

ePlan Review is a webbased solution that will allow building plans to be submitted electronically, improve the plan review cycle, reduce costs associated with obtaining residential and commercial construction permits, as well as support green initiatives.

Applicant User Guide
In addition to this user manual, please refer to the instructions provided in the electronic forms (eForms) for further assistance.

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# **Electronic Plan Submission**

Please complete the following prior to getting started:

- 1. Make application at the City's Building Safety permitting desk, located in the Plaza Del Sol building, 600 2<sup>nd</sup> St NW, where you will be given an application number and fees can be paid.
- 2. Review the standards for how to name your drawing and documents files, border spacing, file formats accept, etc. (See Standards section in this guide.)

# **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.

# **Required Files**

- 1. Drawing Files all required drawings as well as the initial page following City standards for submission (along with other information required by the City's checklist).
- 2. Supporting Document Files all other files that are required as part of the application submission that are not drawing files (e.g. Easement letter, construction specifications, truss calculations, geotechnical reports, etc.)

# **File Naming Standards**

Filenames for drawings submitted through ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

- **Discipline** First characters represent the discipline area, example "ARCH" for Architectural, "STRUCT" for Structural, etc. Ensure that all plans, including the associated details, are submitted under the correct discipline characters to use.
- **Sheet Number** Must be a 3 digit number with leading zeros. Note: if decimals are needed, place decimal after the 3<sup>rd</sup> digit, ex. P001.99

Drawing Type	Discipline	Sheet Number	Example File Names
Architectural	ARCH	000-999	ARCH010
Interior Design	INTDS	000-999	INTDS009
Structural – All		000-999	STRUCT002
Structural and related	STRUCT		
plans including details			
Plumbing	PLUMB	000-999	PLUMB099
Electrical	ELEC	000-999	ELEC001
Smoke Control	SMCTRL	000-999	SMCTRL012
Mechanical	MECH	000-999	MECH101
Landscape	LAND	000-999	LAND011
Civil	CIVIL	000-999	CIVIL 005
Life Safety – Other	LSOTH	000-999	LSOTH046
Alternate Method	ALTMET	000-999	ALTMET246
Survey	SURVEY	000-999	SURVEY788
Site Plan	SITE	000-999	SITE456
Shoring	SHOR	000-999	SHOR022
Fire Protection	FIRE	000-999	FIRE799
Energy	ENER	000-999	ENER012

### **Border Standards**

# **Cover Sheet Files**

The top page of all plans must follow the City standards set for each type of application. Please
refer to the City's website at <a href="www.cabq.gov/planning">www.cabq.gov/planning</a> for more details or contact the One Stop
Shop for more information.

# All Drawing Files

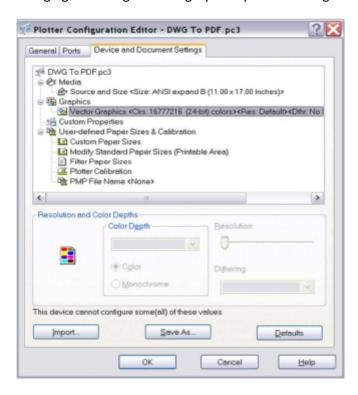
- The top right corner of all drawings must be reserved for the City of Albuquerque electronic stamp. Please leave the top right corner completely blank on all drawings (with exception of the border).
  - o Dimensions: 3" width x 3" height, offset 2" from the right, 1" from the top

# File Type Standards

Supporting files may be in the following formats: Microsoft Word or Excel or PDF. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-drawing files).

Only vector PDF or DWF files will be accepted for drawings. 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."

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.



# **Folder Structure**

- All documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the "Documents" folder for each project.
  - o Note: The application must be included in the documents upload.
- All drawings should be uploaded to the "Drawings" folder for each project.

