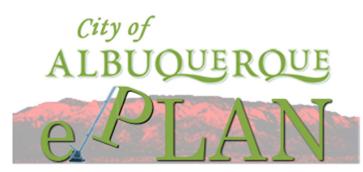


# About DRB ePlan



Save time and money by submitting your application and paperwork through the electronic plan review system, called ePlan. It's fast, easy and available to you at no additional charge.

Development Review Board (DRB) ePlan is available to developers, contractors, architects, homeowners, and anyone else planning to submit plans to the DRB. ePlan

is a web-based electronic review solution that allows pending development and building applications to be submitted electronically to improve efficiency of the plan review cycle.

# Using DRB ePlan



DRB ePlan is web-based and easy to use with the click of a mouse. However, there are certain steps that need to be followed to ensure accuracy and efficient information delivery.

To assist you in completing those steps, the *DRB ePlan Applicant Manual* has been created. On the following pages you'll find all the steps, diagrams and information to assist you in utilizing the ePlan system for your DRB application and submittal process.

# Questions?

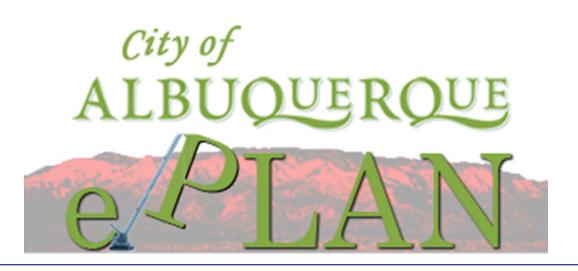


If you still have questions after reading through the DRB ePlan Applicant Manual, feel free to contact us.

Our staff is available to assist you as you

learn more about utilizing the ePlan system.

Planning Department staff may be reached M-F from 8 a.m. to 5 p.m. in person at the One Stop Shop located on the ground floor of 600 2nd St NW in Downtown Albuquerque or via telephone at (505) 924-3946.



# DRB ePlan Applicant Manual

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# 1) Electronic Plan Submission

Note: Use of the Internet Explorer browser is highly recommended when interacting with the City's ePlan system.

Submit your application to the City's *One Stop Shop* located on the ground level of the Plaza Del Sol building, 600 2nd St NW, where you will be given an application number and may pay your fees. As we further develop the electronic plan review solution for the Development Review Board (DRB) and other Planning Department boards and commissions, we will eventually provide an online credit card payment option. For the time being, payment must be made at our offices.

Please review the submission standards below for naming and other conventions for uploading documents and drawings.

## A) Standards

We ask that the applicant adhere to our naming and file submissions standards which are designed to allow for easy identification of your drawings and documents. The more succinct the name of the file submitted, the easier it is for the plan reviewer to ascertain the content, thus eliminating the need to review documents that are not relevant to their area of expertise. Your submission of vector file types (active content PDF or other vector based files) also facilitates the most efficient review by the City and other reviewing agencies.

# i) Required Files

- ► Electronic copy of the Development Review Board ePlan application
- ► Electronic copy of the Development Review Board checklist
- ► Electronic copies of drawings for review (one sheet per drawing)
- ► Any supporting documentation necessary to assist or clarify your application
- ► Copies of easements, the letter of application to the DRB chair and other miscellaneous documents to be considered with the application

### ii) File Naming Standards

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

- ► **Drawing Type/Discipline** First characters represent the type of submittal/plan; example, "SPBP" is for "Site Plan for Building Permit." Ensure that all plans, including the associated details, are submitted under the correct drawing type. This facilitates rapid identification and review of your plans.
- ➤ **Sheet Number** Each sheet must have a three digit number with leading zeros. Note: if your numbering system includes the use of decimals you may utilize decimal(s) after the third digit, ex. P001.99.

