

Applicant User Guide



**Electronic Submission of
Engineering Drawings**

Last Updated October 2014

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1.0 Electronic Plan Submission

1.1 Overview

ePlan uses a program called ProjectDox, which is a web-based solution that will allow plans to be submitted electronically, improve the plan review cycle, reduce costs associated with obtaining residential and commercial permits and approvals, as well as support *The Way We Green*.

Before you begin your submission, ensure you review the technical requirements, standards below for file naming, border spacing, acceptable file formats, etc.

1.2 Technical Requirements

1.2.1 Browser

In order to experience the full features of **ePlan**, Internet Explorer is recommended. The program will run in Google Chrome, however, functionality will be extremely limited.

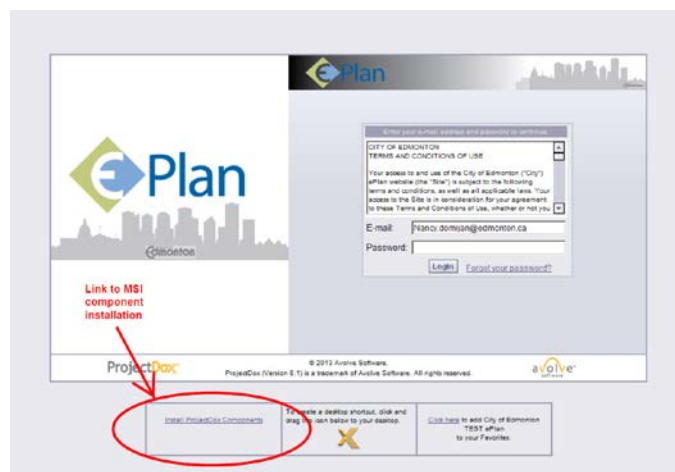
1.2.2 Pop-Up Blockers

If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the **ePlan** web address <https://ePlan.edmonton.ca>. If this has not been done, the page will immediately disappear when you try to login. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc). Once the **ePlan** site is allowed, you will be able to utilize the application.

1.2.3 Installation of ProjectDox Controls

The login page has a Microsoft Silent Install (MSI) component required to install the necessary ProjectDox ActiveX controls. This installation will only need to be done once per computer. The link to the component install is shown below.

Please note that in order to install the MSI component, you must have administrator rights for your computer. If you do not have administrator rights, you will need to contact your Information Technology branch to assist with the installation of the components.



1.3 Standards

Standards allow for easy identification of drawing by naming convention, vector file types in order to facilitate the most efficient review, color coding of comments for visual identification of departments and so on.

1.3.1 Required Documents

- Drawing Files – all required drawings as per the City of Edmonton’s Design and Construction Standards.
- Supporting Documents – required to be submitted as part of the application such as the Geotechnical Report. Visit the City’s website for the complete list of [submission requirements](#).

1.3.2 File Naming Standards

Filenames for drawings should include the first characters of the discipline name, followed by a 3-digit sheet number, followed by a short description of the drawing.

- **Discipline** – First character represent the discipline area, example “C” for Civil, “E” for Electrical, etc. Ensure that all plans, including the associated details, are submitted under the correct discipline characters.
- **Sheet Number** – Must be a 3 digit number with leading zeros.
- **Description** – Describes the drawing in short form. Limit the number of characters in the description to less than 35.

| Drawing Type | Discipline | Sheet Number | Example File Names |
|---------------------------------------|------------|--------------|------------------------|
| Civil | | | |
| Cover Sheet | C001 | 001 – 999 | C001 – 001 – COVER |
| Legend | C002 | 001 – 999 | C002 – 001 – LEGEND |
| Index | C003 | 001 – 999 | C003 – 001 – INDEX |
| Topography | C004 | 001 – 999 | C004 – 001 – TOPO |
| Overall Storm, Sanitary and Watermain | C005 | 001 – 999 | C005 – 001 – UTILITIES |
| Road and Sidewalk | C006 | 001 – 999 | C006 – 001 – ROAD |
| Lot Grading | C007 | 001 – 999 | C007 – 001 – GRADING |
| Storm Drainage | C008 | 001 – 999 | C008 – 001 – STORM |
| Street Furniture | C009 | 001 – 999 | C009 – 001 – STR FURN |
| Sanitary Catchment | C010 | 001 – 999 | C010 – 001 – SAN BASIN |
| Storm Catchment | C011 | 001 – 999 | C011 – 001 – STM BASIN |
| Water Network | C012 | 001 – 999 | C012 – 001 – WAT NET |
| Storm Water Management | C013 | 001 – 999 | C013 – 001 – SWMF |

| Drawing Type | Discipline | Sheet Number | Example File Names |
|----------------------|------------|--------------|---|
| Facility | | | |
| Easement | C014 | 001 – 999 | C014 – 001 – EASEMENT |
| Erosion Control | C015 | 001 – 999 | C015 – 001 – ESC |
| Other | C016 | 001 – 999 | C016 – 001 – DESCRIPTION |
| Plans / Profiles | C100 | 001 – 999 | C100 – 001 – WRIGHT DRIVE C100 – 002 – 62 AVENUE |
| Sections and Details | C200 | 001 – 999 | C200 – 001 – CROSS SECTIONS C200 – 002 – DETAILS |
| Gas | G001 | 001 – 999 | G001 – 001 – GAS |
| Electrical | E001 | 001 – 999 | E001 – 001 – POWER E001 – 002 – LIGHTING |
| Landscape | L001 | 001 – 999 | L001 – 001 – LANDSCAPE L001 – 002 – DETAILS |
| Structural | S001 | 001 – 999 | S001 – 001 – ENTR FEAT |

1.3.3 Drawing Standards

Cover Sheet - The cover page of all plans must follow the City standards set for each type of application.

- For Engineering Drawings, please refer to [Volume 1: General of the City's Design and Construction Standards](#)

All Drawing Files - The bottom right corner of all drawings is where the City of Edmonton electronic stamp will be affixed. Please leave this area free of important design information.

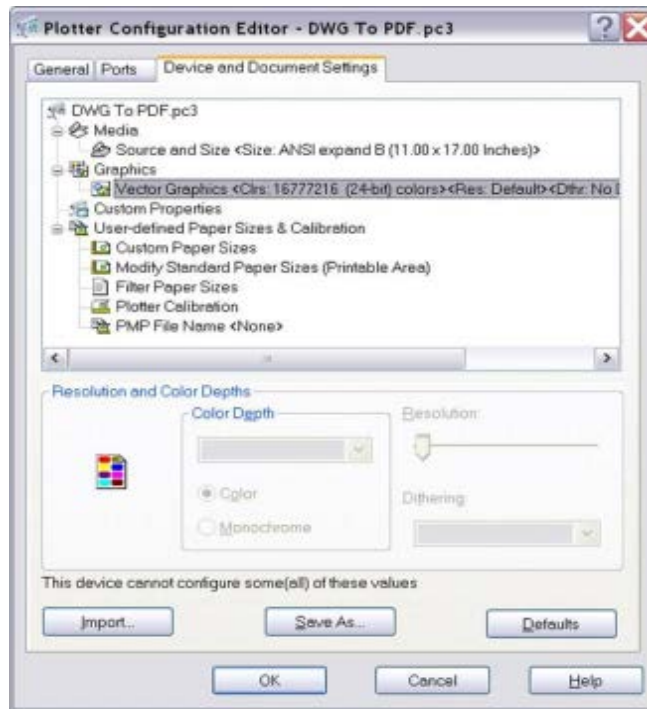
- Dimensions: 3" width x 3" height, offset 5" from the right, 3" from the bottom

1.3.4 File Type Standards

- Drawing files must be in Vector PDF format
- Supporting files may be in Microsoft Word, Excel or searchable PDF format

AutoCAD software is commonly used to create drawing files. 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" as shown in the diagram below.

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



1.3.5 Folder Structure

- **Documents:** All supporting documentation (non-drawing files) such as calculations, geotechnical reports, etc. should be uploaded into this folder for each individual project.
- **Drawings:** Each individual drawing file should be uploaded into this folder for each project.
- **Redlines:** This folder is not active at this time, but will eventually be used to upload redline revisions for each project.
- **As-Builts:** This folder is not active at this time, but will eventually be used to upload as-built drawings for each project.
- **Approved:** Once the drawings have been approved by the City of Edmonton, they will appear in this folder for each project.

