

Electronic Plan Review Guide
Planning Applicant



333 Broadalbin St SW, Albany, OR 97321 / 541-917-7550 / www.cityofalbany.net/eplans

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See also

EPlans Quick Reference Guide

EPlans Troubleshooting Guide

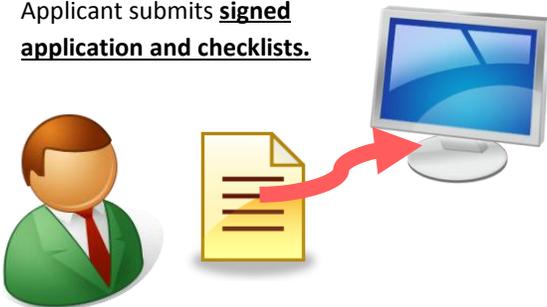
Agency EPlans User Guide

Planning

Electronic Review Process (ePlans)

#1 Submit Application

Applicant submits signed application and checklists.



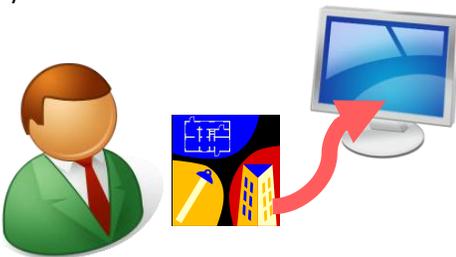
#2 Assign Permit Number, Access

City staff assigns a permit number and grants applicant rights to upload plans.



#3 Upload Plans

Applicant uploads plans into ePlans review system.



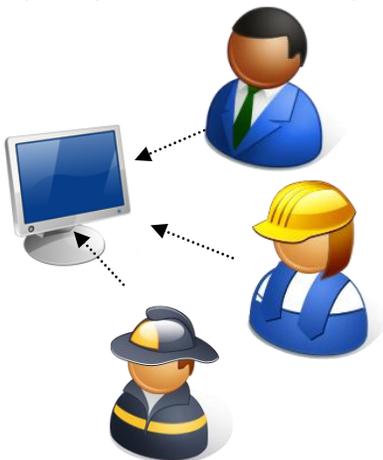
#4 Pre Screen Review, Collect Fees

Permit tech performs pre-screen review, working with applicant to assure proper plan submittal. Fees are collected after submittal.



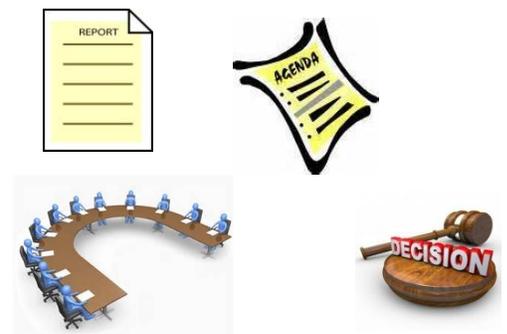
#5 Perform Plan Review

City staff performs simultaneous project review.



#6 Process Continues Outside of ePlans

Staff report, Hearings, Decisions, Appeals



Electronic Plan Review

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. ProjectDox allows city staff to perform simultaneous reviews on plans. 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 a Planning application and any associated checklists at: www.cityofalbany.net/drc-forms.
2. E-mail the completed application to eplans@cityofalbany.net.
3. Wait for a Permit Technician reply. Invitation to upload is sent to you. If you have not received notification within 4 business hours, call 541-917-7550 to ensure the application has been received.
4. Upload plans following instructions in the ePlans invitation.
5. Pay fees.

If an applicant does not have the resources required to use ePlans, 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.