Drawing Type/Disciplin	e	File Names	Example File Names AND Sheet Number
SITE PLAN FOR SUBDIVI	SION	SPSB	SPSB_001
SITE PLAN FOR BUILDIN	G PERMIT	SPBP	SPBP_002
ELEVATION PLANS		ELEV	ELEV_003
LANDSCAPING PLAN		LAND	LAND_004
GRADING AND DRAINGE	PLAN	GD	GD_005
PLAT		PLT	PLT_006
PRELIMINARY PLAT		PRLM_PLT	PLRM_PLT_007
SKETCH PLAT		SK_PLT	SK_PLT_008
UTILITY PLAN		UTL	UTL_009
FIRE MARSHALL APPRO	VED SITE PLAN	FMSP	FMSP_010
ALTERNATE METHOD		ALTMET	ALTMET_011
ALTA SURVEY		ALT_SURV	ALT_SURV_012
SITE PLAN		SP	SP_013

# iii) Border Standards

#### 1. Cover Sheet Files

All submitted plans must follow the City standards set for each type of application. Please refer to the City's website at www.cabq.gov/planning for more details or contact the One Stop Shop for more information.

# 2. All Drawing Files

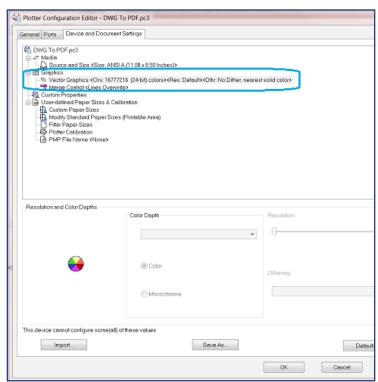
The top right corner of all drawings must be reserved for the City of Albuquerque electronic stamp. Please leave the top right corner completely blank on all drawings (with the exception of the border). The area left blank should have dimensions of 1" width x 1" height.

# iv) File Type Standards

Supporting files may be in the following formats: Microsoft Word, Excel, Powerpoint or PDF.

Please submit searchable (vectored or active content) PDF files for calculations, reports and other supporting documentation (i.e. non-drawing files).

Only vector PDF 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 vectored PDF by using the Autodesk Vector Graphic Converter "DWG to PDF.pc3 plotter driver."



## v) Folder Structure

- ► All documentation should be uploaded into the *Documents* folder for each project
- ► All drawings should be uploaded to the *Drawings* folder for each project

### vi) 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
City Engineer	Dark Orange
Hydrology	Light Blue
Parks & Recreation	Dark Green
Planning	Magenta
Transportation Development	Light Green
ABCWUA (Water Authority)	Dark Blue
City Surveyor	Cyan
Solid Waste	Yellow
Fire Department	Red
Zoning	Purple
DRC	Light Purple

# B) Login to ePlan (ProjectDox)

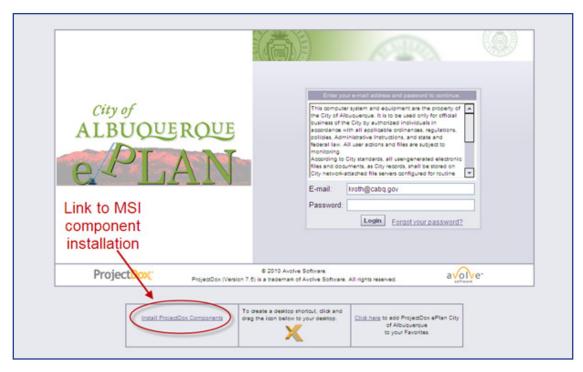
#### i) ePlan Review Invitation

When your application is processed at the counter and input into the City's permitting system, an ePlan review invitation will be sent to your email address. The email will contain your login information and information about your project, including a link to the project. It's essential that you provide the correct email address for the individual in your organization who will be managing the ePlan process.

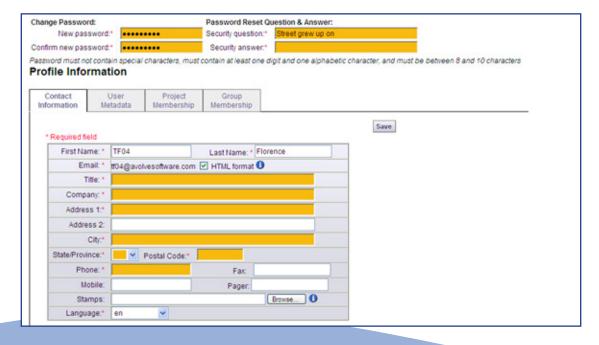
## ii) New Users

- 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 ePlan (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 website 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 ePlan (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 email address and temporary password and click the *Login* button, as shown below:



- 3. Enter your new password and reconfirm the new password, then enter your personal account information.
- 4. Yellow highlighted fields are required but a full profile record is ideal. Once complete, click the Save button.



