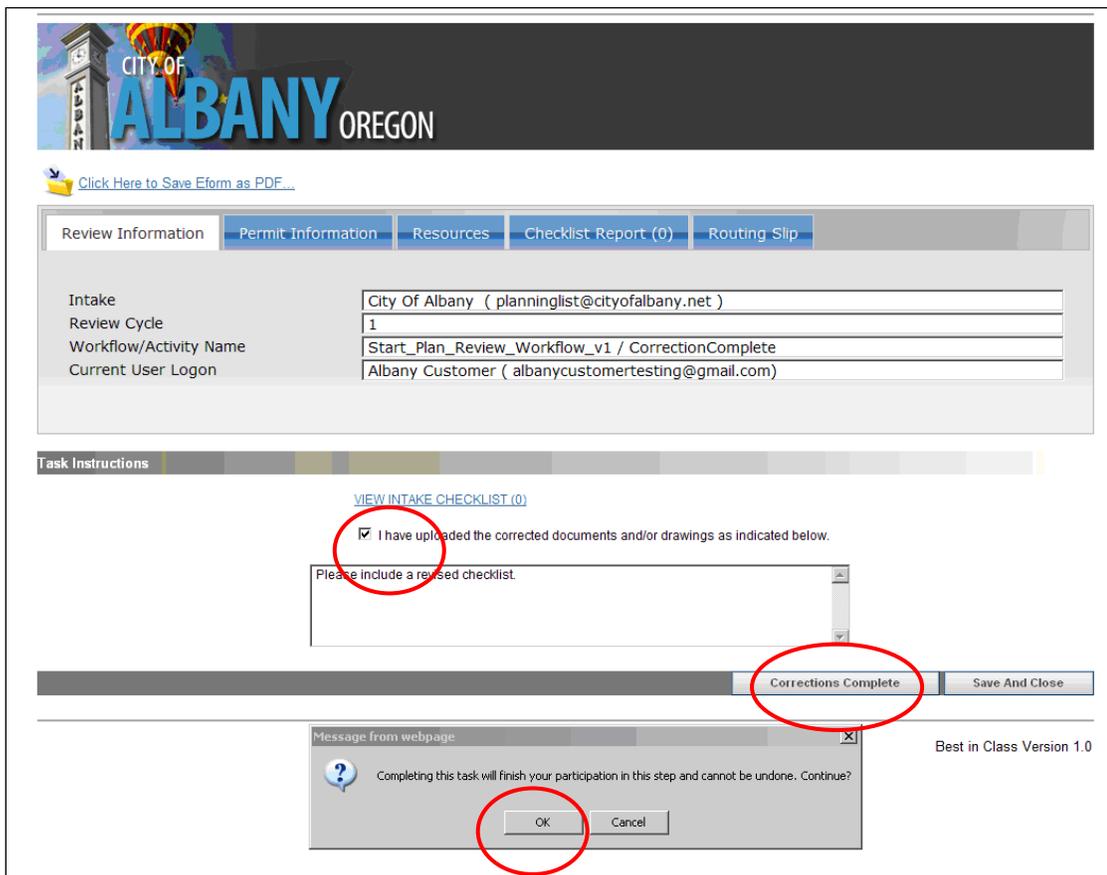
Files highlighted in blue are version candidates.
They will be versioned if the file content has been changed in any way.

Close

- Click on the **Correction Complete** task from the Project Task List to be returned to the eForm.