1.3.6 Markup Name and Color Standards

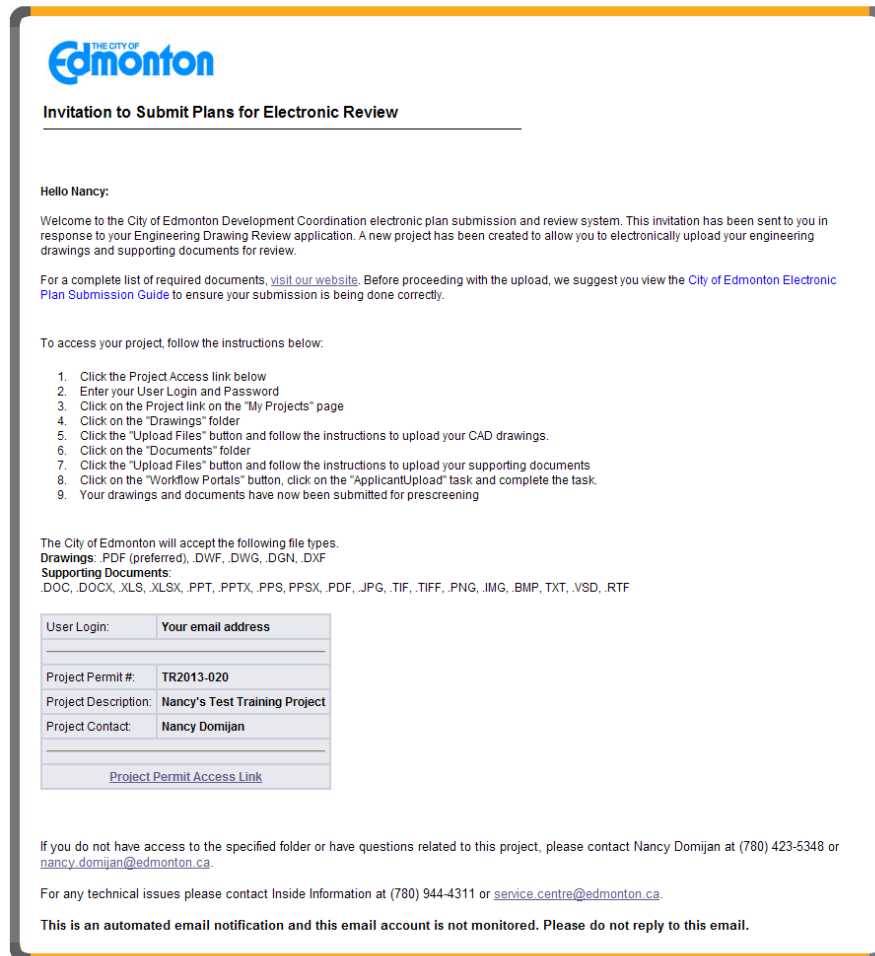
- Standard markup names and colors will be used for each reviewing department for easy identification. A markup can have one or more “changemarks.” Changemarks are created to quickly identify a markup and associated comments.
- Corrected files should always be re-submitted with the **SAME FILE NAME** as the original submission.

| REVIEW GROUP | MARKUP NAME | MARKUP COLOR |
|--|--------------------|---------------------|
| Parks Planning, Urban Planning & Environment | ParksPlanning | Light Green |
| Signals, Street Lighting and Infrastructure, Transportation Operations | StreetLighting | Yellow |
| Development Services, Drainage Services | Drainage | Dark Green |
| Development Engineering, Transportation Planning | Transportation | Light Blue |
| Traffic Control, Transportation Operations | TrafficControl | Orange |
| EPCOR Water Services Inc. | EWSI | Dark Blue |
| EPCOR Distribution and Transmission Inc. | EDTI | Dark Red |

1.4 Login to ePlan

1.4.1 ePlan Review Invitation

When your application is received and processed by Development Coordination, it will be input into **ePlan**, and an Invitation to Submit Plans for Electronic Review will be sent to your e-mail address. The e-mail will contain your login information and information about your project, including a link to the project.



THE CITY OF
Edmonton

Invitation to Submit Plans for Electronic Review

Hello Nancy:

Welcome to the City of Edmonton Development Coordination electronic plan submission and review system. This invitation has been sent to you in response to your Engineering Drawing Review application. A new project has been created to allow you to electronically upload your engineering drawings and supporting documents for review.

For a complete list of required documents, [visit our website](#). Before proceeding with the upload, we suggest you view the [City of Edmonton Electronic Plan Submission Guide](#) to ensure your submission is being done correctly.

To access your project, follow the instructions below:

1. Click the Project Access link below
2. Enter your User Login and Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" folder
5. Click the "Upload Files" button and follow the instructions to upload your CAD drawings.
6. Click on the "Documents" folder
7. Click the "Upload Files" button and follow the instructions to upload your supporting documents
8. Click on the "Workflow Portals" button, click on the "ApplicantUpload" task and complete the task.
9. Your drawings and documents have now been submitted for prescreening

The City of Edmonton will accept the following file types.
Drawings: .PDF (preferred), .DWF, .DWG, .DGN, .DXF
Supporting Documents:
 DOC, DOCX, XLS, XLSX, PPT, PPTX, PPS, PPSX, PDF, JPG, TIF, TIFF, PNG, IMG, BMP, TXT, .VSD, .RTF

| | |
|--|-------------------------------|
| User Login: | Your email address |
| Project Permit #: | TR2013-020 |
| Project Description: | Nancy's Test Training Project |
| Project Contact: | Nancy Domijan |
| Project Permit Access Link | |

If you do not have access to the specified folder or have questions related to this project, please contact Nancy Domijan at (780) 423-5348 or nancy.domijan@edmonton.ca.

For any technical issues please contact Inside Information at (780) 944-4311 or service_centre@edmonton.ca.

This is an automated email notification and this email account is not monitored. Please do not reply to this email.

1.4.2 New Users

1. To login, either click on the link in the invitation email or go to <https://ePlan.edmonton.ca>. Enter your e-mail address and temporary password and click the Login button, as shown below

Enter your e-mail address and password to continue.

CITY OF EDMONTON
TERMS AND CONDITIONS OF USE

Your access to and use of the City of Edmonton ("City") ePlan website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you

E-mail: Nancy.domijan@edmonton.ca

Password:

Login [Forgot your password?](#)

ProjectDox © 2014 Avolve Software.
ProjectDox (Version 8.1) is a trademark of Avolve Software. All rights reserved. avolve software

[Install ProjectDox Components](#) To create a desktop shortcut, click and drag the icon below to your desktop. [Click here](#) to add City of Edmonton ePlan to your Favorites.

2. Once you've logged in you will be prompted to change your password. Enter and confirm your new password, as well as any personal account information. Yellow highlighted fields are required but you are encouraged to fill in the complete Profile Information. Be sure to click the Save button in the middle of the screen.

Settings for Nancy Domijan (Nancy.domijan@edmonton.ca)

Welcome to City of Edmonton TEST ePlan.

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: * Confirm new password: *

Password Reset Question & Answer: Security question: Mother's maiden name? Security answer: <Answer has been encrypted>

Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 10 characters

Profile Information

Contact Information | User Metadata | Project Membership | Group Membership

Save

* Required field

| | | | |
|-------------------|---|----------------|---------|
| First Name: * | Nancy | Last Name: * | Domijan |
| Email: * | Nancy.domijan@edmonton.ca <input checked="" type="checkbox"/> HTML format i | | |
| Title: * | Lead Development Engineer | | |
| Company: * | City of Edmonton | | |
| Address 1: * | 10250 - 101 Street | | |
| Address 2: * | 10th Floor | | |
| City: * | Edmonton | | |
| State/Province: * | AB | Postal Code: * | T5J 3P4 |
| Phone: * | 780-423-5348 | Fax: | |
| Mobile: | | Pager: | |
| Stamps: | i | | |
| Language: * | en | | |

