Getting Started

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Navigating the Review Process

Click here to go to E Plan.

Technology required to use E Plan

- Active X Web Client.
  - Internet Explorer 11.0
- HTML Web Client (Macintosh OS).
  - Chrome 49
  - Firefox® - (See Firefox Browser Support on page 131)
  - Safari 6.2.0, 7.1.0, 8.0.0, or 9.0.0 - (See Safari Browser Support on page 132 for additional information)
- HTML Web Client (Windows OS).
  - Chrome 49
  - EdgeHTML 13 (limited support) - (See Edge Browser Support on page 131)
  - Firefox® - (See Firefox Browser Support on page 131)
  - Internet Explorer 11.0
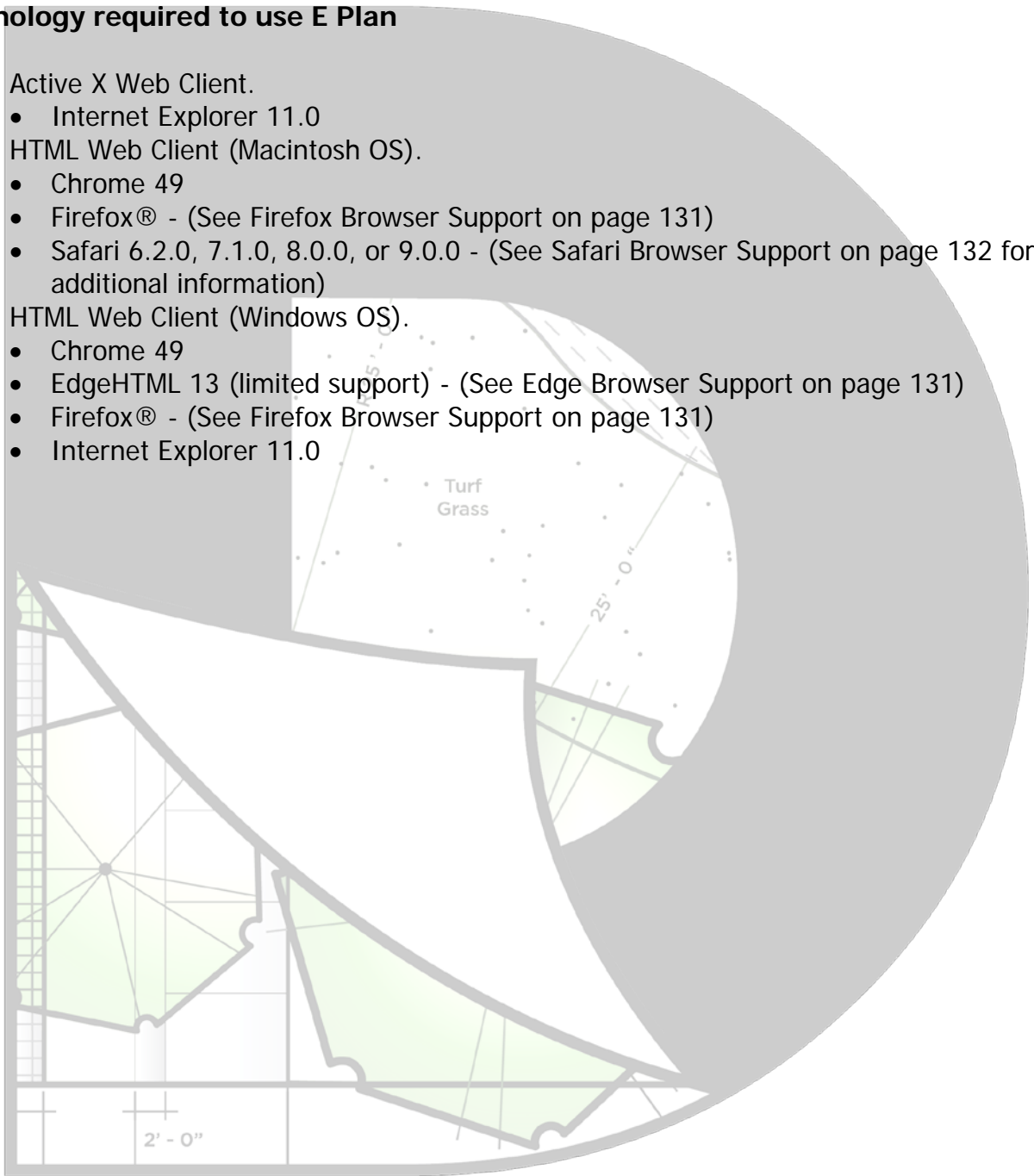
Click here to go to E Plan.