# **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 submittal.

MARKUP NAME	MARKUP COLOR
IBC & IRC (Building and Safety)	Royal Blue
Hydrology	Light Blue
Transportation	Light Green
Solid Waste	Yellow
Zoning	Purple
Environmental Health/Services	Orange
Fire	Red
MEP (Mechanical, Electrical,	Dark Green
Plumbing)	
Risk Management	Pink
City Architect	Pink
City Engineer	Pink
DRC	Pink

# Login to ProjectDox

### ePlan Review Invitation

When your application is processed at the counter and input into the Kiva permitting system, an ePlan Review invitation 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.



# **Building Permit Plans Review Invitation**

### Hello TF01 Demo User:

Welcome to the City of Albuquerque electronic building plans review system, *ePlan*. This project invitation has been sent to you in response to your building permit request. A plans review project has been created to allow you to electronically upload your drawings for plans review. To access your new plans review 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
- Click on the "Drawings" folder to upload your main project drawings and "Documents" folder to upload any supporting documents
- 5. Click the "Upload Files" button and follow the instructions to upload your drawings and/or documents
- 6. When finished uploading files, please be sure to hit the button titled "Complete Upload Process" to finish the upload process and close the upload window
- 7. Your application has now been submitted for review

The City of Albuquerque will accept the following file types.

Drawings: .PDF (preferred), .DWF, .DXF, .DWG, .DGN

Supporting Documents:
.PDF, .DOC, .DOCX, .XLS, .XLSX, .PPT, .PPTX, .JPG, .TIF, .TIFF, .PNG, .IMG, .BMP

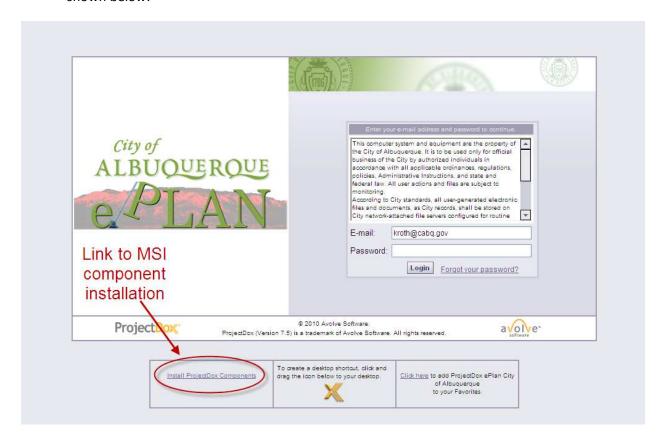
### Accepted Standards for Drawings/Plats

- Follow the City's guidelines for an acceptable Building Plan submission
- Vector PDF raster files are not intelligent files and therefore will slow down the review process
- · Print Ready .DWG or .DWF files

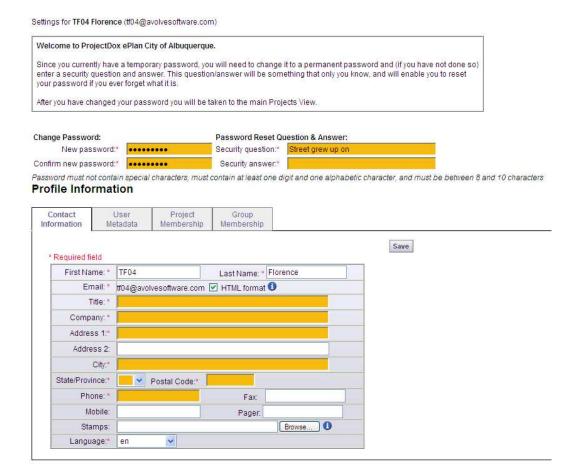
User Login:	TF01@avolvesoftware.com
Project Permit #:	T201390019
Plan Check Coordinator:	EPlan Admin
Plan Check Coordinator's Email:	eplan@cabq.gov
-	
Project Permit Access Link	

### **New Users**

- 1. Prior to logging into the ePlan (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 ProjectDox web address. 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). Once the ProjectDox site is allowed, you will be able to utilize the application.
  - The login page has a MSI (Microsoft Silent Install) component required to install all the
    necessary ProjectDox ActiveX controls. This installation will only need to be done once; if
    you utilize a different computer it will require another installation for each unique
    computer. The link to the component install is shown below.
- 2. To sign in, enter your e-mail address and temporary password and click the Login button, as shown below:



3. Enter your new password and reconfirm the new password, personal account information. Yellow highlighted fields are required but a full Profile record is ideal, then click the Save button in the middle of the screen.