1.4.3 Existing Users

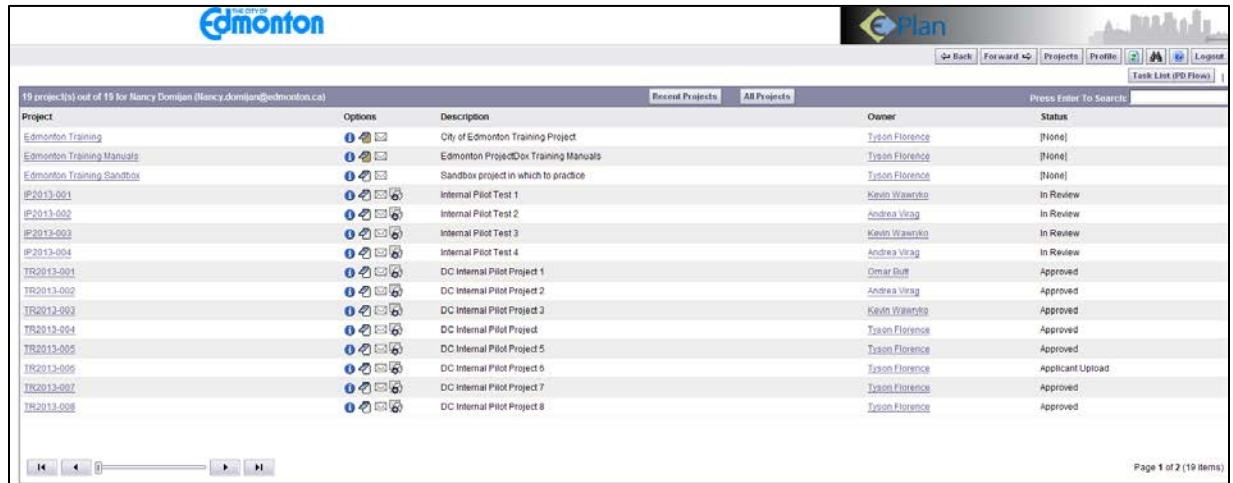
If you are a returning user, login to **ePlan** with your full e-mail address and password. If you have forgotten your password, click on the “Forgot Password” button so that it can be e-mailed to you. This will work only if you have logged in once and added a security question and answer.

1.4.4 Security Timeout

ePlan 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.

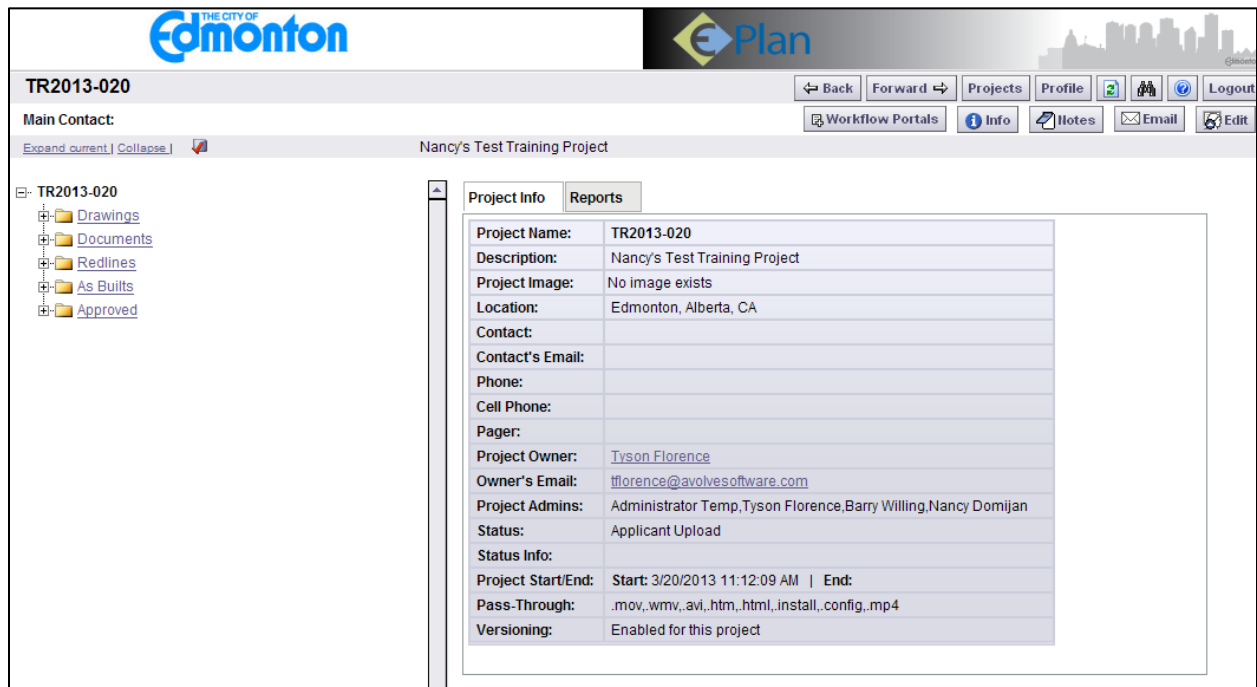
1.5 Uploading Files

When you have successfully logged into **ePlan**, the projects screen will be displayed. Any projects for which you have access will be shown in the list. Any outstanding tasks that require your action are displayed in the My Task List area below the project list. 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.



| Project | Options | Description | Owner | Status |
|---------------------------|---------|--------------------------------------|----------------|------------------|
| Edmonton Training | | City of Edmonton Training Project | Tyson Florence | [None] |
| Edmonton Training Manuals | | Edmonton ProjectDoc Training Manuals | Tyson Florence | [None] |
| Edmonton Training Sandbox | | Sandbox project in which to practice | Tyson Florence | [None] |
| IP2013-001 | | Internal Pilot Test 1 | Kevin Wazanko | In Review |
| IP2013-002 | | Internal Pilot Test 2 | Andrea Vitag | In Review |
| IP2013-003 | | Internal Pilot Test 3 | Kevin Wazanko | In Review |
| IP2013-004 | | Internal Pilot Test 4 | Andrea Vitag | In Review |
| TR2013-001 | | DC Internal Pilot Project 1 | Omar Butt | Approved |
| TR2013-002 | | DC Internal Pilot Project 2 | Andrea Vitag | Approved |
| TR2013-003 | | DC Internal Pilot Project 3 | Kevin Wazanko | Approved |
| TR2013-004 | | DC Internal Pilot Project | Tyson Florence | Approved |
| TR2013-005 | | DC Internal Pilot Project 5 | Tyson Florence | Approved |
| TR2013-006 | | DC Internal Pilot Project 6 | Tyson Florence | Applicant Upload |
| TR2013-007 | | DC Internal Pilot Project 7 | Tyson Florence | Approved |
| TR2013-008 | | DC Internal Pilot Project 8 | Tyson Florence | Approved |

1. Click the “Drawings” folder to upload your plan drawings or “Documents” folder to upload supporting project documents.



TR2013-020

Main Contact: Nancy's Test Training Project

Expand current | Collapse |

Workflow Portals | Info | Notes | Email | Edit

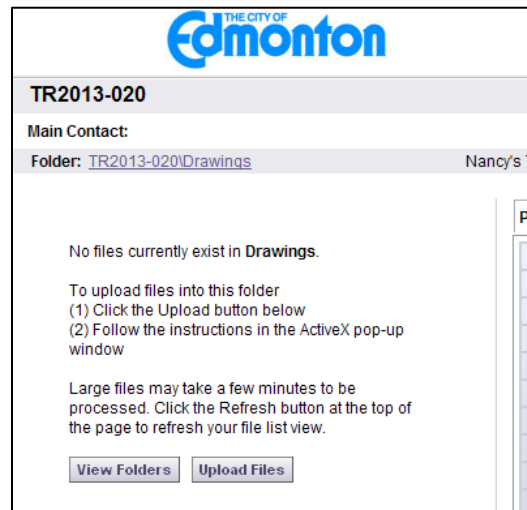
Project Info | Reports

| | |
|--------------------|--|
| Project Name: | TR2013-020 |
| Description: | Nancy's Test Training Project |
| Project Image: | No image exists |
| Location: | Edmonton, Alberta, CA |
| Contact: | |
| Contact's Email: | |
| Phone: | |
| Cell Phone: | |
| Pager: | |
| Project Owner: | Tyson Florence |
| Owner's Email: | tflorence@avolvesoftware.com |
| Project Admins: | Administrator Temp, Tyson Florence, Barry Willing, Nancy Domijan |
| Status: | Applicant Upload |
| Status Info: | |
| Project Start/End: | Start: 3/20/2013 11:12:09 AM End: |
| Pass-Through: | .mov, .wmv, .avi, .htm, .html, .install, .config, .mp4 |
| Versioning: | Enabled for this project |

