eplans
MontgomeryPlanning

Applicant User Guide

DRAFT

NOTE: Your feedback is greatly appreciated as we continue to revise this draft document.

Please send comments to eplans@montgomeryplanning.org

Rev. 11/3/2012

Contents (click headings to jump to sections)

Introduction

About ePlans

ePlans is a web-based application that facilitates electronic plan review and has been tailored to the MNCPPC Montgomery Planning Department regulatory process using ProjectDox software from Avolve. ePlans allows the agencies and individuals who review and comment on new development plans as part of the county's development review process to organize and formulate their comments as one public voice to the development community and public, and to better manage critical project information.

By using ePlans to create online, virtual project workspaces, individual reviewers for specific disciplines working in different locations with varying schedules can share the same information at any time, thus facilitating communication and greater productivity.

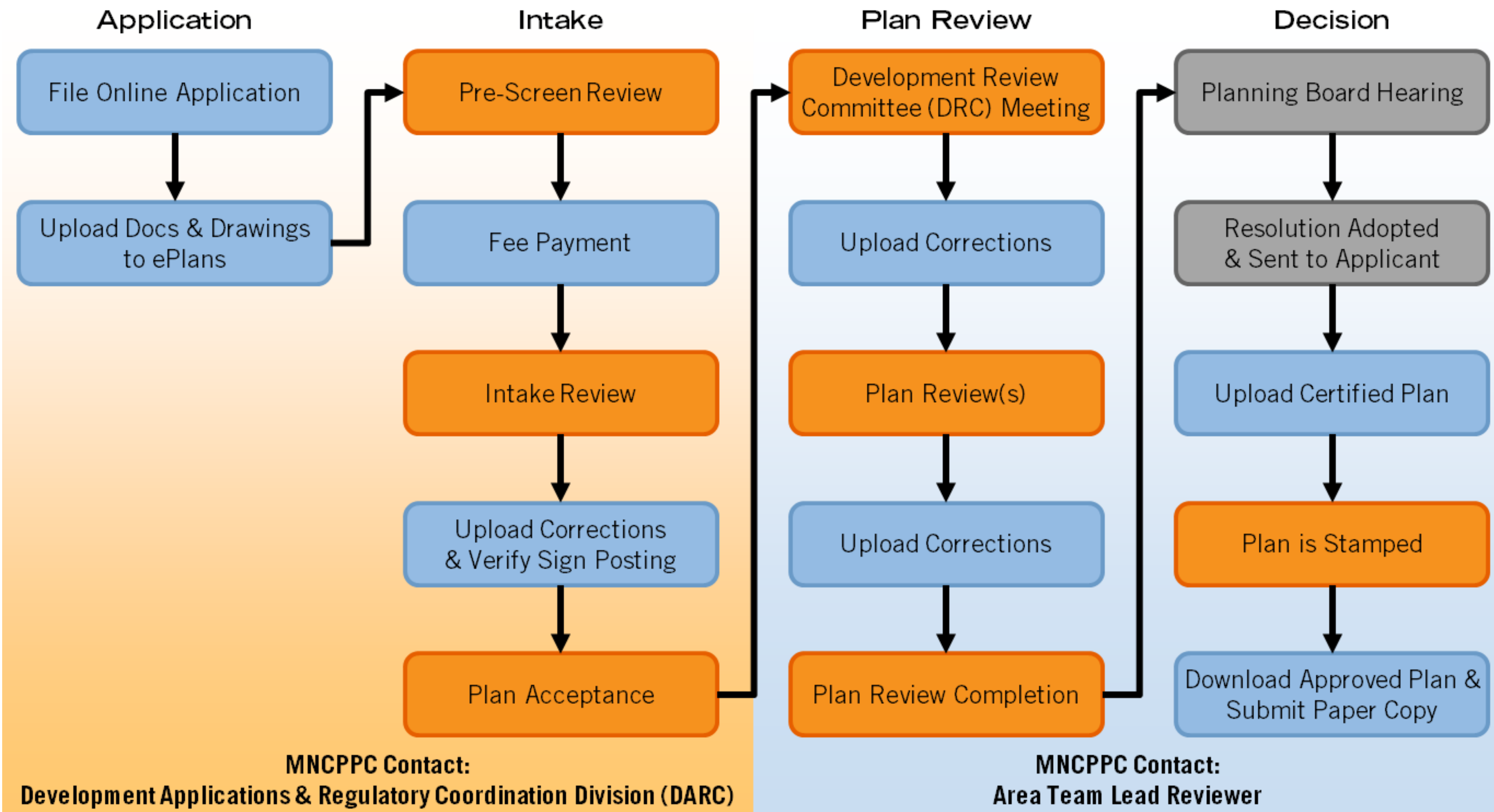
Here's what ePlans does to enable online project information management:

- All the shared project information (documents, drawings, markups, project email, discussion threads, faxes) is centralized in one electronic location so it becomes visible, accessible and usable by everyone who needs it
- The friendly user-interface makes it easy for users at all technical skill levels to leverage the tools in the system
- Permissions and role-based security restrictions are configured and applied so that only appropriate personnel have access to project information, or subsets of that information
- Using electronic workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and force accountability within a given process
- Multiple-users have access to the same information at the same time, and the system manages every session to keep document versions organized properly
- Automation features ensure that when activity takes place in the workspace, those who need the updated information are informed immediately
- Tools for viewing plans, documents and markups, holding online discussions, and sending out group email provide for timely information and a more productive review for the whole team
- Complete details of all workspace activity are recorded, creating a complete audit trail for documents, email, markups, workflows and forms, access and egress, plus much more

In summary, ePlans allows the stakeholders in a project to manage information, communication, activity and resources better than manual or conventional means.

Process Overview

The ePlans workflow adheres to the regulatory procedures of the Development Review Manual, essentially changing how the applicant delivers plan information, documents, and drawings and the way agency staff collaborate on needed revisions and transmit comments back to the applicant. Before using ePlans, applicants fill out an online application. This is where plan information, found on the traditional application form is entered. Completion of this step generates an invitation to log into ePlans and upload the documents and drawings associated with the application. ePlans will walk the applicant through the plan review process by emailing notifications such as: when to pay fees, what revisions are requested, when Development Review Committee and Planning Board dates are scheduled, when to upload or download documents, etc. The following is an example of a "typical" plan review process through ePlans:



Revisions vs. Amendments

An important distinction to make is the difference between plan revisions and amendments. **Revisions** to plans occur after plan submission but before Planning Board approval. A revision is something that requires resubmission of critical application form information such as a change in: acreage; number of lots or units; type of use or units proposed; ownership, applicant or engineer; or method of development proposed. In ePlans, revisions will require upload of a PDF document titled "Updated Application Information" and payment of appropriate fees.

Amendments are requests to revise a plan that has already been approved by the Planning Board. Amendments may be major or minor and applicants need to work with staff to determine which type is suitable. Amendments require filling out an online application, starting a new workflow in ePlans and new fee payments. In some instances (such as re-subdividing recorded lots), staff may determine that an applicant does not qualify for an amendment and a new application needs to be submitted.

Before You Begin

Minimum User Requirements

This document will guide you through the Online Plan Submittal process. To begin you must have basic internet navigation skills and the ability to create the necessary documents and drawings and submit them in the required formats. In addition to the minimum skill requirements, you must have the following:

- An email address
- A computer with the following minimum specifications:
    - Windows XP Professional or Higher
    - Internet Explorer 7.0 or 8
    - Dual Core or Quad Core Processors 2.0 GHz or faster
    - 2GB+ Ram of Memory
    - Hard Drive with 100 GB or more
    - Graphics Card with minimum of 25MB of dedicated video memory
- Ability to create drawings in a layered, vector .pdf format
- Adobe PDF reader (available at http://www.adobe.com/products/acrobat/readstep2.html) and the Microsoft Office Suite

Standards for Electronic Plan Submission

You must be ready to upload files after completing the online application. The following helps you prepare files that meet standards for ePlans prior to this critical step.

Required Files

All drawings and documents as specified by the plan type's **Application Upload Checklist** must be submitted and meet the plan type's **Submission Requirements** for content.

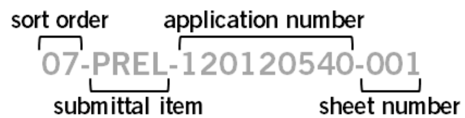
- Preliminary Plan – Upload Checklist & Submission Requirements
- Site Plan – Upload Checklist & Submission Requirements

A cover sheet with sheet index is required for all multi-page drawing sets.

File Naming Standards

Drawings

Filenames for drawings submitted through ePlans should include a description code, followed by the application number, followed by a 3-digit sheet number **(Example: 07-PREL-120120540-001)**. A separate file for each individual sheet of a drawing set is required.



Documents

Filenames for documents submitted through ePlans should include a sort order, submittal item code, followed by the application number **(Example: 01-SOJ-120120540)**. Multi-page documents or related document sets should be provided as one file.
Submittal item codes for the commonly required drawings and documents are included in the Application Drawings/Documents Upload Checklist for each plan type (see links above).

Stamp Placeholder

The top left corner of all drawings must be reserved for the Planning Department's electronic stamp.

- Dimensions 4" width x 3" height

File Type Standards

- Only searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files). Documents may also be submitted as Word (.doc), Excel (.xls) or PowerPoint (.ppt) files.
- All drawings must be submitted as layered, vector PDF files (1 file per each drawing sheet). It is recommended that drawings be created in AutoCAD and converted to PDF files. CAD files (.dwg format) are also acceptable.

Folder Structure – Uploads Standards

This is how the ePlans folder structure looks:

- **120130130**
  - Submitted Drawings
    - Application Drawings
    - Support Drawings
  - Submitted Supporting Documents
  - Board Hearing Documents and Exhibits
  - Approved Drawings
  - Post-Approval Documents
  - Uploads

- At initial application all documents and drawings may only be uploaded into the ***Uploads*** folder for each project. After Intake Review and acceptance of the submitted files, they will be moved by Planning Department staff into the appropriate *Submitted Drawings* or *Submitted Supporting Documents* folder or sub-folder.
- After application acceptance:
  - All documents must be uploaded into the ***Submitted Supporting Documents*** folder by the applicant.
  - All drawings must be uploaded into either ***Application Drawings*****,** or ***Support Drawings*** in the *Submitted Drawings* folder.
  - All revised files must have the <u>same name</u> as the original.

Filing an Online Application

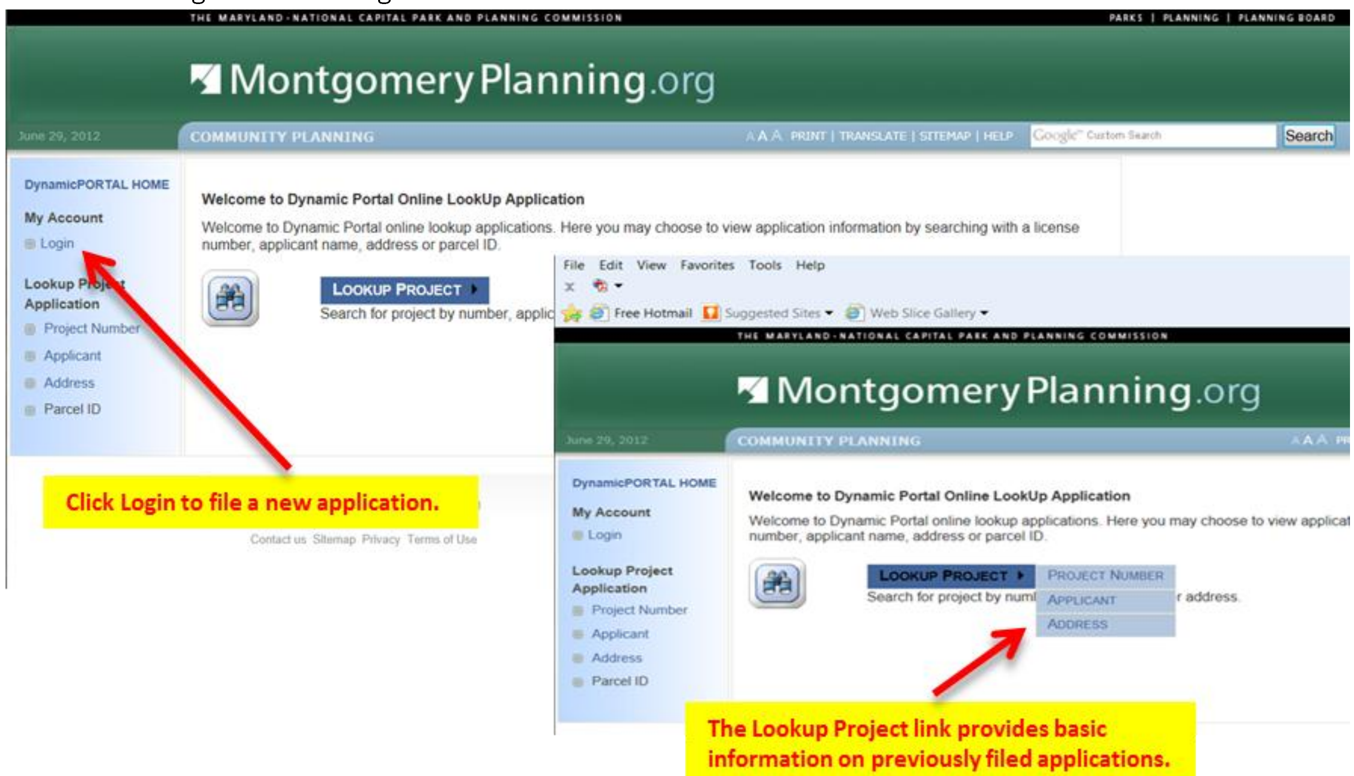
Online Applications

The first step in the ePlans process is filing an online application. We suggest you complete and print the traditional application form so you can refer to the information while applying. Traditional application forms can be accessed here:

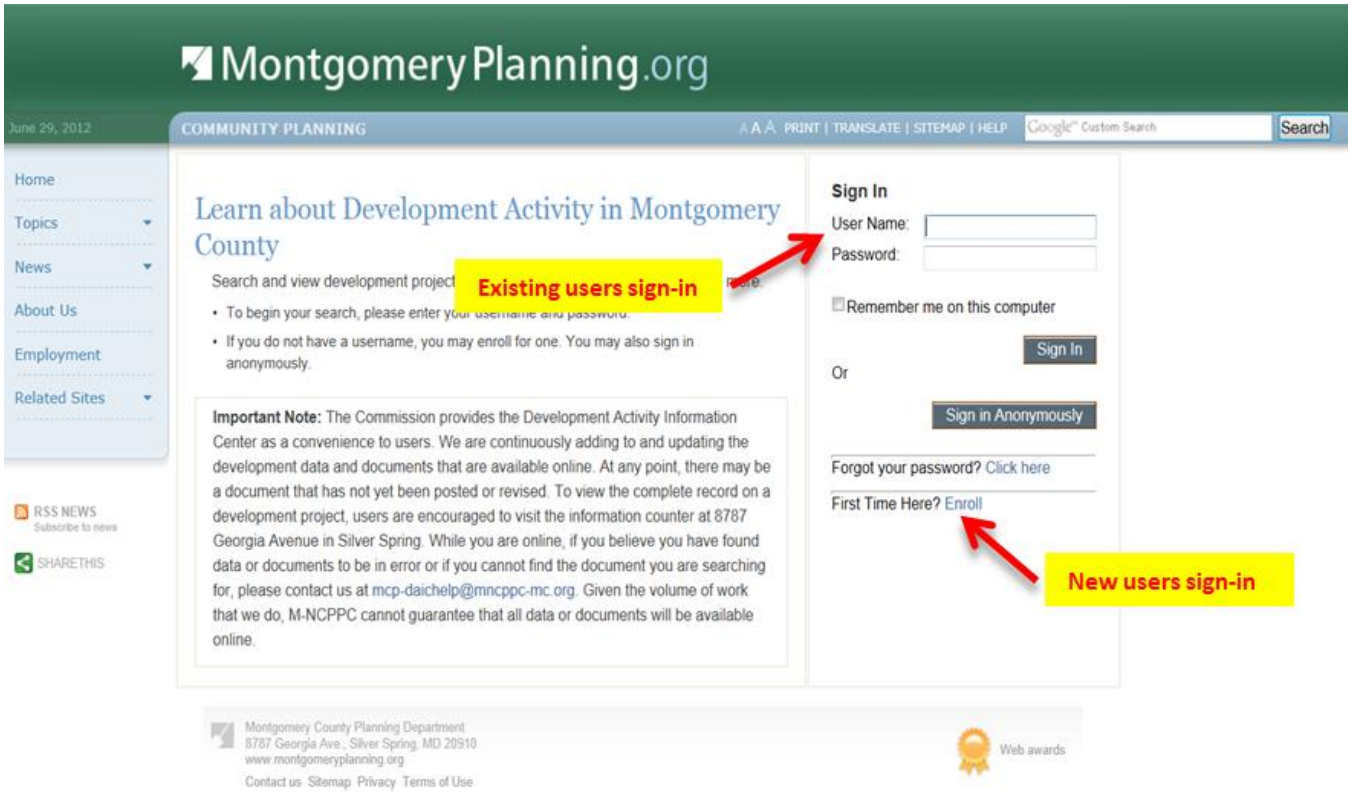
- Preliminary Plan traditional (paper) application form
- Site Plan traditional (paper) application form

Access the online application here.

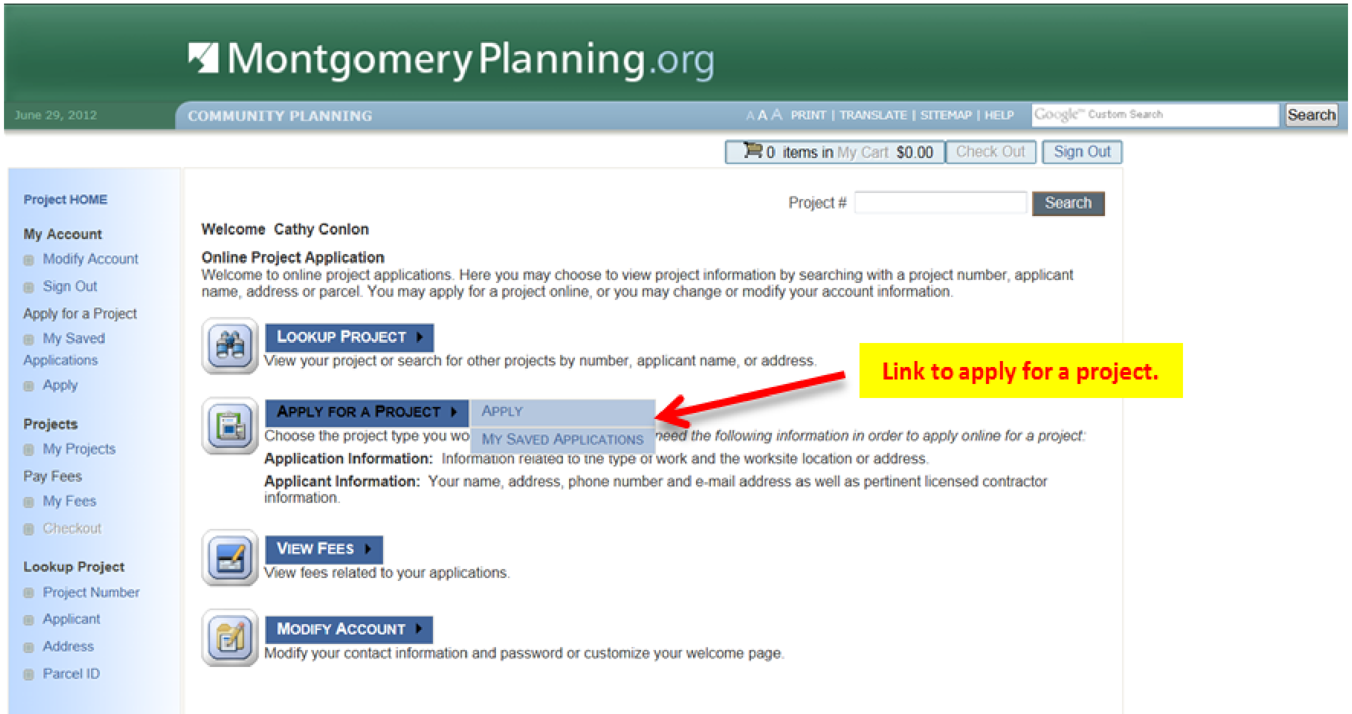
- From the **Online Application main page**, it is possible to look up information on previously filed projects, or to access the login page and create a new account or log into an existing account.



- On the **Login page**, enter your user name and password to access your account. If you have not previously logged in, click the link to *Enroll*, and open a new account.

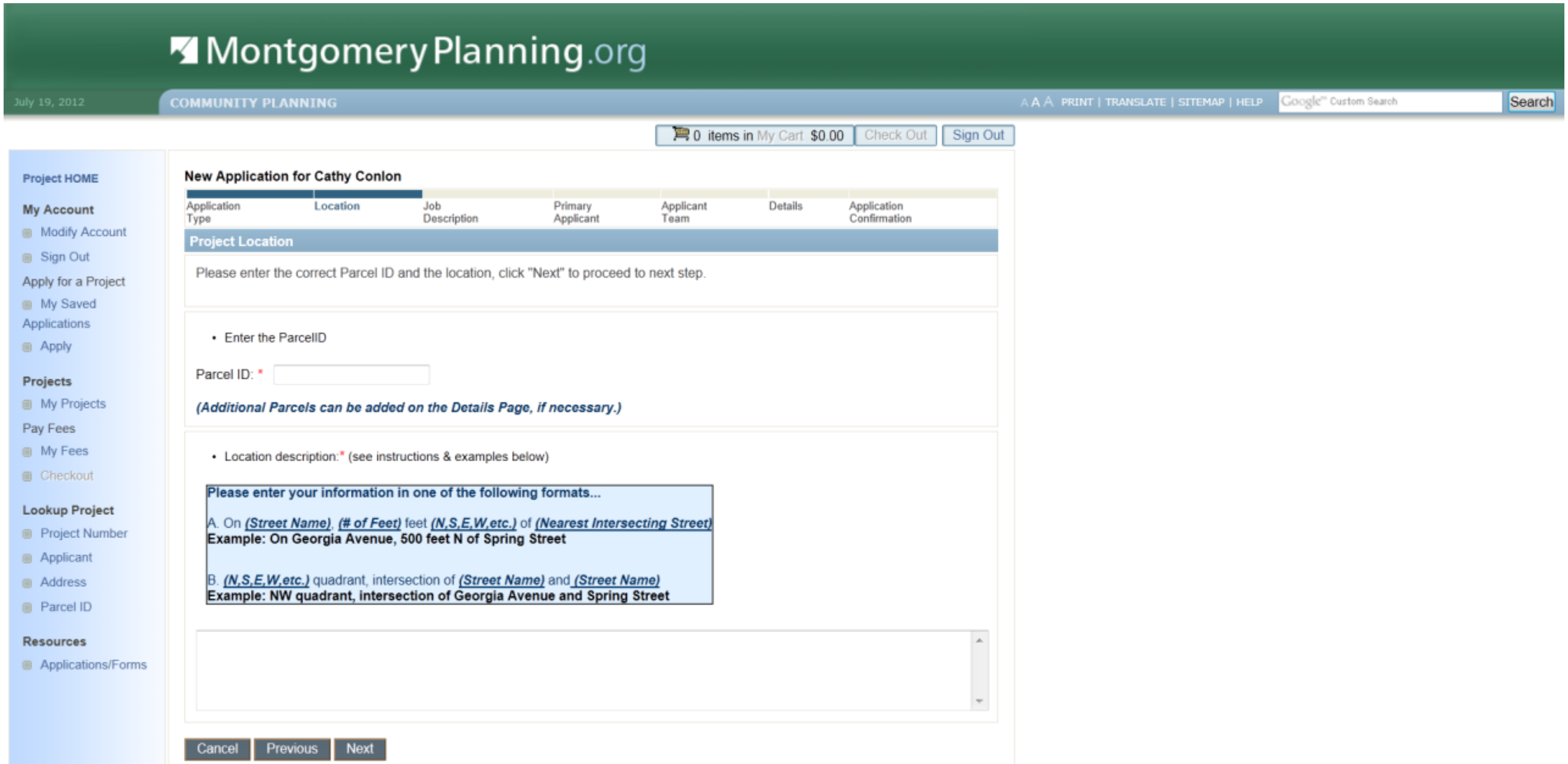


- From the **Project Application page**, you can lookup detailed information about previously filed projects, apply for a new application, view fees or modify your account information. To apply for a new application, click on *Apply for a Project* and then *Apply*. If you have saved previous applications without filing them, you can also access them from the *Apply for a Project* link.

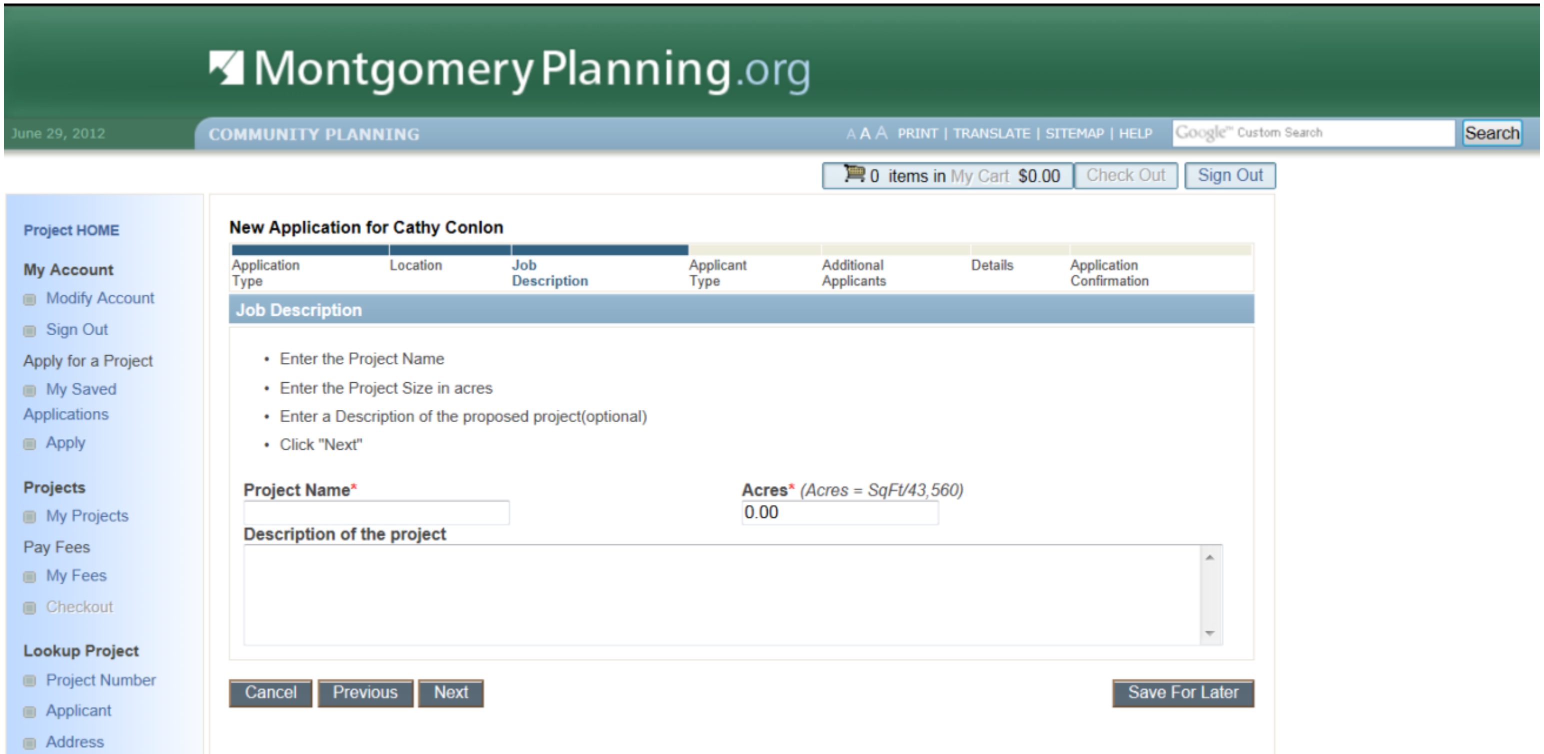


- After you have clicked on the link to *Apply*, you will be taken to a series of pages on which you need to insert the application information. Required fields are marked with a red asterisk (*), but all fields should be filled out. On the first screen, select the type of application.