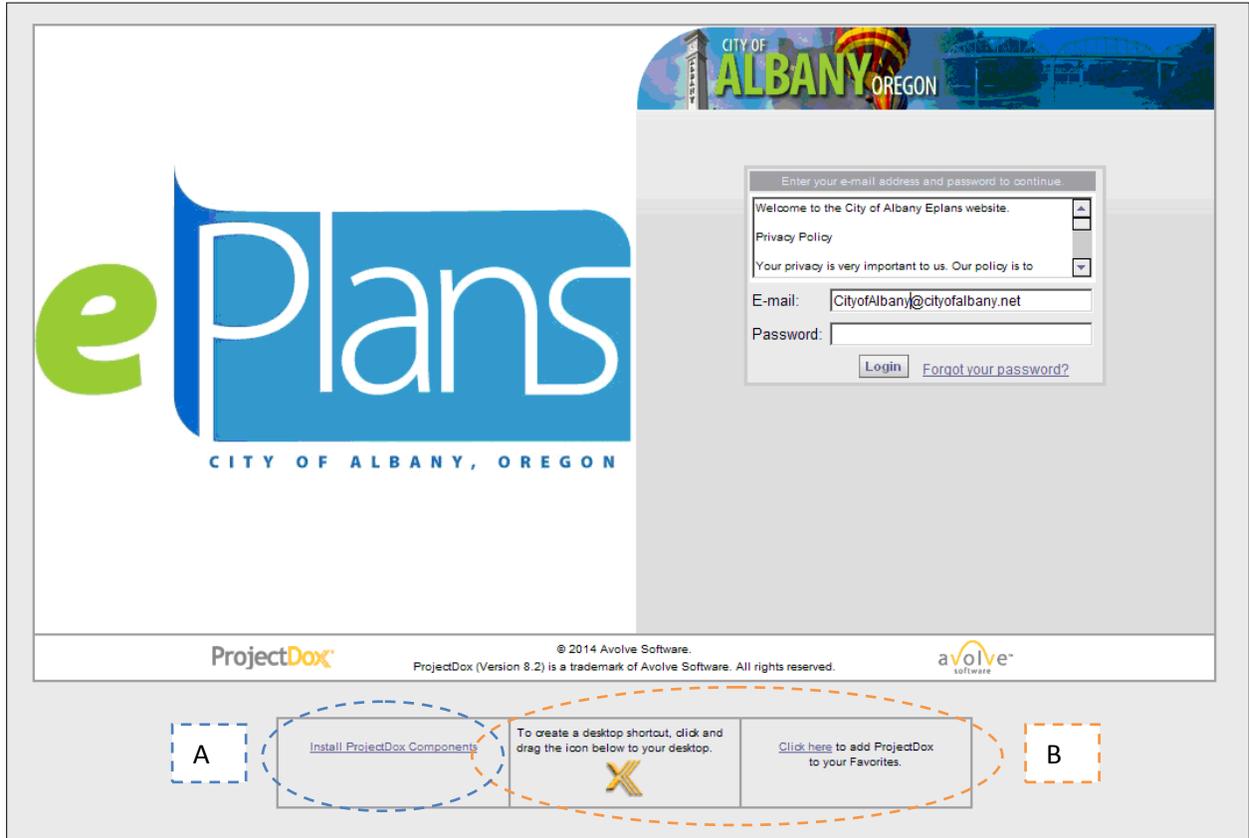
Existing Users

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 that 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/Project Dox website.
2. Prior to logging into the ePlans (Project Dox) 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.). 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 once for each

computer accessing 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

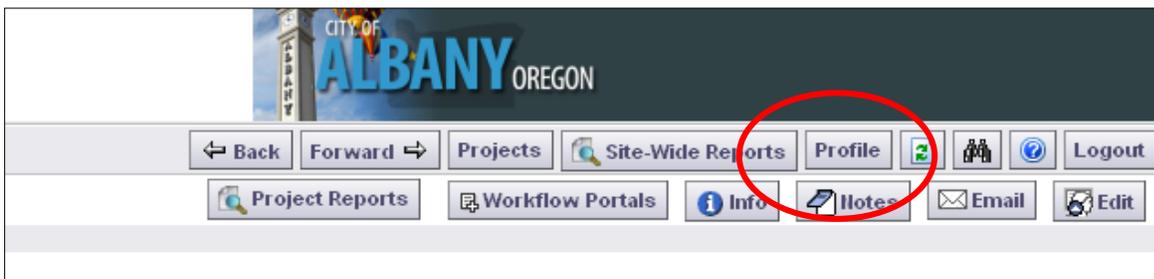
Contact Information | User Metadata | Project Membership | Group Membership

Save

* Required field

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

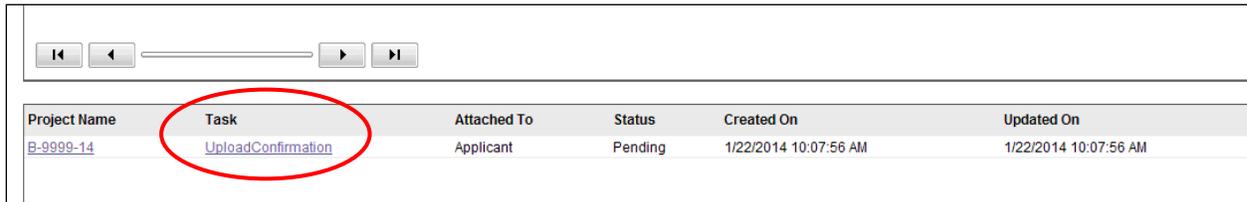


Tasks

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.

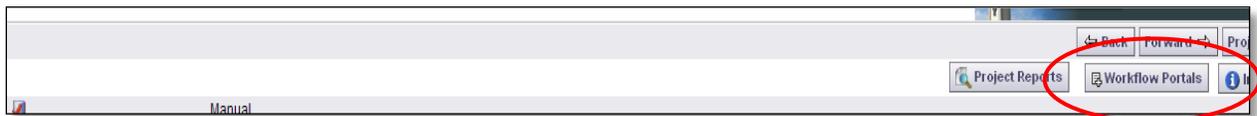


Project Name	Task	Attached To	Status	Created On	Updated On
B-9999-14	UploadConfirmation	Applicant	Pending	1/22/2014 10:07:56 AM	1/22/2014 10:07:56 AM

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

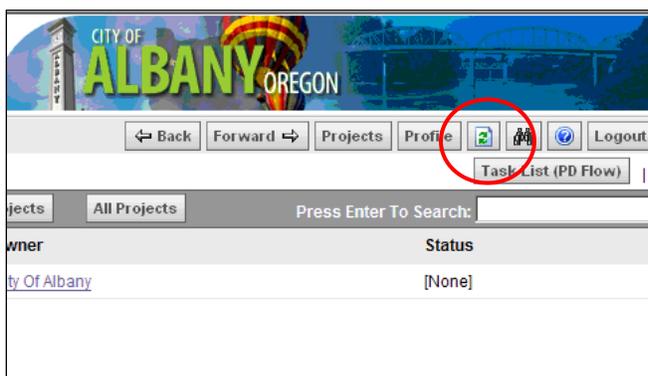


3. If you are inside a project, you can click on the "Workflow Portals" button at the top of the page.



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.