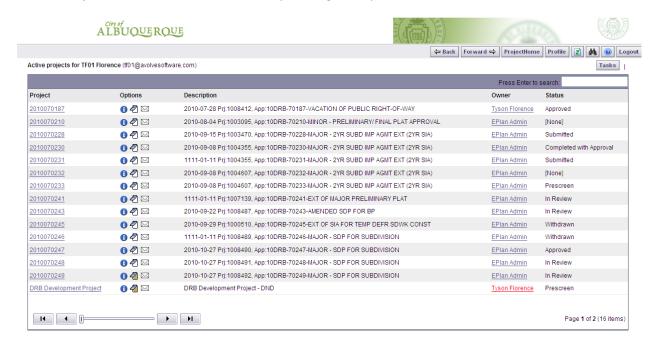


# **Existing Users**

If you are a returning user, login to ePlan Review 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.

# **Uploading Files**

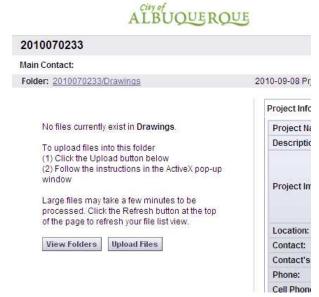
1. When you have successfully logged into ProjectDox, the projects screen will display. Any projects for which you have access will display in the list. Any outstanding tasks that require your action are displayed in the My Task List area below the project list. Select the specific project that corresponds 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.



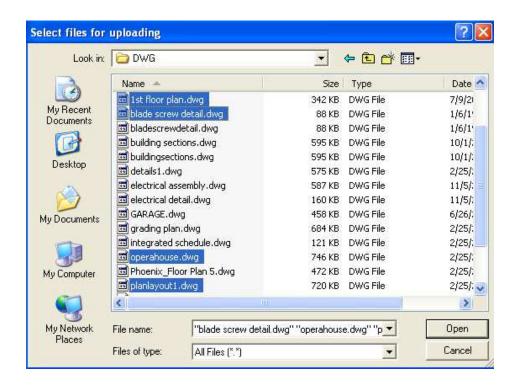
2. Click the "Drawings" folder to upload your plan drawings or "Documents" folder to upload supporting project documents.



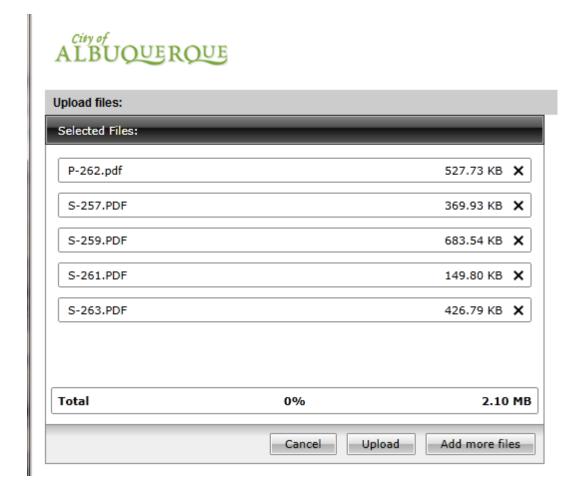
3. Upon entering the either folder, you will be presented with two buttons, View Folders and Upload Files.



4. Click the "Upload Files" button. You can select individual files by clicking on the "Browse" button, or you can install the Microsoft Silverlight control (if not already installed on your computer) that will allow you to select multiple files or drag-and-drop files into the window. Select the file location on your computer. Select or highlight files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the "Open" button. The files will then be copied to the upload window.