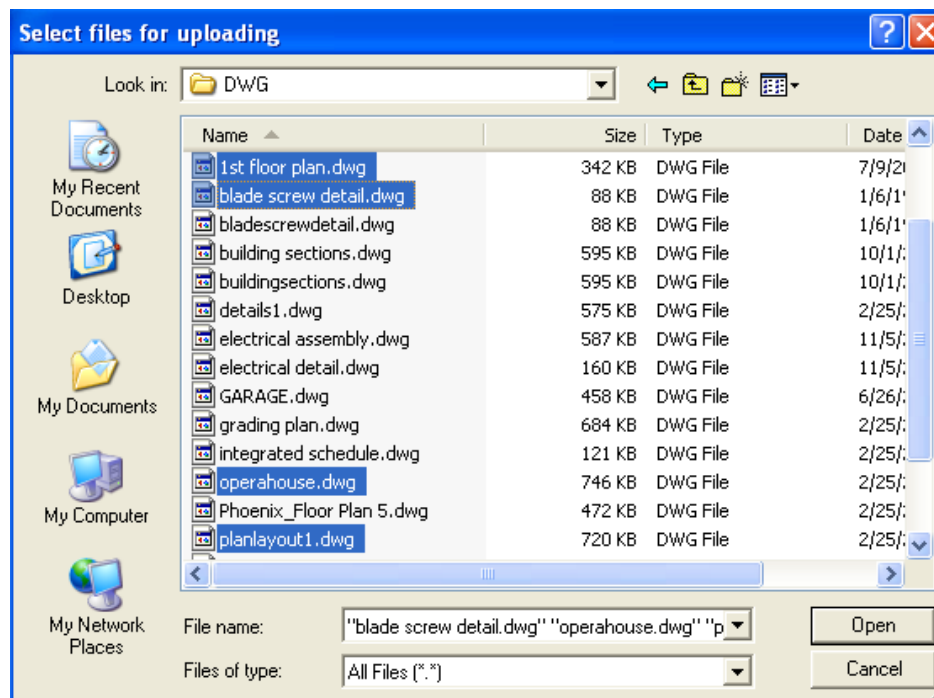
File browser contents:

- TR2013-020
 - Drawings
 - Documents
 - Redlines
 - As Built's
 - Approved

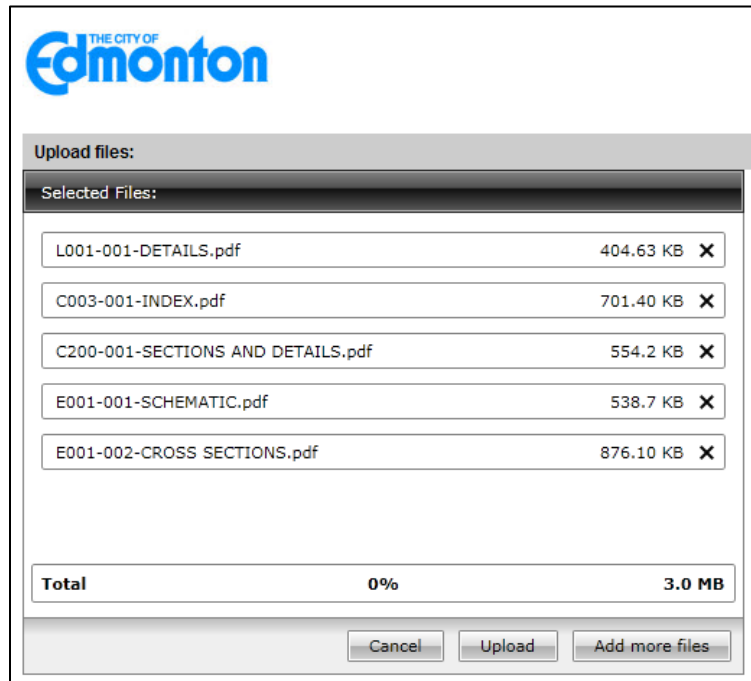
- Upon entering the either folder, you will be presented with two buttons, View Folders and Upload Files.



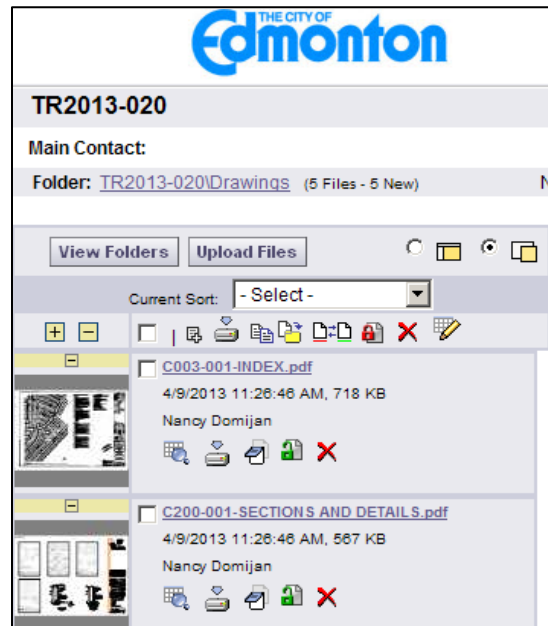
- Click the "Upload Files" button. Click on the "Browse" button, and select the files you want to upload from their location on your computer. Multiple files can be selected by using the Shift or Ctrl keys. Click the "Open" button. The files will then be copied to the upload window. **Please ensure your files are correctly named prior to the upload.**



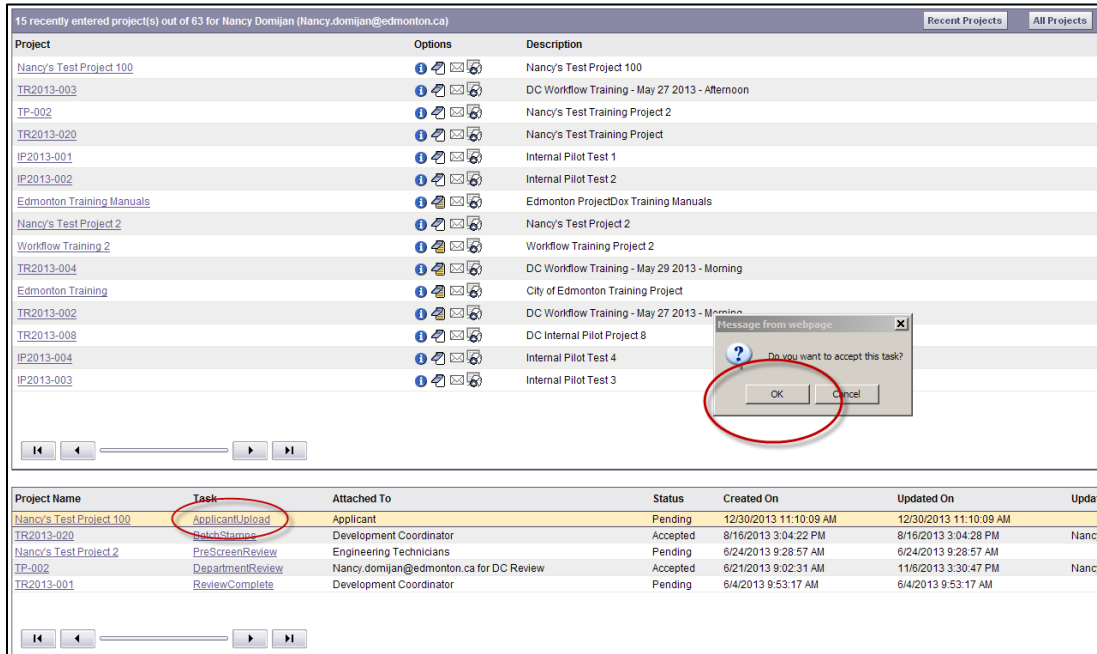
- When all files you wish to upload are listed in the window, click the "Upload" button and the files will be uploaded to **ePlan**. Click the "Complete Upload Process" button to close out of the file upload complete dialog box.