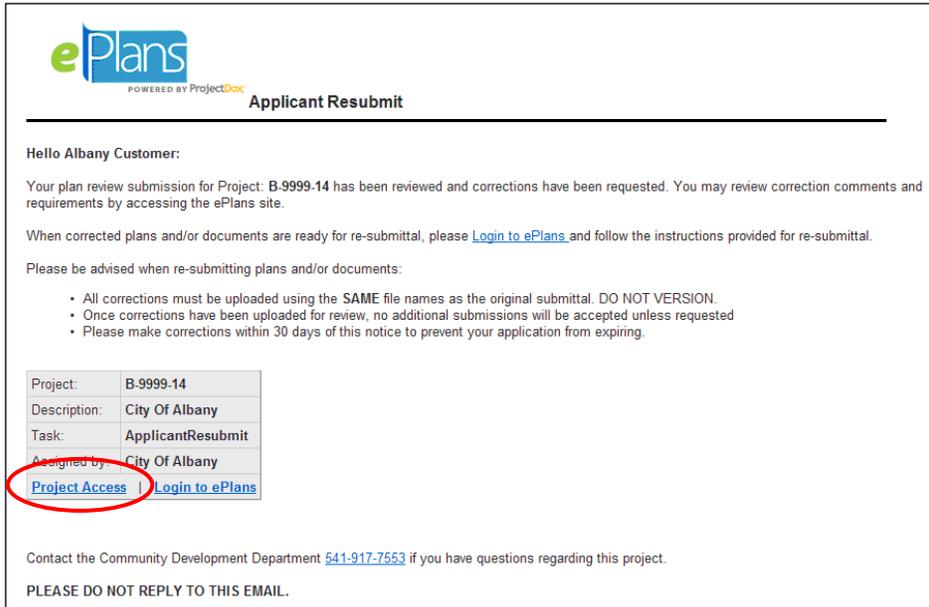
- When the eForm opens, place a checkmark in the “I have uploaded the corrected...” and the Corrections Complete button will display for you to click to complete your task.



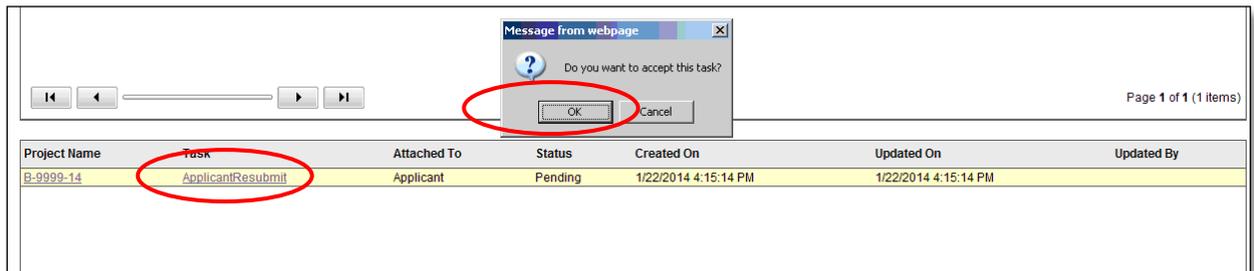
#5 Plan Review Performed

If corrections are requested during the formal review cycle(s) of your drawings, you will receive an **Applicant Resubmit** e-mail notification from the Plans Examiner or Planner requesting revised documents.

1. Click the “Project Access” link in your e-mail notification to access the corrections requested in ePlans.



2. Login to ePlans. You will be automatically directed to the corresponding project.
3. Select the **Applicant Resubmit** task under the task list. This will bring up the Applicant Resubmit eForm. Review the eForm.



- The eForm and drawing markups provide a complete correction package from all reviewing departments.
- Save and close, you will come back to this after resubmitting required documents and drawings.

[Click Here to Save Eform as PDF...](#)

Review Information | **Permit Information** | Resources | Checklist Report (0) | Routing Slip

Intake: City Of Albany (planninglist@cityofalbany.net)
 Review Cycle: 1
 Workflow/Activity Name: Start_Plan_Review_Workflow_v1 / ApplicantResubmit
 Current User Logon: Albany Customer (albanycustomertesting@gmail.com)

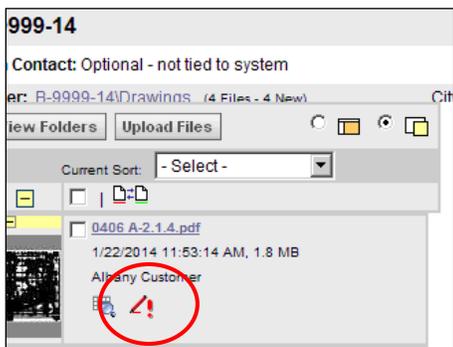
CHANGEMARKS

Filter by Department:

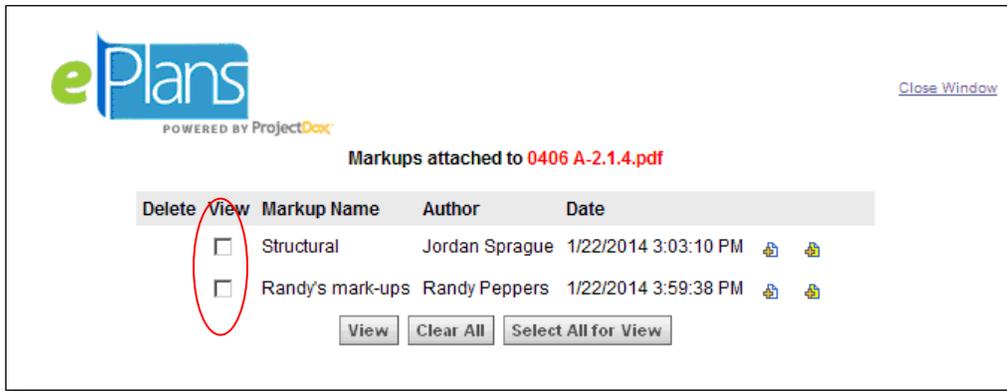
[Click Here to Load Changemarks...](#)

Resolved	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
No		1	Building Plans Examiner	Brookwood Plat.pdf	Planning	Lot Footage	The size of the lot does not calculate with the dimensions.	
No		1	Building Plans Examiner	0406 A-2.1.4.pdf	Structural	Footing	Additional footings require to support beam.	
No		1	Building Plans Examiner	0406 A-2.1.4.pdf	Structural	Fire Hazard	Door from too narrow for emergency exit. Allow an extra 6 inches.	

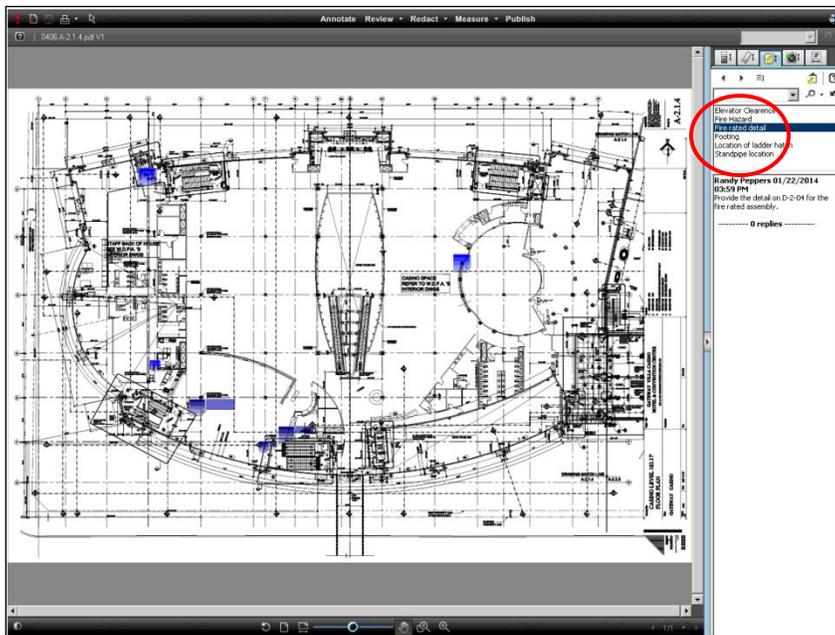
- Open the appropriate folders (Drawings or Documents, etc.) to review your plan markups.
- Notice the plan sheets that have been reviewed (marked up) now have a red markup icon next to them.
- Select the red markup icon, this will prompt a Markup pop-up window.



- Check the “View” box(es) of each reviewer and select the “View” button at the bottom.