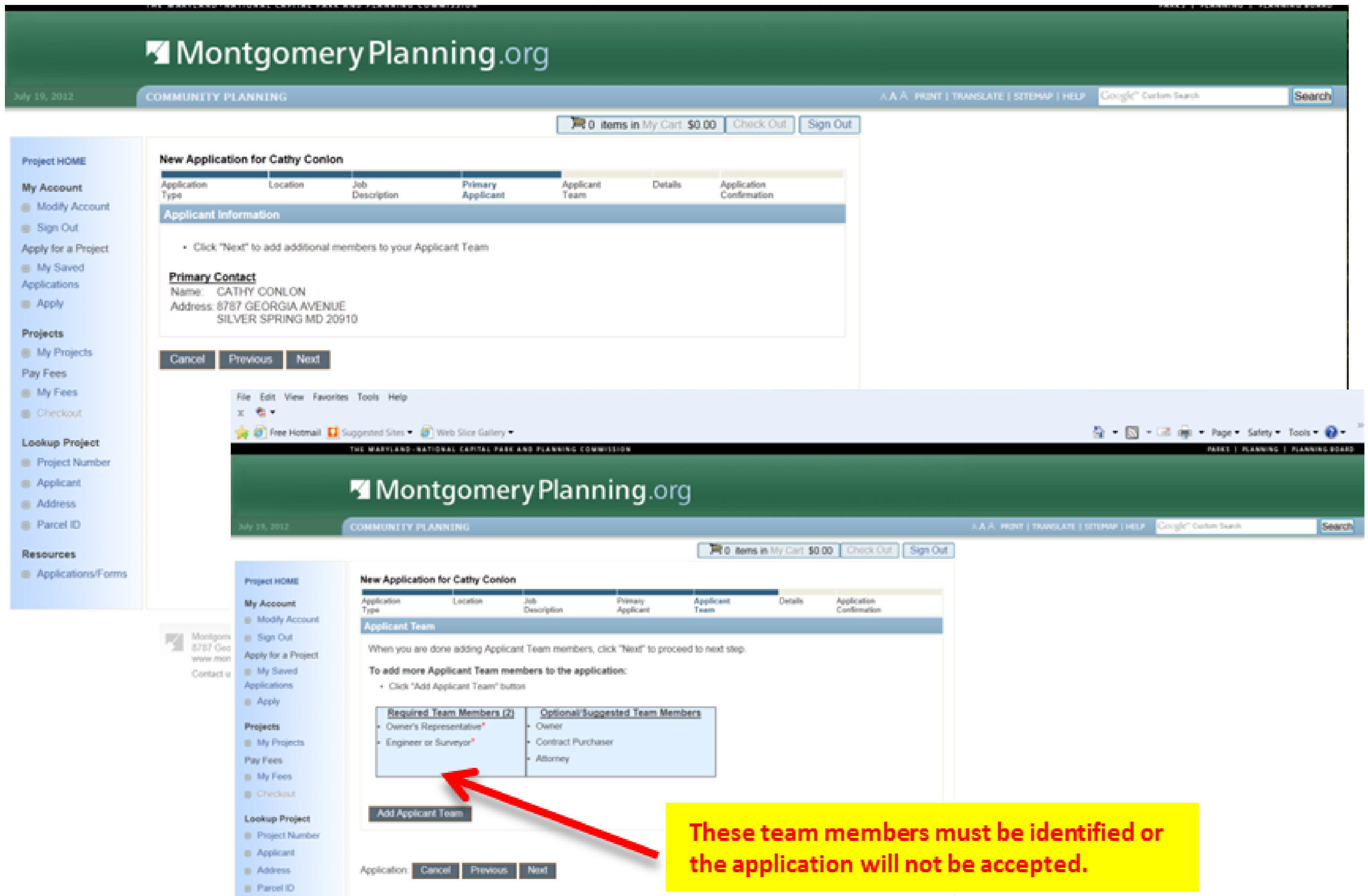
- Insert a tax parcel identification number and describe the location of the project. The *Parcel ID* must be an 8-digit number that is currently in the land records. The system will check that the number is valid before permitting you to move to the next screen.



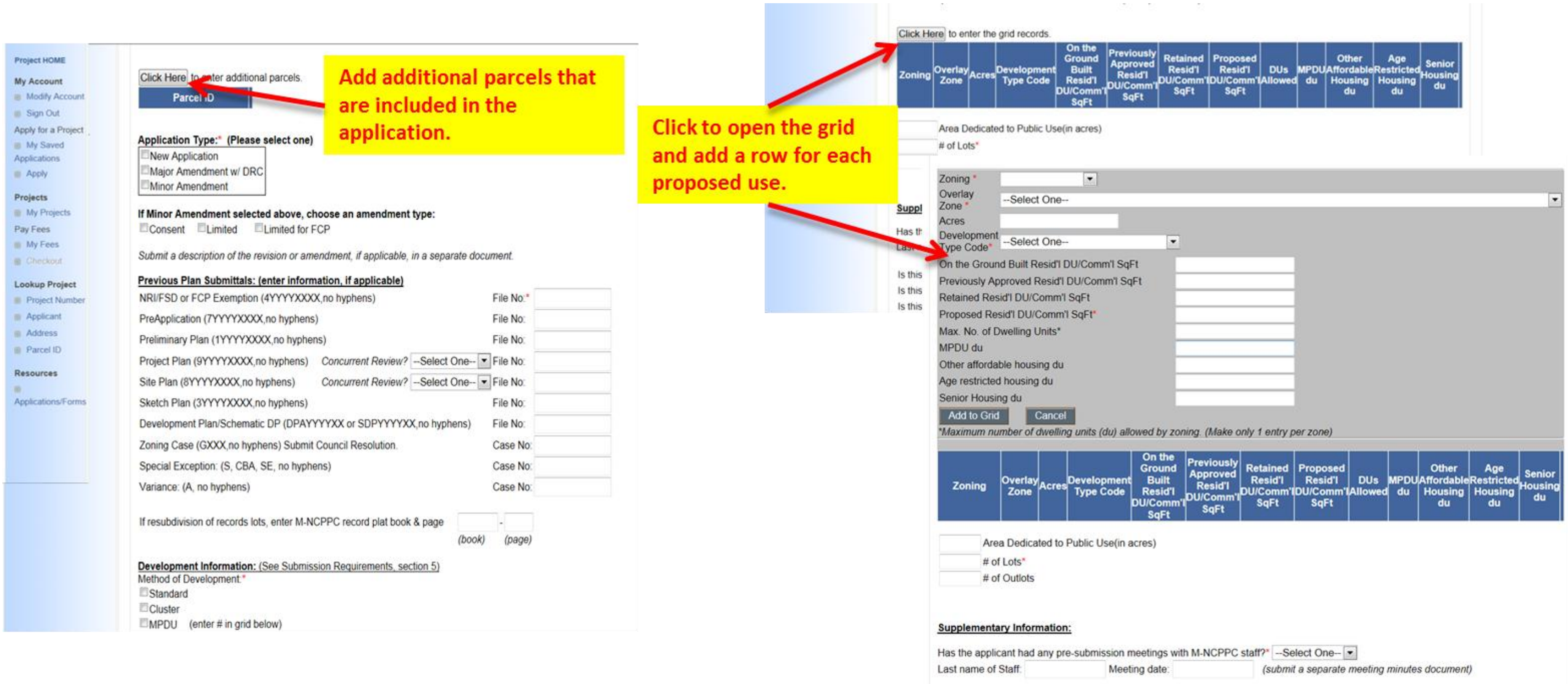
- The next step is to enter a project name, project description, and acreage. For a new subdivision, choose a name for your project that will distinguish it from others. In an existing subdivision do not simply choose the subdivision name; include the applicable lots and/or parcels (i.e. "Sligo Woods, Lot 5"). The description should be a simple summary of the project such as, "request to create 2 lots for 2 one-family detached dwellings."



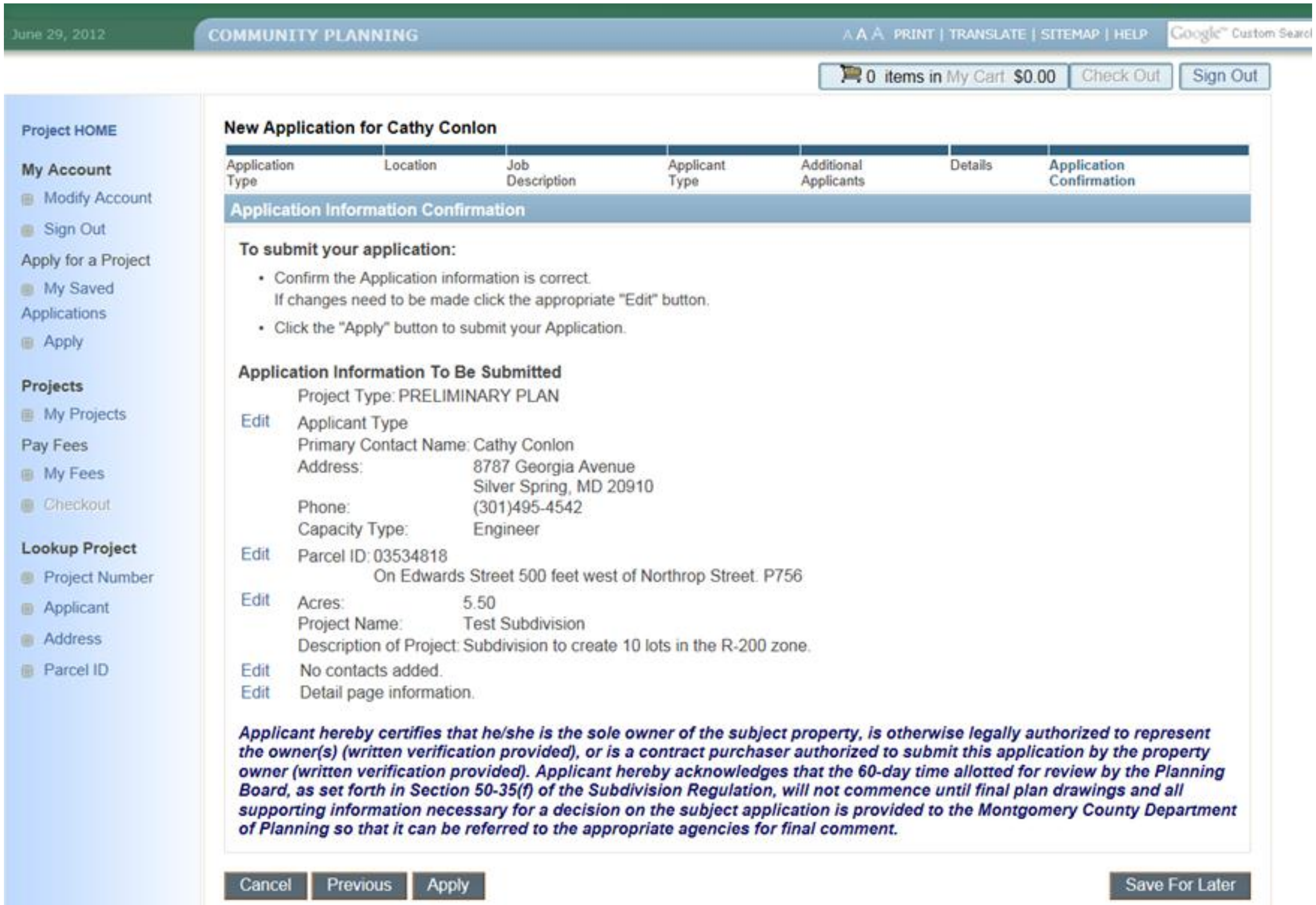
- The individual submitting the application will automatically be designated as the Primary Contact for the ePlans process. All applicant tasks that are generated during the review of the project will be sent to the email address for this individual. **You may choose to set up an account that is accessible to more than one individual, but we strongly recommend that only one person be assigned responsibility for completing tasks.**
- The next screen will permit you to enter all the other members of the applicant's team. The individual who is the Primary Contact may be entered again from this screen and placed under their appropriate role (e.g. engineer, landscape architect, or surveyor). Note that certain team members are required to be identified before the application will be accepted.



