



Polk County Board of County Commissioners Building Customer Eplan User Guide

ePlan

The screenshot shows the ePlan login interface. At the top right, there is a header for "Polk County BoCC E-Plan" with a small logo. The main content area contains a login box with the following elements:

- A header: "Enter your e-mail address and password to continue."
- A text area: "Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use, which together with our privacy policy govern..."
- An "E-mail:" label followed by a text input field.
- A "Password:" label followed by a text input field.
- A "Login" button.
- A link: "Forgot your password?"

ProjectDox

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software

[Install ProjectDox Components](#)

To create a desktop shortcut, click and drag the icon below to your desktop.



[Click here](#) to add ProjectDox to your Favorites.



Welcome to Electronic Plan Review (ePlan)

Polk County utilizes **ProjectDox** software to achieve ePlan

On the following pages you will find:

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FAQ

What is ProjectDox?

ProjectDox is a web-based electronic plan and document workflow solution (ePlan) that lets citizens and government personnel initiate and complete the plan submission, review, and approval process online, rather than using a manual, paper-based process.

How does it work?

ProjectDox works in tandem with permitting software to help automate the plan review process. When a citizen (architect, engineer, contractor, owner) submits an application for a construction requiring drawing plans and other documents, ProjectDox uses the permit application email information to invite the applicant to a “project”, where the applicant can upload electronic plan files. Review department personnel then have access to the plans in ProjectDox, and use ProjectDox workflow, collaboration and view/markup tools to complete the initial review. Required changes are noted and then communicated to the applicant, who makes the noted revisions to the original files and then resubmits revised files back into ProjectDox. The review cycle continues until all the regulatory requirements are satisfied and the jurisdiction grants approval for the plans and the permit.

Is ProjectDox a secure web application?

ProjectDox uses the same browser security deployed by online banking sites. When combined with network and application security best practices deployed by your jurisdiction, ProjectDox ePlan technology will provide a secure collaboration environment for the citizen and government project stakeholders.

Electronic Plan Review (ePlan) Workflow Overview

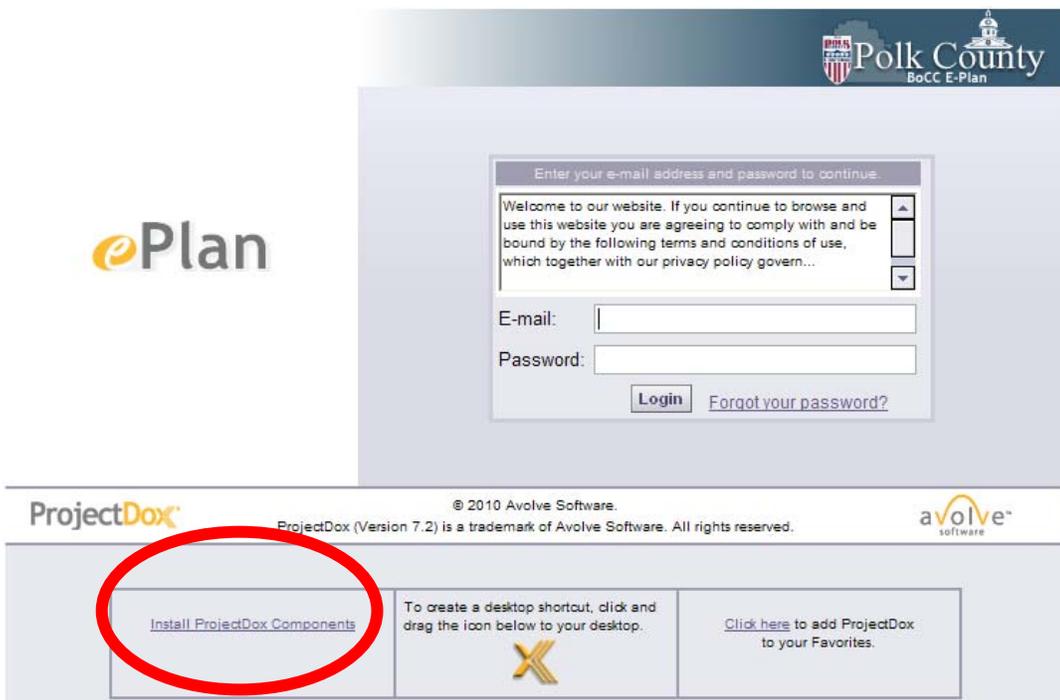
1. Customer submits application to bldgPlan@polk-county.net
2. Customer prepares PC to use ePlan program (One time occurrence per PC)
3. Permit Tech triggers project in ePlan.
4. ePlan sends “Invitation” email to customer containing:
 - User Name/ID (One time occurrence. This is the customers email address)
 - Temporary Password (Customer must reset password upon initial log in)
 - Project/Permit Number
5. Customer logs into ePlan, accesses project, and uploads documents and Plans
6. Customer completes “Applicant Upload” task thus triggering workflow to be sent to ePlan Tech
7. Eplan Tech receives “Workflow Notice” email
8. Eplan Tech performs “Prescreen Review” triggering workflow to be sent to Plans Examiners
9. Plans Examiners receive “Workflow Notice” email
10. Plans Examiners perform plan review, stamps plans if approved, and completes a “Quality Assurance” Task thus triggering email to customer
11. Customer receives email notice with instructions. Customer is instructed to do one of the following:
 - If Corrections are needed - Upload corrected documents then complete an “Applicant Resubmit” task to send the workflow back to County for re-review, or
 - If Plans are Approved: Contact ePlan Tech to pay fees.
12. Eplan Tech receives workflow notice when project is in “Final Processing Stage”
13. Eplan Tech calls, emails or uses the ePlan Notes feature to contact customer in order to collect fees.
14. Eplan Tech prepares and uploads permit card into Approved folder in ePlan, electronically stamps documents as needed and completes “Batch Stamp” task in ePlan.
15. Eplan emails customer download and print instructions.
16. Customer places 1 set of documents and plans containing ePlan approval stamp on job site.