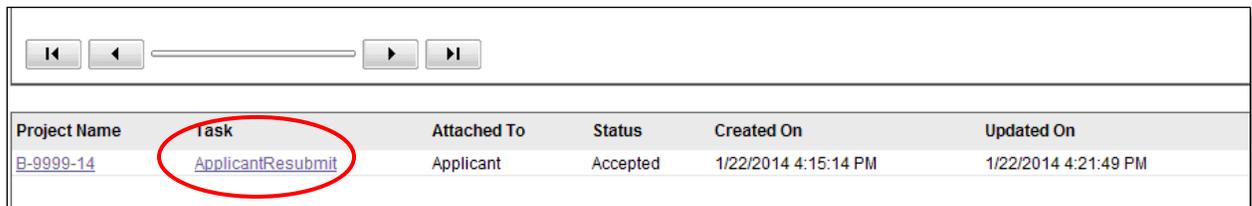


- You can view specific change mark comments on the plans by clicking on the comments from each change mark on the right-hand side of the view screen.



- After you have made the necessary corrections to your plans and documents, re-upload them just as explained in #4 Pre Screen Review.

- Once the revisions are uploaded and everything is addressed, return to the **ApplicantResubmit** task.



13. Check the **3** boxes at the bottom of the eForm and select the “Complete” button. Note: the Save and Close button should only be used if you are not ready to submit your corrections.

The screenshot displays the eForm interface for a plan review. At the top, there is a header with a dropdown menu set to 'No', a map thumbnail, and a table of review items. The table has columns for 'CYCLE', 'DEPARTMENT', 'REVIEWED BY', and 'STATUS & NOTES'. Below the table, there are two rows of review data. The first row is for 'BUILDING PLANS EXAMINER' reviewed by 'JORDAN SPRAGUE'. The second row is for 'STRUCTURAL' reviewed by 'RANDY PEPPERS'. Each row has a 'CORRECTIONS REQUIRED' field and a 'PLAN REVIEW AND/OR ASSIGNMENT COMPLETE' checkbox. Below the table is a 'Task Instructions' section with three checked items. The 'Complete' button at the bottom right is circled in red.

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	BUILDING PLANS EXAMINER JORDAN SPRAGUE JORDAN.SPRAGUE@CITYOFALBANY.NET	CORRECTIONS REQUIRED <input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
<input checked="" type="checkbox"/>	1	STRUCTURAL RANDY PEPPERS RANDY.PEPPERS@CITYOFALBANY.NET	CORRECTIONS REQUIRED <input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE

Task Instructions

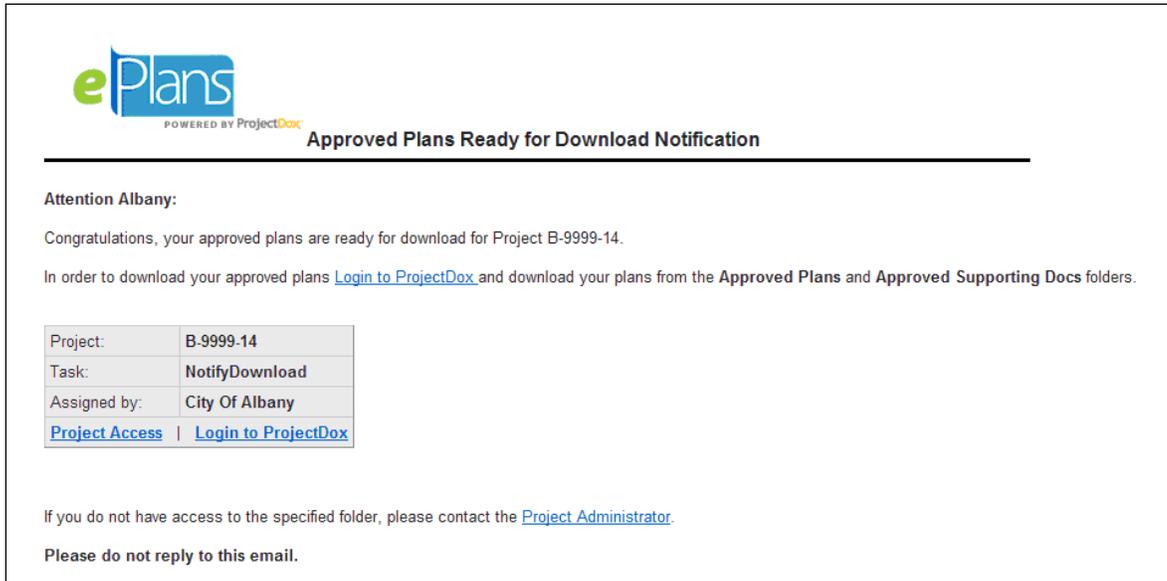
- I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.
- I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.
- I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