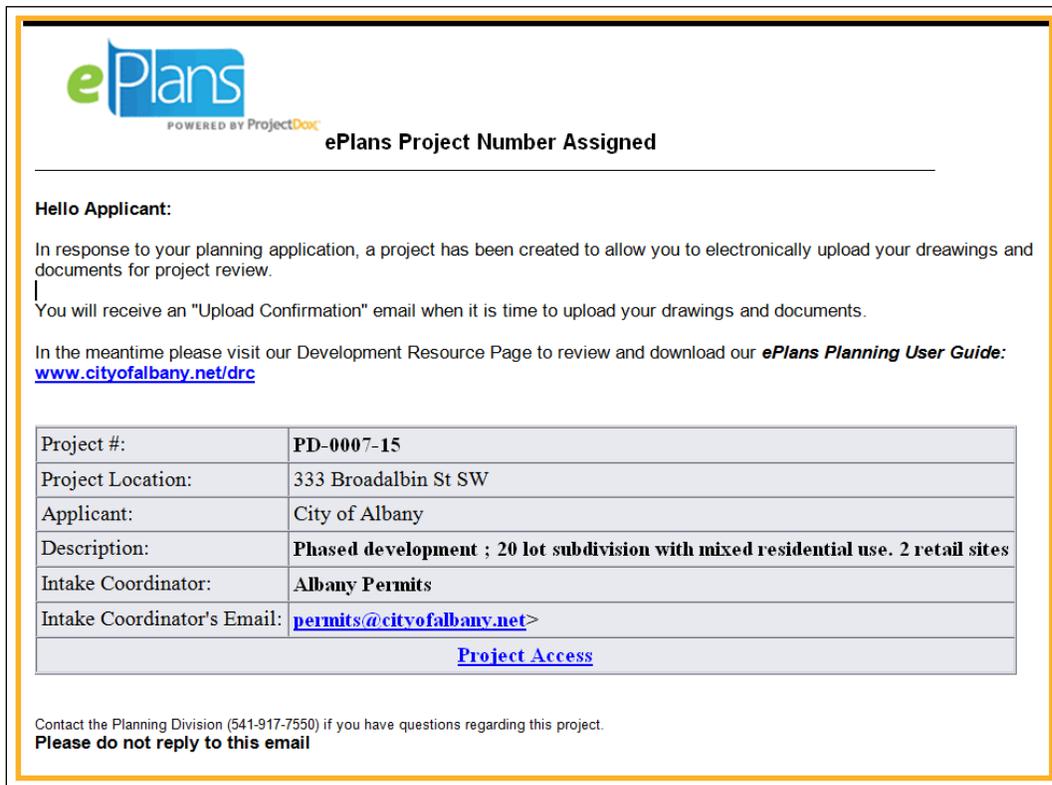
Electronic Plan Review Workflow

#1 - Submit Application

Select land use application link and any appropriate checklists 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. E-mail **signed application and appropriate checklists** to ePlans@cityofalbany.net or visit us at City Hall at 333 Broadalbin Street SW in downtown Albany.

#2 - Assign Project Number

After your application is processed into the City's permitting system, an ePlans e-mail will be sent to the Primary Contact's e-mail address with your project number.



The screenshot shows an email interface with the ePlans logo (powered by ProjectDox) and the subject line "ePlans Project Number Assigned". The body of the email includes a greeting to the applicant, an explanation of the project creation, and instructions to visit the Development Resource Page for a user guide. A table provides project details, and a "Project Access" link is highlighted in a grey box. At the bottom, contact information for the Planning Division is provided, along with a warning not to reply to the email.

ePlans
POWERED BY ProjectDox

ePlans Project Number Assigned

Hello Applicant:

In response to your planning application, a project has been created to allow you to electronically upload your drawings and documents for project review.

You will receive an "Upload Confirmation" email when it is time to upload your drawings and documents.

In the meantime please visit our Development Resource Page to review and download our **ePlans Planning User Guide**: www.cityofalbany.net/drc

Project #:	PD-0007-15
Project Location:	333 Broadalbin St SW
Applicant:	City of Albany
Description:	Phased development ; 20 lot subdivision with mixed residential use. 2 retail sites
Intake Coordinator:	Albany Permits
Intake Coordinator's Email:	permits@cityofalbany.net >

[Project Access](#)

Contact the Planning Division (541-917-7550) if you have questions regarding this project.
Please do not reply to this email

#3 - Uploading Files

1. Please review the Standards Section included at the end of this guide for accepted file types and how to name your plan sheets and document files.
2. An ePlans **Upload Confirmation** e-mail will be sent to the Primary Contact's e-mail address with login information, project number, and a link to the project.
3. Click on the "Project Access" hyperlink in the grey box. The site address for the City of Albany ePlans program is <https://eplans.cityofalbany.net>.



Upload Confirmation

Hello Applicant:

Your plan review for Project: **PD-0007-15** has been started. You must complete your assigned task in order to notify the City your upload is complete.