STEP 1. Install ProjectDox Components (One Time Occurrence per PC)

Install components once on each PC to be used for ePlan purposes. Components must be on PC before attempting to use ePlan for the first time.

1. Go to: <https://eplans.polk-county.net/ProjectDox/>
2. Disable Pop Up Blocker
3. Click the *Install ProjectDox Components* to install ActiveX controls.

Note For Windows 7 and Vista Users: go to www.polk-county.net/eplan and follow directions at “Step 3” before Installing ProjectDox Components.



STEP 2. Receive “Project Invitation” email from ePlan@polk-county.net

Follow instructions found within email. If you do not receive an email within 1 business day after submitting an application via email to bldgeplan@polk-county.net, please contact the ePlan Tech at 863-534-5986.

Email will contain user name and temporary password for first time ePlan users.

STEP 3. Log In

Enter user name (email address) and password then press Login.

- ProjectDox uses pop-up windows. If you login but no ProjectDox window appears, you must disable pop-up blocking for the ProjectDox site.

- First time ePlan users will be directed to the user Profile screen where they will be prompted to create a new user profile. This includes setting up a new password and creating a question and answer in order to get a password hint should the user forget their password. Click **SAVE** when you are finished.

STEP 4. Project Access

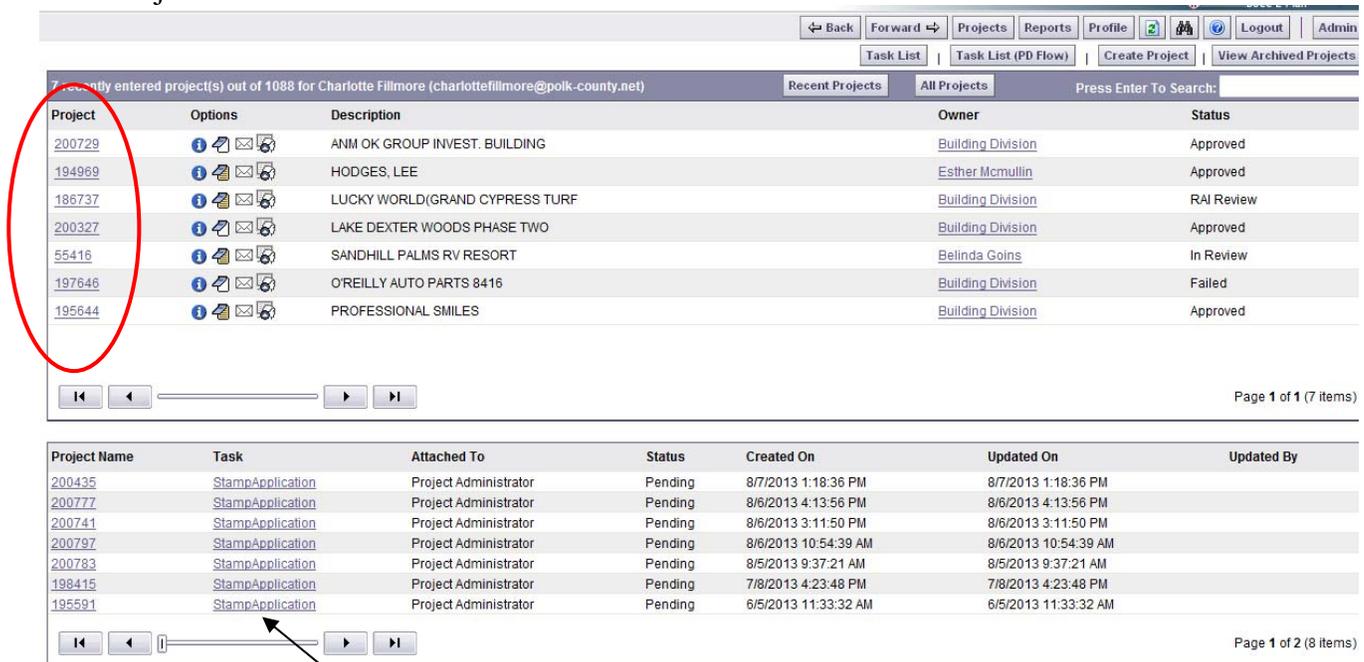
Projects to which you have access will display in a list on the main “Projects” screen.