Registering an E Plan Review Account

In order to upload plan documents for submission and review, you must first create an E Plan Review account.

- Navigate to the E Plan.
- Click *Register* toward the top right of the page.
- Read the disclaimer. Check the box next to *I agree to the above terms and conditions*. Click *Next*.
- Enter your information into the appropriate text fields.
  - Your user name must consist of alphabetical and/or numerical characters with no spaces.
  - Your password is case-sensitive, but your user name is not.
  - You cannot use a user name or email address that is already in use. Click *Check Availability* to see if your chosen user name or email address is available and valid. If they are available and valid, a green check will appear. If not, the text box will turn red.
  - Click *Next*. The *Account Information Summary* window is displayed. Click *Create*. Your E Plan Review account has been created.
- Please note that only registered users will be able to (re)submit projects and receive project related email notifications.

Click here to go to E Plan.

Login to your E Plan Review Account

- Navigate to the E Plan.
- Click *Sign In* toward the top right of the page.
- Enter your user name and password into the appropriate text fields. Click *Sign In*.

Resetting and Retrieving your User Name and Password

- To recover password.
  - Click *Forgot Name/Password*.
    - Enter your user name into the appropriate text field. Click *Show Hint*. Your security hint is displayed. Click *Return to Login*.
    - If you still do not remember your password, click *Reset Password*. An email containing a hyperlink to reset your password will be sent to your registered email account.
- To recover username.
  - Enter your registered email address into the appropriate text field. Click *Find*. An email containing your user name will be sent to your registered email account.

Click here to go to E Plan.

Adding People to your Contacts List

Contacts are used to assign individuals with significant project involvement access to a project's documents. Contacts allows you to assign a person (including you) that has a significant level of involvement with your projects. You may assign as many, or as few, individuals as you would like to a project.

- Click *Settings* toward the top right of the page.
- Click *Contacts* toward the top left of the page.
- Click Add *Contact*.
    - Select the company from the drop down menu, or click *Add* if the company is not listed.
        - When adding a Company be sure to complete all applicable fields. Once all the fields are entered, click *Add*. Your company has been created.
    - Continue adding the contact by entering information into the Name, Address and Contact fields. If your address and company address are the same, click *Copy* below the Address heading and the information will be automatically displayed.
    - Click Add. Your contact has been created

Modifying an Existing Contact

- Click *Settings* toward the top right of the page.
- Click the *Edit* icon to the right of the displayed contact.
    - Update the fields you wish to change. Click *Save*. Your contact has been updated.

Deleting an Existing Contact

- Click *Settings* toward the top right of the page.
- Click the *Delete* icon to the right of the displayed contact. Your contact has been deleted. Please note that E Plan Review will not ask for confirmation after you click the *Delete* icon.

Click here to go to E Plan.

Adding Project Groups

Project Groups can be assigned to any new or existing project in order to help organize related projects. An example would be different projects on the same property, such as a subdivision plat and construction plans for subdivision improvements.

- Click *Settings* toward the top right of the page.
- Click *Project Groups* toward the top left of the page.
- Click *Add Project Group*.
  - Enter the name of the project group. Click *Save*. Your project group has been created.

Modifying an Existing Project Group

- Click *Settings* toward the top right of the page.
- Click *Project Groups* toward the top left of the page.
- Click the *Edit* icon to the right of the displayed contact.
  - Enter change into the text field. Click *Save*. Your project group has been updated.