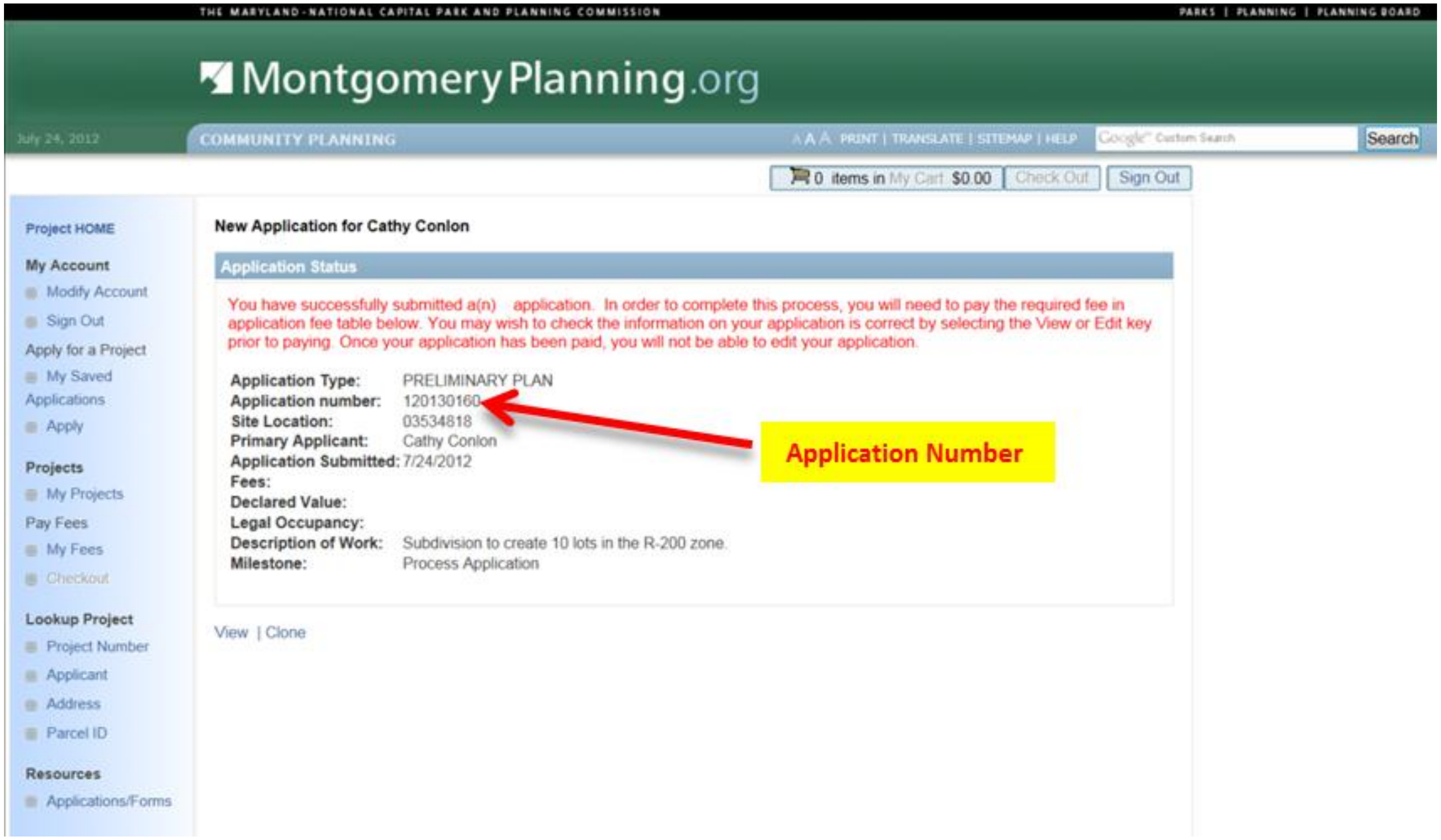
- On the application details page, fill in all required information. Previous plan submittal numbers will be checked for validity against our existing data base. To enter proposed development information, select the *Click Here* button to open the grid. Enter the required information and click *Add to Grid*. Each proposed use should be entered as a new row in the grid by repeating these steps.



- Review the information you have entered and correct as necessary by clicking on the *Edit* links. When you are satisfied with your application, click on *Apply*. Click on the *Save for Later* link if you want to keep the information you have entered, but postpone actually submitting it. You can access saved applications from the Project Application page when you are ready to submit them.



- A confirmation page will appear after your application has been successfully submitted and give you the assigned plan number. Make note of the assigned number, sign out and proceed to the steps for uploading your drawings and documents. **Please do not use the assigned application number to begin any noticing until the Intake Coordinator has confirmed that your application has been accepted.**



Accessing Software and Logging into ePlans

Emails

After your electronic application form has been accepted, you will receive an email from the ePlans site inviting you to upload your supporting documents and drawings. The email will contain your login information, including a temporary password if it is your first time using the site, and a link to the Login screen.

New User Email

eplans MontgomeryPlanning

Application Receipt - New User Invitation

Welcome to Montgomery Planning's eplans. Your application for Preliminary Plan **[ProjectName]** has been received. You may now electronically upload your documents for our review. Please refer to the eplans User Guide for a list of accepted file formats and follow the instructions below.

Project Number & Name:	[ProjectName] - [ProjectDescription]
Login Email:	[ProjectEmail]
Temporary Password:	[Field7]
Review Coordinator:	[Field5]
Review Coordinator Email:	[Field6]
Resource Links:	eplans User Guide
Instructions:	1) Click the **"Launch eplans"** button to access the site.

2) Enter your User Login and Temporary Password highlighted above in yellow.

3) Complete the required fields on the **"User Profile"** page and provide a new password that you will use for logging into the site. Make sure that you complete the **"Security Question"** and **"Security Answer"** fields by entering a question in the **"Security Question"** field and the answer to that question in the **"Security Answer"** field. The information in these fields will be used when a user clicks on the **"Forgot Your Password"** link on the login page of the eplans site.

4) Click on the Project link on the **"My Projects"** page.

5) Click the **"Uploads"** folder link.

6) Click the **"Upload Files"** button and follow the instructions to upload your drawings.

7) Your drawings have now been submitted for electronic plan check review.

PLEASE DO NOT REPLY TO THIS EMAIL

Launch eplans

If for some reason you were unable to log into this review task, please email eplans@montgomeryplanning.org for help.

Montgomery Planning Department | Maryland-National Capital Park & Planning Commission
8787 Georgia Avenue | Silver Spring, MD 20910
www.montgomeryplanning.org

Existing User Email

Application Receipt - User Invitation

Welcome to Montgomery Planning's eplans. Your application for Preliminary Plan **[ProjectName]** has been received. You may now electronically upload your documents for our review. Please refer to the eplans User Guide for a list of accepted file formats and follow the instructions below.

Project Number & Name:	[ProjectName] - [ProjectDescription]
Review Coordinator:	[Field5]
Review Coordinator Email:	[Field6]
Resource Links:	eplans User Guide
Instructions:	1) Click the **"Launch eplans"** button to access the site.
	2) Enter your User Login and Temporary Password.
	3) Click on the Project link on the **"My Projects"** page.
	4) Click the **"Uploads "** folder link.
	5) Click the **"Upload Files"** button and follow the instructions to upload your drawings.
	6) Your drawings have now been submitted for electronic plan check review.

PLEASE DO NOT REPLY TO THIS EMAIL

Launch eplans

If for some reason you were unable to log into this review task, please email eplans@montgomeryplanning.org for help.

Montgomery Planning Department | Maryland-National Capital Park & Planning Commission
8787 Georgia Avenue | Silver Spring, MD 20910
www.montgomeryplanning.org

Obtaining Access to the ProjectDox Software before Logging into a First Project

To run ePlans you must download the ProjectDox software.

Disable Pop-up Blockers

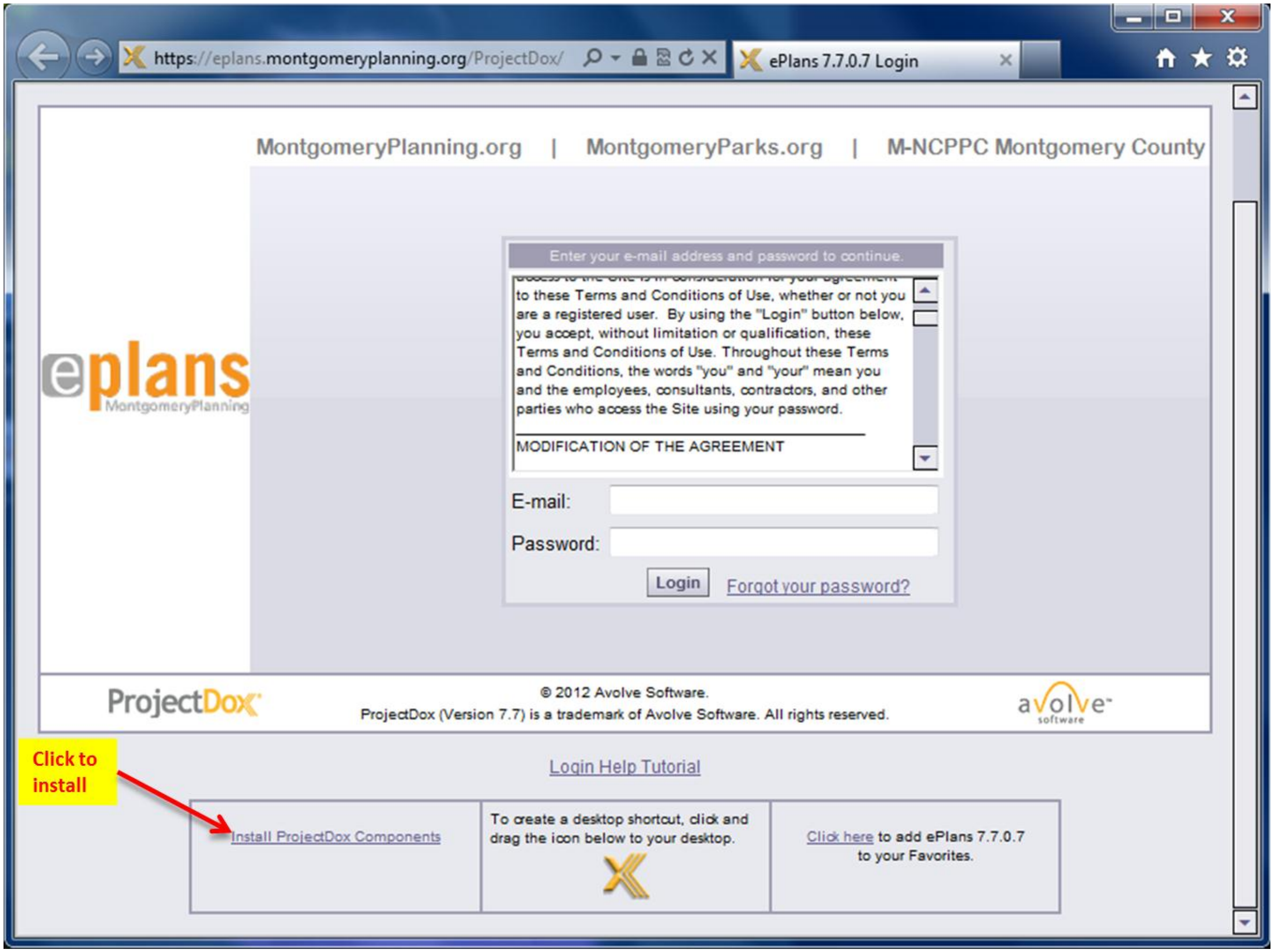
- ProjectDox uses pop-up windows (browser with no toolbars). If you login but no ProjectDox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to disable pop-up blocking for the ProjectDox site.