Click on a project number to access project

To navigate to the main “Projects” screen from other areas within the program, press the “Projects” button located in the upper right corner of your screen.

Also located in this area is a help icon . Pressing the help icon will open the in depth ProjectDox software manual.

Main Projects Screen



The screenshot shows the 'Main Projects Screen' with a navigation bar at the top containing buttons for Back, Forward, Projects, Reports, Profile, Logout, and Admin. Below the navigation bar is a search bar and a list of projects. The project list has columns for Project, Options, Description, Owner, and Status. A red circle highlights the project numbers in the 'Project' column. Below the project list is a table of tasks with columns for Project Name, Task, Attached To, Status, Created On, Updated On, and Updated By. An arrow points from the text below to the task table.

Project	Options	Description	Owner	Status
200729	   	ANM OK GROUP INVEST. BUILDING	Building Division	Approved
194969	   	HODGES, LEE	Esther McMullin	Approved
186737	   	LUCKY WORLD(GRAND CYPRESS TURF	Building Division	RAI Review
200327	   	LAKE DEXTER WOODS PHASE TWO	Building Division	Approved
55416	   	SANDHILL PALMS RV RESORT	Belinda Goins	In Review
197646	   	O'REILLY AUTO PARTS 8416	Building Division	Failed
195644	   	PROFESSIONAL SMILES	Building Division	Approved

Project Name	Task	Attached To	Status	Created On	Updated On	Updated By
200435	StampApplication	Project Administrator	Pending	8/7/2013 1:18:36 PM	8/7/2013 1:18:36 PM	
200777	StampApplication	Project Administrator	Pending	8/6/2013 4:13:56 PM	8/6/2013 4:13:56 PM	
200741	StampApplication	Project Administrator	Pending	8/6/2013 3:11:50 PM	8/6/2013 3:11:50 PM	
200797	StampApplication	Project Administrator	Pending	8/6/2013 10:54:39 AM	8/6/2013 10:54:39 AM	
200783	StampApplication	Project Administrator	Pending	8/5/2013 9:37:21 AM	8/5/2013 9:37:21 AM	
198415	StampApplication	Project Administrator	Pending	7/8/2013 4:23:48 PM	7/8/2013 4:23:48 PM	
195591	StampApplication	Project Administrator	Pending	6/5/2013 11:33:32 AM	6/5/2013 11:33:32 AM	

Any outstanding tasks that require your attention are displayed in a box below the project list.

STEP 5. Preparing Documents And Plans For Eplan Use

Upon accessing your project, you will be uploading files into a variety of folders. See folder tree snip it below. Before uploading documents you will need to prepare and label files according to instructions below.

Project Folder Structure



Application and Permit Documentation folder

Please name all Application and Permit Documentation after the type of form it represents. Maximum size file name is limited to 70 characters.

Application and Permit Documentation folder	
Sample Document Types	
Authorization Signature Letter	Green Swamp Verification
Commercial Industrial Supplement Sheet	State Approval Letters if applicable (DOH, DBPR, DOT, SWFWMD, DEP, Etc.)
Notice Of Commencement	Setback Form
Permit Application	Subcontractor Supplement Form
Plot Plan	Parcel ID Information From Property Appraiser
Septic Tank Approval	Water / Sewer Documentation
Construction Waste Form	Electrical Utility Provider

Plans Folder

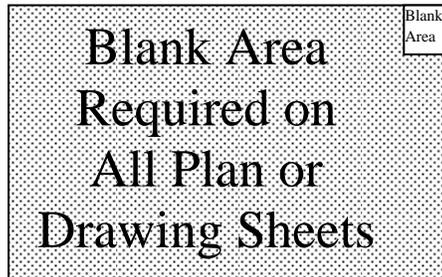
Each plan or drawing sheet shall be:

- saved as PDF (with layers intact)
- saved as a separate file (e.g. floor plan, electrical plan, architectural plan, etc.). Do not create multiple sheets in the same file.
- printable to 24" x 36" sheet.
- saved and uploaded in LANDSCAPE format
- scaled in paper space to be 1/4"=1'
- contain a graphic scale

Note: PDF is the preferred file type; however other formats can be used such as .dwg, dgn, jpg, gif, etc.