Deleting an Existing Project Group

- Click *Settings* toward the top right of the page.
- Click *Project Groups* toward the top left of the page.
- Click the *Delete* icon to the right of the displayed contact. Your project group has been deleted. Please note that E Plan Review will not ask for confirmation after you click the *Delete* icon.
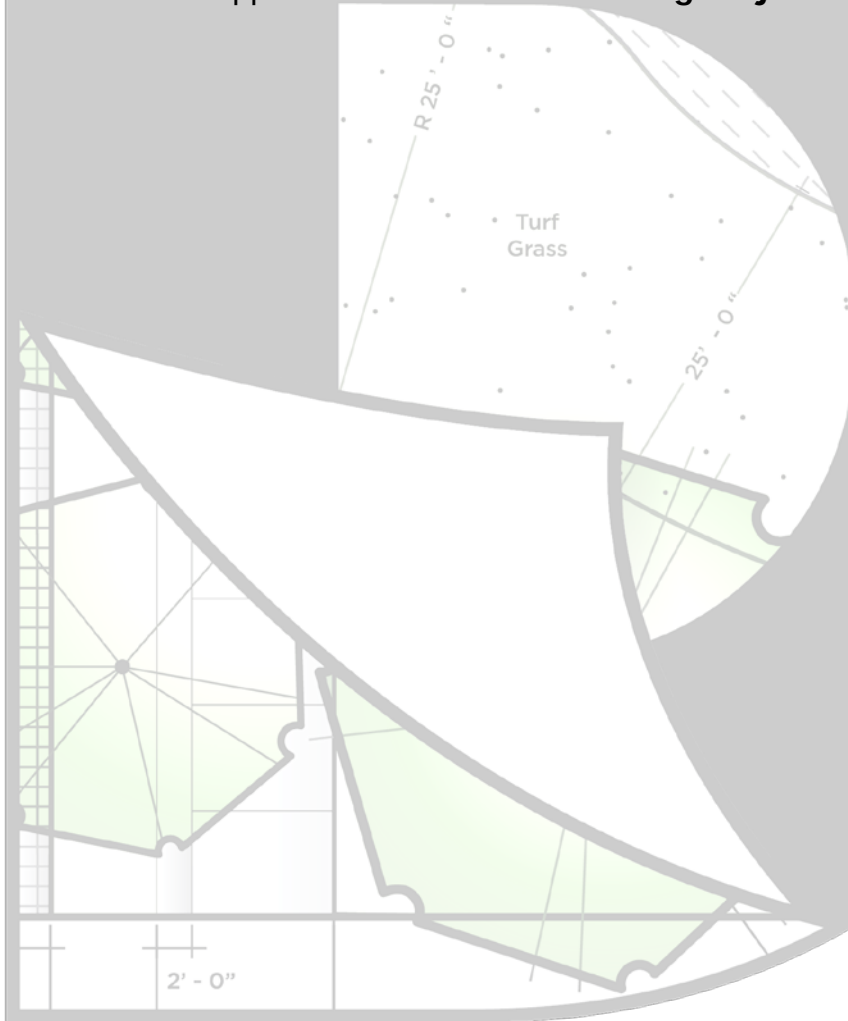
Click here to go to E Plan.

Entering Project Information

- Click the *Projects* tab toward the top right of the page.
- Click the *Review Type* drop down, select *Standard Review* and click *Add Project*.
  - Enter project information into the appropriate text fields. Please note that *Alternate ID* is for your use if you wish to include internal project identification.
  - Enter role(s).
    - Click the *plus* icon to the right of *Roles*.
    - Enter new role information into the appropriate text fields.
    - If the new role and company is in your Contacts list, click *Lookup* and click the relevant contact. The information is automatically displayed.
    - Delete a roll by clicking the *minus* icon below the *plus* icon to the right of *Roles*. The role has been deleted. Please note that E Plan Review will not ask for confirmation after you click the *minus* icon.
    - Add additional new roles by clicking the *plus* icon to the right of *Roles*.
    - Expand or collapse roll information by clicking the icon to the left of *Roles*.
    - Please note that at a minimum the owner's contact information and contractor (if applicable) shall be provided.
  - Enter location parcel(s).
    - Click the *plus* icon to the right of *Location Parcels*.
    - Enter parcel information into the appropriate text field.
    - If you do not know your parcel information you can find it by clicking here.
    - Delete a parcel by clicking the *minus* icon below the *plus* icon to the right of *Location Parcels*. The parcel has been deleted. Please note that E Plan Review will not ask for confirmation after you click the *minus* icon.
    - Add additional parcels by clicking the *plus* icon to the right of *Location Roles*.
    - Expand or collapse parcel information by clicking the *expand* or *collapse* icon next to the left of *Roles*.
  - Enter additional information.
  - Once all the information has been entered click *Add*.
  - If applicable, expand Project Group at the left side of the page. Click the drop down and select created project group. Click *Set*. The project has been assigned.
  - Review the project information to ensure accuracy. Make any edits by clicking *Edit* toward the top right of the page.
- Create a new project with the same information as an existing project.
  - Click the *Projects* tab toward the top right of the page.
  - Click the *Folder* icon to the right of the displayed project.
  - Click the *expand* icon to the left of *Add New Project* at the left of the page.
  - Click the Review Type drop down, select Standard Review and click Add Project.
  - Review the project information to ensure accuracy.
  - Click *Add*. Your project has been created.