5. 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.



6. 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.



7. 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 Review Coordinator to start the prescreening process to determine if the submittal requirements have been met.

### **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.

# **Prescreening**

Prescreening is a cursory review of your uploaded documents in preparation for formal review. This may be performed by the City Surveyor for certain types of applications. Allow a minimum of 48 business hours after you have uploaded your documents for the Prescreening process to take place. If there are questions or missing items from your submittal, you will receive a "Prescreening Rejection" e-mail with instructions on the changes requested and how to resubmit. If you have met all submittal requirements, your application will move to be formally reviewed.

### **Returned for Corrections**

If your submittal requirements were not complete, you will receive an e-mail notification that prescreening has been rejected.



**Electronic Building Permit Plans Review Information** 

### Attention Tyson:

Your plan review submission for Application 200990098 - TRADITIONAL-RESIDENTIAL ADDITION LT 500 SF: 200990098 has been reviewed, but has not met the minimum submission criteria. You may review the comments by accessing the ePlan site. Please note, we must receive your re-submittal documents with in 180 days or your applications will expire.

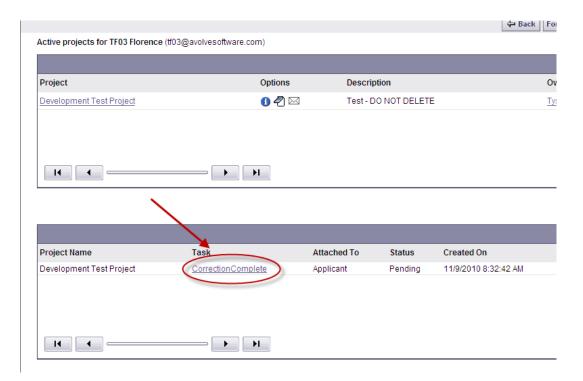
When corrected plans and or documents are ready for re-submittal, please, <u>Login to ePlan</u> and follow the instructions provided for re-submittal.

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
- Please make corrections and resubmit as soon as possible

Project:	200990098
Description:	TRADITIONAL-RESIDENTIAL ADDITION LT 500 SF: 200990098
Task:	CorrectionComplete
Assigned by:	Tyson Florence
Project Access   Login to ProjectDox	

Click the link in the e-mail to access the Prescreening information. Login to ePlan (ProjectDox).
 The Prescreening corrections task will appear at the bottom of the Project Home screen. Click on the CorrectionComplete task. This will launch one Internet Explorer screen with the corrections form and another screen with the Drawings and Document folders you saw in the original upload request.



- 2. Review the Prescreening Comments to identify which requirements were noted as missing.
- 3. After you have identified the missing or corrected drawings and/or documents to upload, enter the project.
- 4. Upload the missing and/or corrected drawings and documents (see the "Uploading Your Files" section for instructions).
- 5. Click back to the eForm with your task assignment as shown below.



6. 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, the City will be notified that the files have been completed or corrected and will

continue with the Prescreening process.

# **Prescreen Approved**

If your submittal is approved, it will immediately move into the formal review process

# **Change Notification and Plan Resubmit**

# **Review Requested Corrections**

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

1. You will receive an e-mail notification from the Review Coordinator requesting revised documents.



### **Electronic Building Permit Plans Review Information**

### Attention Tyson:

Your building permit plan review submission for Building Permit: T201291986 - TRADITIONAL-COMMERCIAL RENOVATION: T201291986 has been completed, but has generated staff comments or requires corrections. You may review the comments and drawing markups by accessing the ePlan site. Please note, we must receive your re-submittal documents with in 180 days or your applications will expire.

When corrected plans and/or documents are ready for re-submittal, please Login to ePlan and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans 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
- Please make corrections and resubmit as soon as possible.

The City of Albuquerque will accept the following file types.