Cover Sheet is required and shall:

- be named “001 Cover”
- contain an accurate index indicating sheet size for each plan sheet
- must contain a 2” W x 2” L (two inch width by two inch length) blank area in the uppermost right hand corner to be used for County approval stamp placement



Other Plan Sheets shall:

- be site specific plans for the structure submitted
- contain a 2” W x 2” L (two inch width by two inch length) blank area in the uppermost right hand corner to be used for County approval stamp placement

File names for Plan Sheets must be identified according to index on coversheet. The coversheet shall be named “001 Cover.”

Plan Sheet Naming Convention	
Sheet	Name
Coversheet (must contain index)	001 Cover
All drawings must be identified according to index on coversheet.	
<i>Examples below:</i>	
ARCHITECTURAL	A1, A2, A3
STRUCTURAL	S1, S2,
MECHANICAL	M1, M2, M3....
ELECTRICAL	E1, E2,....
PLUMBING	P1, P2, P3....
FIRE	F1, F2, F3...

Supporting Plan Documents folder

Supporting Plan Documents shall:

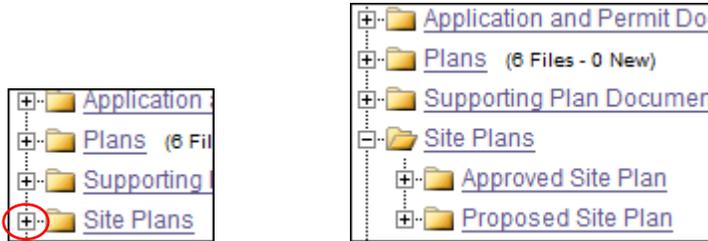
- be listed on the coversheet
- identified according to index

Examples of supporting plan documents - Energy Load Calculations, Garage Door Cut Sheet, Truss Layout, Product Approvals, and engineer’s report that contains additional information not found on plans, and etc.

Site Plan folder

The site plan folder contains two subfolders.

Click the plus sign next to the Site Plans folder to access a desired subfolder.



- Approved Site Plan Subfolder – For Commercial use only
 - Upload L2 Site Plan Approval Letter
- Proposed Site Plan
 - Upload Proposed Site Plan

STEP 6. Uploading files

Clients, and Co-Professionals at Client's request, can upload files to project folders and subfolders (*see "Notes - ePlan Communication Feature" later in this document for instructions on requesting Co-Professional upload rights*).

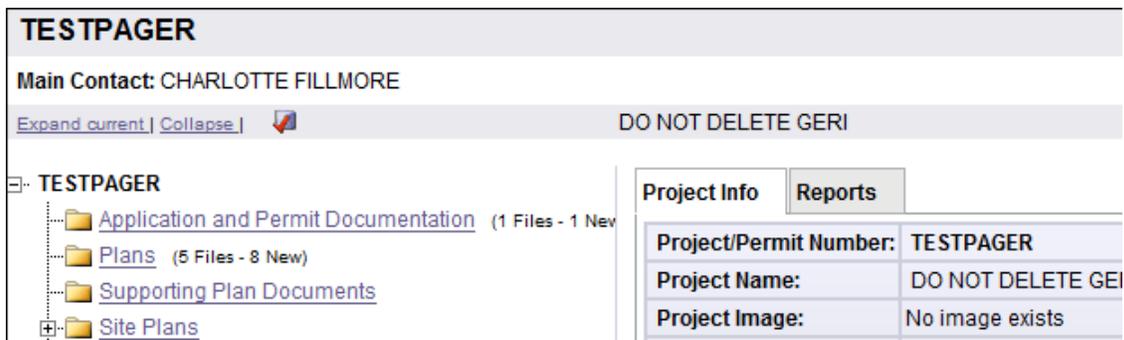
1. Open desired project
2. Click desired folder name to open folder