Click here to go to E Plan.

Modifying Existing Project Information

- Click the *Projects tab* toward the top right of the page.
- Click the *Folder* icon to the right of the displayed project to be modified.
- Click the *Project Information* tab toward the top left of the page.
  - Click *Edit* toward the top right of the page.
  - Enter changes into the text fields. Click *Save*. Your project information has been updated.
- Please note that if forgot to add project contacts upon initial submission, once you click *Edit Roles* will appear. Please refer to **Entering Project Information**.

Click here to go to E Plan.

Plan Document File Type

- Portable Document Format (PDF) files are the only acceptable files for E Plan Review.
- E Plan Review does not support secured PDF documents.
- File type standards.
  - Drawings files.
    - Drawing files shall be uploaded as individual vector based PDF files with drawing layers built in.
    - With the exception of plats, a 3″ x 3″ area shall be reserved at the top right (with the exception of the border) of all drawings for the City approval stamp.
    - All plans shall be drawn to scale. Each sheet shall have a graphical scale.
    - Submitted in landscape format
  - Non-drawing files.
    - Calculations, reports and other supporting documentation shall be searchable PDF files.

Plan Document Naming
- Document file names shall not exceed 100 characters and shall not contain a "." in the file name.
- Use the exact same file name as the original file when uploading revised drawings to avoid creating duplicate files.
- Disciplines and Sheet Types – If property named the discipline and sheet type will auto populate when the file is uploaded.
  - Architectural – "A"
    - Cover Sheet
    - General
    - Architectural
    - Structural
    - Demolition
    - Mechanical
    - Electrical
    - Plumbing
  - Civil – "C"
    - Cover Sheet
    - Site Plan
    - Existing Conditions
    - Demolition
    - Grading
    - Utility
    - Streetscape
    - Erosion Control
    - Details

Click here to go to E Plan.

**Plan Document Naming (Continued)**

- Contractor/Shop Drawings – "Z"
  - No Associated Sheet Type
- Electrical – "E"
  - No Associated Sheet Type
- Equipment – "Q"
  - No Associated Sheet Type
- Fire Protection – "F"
  - No Associated Sheet Type
- General – "G"
  - No Associated Sheet Type
- Geotechnical – "B"
  - No Associated Sheet Type
- Hazardous Materials – "H"
  - No Associated Sheet Type
- Interiors – "I"
  - No Associated Sheet Type
- Landscape – "L"
  - No Associated Sheet Type
- Mechanical – "M"
  - No Associated Sheet Type
- Operations – "O"
  - No Associated Sheet Type
- Other – "G"
  - No Associated Sheet Type
- Plumbing – "P"
  - No Associated Sheet Type
- Process – "D"
  - No Associated Sheet Type
- Reports – "J"
  - No Associated Sheet Type
- Resource – "R"
  - No Associated Sheet Type
- Structural – "S"
  - No Associated Sheet Type
- Survey/Mapping – "V"
  - No Associated Sheet Type
- Telecommunications – "T"
  - No Associated Sheet Type

Click here to go to E Plan.