Drawings: .PDF (preferred), .DWF, .DXF, .DWG, .DGN

Supporting Documents:
.PDF, .DOC, .DOCX, .XLS, .XLSX, .PPT, .PPTX, .JPG, .TIF, .TIFF, .PNG, .IMG, .BMP

### Accepted Standards for Drawings/Plats

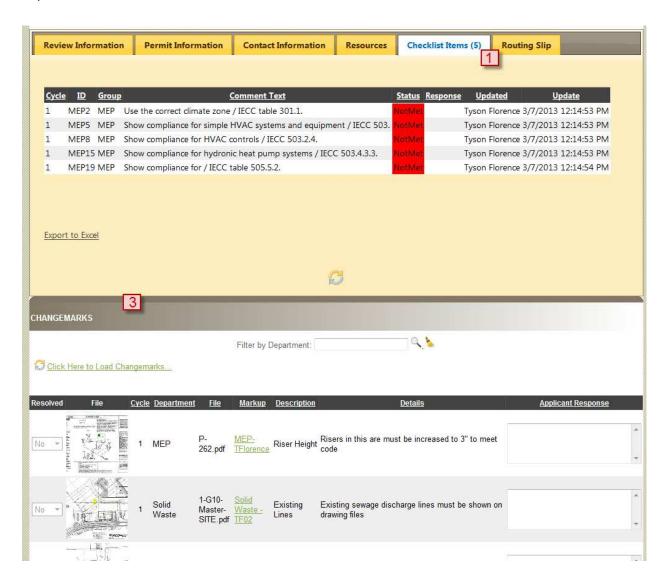
- Follow the City's guidelines for an acceptable Building Plan submission
- Vector PDF raster files are not intelligent files and therefore will slow down the review process
- · Print Ready .DWG or .DWF files

Project:	T201291986
Description:	TRADITIONAL-COMMERCIAL RENOVATION: T201291986
Task:	ApplicantResubmit
Assigned by:	Tyson Florence
Project Access   Login to ProjectDox	

- 2. Click the link in your e-mail to access the corrections requested in ProjectDox.
- 3. Login to ProjectDox. The Applicant Resubmit task will display at the bottom of the main page with your Plan Review number in the name (ie. *T201291986*).



4. The eForm and drawing markups provide a complete correction package from all reviewing departments:

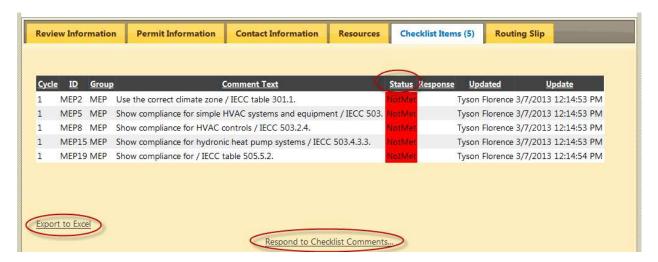




- 1) Consolidated department checklist and markup items
- 2) Review cycle & department review information
- 3) Review Markups and Changemarks
- 4) Checkboxes 1 and 2 are confirmation that you have read and corrected the issues
- 5) Checkbox 3 is confirmation you have uploaded all new and/or corrected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

# (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).



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.

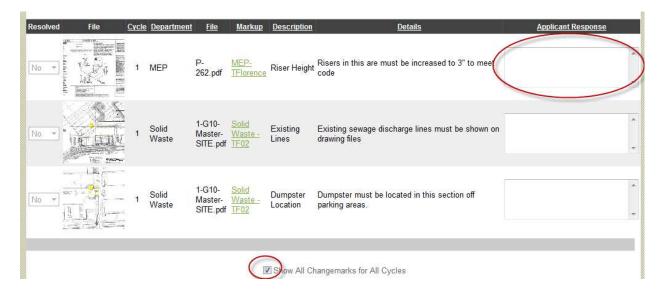
### (2) Review Cycle

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.



# (3) Review Markups

There are 2 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.