14. Check your “Task” list. There should be no task for you to complete.

Congratulations, your re-submittal is complete. Staff will review your resubmissions and contact you with any questions or additional markups.

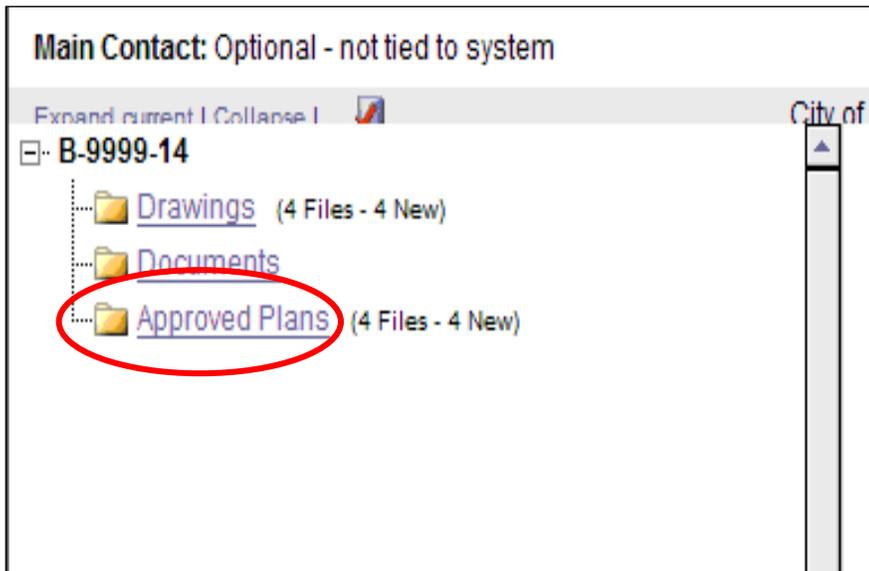
#6 Download and Printing of Approved Plans

After an approval has been issued, the plans will be electronically stamped by the City (See Standards discussion included at the end of this document). A Permit Technician will contact you for payment of the fees due. Upon receipt of full payment, you will then receive an **Approved Plans Ready** task e-mail indicating that your application/permit is complete, with instructions on how to download and print your files.