Add ePlans.MontgomeryPlanning as Trusted Site

- You will need to set your browser security setting to a minimum level that allows certain ProjectDox technologies to function. Add the ProjectDox site to the list of Trusted Sites of your Internet browser. For Internet Explorer, follow the steps below:
  - Click on the Tools menu and select Internet Options
  - In the Internet Options dialog box, click the Security tab
  - In the Security tab, click the Trusted Sites icon and then Sites...button
  - Type in the main URL for the ePlans.MontgomeryPlanning site: https://www.ePlans.montgomeryplanning.org
  - Click the Add button to add the site to the list
  - Close all open dialogs by clicking OK

Download and Install Necessary ActiveX Components

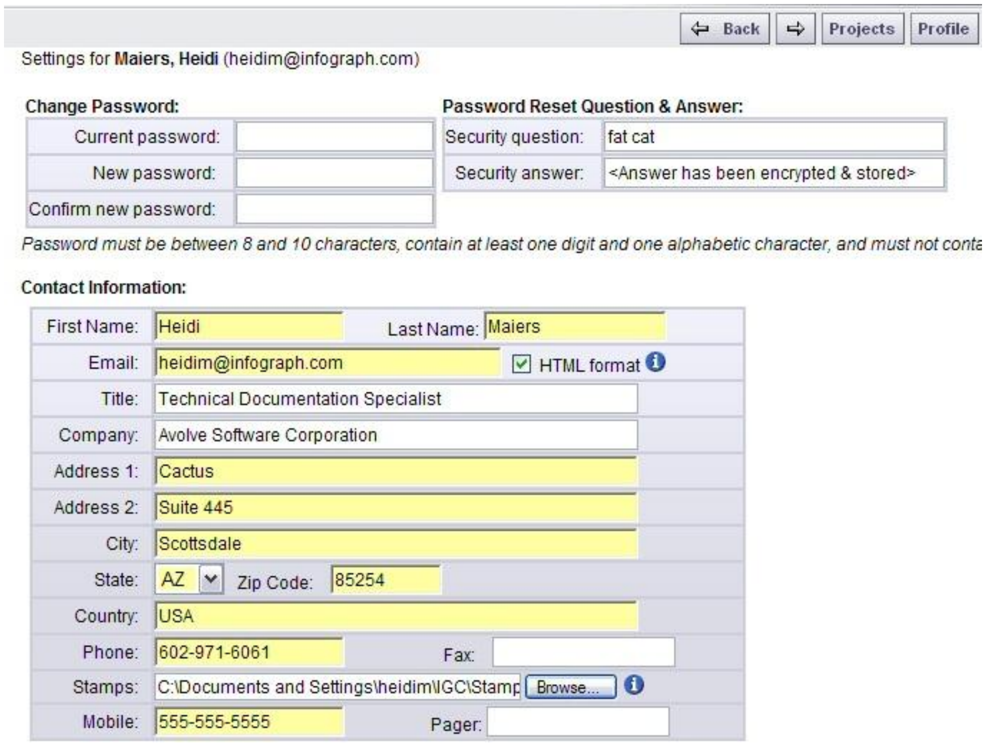
- Click the *Install ProjectDox Components* link in the bottom left corner of the ePlans login page. The components are required in order to use the software. If you do not have Administrator privileges on your PC, a network administrator can distribute the ActiveX components via any method already in place. The login page has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ActiveX controls.



Obtaining Access to Your Project for the First Time from the Login Screen

- Enter your email address
- Enter your temporary password
- If this is the first time you have accessed the ePlans site, the user Profile Screen shown below will be displayed. You can change your password and enter your user information (required fields display with colored highlight). Passwords are encrypted and you are prompted for a question and answer password hint. You can access this screen again at any time by clicking the *Profile* button in the main ePlans button bar. Click *Save* when you are finished.

Profile Screen



- If you have logged in at least once and forgot your password, it can be reset by clicking the *Forgot your password?* link. A new temporary password will be emailed after you answer the security question that you saved in your User Profile. You may contact our customer service team by email, if you have any questions or concerns about the use of the ePlans Plan Review Process at: ePlans@Montgomeryplanning.org

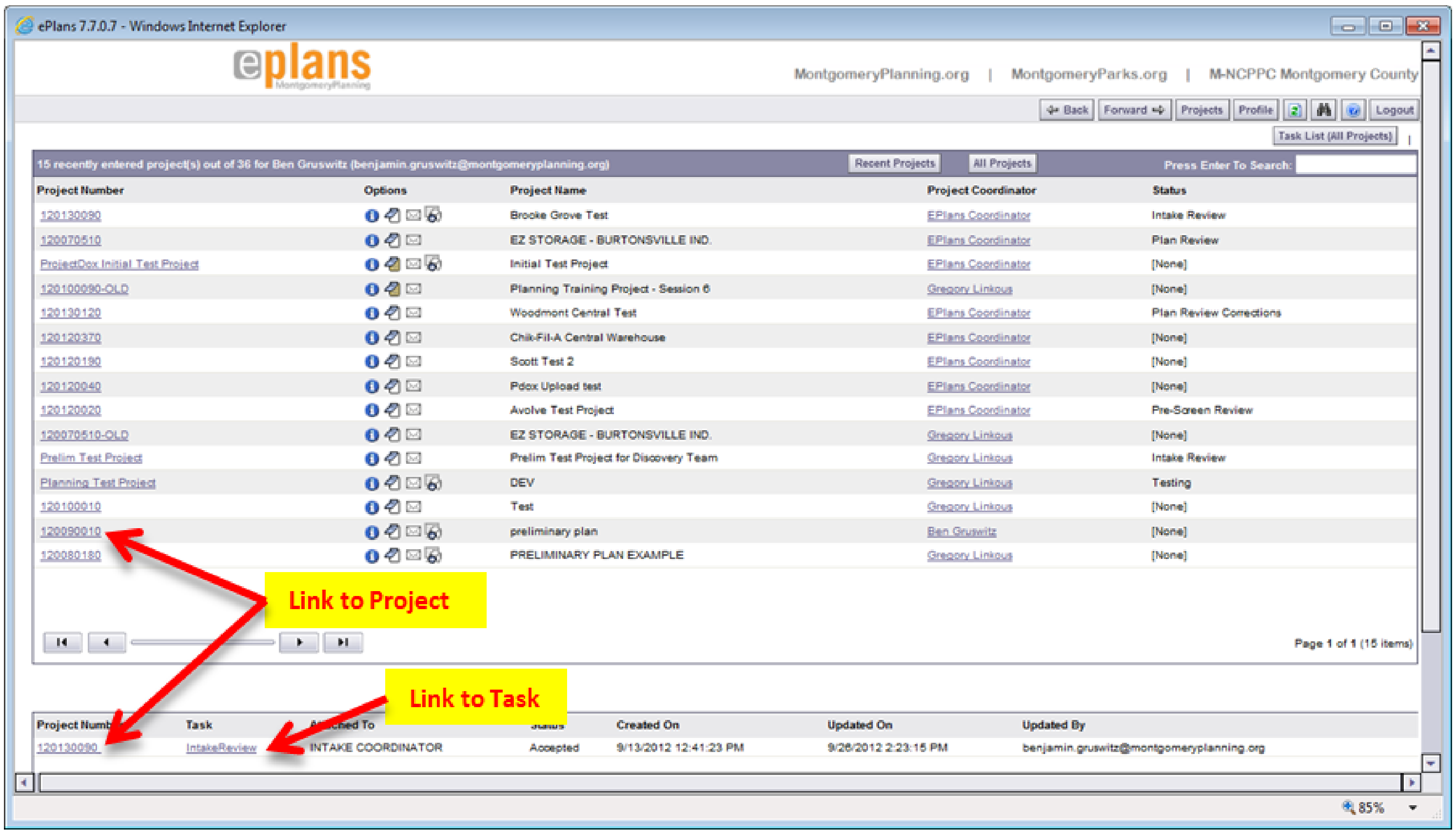
Uploading Drawings and Documents

When you have successfully logged into ePlans, you will be at either an overall **Projects Page**, or a specific **Project Information Screen**. If you log on from a desktop link to the ePlans site, you will reach the Projects Page where all of your currently active projects will be listed. If you log on from an email that you have received for a specific project, you will be taken to that project's Information Screen.

Project and Task Links on the Projects Page

- You can access any of your projects by clicking on the Project Number shown either at the top or bottom portion of the Projects page.
- You can bypass the link to a specific project and go directly to any active task assignment that you have received for a specific Project by clicking on the Task in the bottom portion of the page.

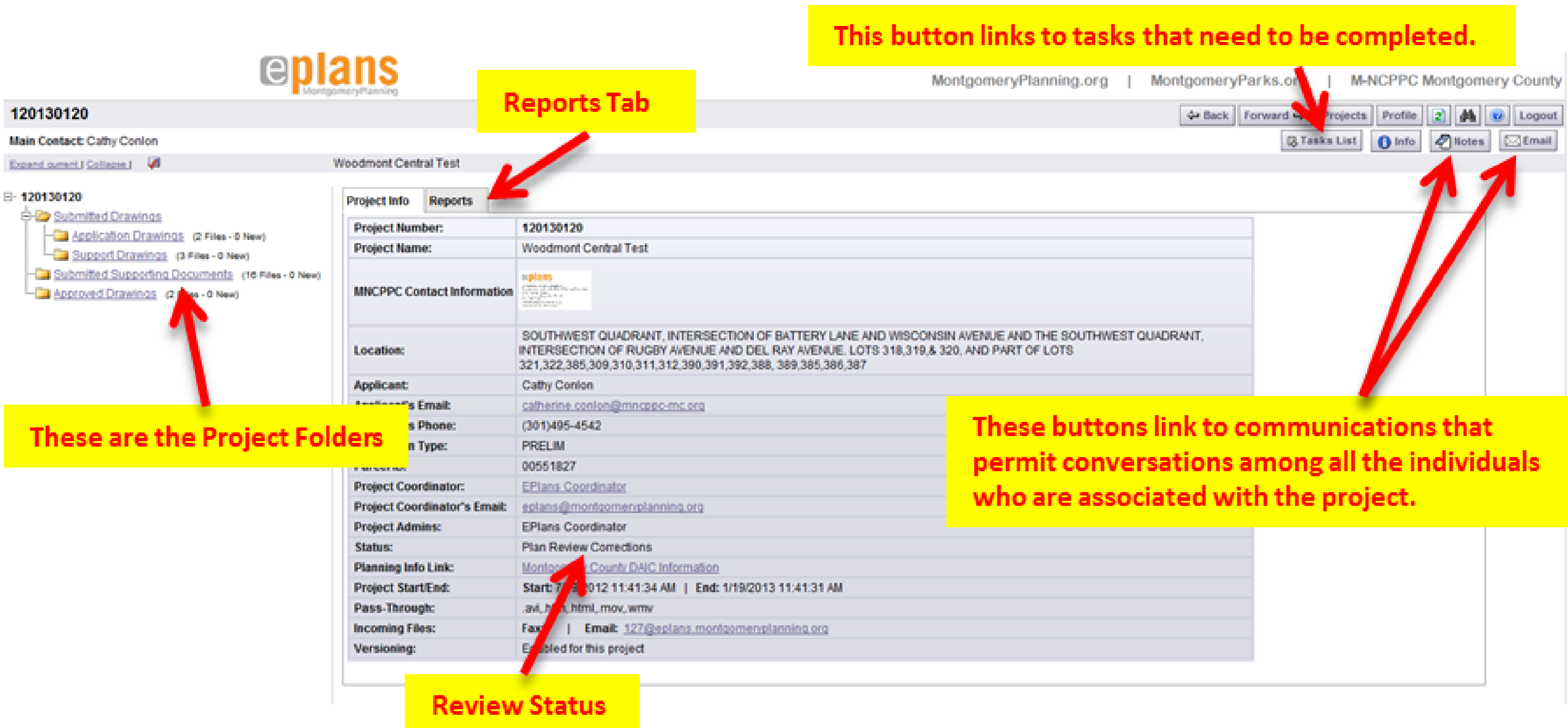
Projects Page



Project Information Screen

- The link to the Project provides access to its information screen. The Project Information Screen shows any folders you have access to, the overall project information, and the project status.
- You can open project folders and view the files within them and any markups that have been made to those files.
- You can access and complete active tasks that you have been assigned for a project by clicking on the *Tasks List* button.
- The *Notes* and *Email* buttons can be used to communicate with all of the individuals who are associated with a project. The *Notes* button permits creation of an ongoing conversation on a specific topic between specified individuals. The *Email* button can be used to send TeamMail to other members of the project.
- The *Reports* tab will take you to links to create summary reports of the review comments.