TESTPAGER

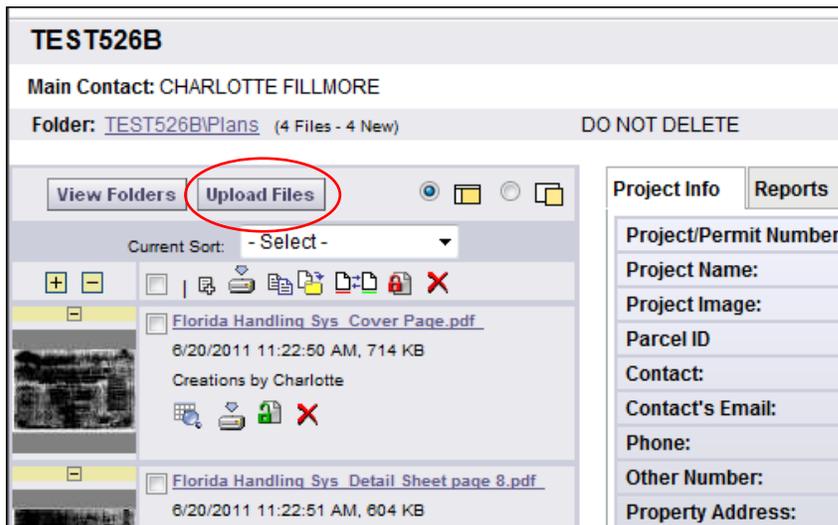
Main Contact: CHARLOTTE FILLMORE

[Expand current](#) | [Collapse](#) |  DO NOT DELETE GERI

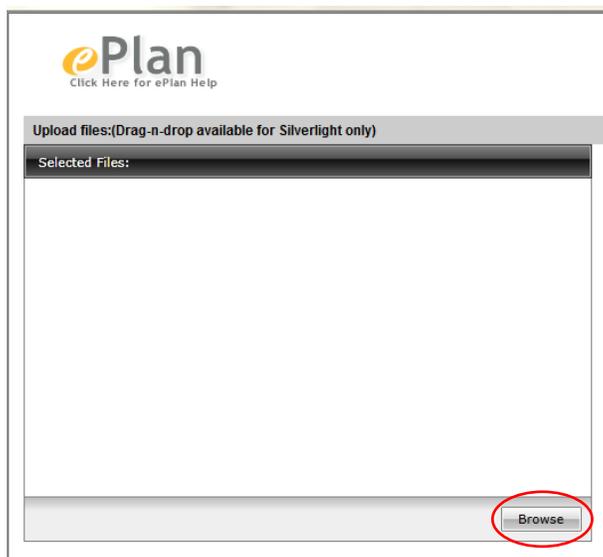
Project Info	Reports
Project/Permit Number:	TESTPAGER
Project Name:	DO NOT DELETE GERI
Project Image:	No image exists