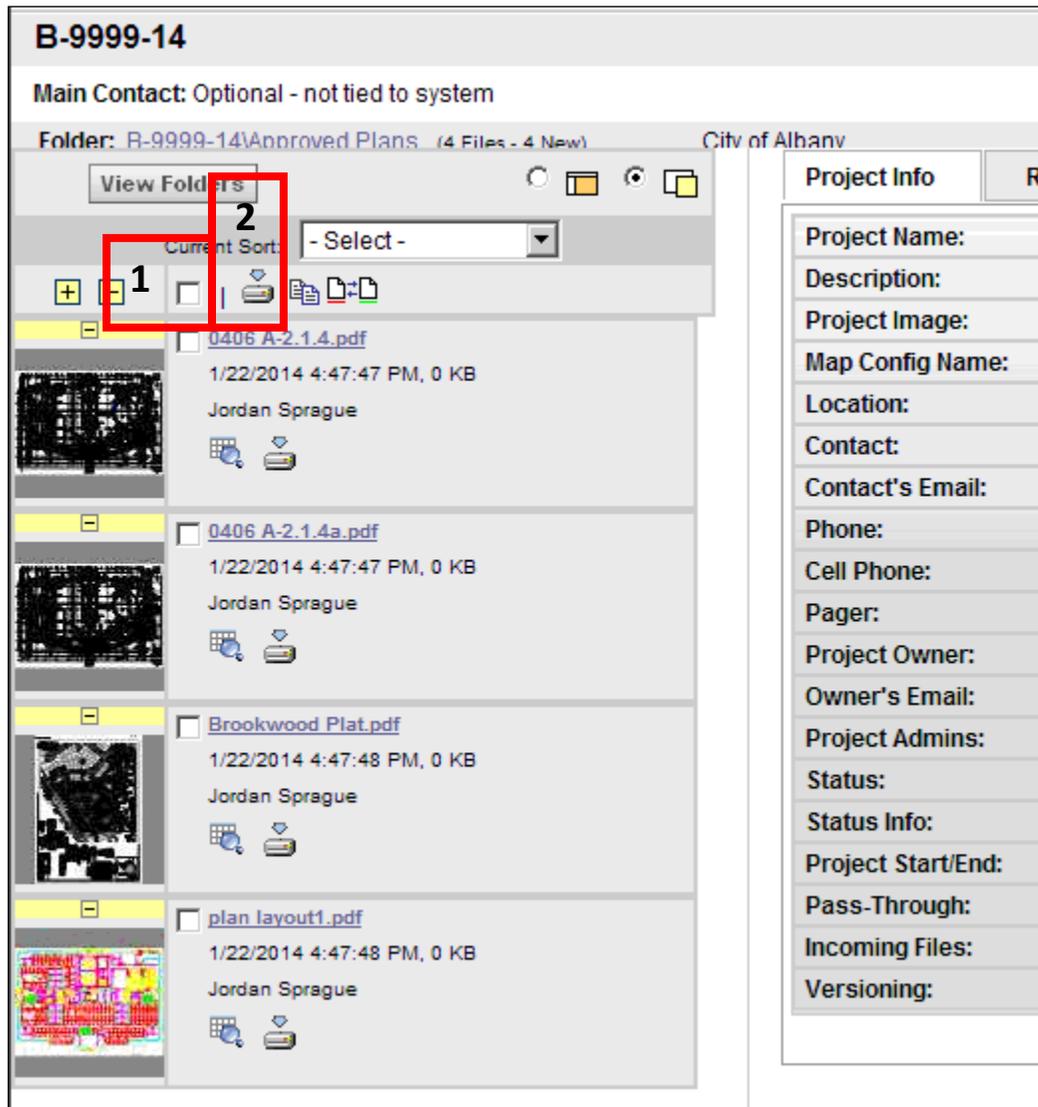


Print Approved Plans

Once the plans have been approved for your project you will notice documents in your Approved Plans folder. Click on the Approved Plans folder



1. Check the box at the top of the list to select all of all files.
2. Click the download files icon to download your final, stamped plans. Once downloaded, plans can be printed from your desktop.



IMPORTANT: You must have a complete, stamped, set of paper plans on the job site for our inspectors to use during inspections. You must download and print the job site Inspection card and keep it onsite as well.

Standards

Standards facilitate the most efficient review and include naming convention (allows for easy identification of drawing), vector file types, department specific color coding of comments for visual identification of departments, and so on.

File Type Standards

All electronically produced plans and supporting documents are required to be submitted in an electronic media format.

The City will accept a wide range of file types for ePlans submittals; however, vector PDF files (non-scanned) are preferred. Use of file types other than vector PDF may extend the review time due to added complications from lost or insufficient data. Submittals made using Design Web Format (DWF) files must be 2D DWF print ready files (i.e., setup properly for printing with title block, no extra data outside the print page area, etc.). The DWF must be saved as AutoCAD version 2013 or lower format. ProjectDox does not support 3D DWF files.

If PDF is your 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.

The City prefers supporting **document files** to be submitted in the following formats: PDF, DOC, DOCX, or XLS. Please submit searchable PDF files for calculations, reports, and other supporting documentation (non-drawing files).