To access your project and upload your drawings, follow the instructions below:

1. Click on the "Project Access" link below.
2. Enter your User Login and Password.
3. Click on the "UploadConfirmation" task next to the project name at the bottom of the page.
4. Click OK to accept the task.
5. Click on the "Save & Close for Later" button.
6. Click on the Project Number Link.
7. Click on the Drawings and/or Documents folder (whichever applies first).
8. Click the "Upload Files" button and follow the instructions to upload your drawing/documents.
9. **DON'T FORGET TO UPLOAD YOUR ORIGINAL APPLICATION IN THE DOCUMENTS FOLDER.**
10. When finished, click on the "Project" button on the toolbar, then scroll to the bottom of the page and click on the "Upload Confirmation" task.
11. Click on the "Upload Complete" button and then the "Ok" button.
12. Your documents and drawings has now been submitted for plan check review.

Drawing files supported are Searchable PDF (non-scanned), AutoCAD, DWF, or DWG files.

Please visit our Development Resource Page to review and download our *ePlans Planning User Guide* for more detailed directions: www.cityofalbany.net/drc

Project #:	PD-0007-15
Project Location:	6502 SW PACIFIC BLVD - 11S04W25 01200
Applicant:	Smith Family Trust
Description:	Phased development; 20 lot subdivision with mixed residential use. 2 retail sites
Task:	Upload Confirmation
Assigned by:	Albany Permits
Project Access	

Contact the Community Development Department 541-917-7550 if you have questions regarding this project.

PLEASE DO NOT REPLY TO THIS EMAIL.

4. After you have located the project to which you have been assigned, you will need to accept the **Upload Confirmation** task for permission to load plans and documents for prescreen review. If you do not see your project, click the "All Projects" button to refresh the screen.

9 project(s) out of 9 for EPlans Test COA (eplans@cityofalbany.net) Recent Projects **All Projects**

Project	Options	Description
CI-0006-15		New workflows, updated emails
CI-0009-15		Testing apps for MA, SA etc to use to check workflows
CP-0007-15		Review of manuals and process with intake
CU-0012-15		Type III Conditional Use for resumption of church services in an existing 10,640 sq. ft. church together with associated parking, access and landscape
CU-0016-15		Review of manuals and process with intake
HI-0014-15		Testing apps for MA, SA etc to use to check workflows
NR-0006-15		testing workflow history in planning, primarily the comments column order
PA-0001-15		Complete partition plat to legalize tax lots 302 and 3054 - TEST
PD-0006-15		TEST - Plan Workflow 5-5-15

Project Name	Task	Attached To	Status	Created On
CI-0006-15	UploadConfirmation	Applicant	Pending	5/7/2015 11:29:25 AM

- An eForm will open with instructions. Click “Save & Close for Later” to be granted access for uploading documents. You will come back to this after upload.

CITY OF ALBANY OREGON

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

Review Information **Permit Information** Resources Routing Slip

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

Please complete this activity when you have successfully uploaded all required plans/documents.

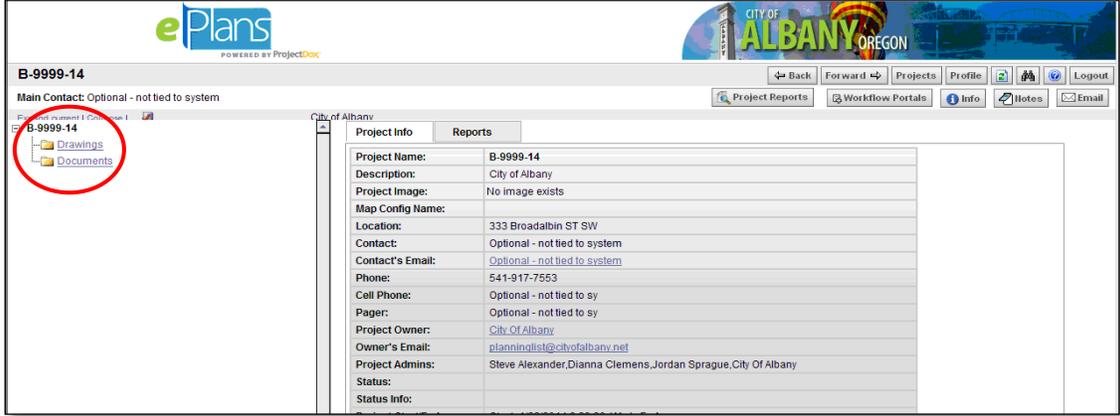
Upload Complete **Save & Close for Later**

Best in Class Version 1.0

- 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.



7. Click on your permit/project, and then click the “Drawings” folder to upload your plan drawings, or “Documents” folder to upload supporting project documents. **DO NOT FORGET TO UPLOAD YOUR ORIGINAL APPLICATION TO THE DOCUMENTS FOLDER.**