3. Click the **Upload Files** button

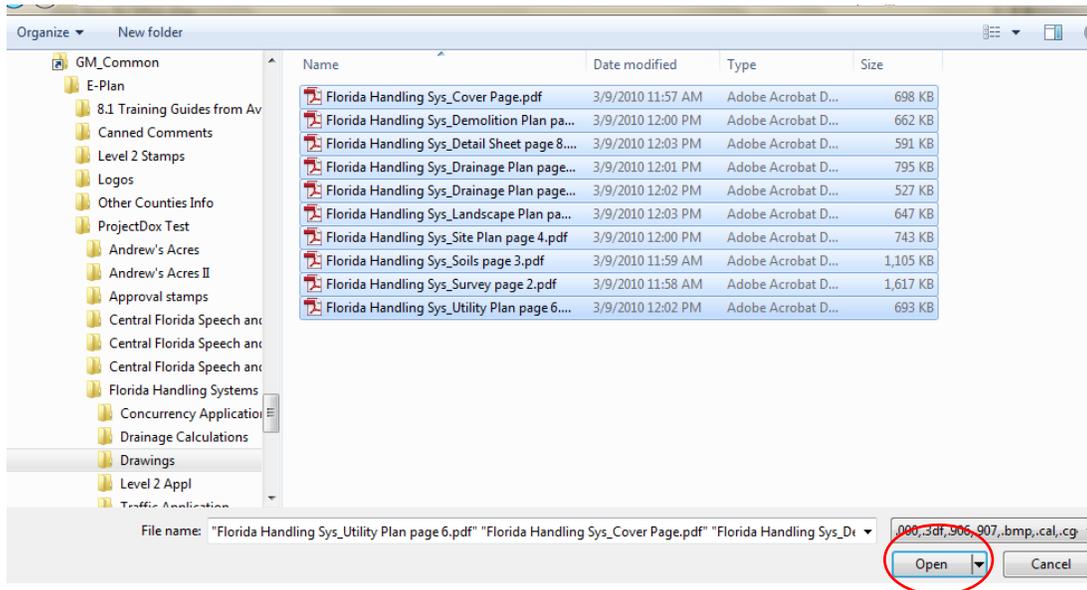


4. Press the “Browse” button to locate files you want to upload into the current folder.



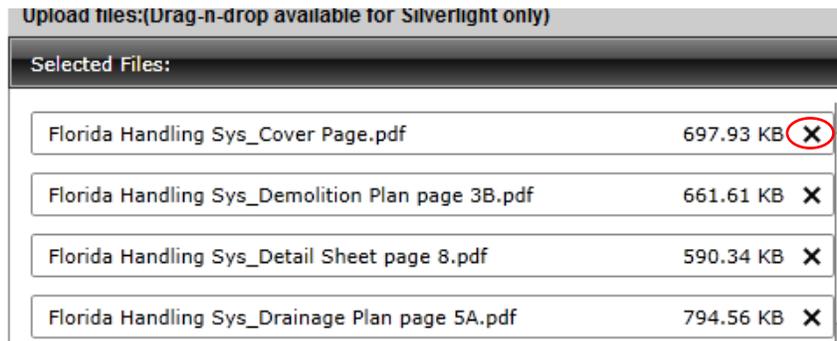
Note: You can select multiple files by holding down the *Shift* or *Ctrl* keys. You can upload zipped files and you can also drag and drop files into the Upload window list. The maximum size file name is limited to 70 characters. File uploading locations shall adhere to the following:

- Click **Open** to move the files into the Files window of the upload screen.



To gather additional files and folders for uploading to the current folder, click the **Add more files** button and continue to add files until you have gathered all that you wish to add to the current folder

To remove a file from the upload area press **X** next to the desired file



- Click **Upload Now** to begin the transfer of files to the project folder. The files will publish and appear shortly in the file thumbnails screen of the folder you uploaded to, along with the name of the user that upload, the upload date, and file size information.

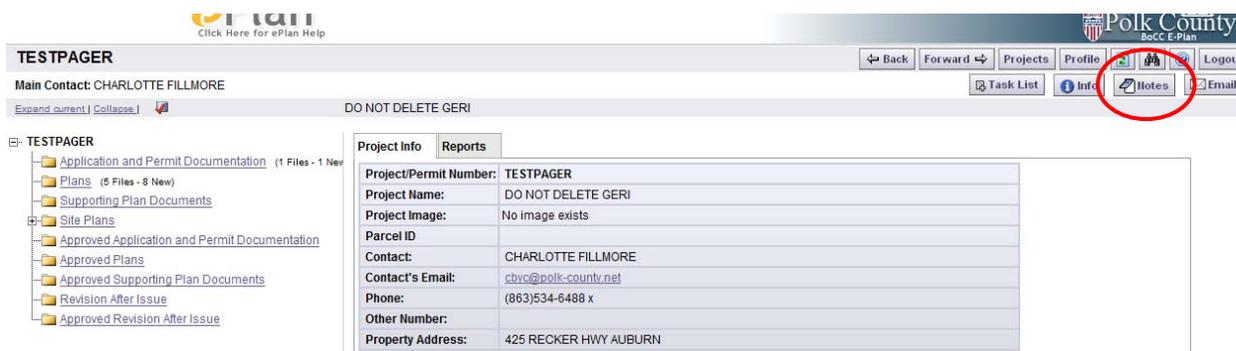
NOTE: If for some reason you have to resubmit a plan sheet, the **edited plan sheet must have the same exact name as the first version so that ePlan can auto version the resubmitted plan sheet.** ProjectDox enables simple versioning, allowing for the upload of files of the same name into ProjectDox to be versioned. The file's previous version is kept and logged in ePlan's history along with its associated markups.

USING NOTES

(ePlan Communication Feature)

To Request a coworker or **Co-Professional** be able to upload plans, calculations, documents, etc., into your ePlan project please follow these simple steps in using “Notes.”

1. Once inside a project, click the Notes icon. 



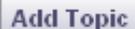
The screenshot shows the ePlan software interface for a project named 'TESTPAGER'. The main contact is 'CHARLOTTE FILLMORE'. The interface includes a navigation bar with buttons for Back, Forward, Projects, Profile, Notes (circled in red), and Logout. Below the navigation bar, there are buttons for Task List, Info, and Email. The main content area displays project information and a tree view of folders. The project information table is as follows:

Project Info	Reports
Project/Permit Number:	TESTPAGER
Project Name:	DO NOT DELETE GERI
Project Image:	No image exists
Parcel ID:	
Contact:	CHARLOTTE FILLMORE
Contact's Email:	cbvc@polk-county.net
Phone:	(863)534-6488 x
Other Number:	
Property Address:	425 RECKER HWY AUBURN

2. A window will pop up. Press the Add Topic button

View Topics

Project: TESTPAGER
Owner: Building Division





No topics have been created yet.