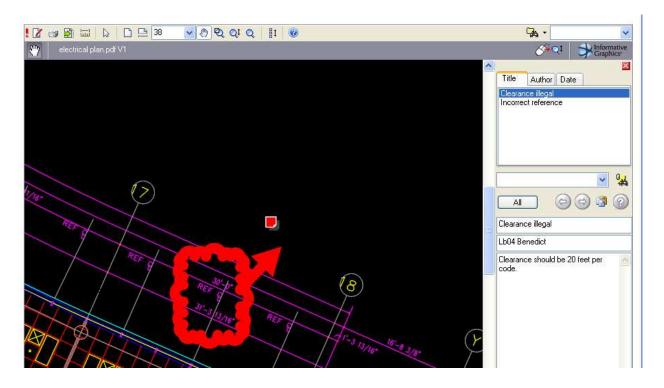
To view markups on a single plan sheet, click on the icon next to the drawing as shown here

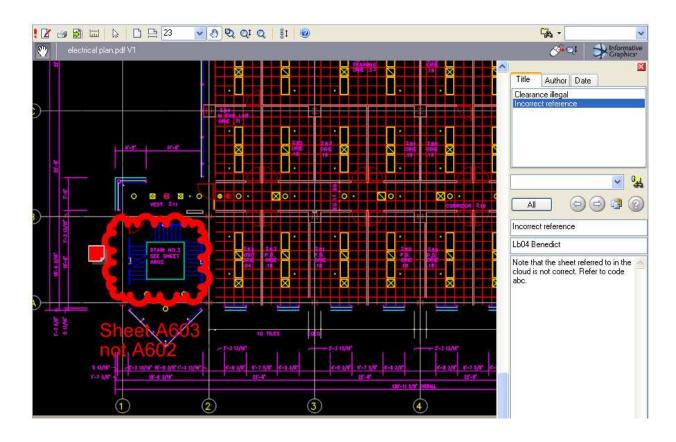


Select from the list of available markups by clicking the "View" checkbox and then clicking the "View/Edit" button.



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.





# (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 upper right hand corner of the popup window. I have addressed all of the items in the File Markups that were identified during the Review.

# (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.



# (6) Resubmit Complete

After all corrections have been addressed and you are ready to complete the task and return to the City for review, click the "Complete" button.

### **Approval**

When the plan review is approved by all reviewers, you will be notified by email.

### **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 permit is 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.

Note: A printed copy of the approved plans must be available on site.

# Status of Plan Review

# **Workflow Routing Slip**

To identify the status of any permit through the plan review process, please follow these instructions:

- 1. Login to ePlans (ProjectDox) if not already logged in.
- 2. Click on the appropriate permit number

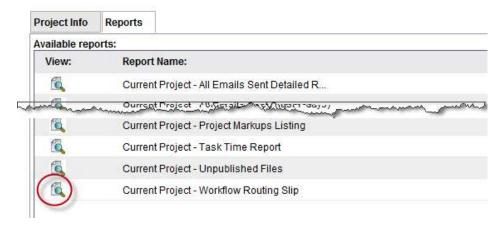
# ALBUQUERQUE



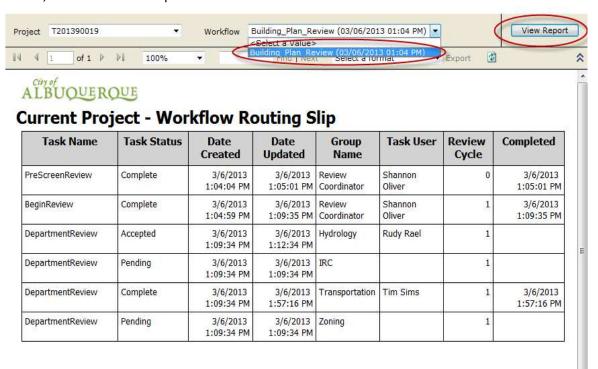
3. Click on the "Reports" tab



4. Click on the report icon next to the report titled "Current Project - Workflow Routing Slip"



5. When report screen launches, click on drop-down for Workflow and pick the Building Plan Review, then click "View Report"



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