Upload Standards

1. Drawing Files – plan sheets as well as an index page. Each page of the plans shall be uploaded as a separate file.
2. All plans must be uploaded in “landscape” format in the horizontal position.
3. Supporting Document Files – Non-drawing files required as part of the application submission (i.e., drainage calculations, easement letter, certifications, etc.). Each document shall be uploaded as a separate file, but document files may contain multiple pages.
4. Upload completed application to Documents folder. If options are available for your project, please include which options will be used for your specific project. If optional are available, but none are specified, we will reject the application until it is complete.

Border Standards All Drawing Files

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

- 24 × 36 or 36 × 48 Plans – Stamp location box dimensions: 3” width × 2” height (2.5” in and 1.25” down from edge of paper)
- 18 × 24 Plans – Stamp location box dimensions: 2” width × 3.32” height (3” in and 1.5” down from edge of paper)
- 11 × 17 Plans – Stamp location box dimensions: 2” width × 3.32” height (2.5” in and 1” down from edge of paper)

Electronic Signatures

- All drawings to be uploaded must contain an electronic seal and signature unless otherwise exempt.

Folder Structure

- All drawings shall be uploaded to the “Drawings” folder for each project.
- All non-drawing files shall be uploaded into the “Documents” folder for each project.

File Naming Standards

A table of contents must be provided as part of the cover sheets. Use a zero to force the cover sheets to sort first.

- **Drawings**
File names for drawings submitted through ePlans Review should include the first character(s) of the discipline, a name, followed by a 3-digit number and drawing type. The file name must match the plan sheet name. See the table below for most common disciplines. These are only suggestions; the list is not intended to be all inclusive. Each page of a plan sheet shall be uploaded as a separate file.
- **Documents**
Supporting document files should be PDF files with names that correspond to the assigned permit or application. Documents may be submitted as multiple page documents.
- **Resubmittals**
Corrected files always need to be re-submitted with the SAME FILE NAME as the original submittal. Please do not version files when uploading resubmitted files; ePlans will version when upload is complete.
- **Sheet ID Name**
The first character must represent the discipline area ("A" for Architectural, "S" for Structural, etc.); use more characters if required, such as "EPSC" for Erosion Prevention and Sediment Control. Ensure all plans, including the associated details, are submitted under the correct discipline.
- **Sheet Number**
The sheet number may be listed with decimals or in whole numbers.
- **Sheet Name**
The sheet name must clearly indicate the information found on the page. Example: “A002.1 - Second Level Floor Plan Details.”

Discipline	Character	Example File Names
Coversheets/Table of Contents	OCS	OCS001 or OCS1.00
Architectural	A	A001 or A1.00
Civil – EPSC, Flood Plain, Grading, Site Plans, Utilities, Stormwater, Survey, etc	C	C001 or C1.00, C002 or C2.00, C003 or C3.00, C004 or C4.00, etc
Contours (Stand Alone)	CON	CON001 or CON1.00
Electrical	E	E001 or E1.00
Elevations	ELEV	ELEV001 or ELEV1.00
Erosion Prevention and Sediment Control	EPSC	EPSC001 or EPSC1.00
Fire Access and Water Supply	FAW	FAW001 or FAW1.00
Fire and Life Safety	FLS	FLS001 or FLS1.00
Flood Plain	FLDP	FLDP001 or FLDP1.00
Grading	G	G001 or G1.00
Landscaping and Irrigation	L	L001 or L1.00
Mechanical	M	M001 or M1.00
Natural Resources	NR	NR001 or NR1.00
Open Space	OS	OS001 or OS1.00
Plumbing	P	P001 or P1.00
Planned Development	PD	PD001 or PD1.00
Preliminary Plats	PP	PP001 or PP1.00
Replat	RP	RP001 or RP1.00
Final Plats	FP	FP001 or FP1.00
Site Plans	SP	SP001 or SP1.00
Site Utilities	U	U001 or U1.00
Stormwater and Drainage	SW	SW001 or SW1.00
Structural	S	S001 or S1.00
Survey	SVY	SVY001 or SVY1.00
Transportation Study	TS	TS001 or TS1.00
Tree or Vegetation Inventory (Existing)	TVI	TVI001 or TVI1.00
Wetlands/Delineation	WTL	WTL001 or WTL1.00
Zoning	Z	Z001 or Z1.00
Others	Contact COA	