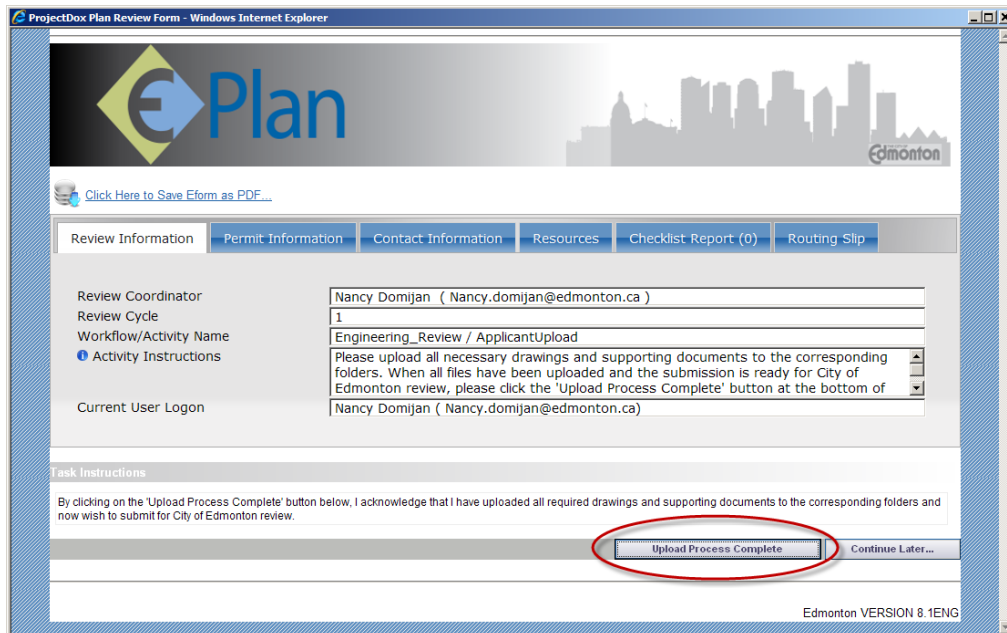
- Once the files are uploaded to the folder, the folder list is replaced by thumbnail images of each file contained in the folder. Next to each thumbnail, the file name, author, date uploaded, file size, and History icon displays.



- The final step in uploading drawings and documents is to complete the Applicant Upload Task. On the main projects window there will be a task available to you called "ApplicantUpload". Select the task and click "Yes" to accept it.



- Selecting "Yes" will generate the Electronic Application Form or eForm for the first time. Select "Upload Process Complete" at the bottom of the eForm to complete the task. Congratulations! You have successfully finished part one of submitting your plans electronically.




8. Completion of the “ApplicantUpload” task generates a notification to Development Coordination to begin the prescreening process to determine if the submittal requirements have been met.

2.0 Prescreening

Prescreening is a cursory review of your uploaded documents and engineering drawings in preparation for the formal review. This will be performed by Development Coordination for all applications. The Prescreening process may take up to one week after you have uploaded your documents and drawings. If there are questions or missing items from your submission, you will receive a Prescreen Revisions Requested e-mail with instructions on the changes requested and how to resubmit. If you have met all submittal requirements, your application will be circulated for formal review.

2.1 Returned for Corrections

If your submission requirements were not complete or the engineering drawings were not ready for circulation, you will receive an e-mail notification requesting revisions.



Prescreen Revisions Requested

Attention Nancy:

Your submission for TP-002 - **Nancy's Test Training Project 2** is incomplete or requires revisions prior to circulation of the engineering drawings for review. A list of the outstanding items is available on the ProjectDox site.

When revised drawings and/or documents are ready for re-submission, please, [Login to ProjectDox](#) and follow the instructions provided for re-submission.

Please be advised when re-submitting drawings and/or documents:

- All corrections must be uploaded using the **same** file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested by Development Coordination
- Please make corrections and resubmit **as soon as possible**

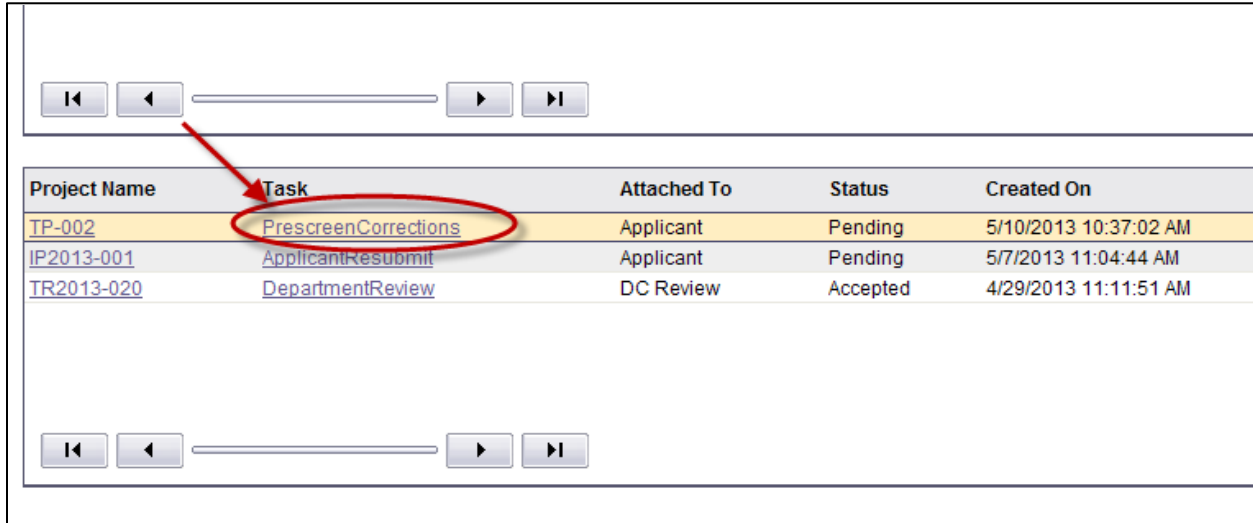
| | |
|--|---------------------------------|
| Project: | TP-002 |
| Description | Nancy's Test Training Project 2 |
| Task: | PrescreenCorrections |
| Project Contact: | Nancy Domijan |
| Project Access Login to ProjectDox | |

For any technical issues please contact the Inside Information at Service.Centre@edmonton.ca or [780-944-4311](tel:780-944-4311).

Contact the Project Contact above if you have any questions regarding this project.

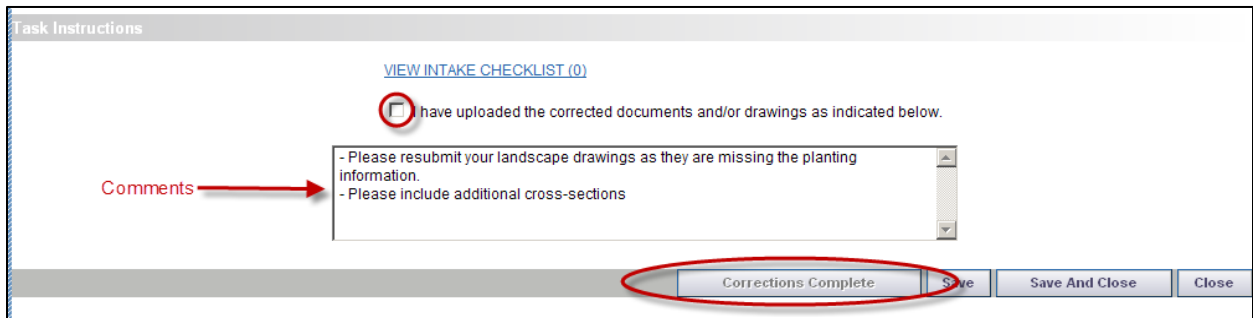
This is an automated email notification and this email account is not monitored. Please do not reply to this email.

1. Click the link in the e-mail to access the Prescreening information. Login to **ePlan**. Click on the “PrescreenCorrections” task that will appear at the bottom of the Project Home screen. This will launch one Internet Explorer screen with the corrections listed on a form called the eForm.



| Project Name | Task | Attached To | Status | Created On |
|----------------------------|--------------------------------------|-------------|----------|-----------------------|
| TP-002 | PrescreenCorrections | Applicant | Pending | 5/10/2013 10:37:02 AM |
| IP2013-001 | ApplicantResubmit | Applicant | Pending | 5/7/2013 11:04:44 AM |
| TR2013-020 | DepartmentReview | DC Review | Accepted | 4/29/2013 11:11:51 AM |

2. Review the Prescreening Comments to identify which requirements were noted as missing or which drawings require revisions.
3. Once you are ready, go into the project to upload the missing and/or corrected drawings and documents (see Uploading Files for instructions).
4. Click back to the eForm with your task assignment as shown below.