Uploading Plan Documents

- Click the *Projects* tab toward the top right of the page.
- Click the *Folder* icon to the right of the displayed project to be modified.
- Click the *Plan Documents* tab toward the top left of the page.
  - Click *Browse* toward the top of the page.
  - Navigate to the location of your files and select them. Select one or several files at a time.
  - Your plan documents are displayed. Select the discipline and sheet type and enter the file description.
  - *Pending Upload* will be displayed below *Upload Status* at the right of the plan documents.
  - Check the box next the files to be upload.
  - To select all files to be uploaded click the box to the left of *Download Selected* icon. Click *Upload*. Click *Yes*. *Success* will be displayed below *Upload Status* at the right of the plan documents.
    - Please note that your plan documents are not saved unless you upload them.
  - Plan documents can be deleted or downloaded by clicking the *delete* or *download* icon.
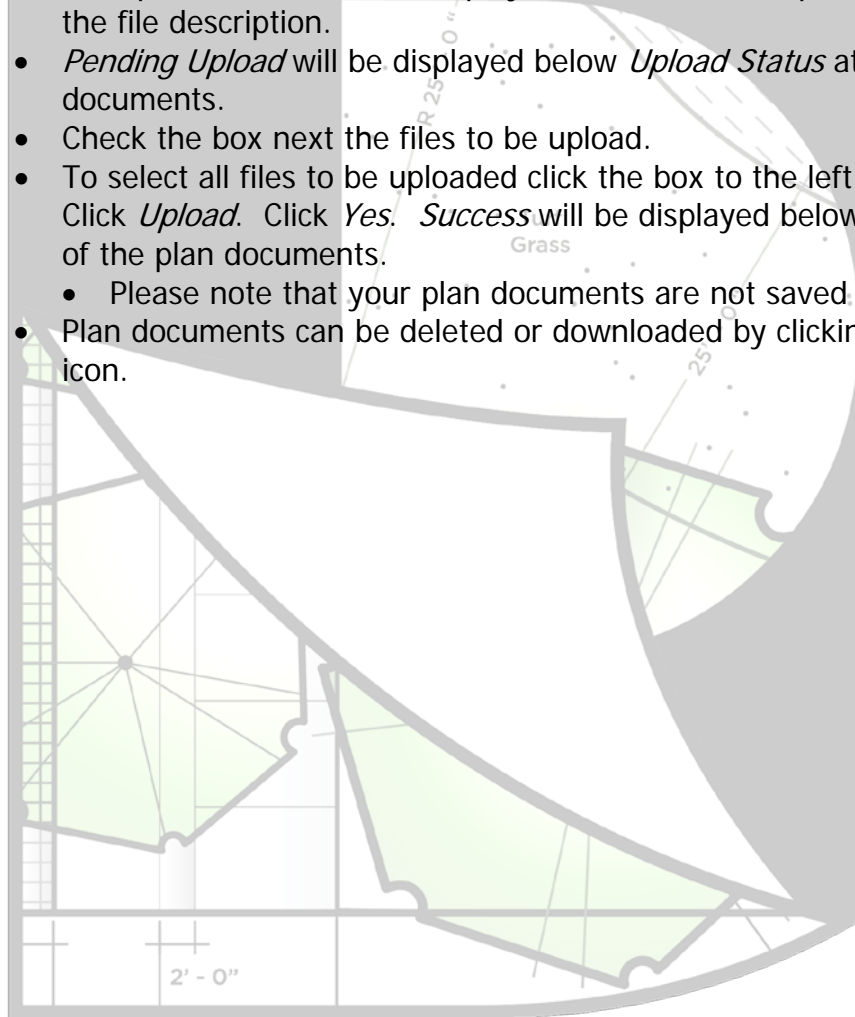
Click here to go to E Plan.

Inviting Other Users

You can grant access to a project that you created to another person by sending them in invitation to your project.

- Click the *Projects* tab toward the top right of the page.
- Click the *Folder* icon to the right of the displayed project you would like to invite a user.
- Click the *Project Initiations* tab toward the top right of the page.
  - Click *Invite User* toward the top of the page.
  - Select Project or *Project Group*.
  - Click the drop down to the right of *Grant Access* and select the appropriate access.
  - Enter the email address.
  - Click *Invite*. The invitation will be sent to the specified email address.
- Please note that invitees will not be able (re)submit projects or receive project related email notifications.

Managing Invitations

Once the user has accepted your imitation, you can manage the level of access they have to the project.

-
- Click the *Projects* tab toward the top right of the page.
- Click the *Folder* icon to the right of the displayed project you would like to invite a user.
- Click the *Manage Initiations* tab toward the top right of the page.
  - Enter the desired changes. Click the *Check* icon to save the changes.
 - Click the *Delete* icon to revoke a user's access.

Click here to go to E Plan.