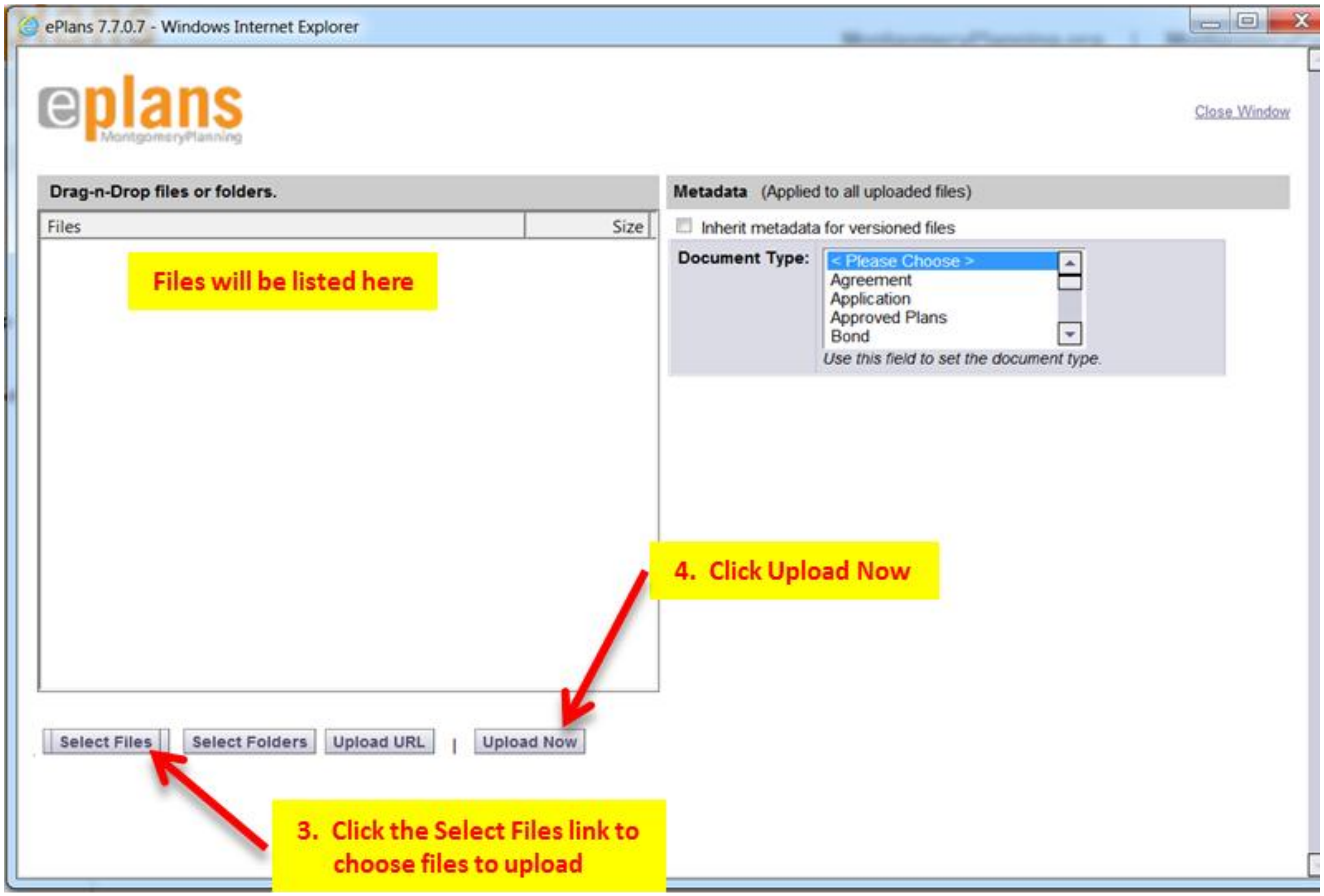
Project Information Screen



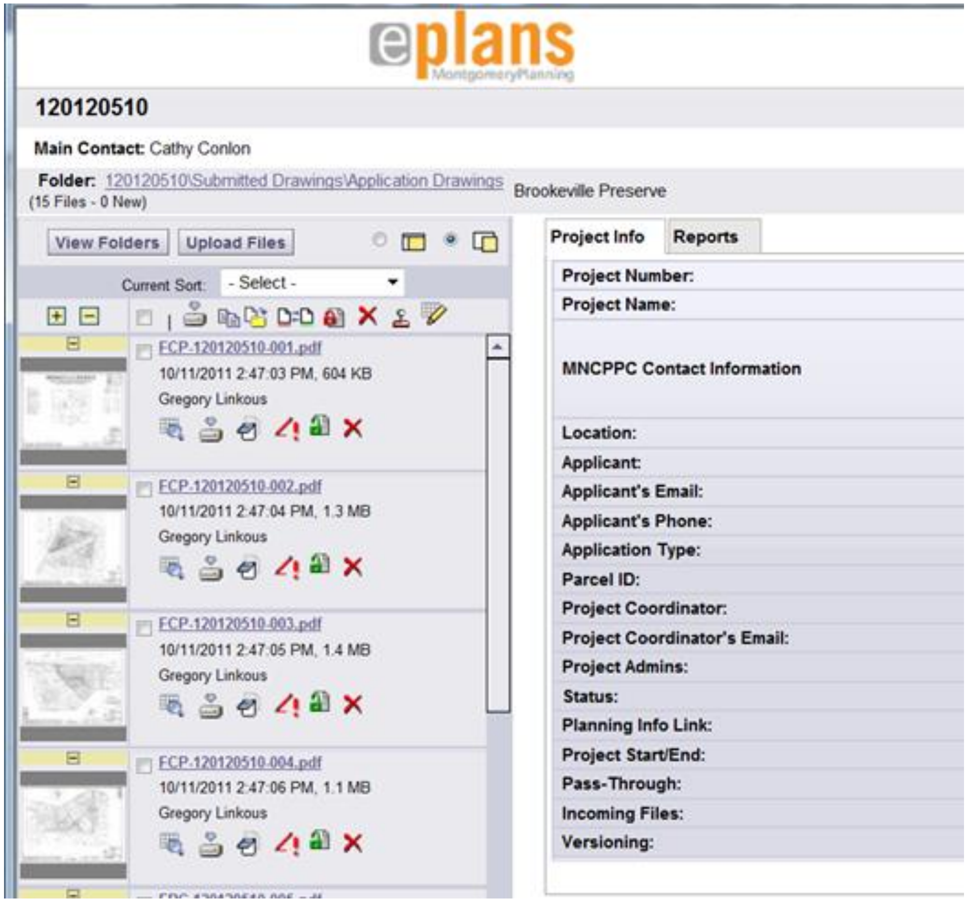
Uploading Files to a Project Folder

- On the Project Information Screen choose the file folder that you want to upload files into. If you are uploading to a new project or still in Pre-Screen Review, all files must be uploaded into the *Uploads* folder. As part of Intake Review, MNCPPC staff will then move the files to the appropriate *Submitted Drawings* or *Submitted Documents* folders and sub-folders. For later responses to review comments on the project files, you will be uploading to one of these folders.
- Click on the folder name to open it and upload files. If the folder is empty, you will automatically get the option to upload files if you have been granted the appropriate permissions.

- Clicking on the *Upload Files* button will take you to a screen that will allow you to either drag and drop files, or choose files to be uploaded from a browse list.
- To browse files on your computer, click the *Select Files* button. Select or highlight the files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the *Open* button and the files with be copied to the upload window.
- After you have accumulated the list of files you want to upload, clicking on the *Upload Now* button will transfer them into the designated project folder. There is no need to fill out Metadata or Document Types, as this will be completed by MNCPPC staff.



- It may take a few minutes for the files to process and become visible as thumbnails within the project folder. Under each thumbnail, the file name, author, date and any relevant file icons display.



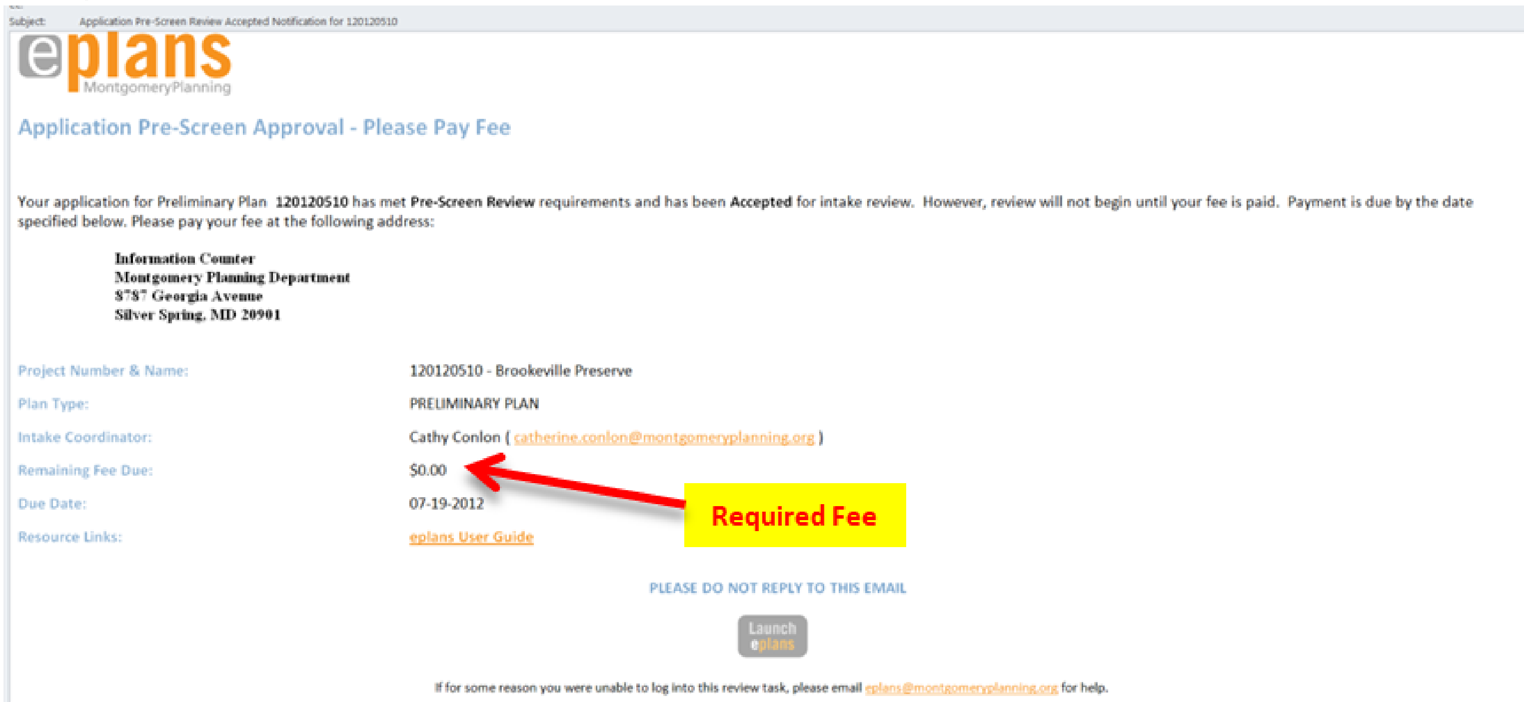
- After you have uploaded your files, you can log out of ePlans. A notification is automatically sent to the Intake Coordinator to start pre-screening to determine if you have submitted all required items.

Application Review

Review of applications in ePlans follows the process established in the adopted Manual of Development Review Procedures. It includes initial Intake review to determine if the application is complete and correct, followed by Department review. Department review of an application will not begin until it is accepted by Intake Review staff.

Pre-Screening

Allow at least 48-business hours after you have uploaded your drawings and documents for pre-screening by the MNCPPC Intake staff. If there are questions or missing items from your submittal, you will receive a "Pre-Screen Rejected" email and associated correction task. If you have met all submittal requirements, you will receive a "Pre-Screen Accepted" email with the calculated application fees and instructions for making payment. **Intake Review of the submitted application will not begin until the applications fees have been paid and proof of certification by all participating professionals has been provided at the MNCPPC Information Counter.**



Subject: Application Pre-Screen Review Accepted Notification for 120120510

eplans MontgomeryPlanning

Application Pre-Screen Approval - Please Pay Fee

Your application for Preliminary Plan **120120510** has met **Pre-Screen Review** requirements and has been **Accepted** for intake review. However, review will not begin until your fee is paid. Payment is due by the date specified below. Please pay your fee at the following address:

Information Counter
Montgomery Planning Department
8787 Georgia Avenue
Silver Spring, MD 20901

Project Number & Name:	120120510 - Brookeville Preserve
Plan Type:	PRELIMINARY PLAN
Intake Coordinator:	Cathy Conlon (catherine.conlon@montgomeryplanning.org)
Remaining Fee Due:	$0.00
Due Date:	07-19-2012
Resource Links:	eplans User Guide

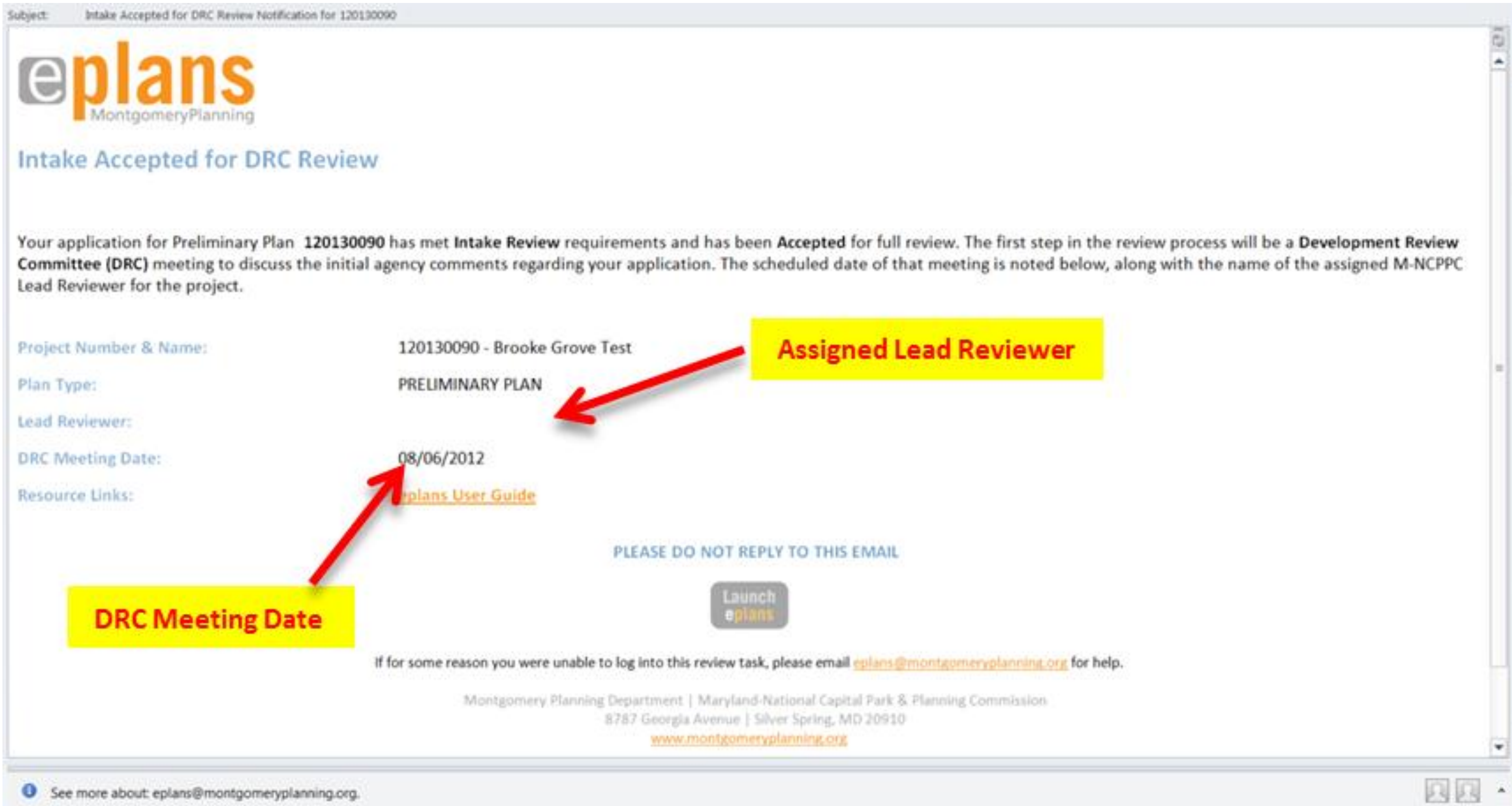
PLEASE DO NOT REPLY TO THIS EMAIL

Launch eplans

If for some reason you were unable to log into this review task, please email eplans@montgomeryplanning.org for help.