Task Instructions

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

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

Comments →

- Please resubmit your landscape drawings as they are missing the planting information.
- Please include additional cross-sections

Corrections Complete Save Save And Close Close

5. 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, Development Coordination will be notified that the files have been completed or corrected and will continue with the Prescreening process.

2.2 Prescreen Approved


If your submission is approved, it will be circulated to all relevant reviewing departments for formal review.

3.0 Change Notification and Plan Resubmit

3.1 Review Requested Corrections

If revisions are required following the formal review cycle(s) of your drawings, follow the steps below:

1. You will receive an e-mail notification from Development Coordination requesting revisions to the engineering drawings.



Engineering Drawing Revisions Required

Attention Nancy:

Your engineering drawing submission for TR2013-020 - **Nancy's Test Training Project** has been reviewed, but has generated department and/or agency comments and requires revisions. You may review the comments and drawing markups by accessing the ProjectDox site.

When revised plans and/or documents are ready for re-submission, please, [Login to ProjectDox](#) and follow the instructions provided for re-submission.

Please be advised when re-submitting drawings and/or documents:

- All corrections must be uploaded using the **same** file names as the original submission
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested by Development Coordination
- Please make revisions and resubmit **as soon as possible**

| | |
|--|--|
| Project: | TR2013-020 |
| Description | Nancy's Test Training Project |
| Task: | ApplicantResubmit |
| Development Coordinator: | Nancy Domijan (Nancy.domijan@edmonton.ca) |
| Project Access Login to ProjectDox | |

For any technical issues please contact the Inside Information at Service_Centre@edmonton.ca or 780-944-4311.

Contact the Development Coordinator if you have any questions regarding this project.

This is an automated email notification and this email account is not monitored. Please do not reply to this email.

Click the link in your e-mail to login to **ePlan** and access the revisions requested. The “ApplicantResubmit” task will be displayed at the bottom of the main page with your Plan Review number in the name (ie. *TR2013-020*).

| Project Name | Task | Attached To | Status | Created On |
|----------------------------|-----------------------------------|-------------|----------|----------------------|
| TR2013-020 | ApplicantResubmit | Applicant | Accepted | 4/9/2013 11:48:55 AM |

- The eForm and drawing markups provide a complete list of revisions from all reviewing departments:

The screenshot displays the ePlan software interface. At the top, there is a header with the 'ePlan' logo and a city skyline graphic. Below the header, there are navigation tabs: 'Review Information', 'Permit Information', 'Contact Information', 'Resources', 'Checklist Report (0)', and 'Routing Slip'. A red box highlights the 'Checklist Report (0)' tab.

Below the tabs is a table with the following data:

| Cycle | ID | Group | Comment Text | Status | Response | Updated | Update |
|-------|-------|-------|---|---------|----------|-------------------------------------|--------|
| 1 | MEP2 | MEP | Use the correct climate zone / IECC table 301.1. | Not Met | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP5 | MEP | Show compliance for simple HVAC systems and equipment / IECC 503. | Not Met | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP8 | MEP | Show compliance for HVAC controls / IECC 503.2.4. | Not Met | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP15 | MEP | Show compliance for hydronic heat pump systems / IECC 503.4.3.3. | Not Met | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP19 | MEP | Show compliance for / IECC table 505.5.2. | Not Met | | Tyson Florence 3/7/2013 12:14:54 PM | |

Below the table is a link: [Respond to Checklist Comments...](#)

The lower section of the screenshot is titled 'CHANGEMARKS' with a red box containing the number '3'. It includes a search filter: 'Filter Changemarks by Keyword: [SEARCH](#) | [SHOW ALL](#)'. Below this is a link: [Click Here to Load Changemarks...](#)

The main table in this section has the following columns: 'Resolved', 'File', 'Cycle', 'Department', 'File', 'Markup', 'Description', 'Details', and 'Applicant Response'. It contains four rows of data:

| Resolved | File | Cycle | Department | File | Markup | Description | Details | Applicant Response |
|----------|------|-------|------------|-----------------------------|-------------|-------------------------|---|----------------------|
| No | | 1 | DC Review | L001-001-DETAILS.pdf | DC-ndomijan | Power Alignment | Alignment does not match what is shown on the profile. | <input type="text"/> |
| No | | 1 | DC Review | E001-002-CROSS SECTIONS.pdf | DC-ndomijan | Boulevard Trees Missing | Boulevard trees should be shown on this cross section as it is for a collector roadway. | <input type="text"/> |
| No | | 1 | DC Review | E001-002-CROSS SECTIONS.pdf | DC-ndomijan | Decorative Poles | These types of poles need advanced approval from the Streetlighting Section. | <input type="text"/> |
| No | | 1 | DC Review | L001-001-DETAILS.pdf | DC-ndomijan | Power Alignment Missing | Please show power alignment on this side of the roadway. | <input type="text"/> |

DEPARTMENT REVIEW - Review Cycle 1 2

| CYCLE | DEPARTMENT | REVIEWED BY | STATUS & NOTES |
|-------|------------|--|--|
| 1 | DC REVIEW | NANCY DOMJAN NANCY.DOMJAN@EDMONTON.CA | REVISIONS NEEDED <div style="border: 1px solid gray; padding: 5px; min-height: 40px;">Minor revisions needed.</div> <input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE |

Task Instructions 4

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 lower left hand corner of the checklist items panel.

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.

5 6

Complete Save Save And Close

- 1) Consolidated department checklist and markup items
- 2) Review cycle & department review information
- 3) Review Markups and Changemarks
- 4) Checkboxes 1 and 2 are confirmation that you have read and corrected the issues
- 5) Checkbox 3 is confirmation you have uploaded all new and/or corrected files
- 6) Resubmit Complete button

3.1.1 Consolidated department checklist

One or more departments may use the Checklist feature in the eForm. A consolidated list of all feedback not related to a red line are available for the applicant's review. You can sort all checklist items by any of the column headers, including the Status column. All checklist items will be reviewed again in the subsequent cycle(s).

Click Here to Save Eform as PDF...

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

| Cycle | ID | Group | Comment Text | Status | Response | Updated | Update |
|-------|-------|-------|---|--------|----------|-------------------------------------|--------|
| 1 | MEP2 | MEP | Use the correct climate zone / IECC table 301.1. | NotMet | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP5 | MEP | Show compliance for simple HVAC systems and equipment / IECC 503. | NotMet | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP8 | MEP | Show compliance for HVAC controls / IECC 503.2.4. | NotMet | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP15 | MEP | Show compliance for hydronic heat pump systems / IECC 503.4.3.3. | NotMet | | Tyson Florence 3/7/2013 12:14:53 PM | |
| 1 | MEP19 | MEP | Show compliance for / IECC table 505.5.2. | NotMet | | Tyson Florence 3/7/2013 12:14:54 PM | |

Export to Excel | Respond to Checklist Comments...

Checklist items may be exported to Excel, if desired, by clicking on the “Export to Excel” link. When appropriate to respond to the checklist items, click on the “Respond to Checklist Comments” link and enter your response in the “Response” field. Don’t forget to click on “Save and Close” when complete or to save your updates.

3.1.2 Review Cycle

The Review Cycle dropdown allows the user to review any review cycle information. The Review cycle also displays in the first column of the Department Review table.