Submitting a New Project

- Click the *Projects* tab toward the top right of the page.
- Click the *Folder* icon to the right of the displayed project to be submitted.
- Click *Submit for Review* at the left of the page. The *Review Status* at the left of the page changes from *None* to *Coordinator Review* indicating your project has been successfully submitted.
  - You will receive an email notification that your project has been submitted.
- Please note that changes can be made while your project is in the Coordinator's cue.
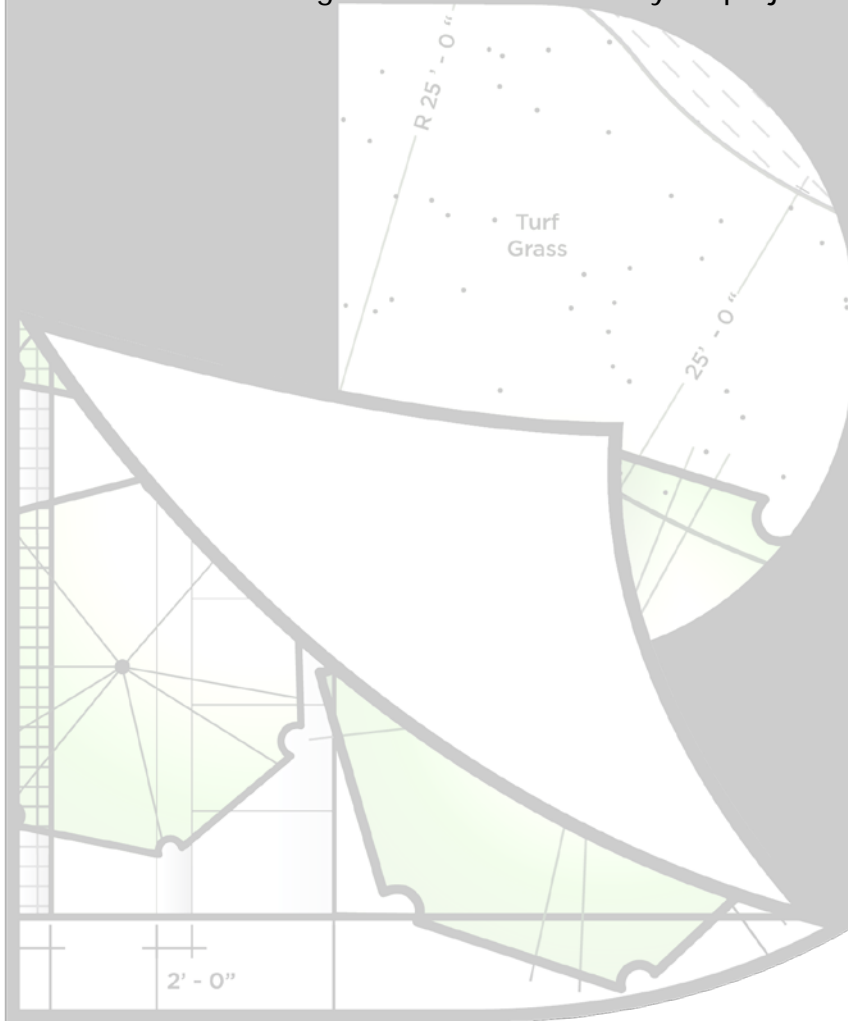
Click here to go to E Plan.

Navigating the Review Process

- Project submitted – application is incomplete.
  - The Coordinator will return the application.
  - You will receive an email notification about the information required.
  - The *Review Status* at the left of the Project Information page changes from *Coordinator Review* to *Plan Submission* indicating your project has been returned.
- Project submitted – application is complete.
  - You will receive an email notification that the review has been initiated.
  - The *Review Status* at the left of the Project Information page changes from *Plan Submission* to *Department Review*.
  - Please note that once the review cycle begins, document upload is disabled.
- Review cycle is complete – plans are not approved.
  - You will receive an email notification.
  - The *Review Status* at the left of the Project Information page changes from *Department Review* to *Plan Submission*.
  - Accessing review letter and marked up plans.
    - Click the *Projects* tab toward the top right of the page.
    - Click the *Folder* icon to the right of the displayed project to be submitted.
    - Click *Review Documents* tab toward the top of the page.
- Review cycle is complete – plans are approved.
  - You will receive an email notification that the application is pending approval and that payment is required.
    - Click the *Projects* tab toward the top right of the page.
    - Click the *Folder* icon to the right of the displayed project to be submitted.
    - Click *Review Documents* tab toward the top of the page.
    - Follow the instructions to pay the invoice online. A check may be mailed to the City but this will cause a delay in the final approval.
    - Once confirmation of payment is received, the approval letter and approved plans will be uploaded.
  - Accessing the approval letter and approved plans.
    - Click the *Projects* tab toward the top right of the page.
    - Click the *Folder* icon to the right of the displayed project to be submitted.
    - Click *Approved Documents* tab toward the top of the page.

Click here to go to E Plan.