Intake Review

Intake Review will begin within one-business day of the fees being paid. Allow at least 10-business days for completion of Intake Review. If there are corrections that need to be made to the submitted application, you will receive an "Intake Review Rejected" email and associated correction task. When you have responded to all issues a request for upload of verification of sign posting (see appropriate application upload checklist and submission requirements) will be sent, if a sign posting is required. Once the sign posting has been verified the application will be accepted. You will receive an "Intake Review Accepted" email that will include the assigned Lead Reviewer and the scheduled Development Review Committee (DRC) meeting date, if applicable.

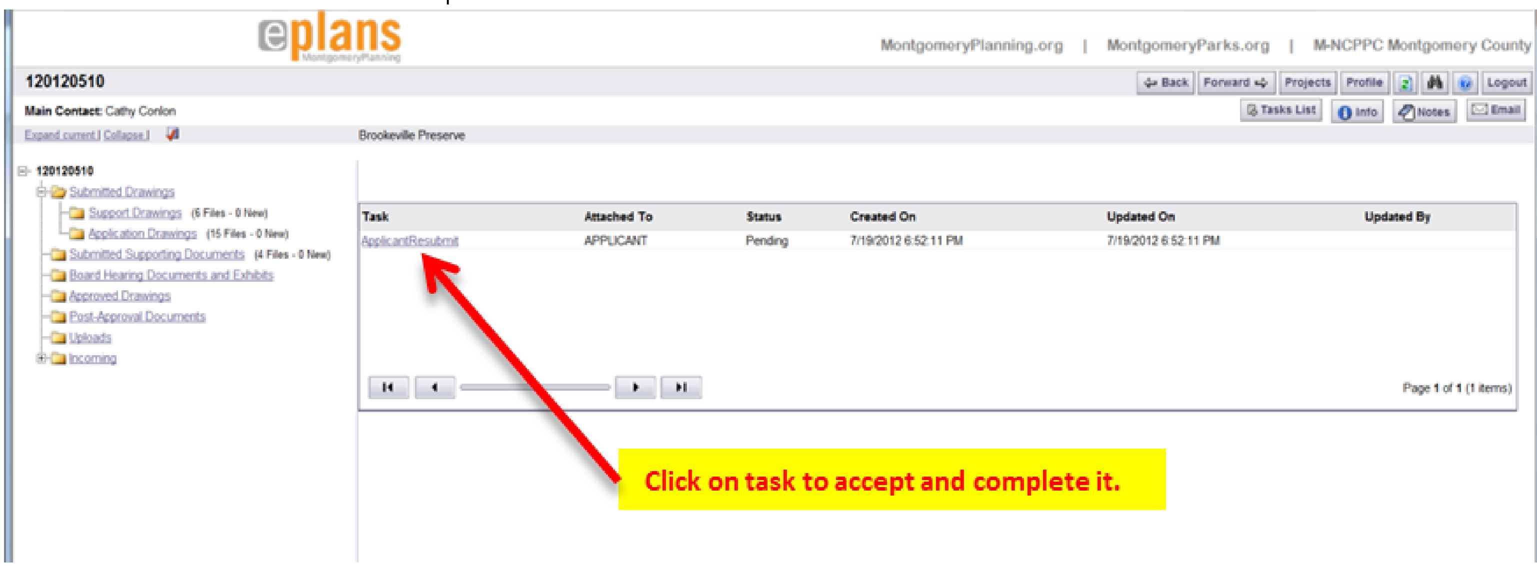


Department Review

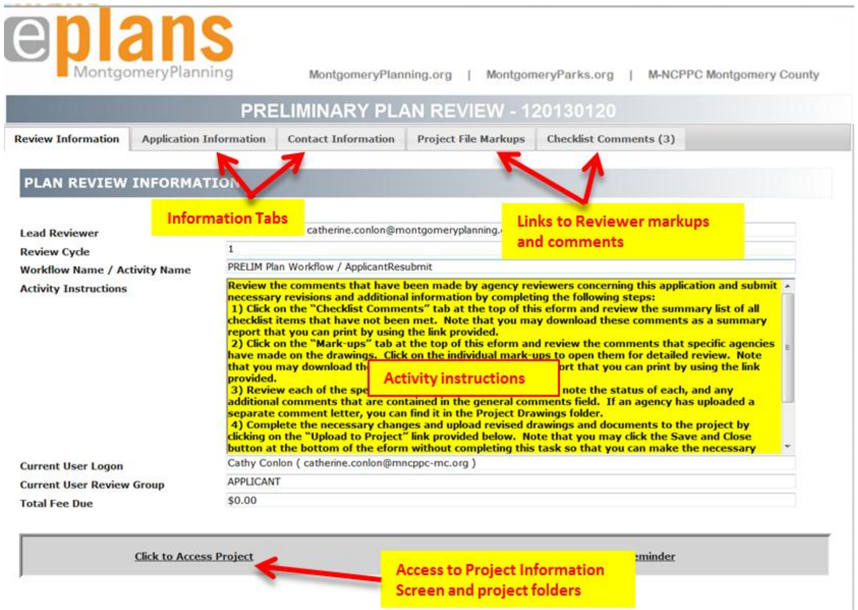
After intake review is complete and an application has been accepted, the Department Review will begin. Participants will review the submitted documents and drawings and provide responses that will be compiled by the MNCPPC Lead Reviewer and then transmitted to the applicant. When reviewer revisions are requested, you will receive a "Resubmit Requested" email and associated correction task. The Department Review may continue for several cycles until each of the reviewers are satisfied with the application and provide the Lead Reviewer with a recommendation for approval. At that point, you will receive a "Review Complete" email that will include the scheduled tentative Planning Board hearing date, if applicable.

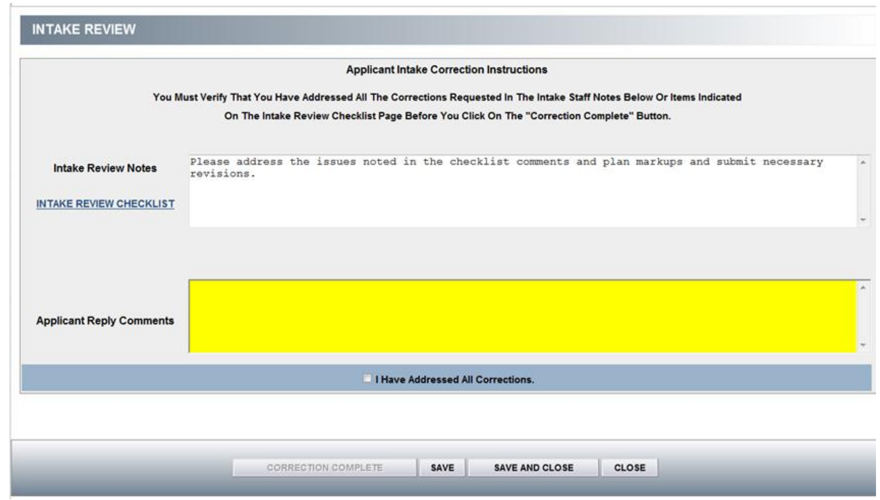
Accessing Review Comments and Resubmitting Plans

If your application needs revisions during any stage of review, you will receive an email notification that you have been assigned a correction task. Click the link in the email to access the ePlans site and login. Access the assigned task from either the Projects Page, or the Project Information Screen. Click on the task and an eForm will open.



The eForm contains Review Information that is split into two sections. The top section contains the name and contact information for the assigned MNCPPC Reviewer, the stage of the review, and the instructions for steps that need to be followed to complete the assigned task. Also at the top of the eForm are tabs that may be clicked to access general application information and summaries of any checklist comments and markups. The bottom of the eForm contains review information.

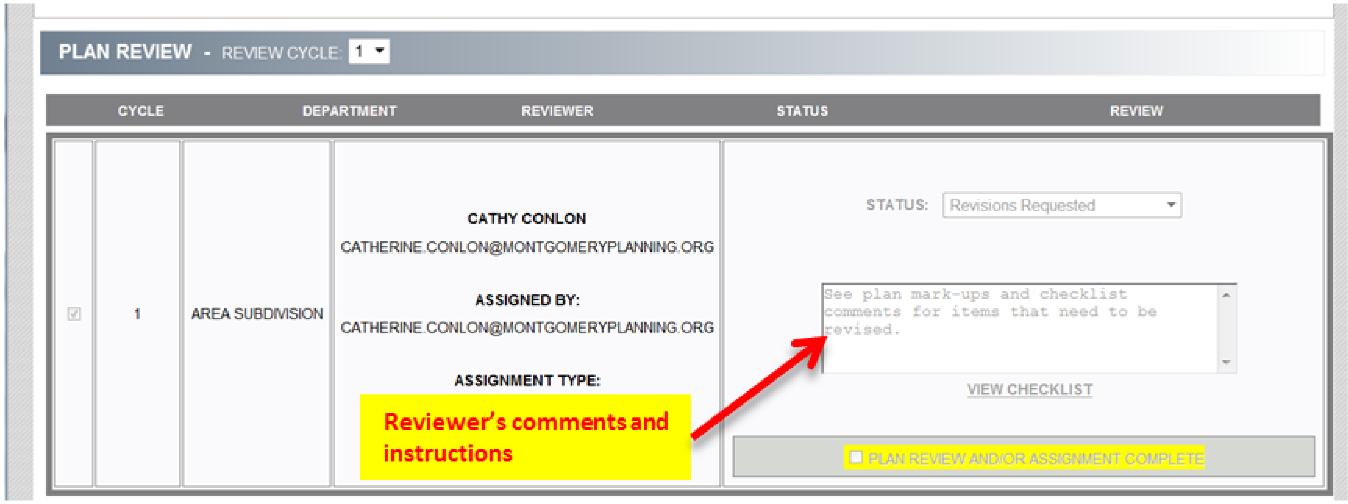




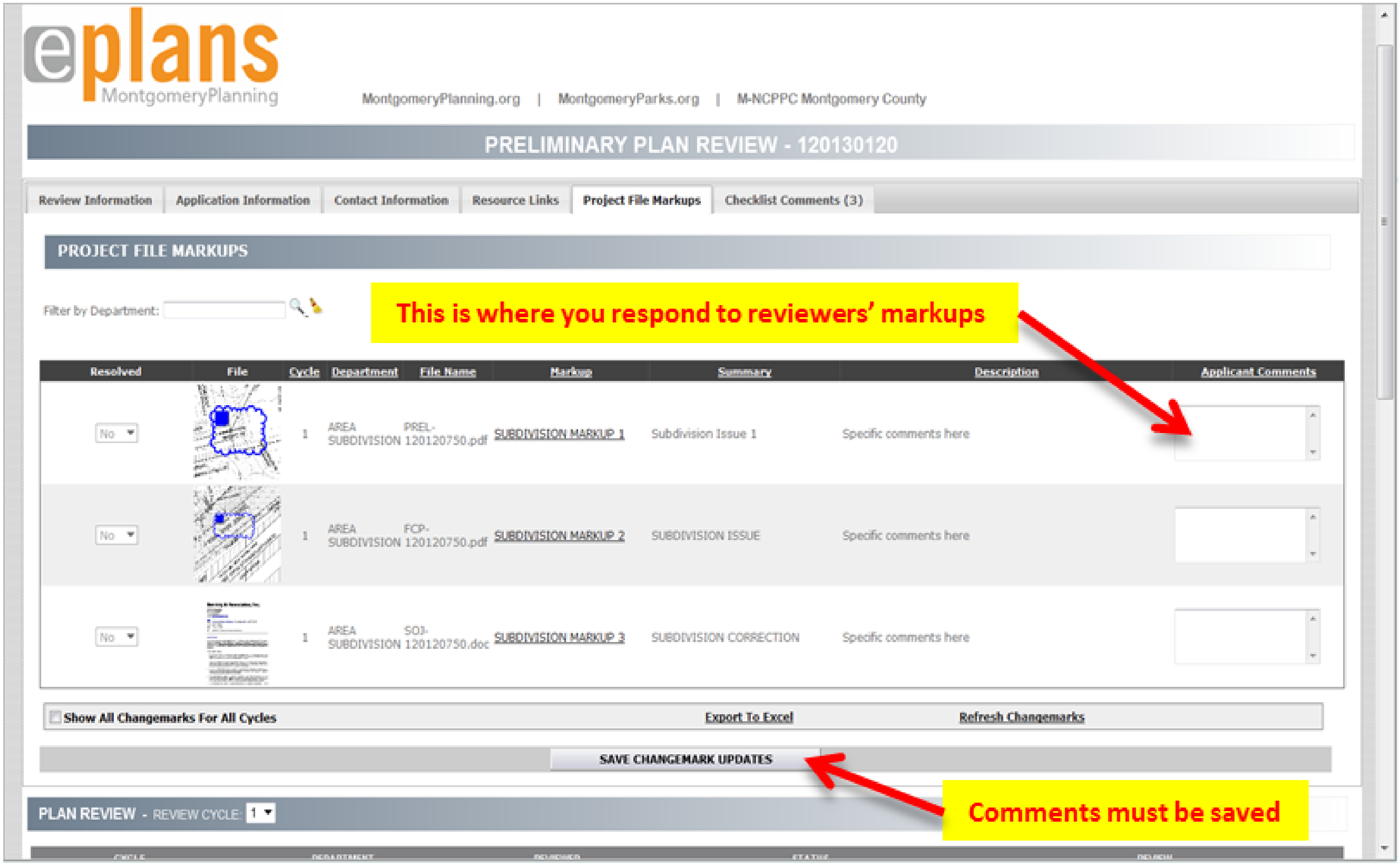
Completing the Applicant Resubmit Tasks

To review the issues that have been raised by reviewers and submit your revisions, follow the steps below:

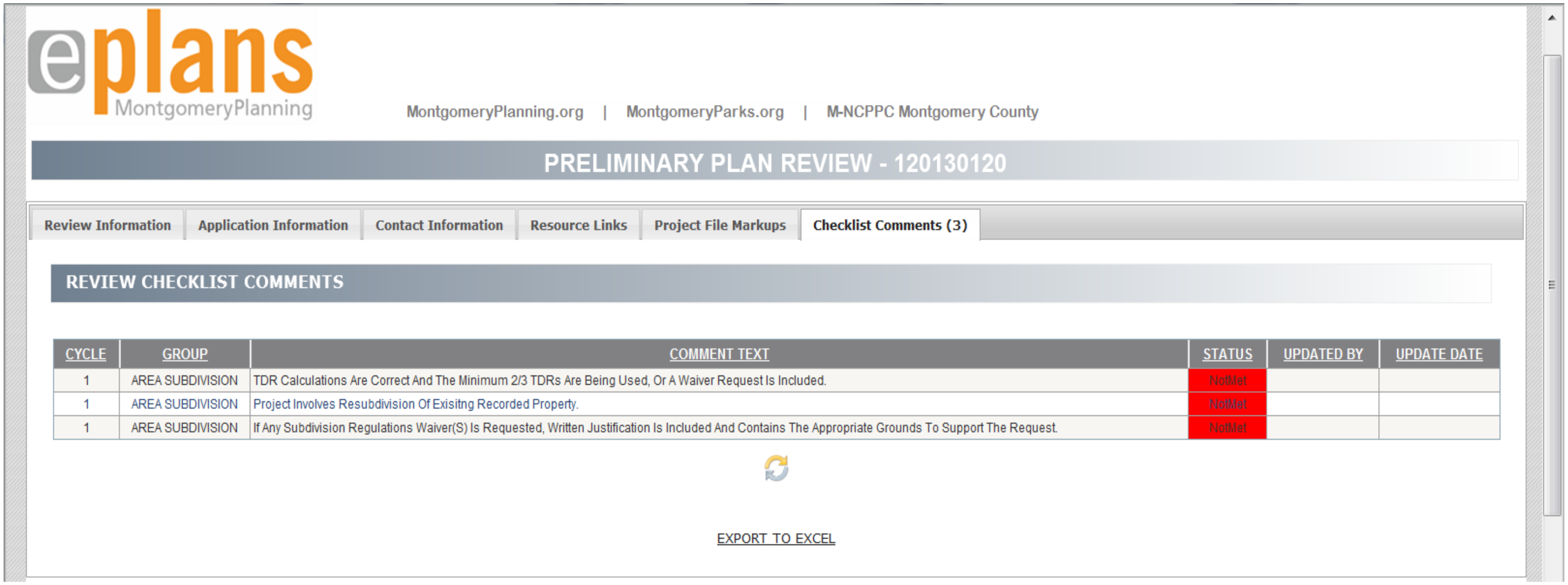
1) Review general comments and instructions from the reviewer in the comment field on the lower half of the eForm. Note that each reviewer will submit separate comments as part of the Department Review.



2) Click on the *Project File Markups* tab at the top of the eForm. This tab summarizes the markups that have been made to drawings by all reviewers. A filter is available to narrow selection to specific reviewers' markups. The links in the Markup column open the markup in the Brava Viewer where there is an option to print it. Markups will be color-coded according to the reviewer. See [Markup Colors and Naming Standards](). To provide a response to markups, use the *Applicant Comments* field. These comments must be saved by clicking on the *Save Markup Updates* button.

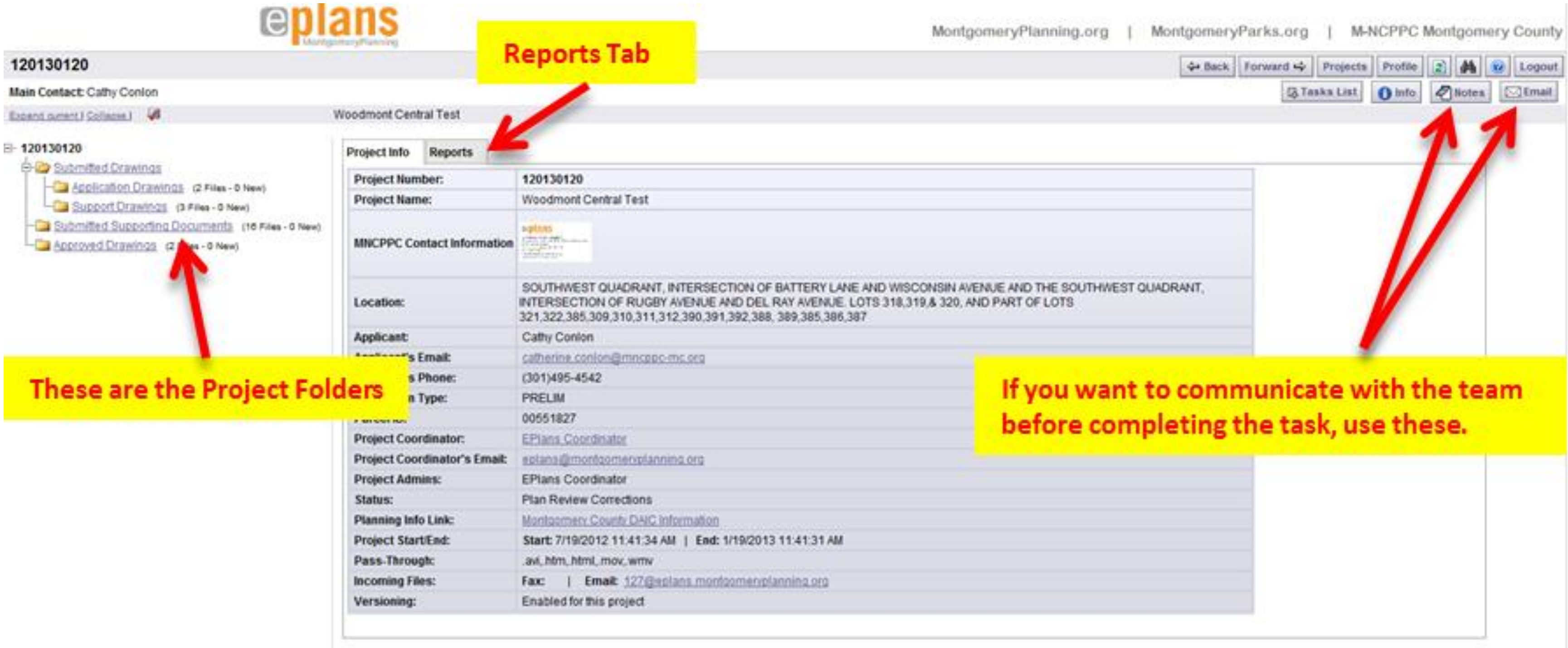


3) The *Checklist Comments* tab lists reviewers' comments. Click column headings to sort. As issues are addressed the Status will be changed by the reviewer.



4) The information on the markups and checklist tabs can be downloaded as excel spreadsheets using the link at the bottom of the tab, or you can generate a report containing the information from the *Reports* tab on the Project Information Screen by clicking on the *Access Project* link.

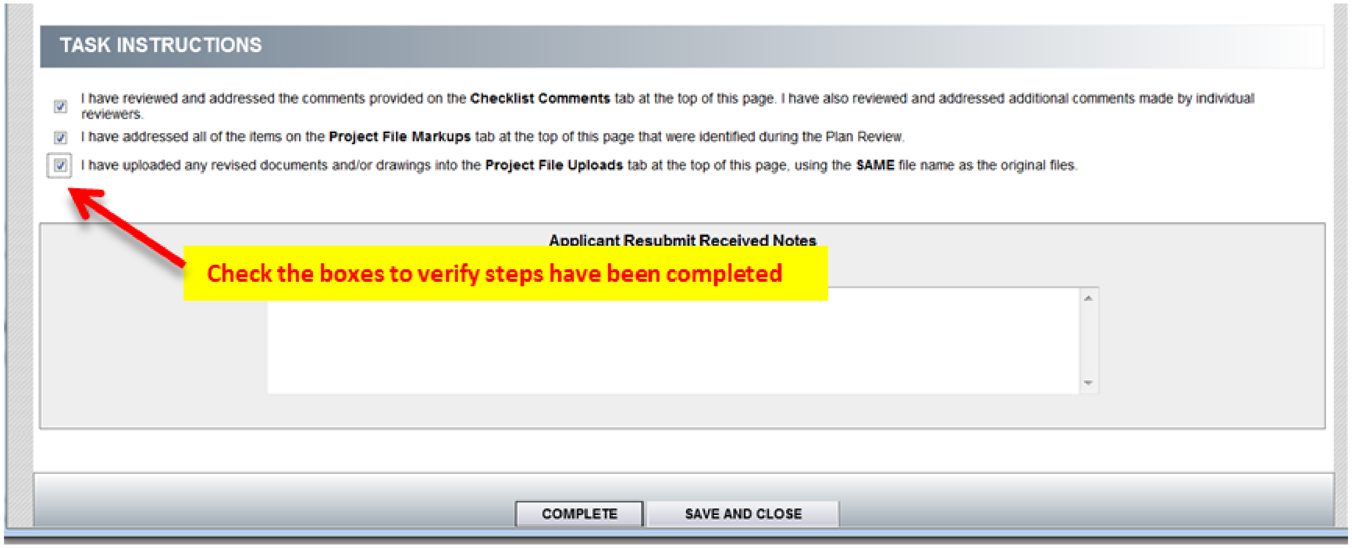
5) When you are ready to complete the correction task, return to the Project Information Screen. Upload new or corrected documents and drawings in response to the reviewer's comments into the *Application Drawings*, *Support Drawings* or *Submitted Supporting Documents* folders, as applicable. These must include a document containing a written summary of your responses to each of the review comments.



6) **Revised drawings and documents must be uploaded with the same name as the original file.** The newest version of the file will always appear first, but the previous versions are retained and can be accessed for comparison by the reviewers.
Note that you may click on the *Save and Close* button at the bottom of the eForm to exit the form and work on the revisions outside of ePlans. When you log back into ePlans, you will be able to reopen the task.

7) Enter any general comments you'd like to send to the reviewer in the highlighted comments field (*Applicant Reply Comments*) at the bottom of the eForm.

8) Check the boxes at the bottom of the eForm to indicate that you have completed the necessary steps.



9) Click on the *Complete* button at the bottom of the form to finish the task and resubmit your changes.

Approval of Certified Plans

Certified Plans

After your application has been approved and the Planning Board resolutions are adopted, if applicable, you will receive an email requesting that you submit copies of the approved plans for certification. Follow the steps above and upload the drawings into the *Approved Drawings* folder.

eplans MontgomeryPlanning

Download Certified Plans

The certified plans for Preliminary Plan **120120510** have been approved and uploaded to the **"Approved Drawings"** folder in the project. To retreive a copy of the certified plans, click on the **"Launch eplans"** image below and enter your user name and password. Select the Download Certified Plans task from your task list. Once you are logged into the Project you may download a copy of the approved plans.

Project Number & Name:	120120510 - Brookeville Preserve
Plan Type:	PRELIMINARY PLAN
Project Status:	Approved
Lead Reviewer:	[DefaultEform.ReviewCoordinator]
Resource Links:	eplans User Guide
Instructions:	1) Click the **"Launch eplans"** button to access the site. 2) Enter your User Login and Password. 3) Click on the Project link on the **"My Projects"** page. 4) Click the **"Approved Drawings"** folder link. 5) Click the **"Toggle All Checkboxes On or Off"** checkbox to select all files for download, or select individual files by checking the checkbox next to the file. 6) Click the **"Download Checked Files"** button and follow the instructions to download the file or files. If more than one file is selected the files will be automatically zipped as a single file for you to save time in downloading. 7) Extract the zip file to your local computer to access and view the downloaded approved files.

PLEASE DO NOT REPLY TO THIS EMAIL

When the plan drawings have been certified and stamped, you will receive a final email containing the instructions for downloading copies. One set of plans will need to be printed with wet-stamps and ink signatures and submitted for Planning Department records.