DEPARTMENT REVIEW - Review Cycle: 1

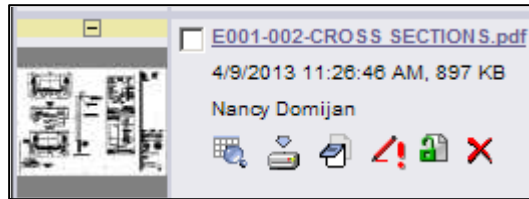
3.1.3 Review Markups

There are two ways to view markups. They can be viewed in a consolidated list on the eForm as shown here. Responses to markup items should be entered in the “Response” column and the “Save” or “Save and Close” buttons utilized at the bottom of the form.

| Resolved | File | Cycle | Department | File | Markup | Description | Details | Applicant Response |
|----------|------|-------|------------|-----------------------------|-----------------------------|-------------------------|---|--------------------|
| No | | 1 | DC Review | L001-001-DETAILS.pdf | DC-ndomijan | Power Alignment | Alignment does not match what is shown on the profile. | |
| No | | 1 | DC Review | E001-002-CROSS SECTIONS.pdf | DC-ndomijan | Boulevard Trees Missing | Boulevard trees should be shown on this cross section as it is for a collector roadway. | |
| No | | 1 | DC Review | E001-002-CROSS SECTIONS.pdf | DC-ndomijan | Decorative Poles | These types of poles need advanced approval from the Streetlighting Section. | |
| No | | 1 | DC Review | L001-001-DETAILS.pdf | DC-ndomijan | Power Alignment Missing | Please show power alignment on this side of the roadway. | |

Show All Changemarks for All Cycles

To view markups on a single plan sheet, click on the icon next to the drawing as shown here



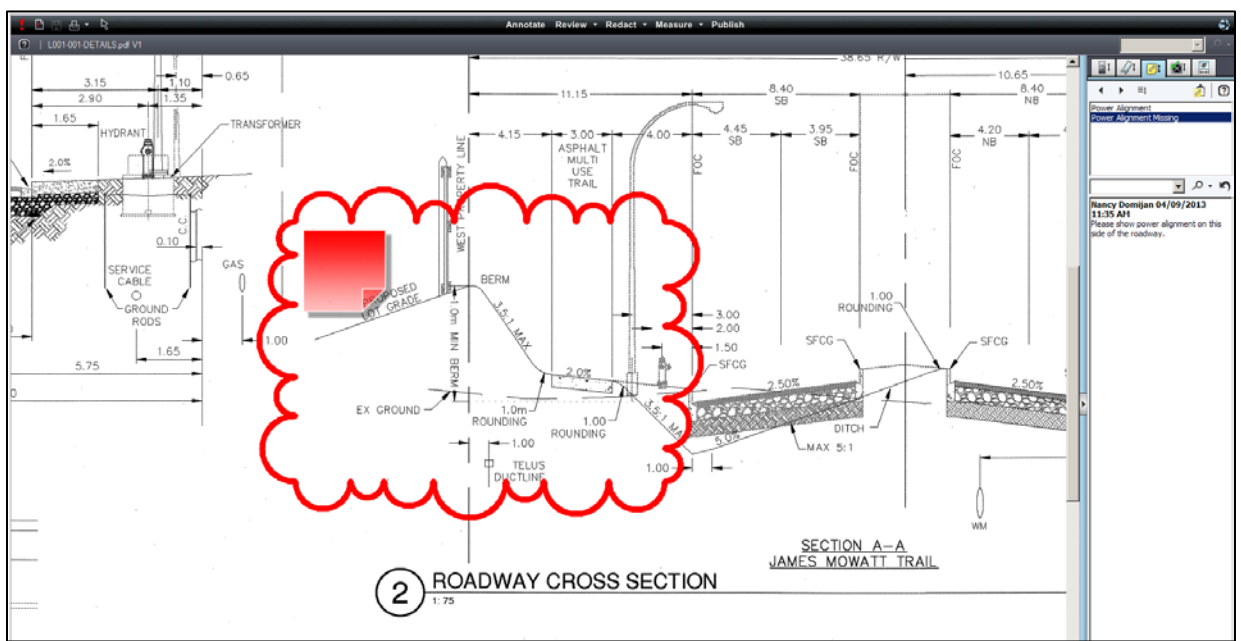
Select from the list of available markups by clicking the “View” checkbox and then clicking the “View/Edit” button.

[Close Window](#)

Markups attached to **L001-001-DETAILS.pdf**

| Delete | View | Edit | Markup Name | Author | Date |
|--------|--------------------------|--------------------------|-------------|---------------|----------------------|
| | <input type="checkbox"/> | <input type="checkbox"/> | DC-ndomijan | Nancy Domijan | 4/9/2013 11:35:30 AM |

All changemarks for this sheet will display in the right hand pane and as you review, click on each changemark and you will zoom directly into the red line from the reviewer.



3.1.4 Checkbox 1 & Checkbox 2

Checkbox 1 asks for confirmation that the checklist and the comments in the eForm have been reviewed. Checkbox 2 asks for confirmation that you have reviewed all the markup comments (red lines) attached to the drawings.

Task Instructions

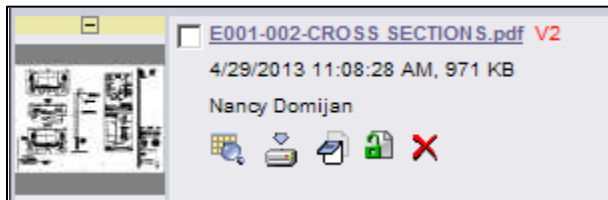
I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the lower left hand corner of the checklist items panel.

I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.

3.1.5 Upload Files

Checkbox 3 asks for confirmation that you have corrected the plans and/or documents per the reviewer's request and that you have uploaded them into the appropriate folder. The Upload dialog is identical to your initial upload.

The file will display the version number, V2 for example, because the correction was uploaded with the **SAME FILE NAME** as the original file name.



3.1.6 Resubmit Complete

After all corrections have been addressed and you are ready to complete the task and return to Development Coordination for review, click the “Complete” button.

3.2 Approval

When the plan review is approved by all reviewers, you will be notified by email and asked to resubmit the final drawings with the electronic stamps and signatures. Follow the same procedure outlined in this section to upload your final submission and complete the task called “FinalSubmissionCorrections”.

You will be notified by email once your drawings have been approved by the City.

3.3 Print Approved Plans

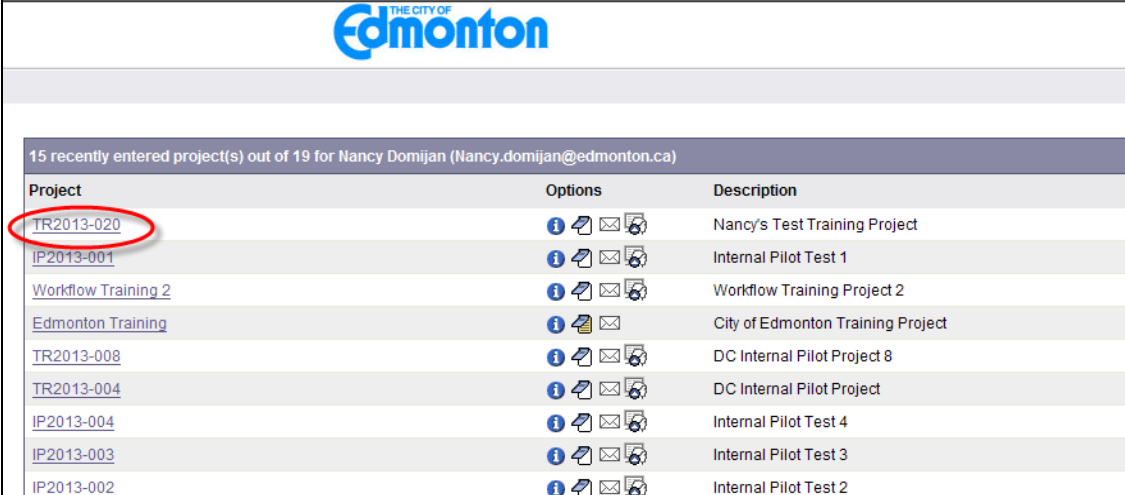
After an approval has been issued the plans will be electronically stamped by the City. You will then receive an e-mail indicating that your plans are ready and instructions on how to download and print your files. These files will then need to be printed and in place at the job site.