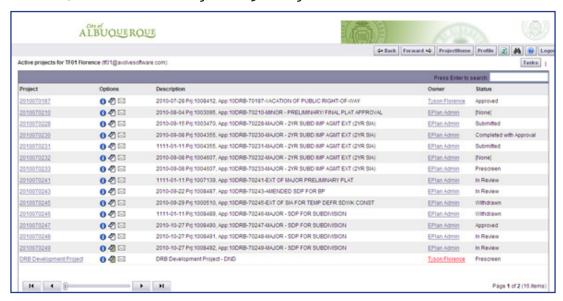
# iii) Existing Users

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

## C) Uploading Files

Follow these steps to upload files to the ePlan system.

1. When you have successfully logged into the ePlan system, the projects screen will appear. 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.



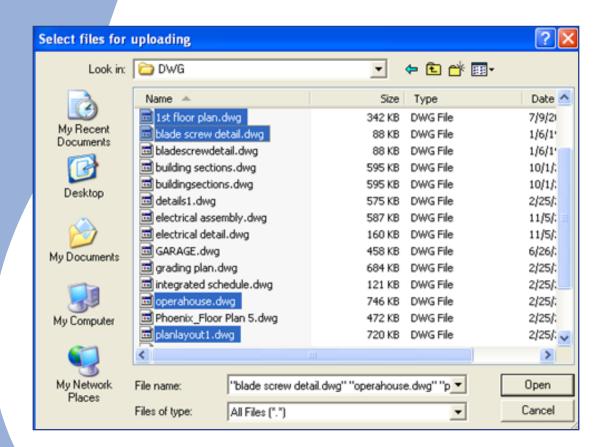
2. Click the *Drawings* folder to upload your plan drawings or *Documents* folder to upload supporting project documents.



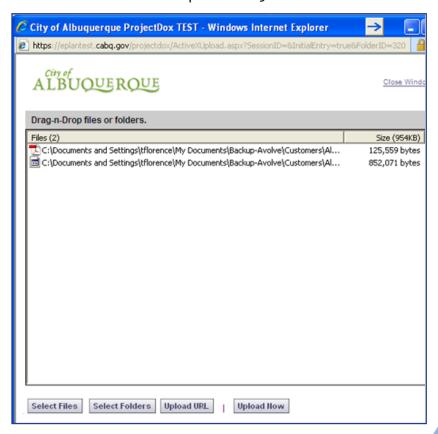
3. Upon entering either folder, you will be presented with two buttons, *View Folders* and *Upload Files*.



4. Click the *Upload Files* button. A box titled *Select Files for Uploading* will automatically display. 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. Click the *Upload Now* button and the files will be copied to the upload window. Click the *Close* button to close out of the file upload 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 you'll find 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 will be sent to the Permit Specialist at the Planning Department to start the prescreening process to determine if the submittal requirements have been met.

# i) Security Timeout

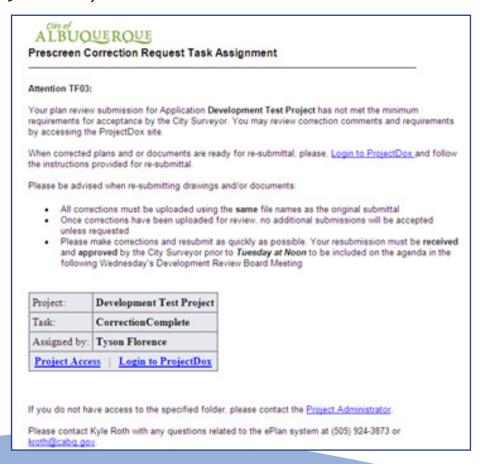
Due to security and resource concerns, the system will automatically sign you out after 30 minutes of inactivity. When you are ready to resume working with the system, click any button on the screen. The system automatically loads the login page for you. You can also close the web browser window and reload the login page manually in a new browser window.