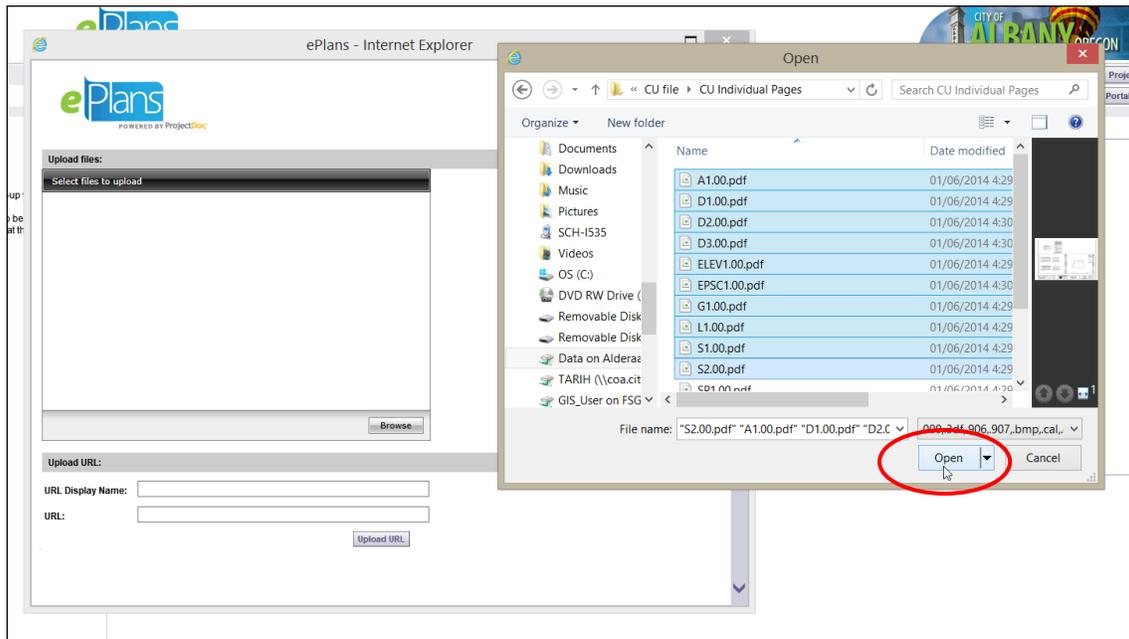


8. Upon entering either folder, you will be presented with two buttons, “View Folders” and “Upload Files.” Click the “Upload Files” button.

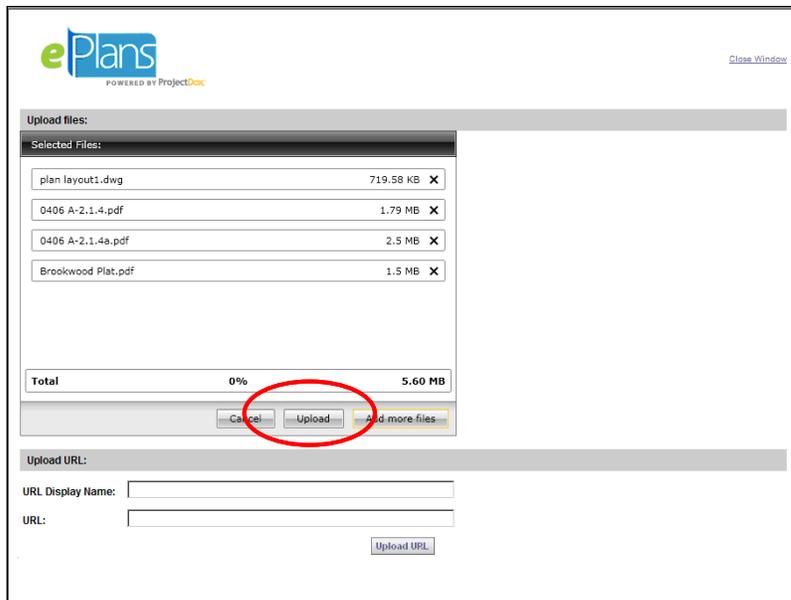


9. In the Upload File box browse to the file location on your computer and select or highlight files you want to upload; multiple files can be selected by using the Ctrl key.

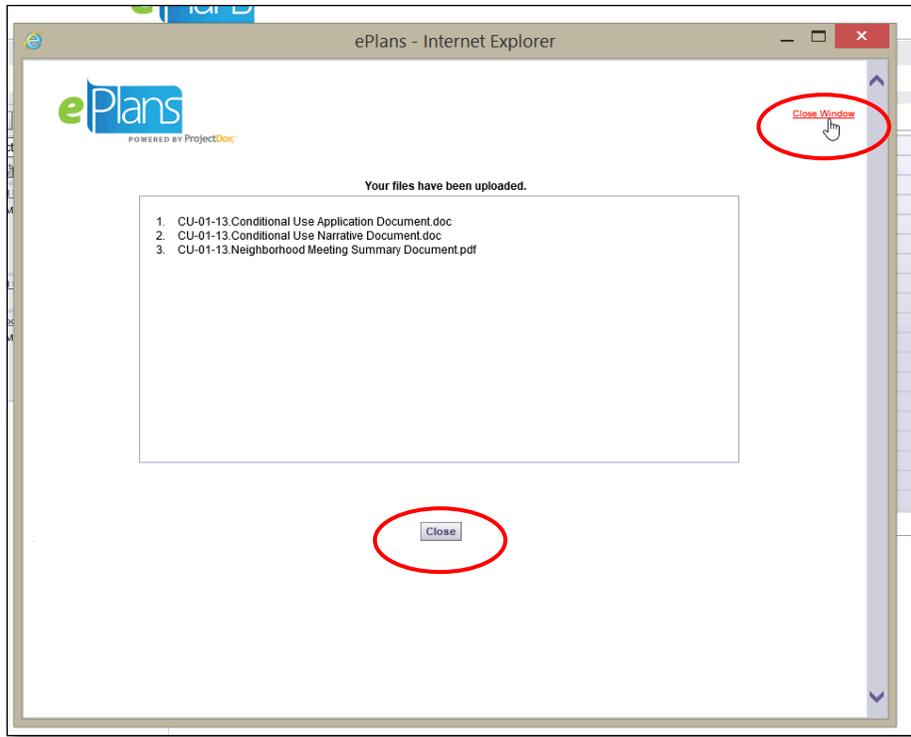
10. Click the “Open” button and the files selected will automatically copy to the upload window.