4.0 Status of Plan Review

4.1 Workflow Routing Slip

To identify the status of any project throughout the plan review process, please follow these instructions:

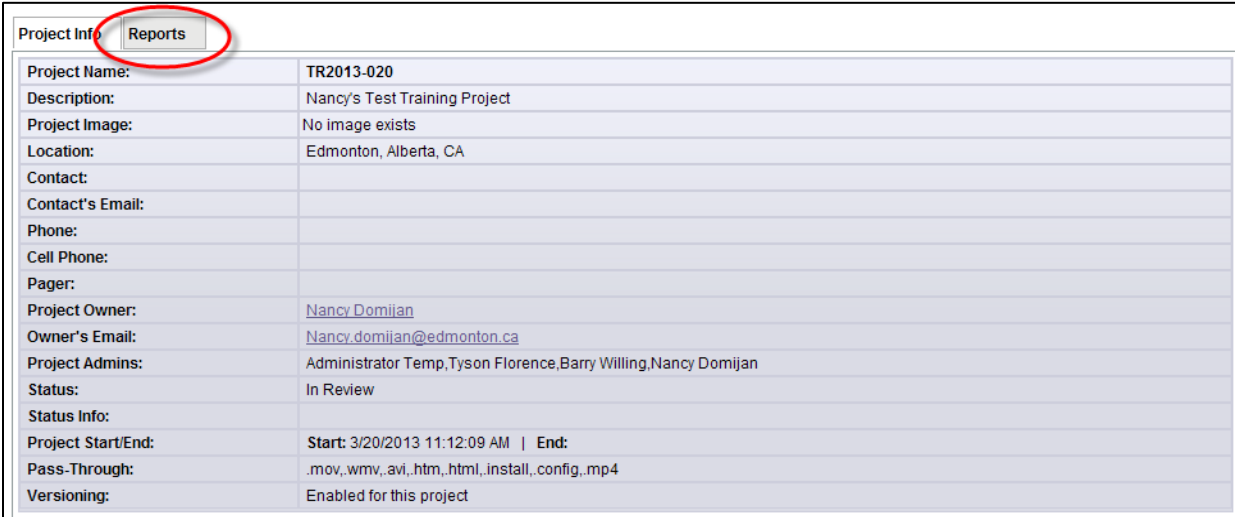
1. Login to **ePlan**.
2. Click on the appropriate project



15 recently entered project(s) out of 19 for Nancy Domijan (Nancy.domijan@edmonton.ca)

| Project | Options | Description |
|-------------------------------------|---------|-----------------------------------|
| TR2013-020 | | Nancy's Test Training Project |
| IP2013-001 | | Internal Pilot Test 1 |
| Workflow Training 2 | | Workflow Training Project 2 |
| Edmonton Training | | City of Edmonton Training Project |
| TR2013-008 | | DC Internal Pilot Project 8 |
| TR2013-004 | | DC Internal Pilot Project |
| IP2013-004 | | Internal Pilot Test 4 |
| IP2013-003 | | Internal Pilot Test 3 |
| IP2013-002 | | Internal Pilot Test 2 |

3. Click on the "Reports" tab



| Project Info | Reports |
|--------------------|--|
| Project Name: | TR2013-020 |
| Description: | Nancy's Test Training Project |
| Project Image: | No image exists |
| Location: | Edmonton, Alberta, CA |
| Contact: | |
| Contact's Email: | |
| Phone: | |
| Cell Phone: | |
| Pager: | |
| Project Owner: | Nancy Domijan |
| Owner's Email: | Nancy.domijan@edmonton.ca |
| Project Admins: | Administrator Temp,Tyson Florence,Barry Willing,Nancy Domijan |
| Status: | In Review |
| Status Info: | |
| Project Start/End: | Start: 3/20/2013 11:12:09 AM End: |
| Pass-Through: | .mov,.wmv,.avi,.htm,.html,.install,.config,.mp4 |
| Versioning: | Enabled for this project |

- Click on the report icon next to the report titled “Current Project – Workflow Routing Slip”

| View: | Report Name: | Report Type: | Report Description: |
|-------|---|--------------|---------------------------------|
| | Current Project - All Emails Sent Detailed R... | Project | All Emails Sent Detailed Report |
| | Current Project - All Emails Sent Summar... | Project | All Emails Sent Summary Report |
| | Current Project - Project Markups Listing | Project | All File Markups Listing |
| | Current Project - Task Time Report | Project | Task Time Report |
| | Current Project - Unpublished Files | Project | Unpublished Files |
| | Current Project - Workflow Routing Slip | Project | Workflow Routing Slip |

- When report screen launches, click on drop-down for Workflow and pick the Engineering Review, then click “View Report”

Project: TR2013-020 Workflow: **Engineering_Review (04/09/2013 10:47 AM)** **View Report**

1 of 1 100% Find | Next Select a format Export

THE CITY OF Edmonton

Current Project - Workflow Routing Slip

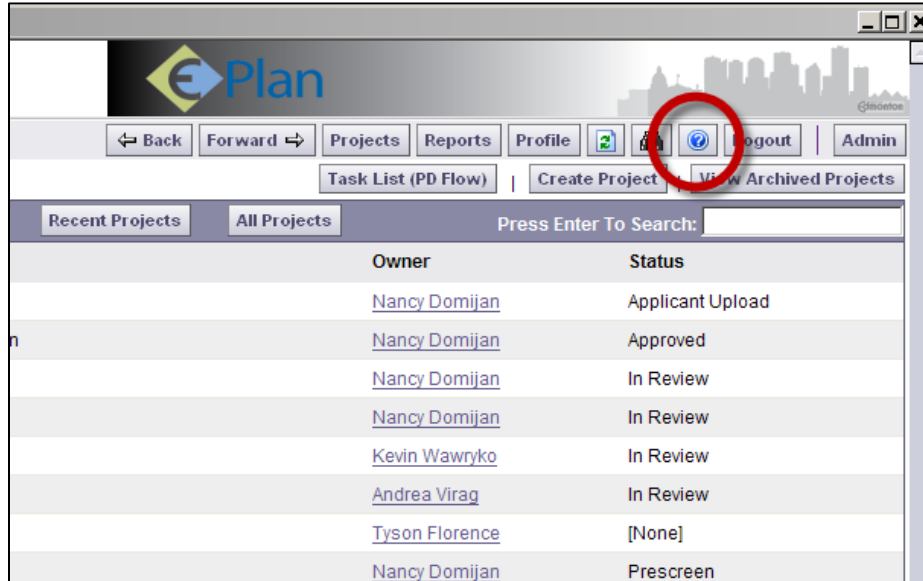
| Task Name | Task Status | Date Created | Date Updated | Updated By | Name | Task User | Review Cycle | Completed |
|-------------------|-------------|-----------------------|-----------------------|------------|-------------------------|---------------|--------------|-----------------------|
| ApplicantUpload | Complete | 4/9/2013 10:47:53 AM | 4/9/2013 11:30:53 AM | 19 | Applicant | Nancy Domijan | 0 | 4/9/2013 11:30:53 AM |
| PreScreenReview | Complete | 4/9/2013 11:30:54 AM | 4/9/2013 11:31:24 AM | 19 | Engineering Technicians | Nancy Domijan | 0 | 4/9/2013 11:31:24 AM |
| AssignDC | Complete | 4/9/2013 11:31:25 AM | 4/9/2013 11:32:00 AM | 19 | Engineering Technicians | Nancy Domijan | 0 | 4/9/2013 11:32:00 AM |
| BeginReview | Complete | 4/9/2013 11:32:00 AM | 4/9/2013 11:32:32 AM | 19 | Engineering Technicians | Nancy Domijan | 1 | 4/9/2013 11:32:32 AM |
| DepartmentReview | Complete | 4/9/2013 11:32:33 AM | 4/9/2013 11:38:07 AM | 19 | DC Review | Nancy Domijan | 1 | 4/9/2013 11:38:07 AM |
| ReviewQA | Complete | 4/9/2013 11:38:07 AM | 4/9/2013 11:38:23 AM | 19 | Development Coordinator | Nancy Domijan | 1 | 4/9/2013 11:38:23 AM |
| ReviewComplete | Complete | 4/9/2013 11:38:24 AM | 4/9/2013 11:48:54 AM | 19 | Development Coordinator | Nancy Domijan | 1 | 4/9/2013 11:48:54 AM |
| ApplicantResubmit | Complete | 4/9/2013 11:48:55 AM | 4/29/2013 11:11:17 AM | 19 | Applicant | Nancy Domijan | 1 | 4/29/2013 11:11:17 AM |
| ResubmitReceived | Complete | 4/29/2013 11:11:19 AM | 4/29/2013 11:11:49 AM | 19 | Development Coordinator | Nancy Domijan | 2 | 4/29/2013 11:11:49 AM |
| DepartmentReview | Accepted | 4/29/2013 11:11:51 AM | 4/29/2013 11:11:56 AM | 19 | DC Review | Nancy Domijan | 2 | |

This report will give you information on all tasks that have been completed and those that are still in progress.

5.0 Help Features

5.1 Reference Guide

ePlan contains a help feature that is available to you at all times. Simply click on the question mark icon in the top right corner of the page to access the ProjectDox User's Reference Guide.



5.2 Contact Us

If you are unable to find what you are looking for through the Reference Guide, you may contact [Development Coordination](#) at the City of Edmonton for further assistance.