# 2) Prescreening

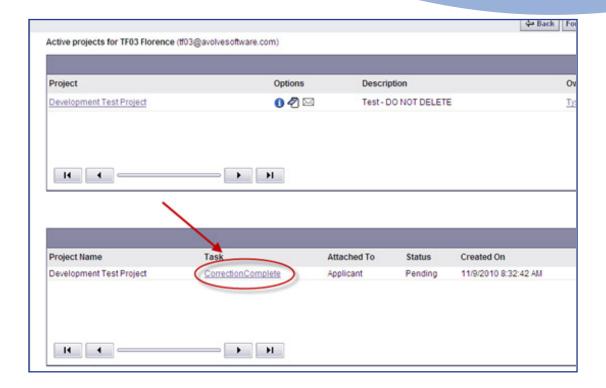
Prescreening is a cursory review of your uploaded documents in preparation for formal review. This may be performed by the City Surveyor for certain types of applications. Allow a minimum of 48 business hours after you have uploaded your documents for the prescreening process to take place. If there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

## A) Rejected

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



1. If you receive a rejection email, click the link in the email 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 *Correction Complete* 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.



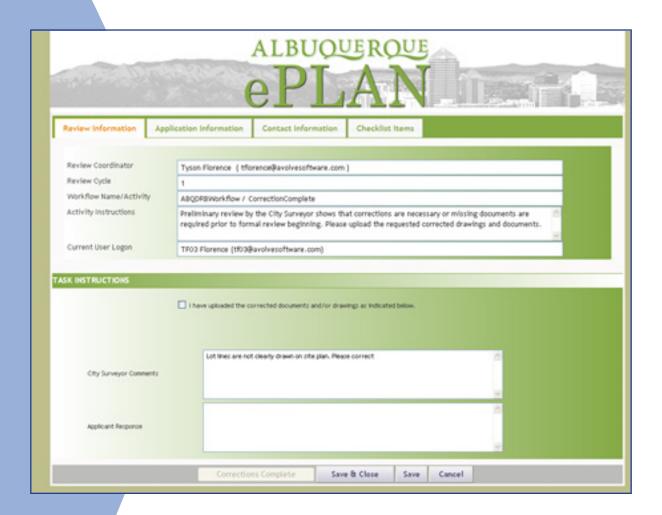
- 2. Review the City Surveyor comments to identify which requirements were noted as missing.
- 3. Open the *Drawings and Documents* folders and view any markups on the drawings by clicking on the markup icon next to the drawing.

This is the markup icon:

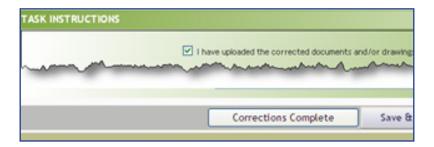


- 4. After you have identified the missing or corrected drawings and/or documents to upload, login to ePlan (ProjectDox) if you have not already logged in, and enter the project.
- 5. Upload the missing and/or corrected drawings and documents (see the "Uploading Your Files" section for instructions).

6. Click back to the eForm with your task assignment as shown below.



7. When the eForm opens, place a check mark 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.



# B) Approved

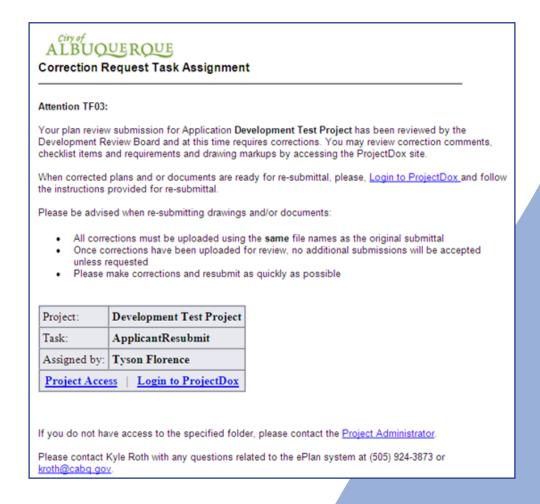
If your submittal is approved, it will immediately move into the formal review process.

# 3) Change Notification & Plan Resubmit

# A) Review Requested Corrections

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

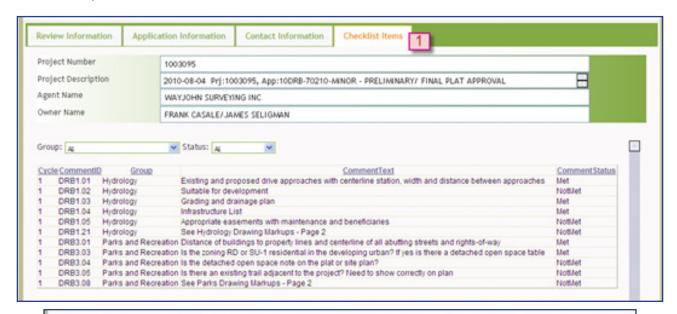
1. You will receive an email notification from the Application Coordinator requesting revised documents.