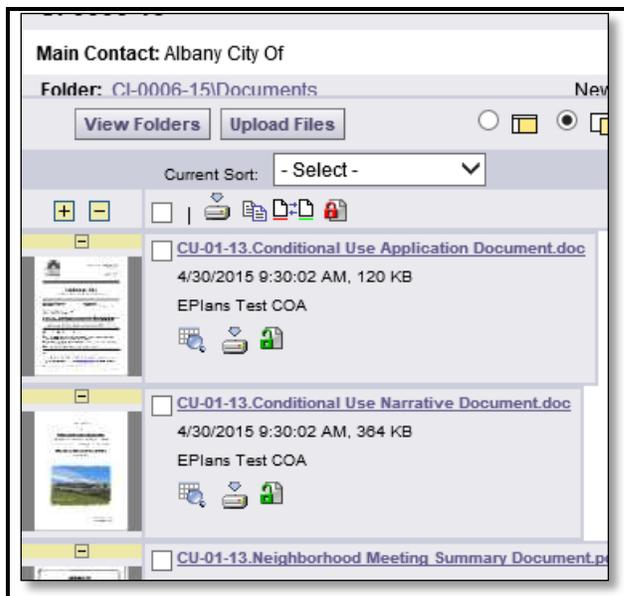
11. Click the “Upload” button.



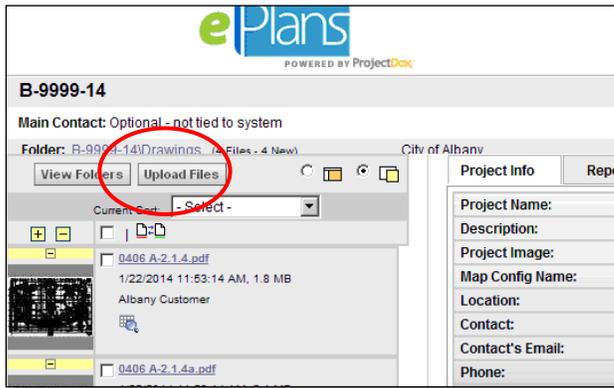
12. The window will reload, stating at the top that your files have been uploaded, with a list of those files. Select the “Close” button underneath the upload window, or in the upper right hand corner and this will complete the file upload for this cycle.



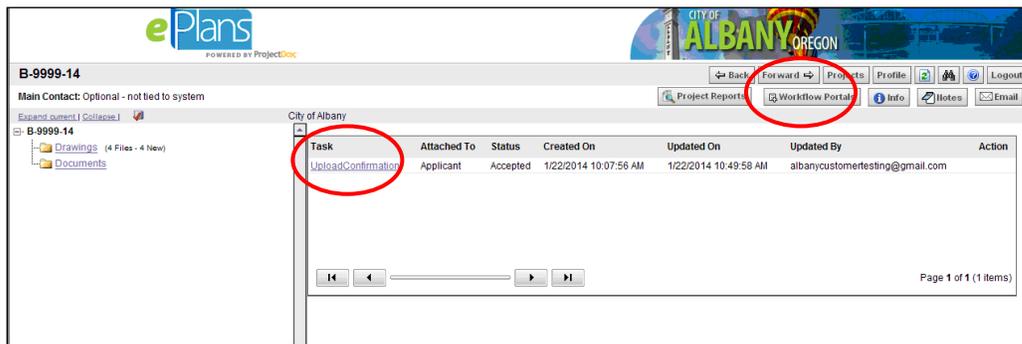
13. Once the files are uploaded to the folder, a thumbnail image of each file is produced. Next to each thumbnail, the file name, author, date uploaded, file size, and history icon displays.



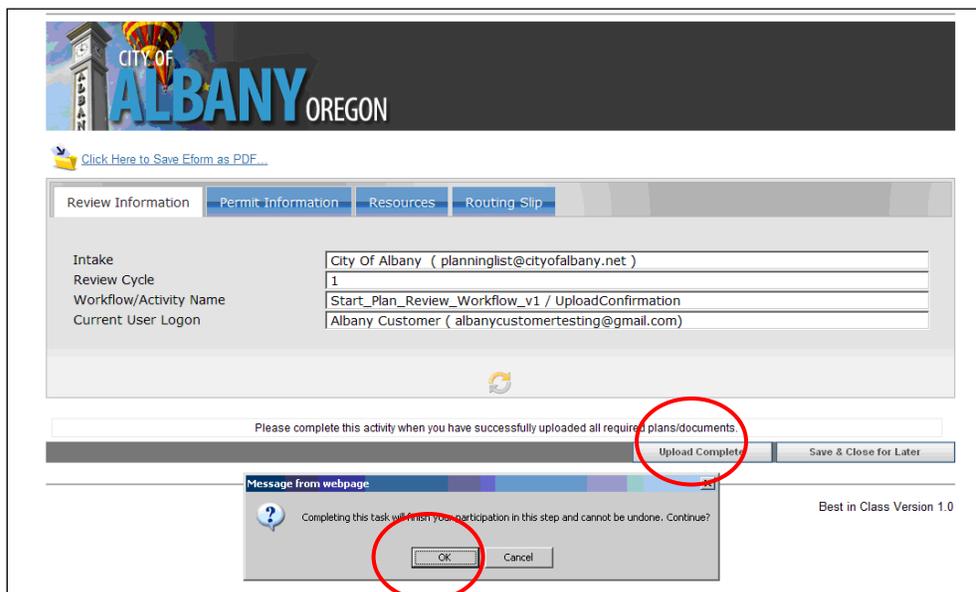
14. To upload additional files, click on the “Upload Files” button and repeat steps 8-13.