3. Select the appropriate topic from the “Category” drop down menu. In the sample below we’ve chosen “Co-Professional Upload Permission Request.”

The screenshot shows the ePlan web interface. At the top left is the ePlan logo with the text "Click Here for ePlan Help". At the top right is a "Close Window" link. Below the logo is a box containing "Attach a Topic to: TESTPAGER" and "Owner: Building Division". The main form has a header with "Author: Creations by Charlotte", "Category: Co-Professional Upload Permission Request" (with a dropdown arrow), and "Date: 6/21/2011". Below the header is a "Subject:" field with the text "Please add my Architech to this project". Below the subject is a "Project Name:" field with the text "Charlotte Fillmore cbyc@polk-county.net". At the bottom of the form are two buttons: "Save" and "Save & Prepare Email".

4. Enter a subject.
5. When requesting a Co-Professional(s) to be added to your permit/project you must list the Co-Professionals information in the body of the message. Co-Professionals must be listed with **First Name, Last Name and valid email address** as shown above.
6. Press Save & Prepare Email button.

Team mail for Project: Test BLD 02
Email type: Topic/Note Notification
Topic Category: Co-Professional Upload Permission Request

Subject: * Please add the following co-professional to my project

Body: *
Charlote Fillmore ccf@polk-county.net

Users/Groups that will be emailed (includes groups that contain users and have permissions): *

Name	
<input type="checkbox"/>	Non Group Members
<input type="checkbox"/>	Applicant
<input type="checkbox"/>	Building Plan Review
<input type="checkbox"/>	Fire Marshall
<input type="checkbox"/>	Other Viewers
<input type="checkbox"/>	Outside Agencies
<input type="checkbox"/>	Permit Techs
<input type="checkbox"/>	Project Administrator

Name	Company
<input type="checkbox"/> Sharleen Co	Avolve Software
<input type="checkbox"/> CC Lead	Reviewer for testing
<input checked="" type="checkbox"/> Building Permit_Tech	Polk County BoCC

QA

Navigation buttons: [Back] [Previous] [Next] [Forward]

Send

7. Press the  plus sign next to a group name to expand the list. (you can use the Notes button to send an email to any person in any of the groups just by expanding the group and selecting the name)
8. Place a check in the box next to “Building Permit_Tech to send the Permit tech an email containing the note. The Project Administrator (which is the permit tech stationed at the ePlan work station) is the only staff member that can add a co-professional to your project.
9. Press Send

STEP 7. APPLICANT UPLOAD TASK

When you and/or your co-professionals have completed uploading all required documents/plans and you are ready for your plans to be reviewed you must complete the Applicant Upload Task.

To complete your task you must click the ApplicantUpload link found near the bottom of the Projects screen next to the project/permit name (*in this example the permit application number is Test BLD 02*) to open the task.

Click Here for ePlan Help

Back Forward Projects Profile Task

6 project(s) out of 6 for Creations by Charlotte (cbyc@polk-county.net) Recent Projects All Projects Press Enter To Search:

Project	Options	Description	Owner
New Features & Workflow		Training & Demonstration	Nikki Thorne
Test		Test	Steve Alexander
Test BLD 02		Do Not Delete Test BLD Other Workflow	Charlotte Fillmore
Test Project for Building Other		Test Project for Building Other - Do Not Delete-ILLORA	Illora Chambers
Test Upgrade		Test	Administrator Temp
TESTNT		TEST	Nikki Thorne

Project Name Task Attached To Status Created On Updated On Updated By

Test BLD 02	ApplicantUpload	Applicant	Pending	1/14/2013 9:20:52 AM	1/14/2013 9:20:52 AM	
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Click the Upload Complete button to submit your documents and plans for review and permitting.

ePlan Growth Management Department 330 West Church Street • Bartow, FL 33830

Polk County BoCC E-Plan

Review Information Permit Information Contact Information Resources Routing Slip

Review Coordinator CC Lead (clead@polk-county.net)