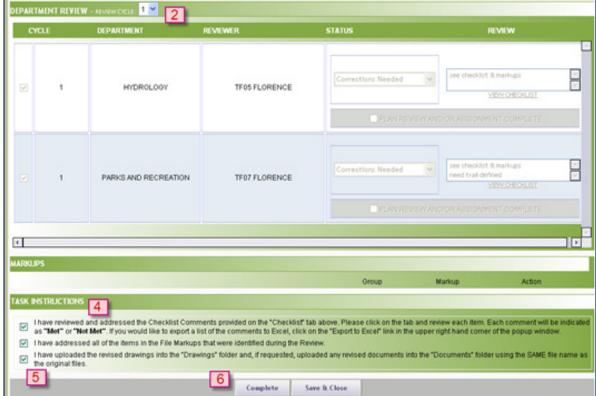


- Click the link in the email to access the corrections requested.
- 3. Login to ePlan (ProjectDox). The Plan Resubmit task will display at the bottom of the main page with your plan review number in the name (ie. 2010070233).



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



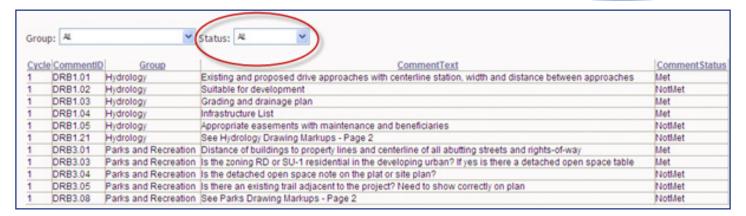


# Image Key:

- 1) Consolidated department checklist
- 2) Review cycle & department review information
- 3) Review Markups (Drawings & Documents Folders from Project screen)
- 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) Resubmission complete button

# i) Consolidated Department Checklist

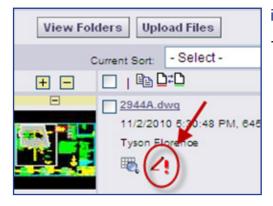
One or more departments may use the checklist feature in the eForm. A consolidated list of all feedback not related to a red line is available for the applicant's review. You can filter to just the not met items by changing the status box. All checklist items will be reviewed again in the subsequent cycle(s).



# ii) Review Cycle

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

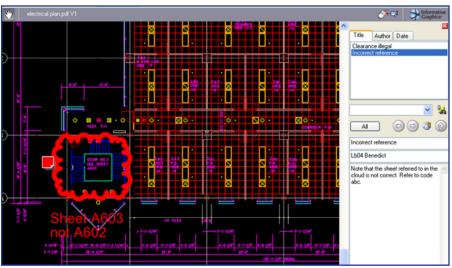




All change marks will display in the right hand pane and as you review, click on each change mark and you will zoom directly into the red line from the reviewer.

# iii) Review Markups (click icon to access markups)

To view a plan markup, click on the icon next to the drawing as shown here



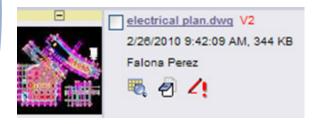
#### iv) Checkbox 1& Checkbox 2

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.

# 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.

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



# vi) Resubmit Complete

When you are ready to complete the task and exit the form, click the Complete button.

# B) Approval

Plans are approved at the DRB hearing. The electronically approved plans, which will include the City Electronic Stamp, will be available after the hearing. If the plans are approved with conditions and delegated to one or two DRB members, then the plans may have to be uploaded to the ePlan system (assuming that additional corrections are required) prior to receiving the City Electronic Stamp.

# C) Print Approved Plans

The plans can be printed after obtaining the City Electronic Stamp. You will receive an email indicating that your plans are ready and instructions on how to download and print your files. If the plan is a Plat then it must be printed and then recorded with the Bernalillo County Clerk. A hard copy and PDF copy of the recorded plan must be submitted to the DRB.