15. After 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.



16. If all documents are uploaded, click on “Upload Complete” and “OK” buttons.



17. Congratulations! You have successfully finished part one of submitting your plans electronically. Please logout after your session is complete. A notification has been sent to the Permit Technician to start the prescreening process to determine if the submittal requirements have been met. Once prescreen is complete, you will receive an e-mail stating that review is underway.



Prescreen Review Approved

POWERED BY ProjectDoc

Hello EPlans:

Your Project: **PA-0005-15** has been prescreen approved. No action is required by you at this time.

Project #:	PA-0005-15
Project Location:	333 NW 98th AVE - 11S03W06CC02654
Applicant:	City of Albany
Description:	Partitioning 24,789 Sq. ft. parcel in 3 parcelsQty. 2 - 12,000 sq. ft. parcelsQty. 1 - 788.8 sq. ft. parcel.
Project Access	

Please visit our Development Resource Page to review and download our **ePlans Planning User Guide** for more detailed directions:
www.cityofalbany.net/drc

Contact the Planning Division (541-917-7550) if you have questions regarding this project.

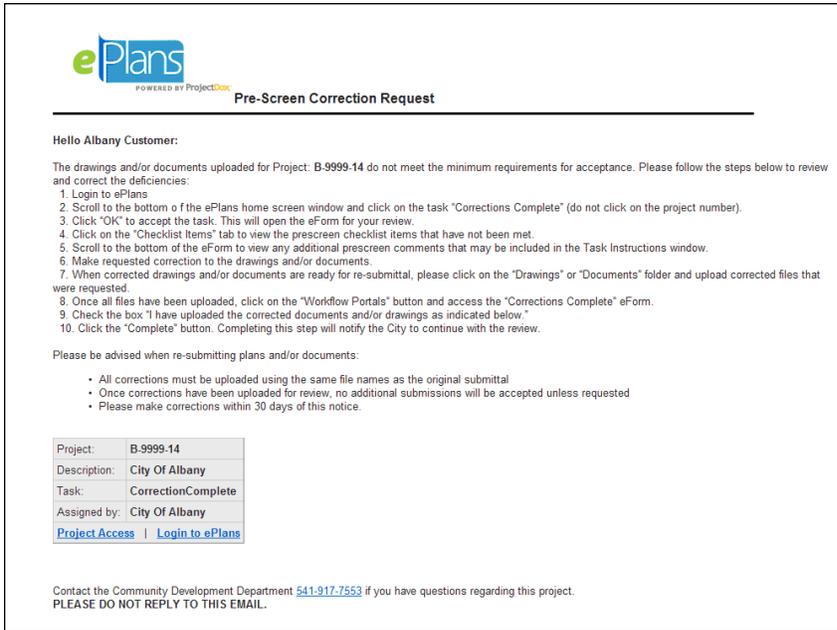
PLEASE DO NOT REPLY TO THIS EMAIL.

#4 - Pre-Screen Review and Correction Requests

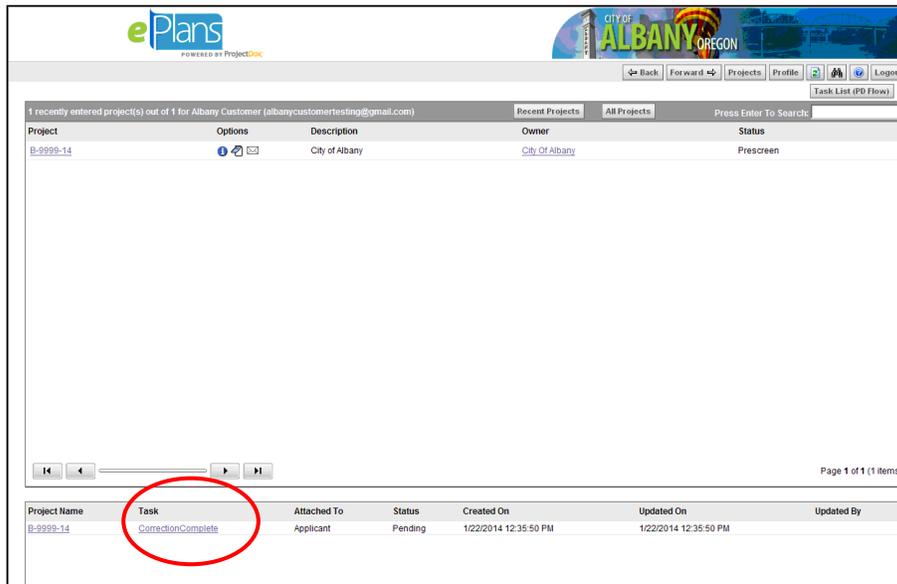
Prescreening is a cursory review of your uploaded documents in preparation for formal review. This will be performed by a Permit Technician for most types of projects. This is **not** your Completeness Determination. That is completed by the planner assigned to your project.

If no corrections are required during prescreen City staff will contact you to collect fees.

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.