Review Cycle 1

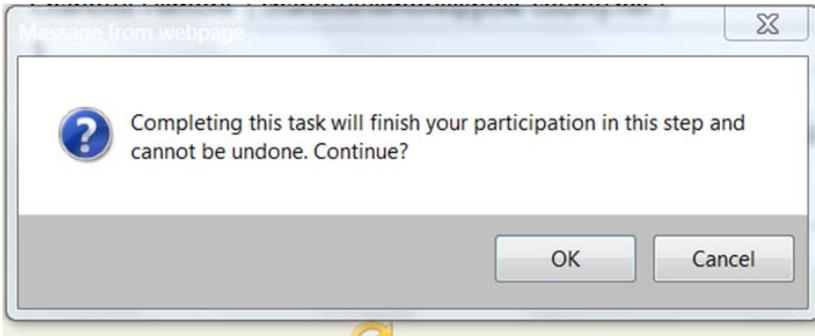
Workflow/Activity Name BuildingOther_Workflow / ApplicantUpload

Activity Instructions Please complete this activity when you have successfully uploaded all required plans/documents.

Current User Logon Creations by Charlotte (cbyc@polk-county.net)

Upload Complete Close

You will receive a conformation message. Press OK



STEP 8 Submitting Revised Plans

If you receive an email requesting a re-submittal, you will also receive an Applicant Resubmit task. Click the Applicant Resubmit task to open.

6 project(s) out of 6 for Creations by Charlotte (cbyc@polk-county.net)

Project	Options	Description
New Features & Workflow		Training & Demonstration
Test		Test
Test BLD 02		Do Not Delete Test BLD Othe
Test Project for Building Other		Test Project for Building Othe
Test Upgrade		Test
TESTNT		TEST

Navigation: [Previous] [Back] [Progress Bar] [Next] [End]

Project Name	Task	Attached To	Status
Test BLD 02	ApplicantResubmit	Applicant	Accepted
Test Project for Building Other	ApplicantUpload	Applicant	Accepted

The form may contain thumbnail images that you can click on to open documents containing mark-ups. Read Plans Examiners comments by visiting the Permit Status Viewer <http://permitviewer.polk-county.net>.

1. Make appropriate changes to plans and supporting documents.
2. Upload revised documents into the appropriate folders using the **SAME EXACT FILE NAME** used in the previous upload.

Note: Uploading revised documents using the same exact file name is imperative to the systems overlay and compare feature. ePlan will recognize that the files are named the same and it will attach a version number to the document. **Resubmittals with renamed files will be rejected.**

3. Check boxes **after uploading revised files.....**then, click Complete.

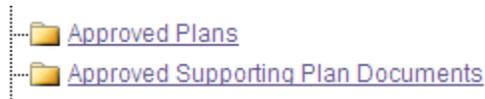
STEP 9. Final Processing - Download And Print Approved Plans And Documents

Upon Plan and Permit Approval, you will receive an email notification that your project/permit is in the Final Processing stage. You will be instructed to remit any fees due.

Customers using Digitally Signed and Sealed Plans, you will only need to remit payment at this stage. Go To Step 10.

Customers not using Digitally Signed and Sealed Plans

1. You must contact the ePlan Technician to request download and print rights from the Approved Plans and the Approved Supporting Plan Documents folders.



2. Print 3 sets of plans and supporting documents.

Note: Printed plan/drawing sheets must show the “Red Stamp Required” logo that is placed electronically on each sheet by County Staff upon plan sheet approval. **This stamp must be present on all sheets that you submit for final sign off by the county.**

3. Submit hard copies to Polk County Building Division for final sign off.

STEP 10. Approved Plans And Permit Ready For Download

For **Customers using Digitally Signed and Sealed Plans**, download all files from all Approved folders and post on jobsite as required.

Customers that did not use Digitally Signed and Sealed Plans method will need to come to the Building Division to pick up stamped plans and permits.

REVISIONS AFTER ISSUANCE OF PERMIT

1. If you have a revision to a plan sheet after the permit has been issued, contact the ePlan Technician and request that you be allowed to upload into the “Revision After Issue” folder. (Or use “Notes” as directed on page 8-10 above to request access to the Revision After Issuance folder).

Press Enter to search:				
Project	Options	Description	Owner	Status
02-08-2011 08-56-AM - test Osceola.xml	   	DO NOT DELETE	Stephanie Morse	[None]
132774	   	LEGOLAND TECHNIC COAST X376.61	Geri Irons	Approved
132774A	   	LEGOLAND TECHNIC COAST CANOPY	Geri Irons	[None]

 [Revision After Issue](#)

2. Naming convention shall match previously approved sheet.
3. Uploading sheet (s),
4. Complete the Applicant Upload Task..
4. Once your change has been approved, your plan sheet(s) will be placed in the Approved Revision After Issue folder and you will need to follow the same steps that you followed previously.

 [Approved Revisions After Issue](#)