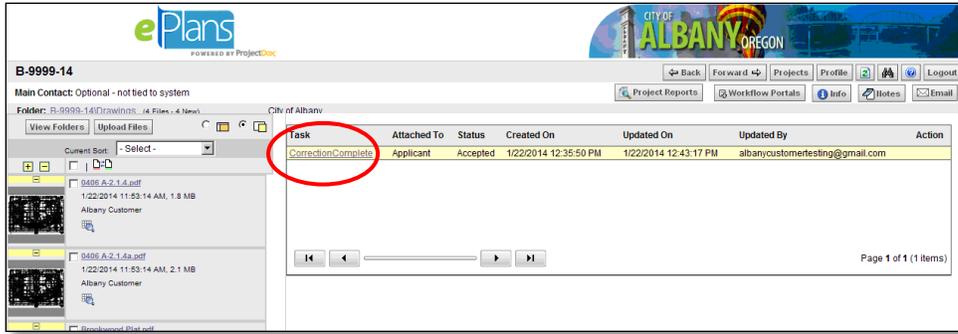
1. The **Corrections Complete** task will appear at the bottom of the Projects screen. Click on this task and this will launch the eForm.



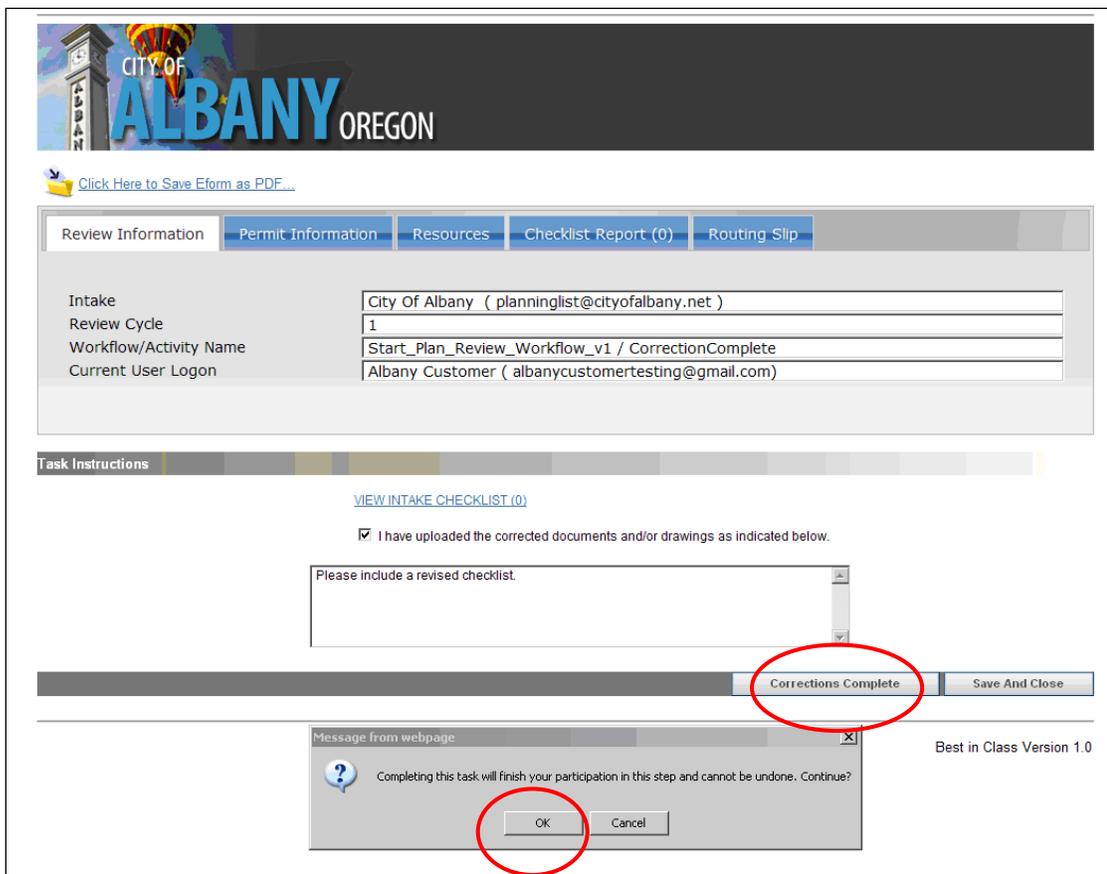
2. Review the Permit Technician’s comments to identify which requirements were noted as missing. Save and close; you will come back to this form.

- 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 corrected files; ePlans will automatically version when upload is complete.
- You will receive an upload confirmation message; notice the versioning information in blue.

- 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.



When completed, the City will be notified to continue with the formal review process.

If corrections were made and City staff approves of the corrections, you will receive an e-mail stating they are under review.

City staff will contact you to collect fees.

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. set up 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., narratives, review criteria response, neighborhood meeting notes, etc.). Each document shall be uploaded as a separate file, but document files may contain multiple pages.
4. Upload completed application to Documents folder.

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 at the beginning of the file name to force the cover sheets to the top of the list.

- Drawings**
 File names for drawings submitted through ePlans Review should include the first character(s) of the discipline name, followed by a three-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.
- 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
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
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	R001 or RP1.00
Final Plats	FP	FP001 or FP1.00
Site Plans	SP	SP001 or SP1.00
Site Utilities	U	U001 or U1.00

Discipline*	Character	Example File Names
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	