



Polk County Eplan User's Guide for Land Development Division Customers

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 is a light blue box containing a login form. The form has a title "Enter your e-mail address and password to continue." and a text area with a scroll bar containing the following text: "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...". Below the text area are two input fields: "E-mail:" and "Password:". At the bottom of the form are two buttons: "Login" and "Forgot your password?".

ProjectDox

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[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.



Logging in to

When you have been invited to a project, you will receive an email containing your login information and information about the project, including a link to the project. If this is your first time using ePlan, please see the **First Time Users Notes** at the bottom of this page.

1. Click the Project Access link in your invitation email.
2. At the login screen, enter your email address and the temporary password provided in the Invite email. If you have logged in at least once and forget your password, it can be resent to your email address by clicking the “*Forgot your password?*” link.

First Time User Notes:

- ProjectDox uses pop-up windows (browser windows 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 (pop-up blockers allow you to disable pop-up blocking for specified sites).
- The login page now has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ProjectDox ActiveX controls. Click the **Install ProjectDox Components** link. If you have Windows 7 or Vista, please refer to the ePlan help page special instructions.

- If this is the first time you have accessed the ePlan site, the user Profile screen will display. You are prompted to change your password and enter your user information (required fields display colored). 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 ProjectDox button bar. Click **SAVE** when you are finished.
3. When you have successfully logged into ePlan, the Projects screen will display. Your most recently accessed projects will display. To access older projects, press the “All Projects” button and scroll through the list. Any outstanding tasks that require your action are displayed in the “My Task List” area below the project list.

In this screen you can access project files, view project information, view topics and notes associated with a project, send Team Mail to other members of the project, and view the project status and project owner.

7 recently entered project(s) out of 307 for Charlotte Fillmore (charlottefillmore@polk-county.net)

Recent Projects All Projects Press Enter To Search:

Project	Options	Description	Owner	Status
130837	   	Legoland Fun Town Theater T239.00	Gerl Irons	Failed
55093	   	TWISTEE TREAT 5601	Rachel Ku	Approved
TESTDMO	   	TESTDMO 5/18/2011 1:56:18 PM	Building Division	In Review
55039	   	Del Webb Orlando Reclaim Water	Rachel Ku	Approved
TESTSWM4	   	DO NOT DELETE	Building Division	In Review
54857	   	LAKE BURBANK MOBILE HOME PARK	Karen Murphy	Failed
55280	   	CAR AND RGP RANCH, LLC	Belinda Goins	In Review

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My Task List

Task	Workgroup	Priority	Assigned	...
 Plan Review: TESTDMO Review Complete	TESTDMO	1	5/18/2011	-

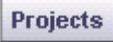
As Project Administrator, it is your responsibility to determine if the entire review is complete, or if a resubmittal from the applicant is required.

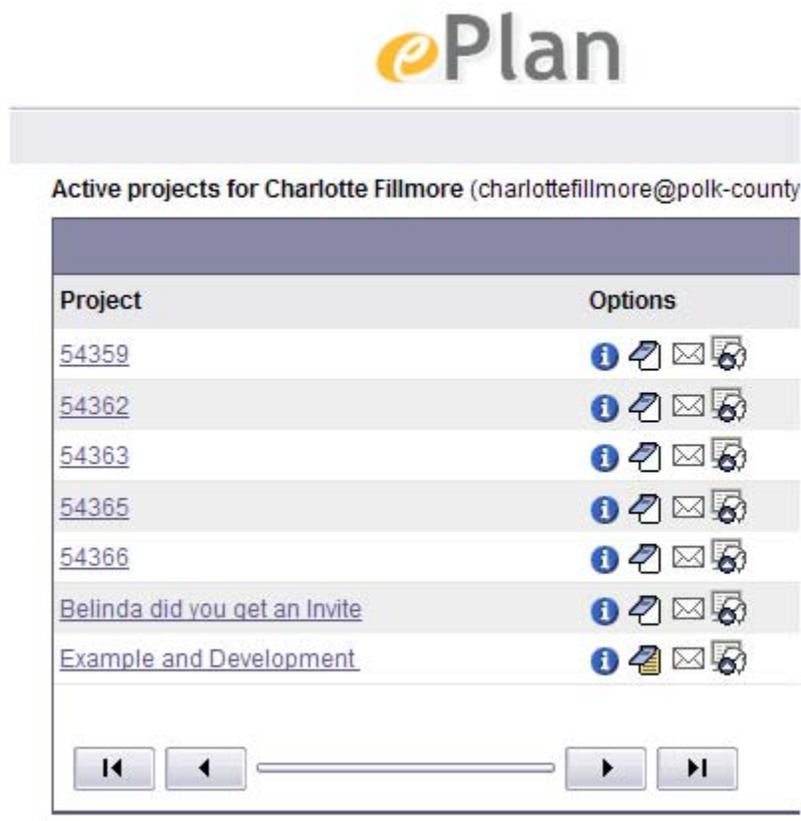
Uploading Files

Drawing Files have very specific requirements in order to be accepted, reviewed, or approved in ePlan. Please read this entire section before attempting to upload files. Once all required documents are uploaded you must notify the Project Administrator. The best way to do this is to use the  “Notes” button (see instructions further down in this guide) or you can call 863-534-6449.

Project Administrators and clients can add files to project folders and subfolders.

You can upload files to any project for which you have been granted upload privileges. When using the check-out feature, files that have been downloaded and edited can be uploaded as a new version and are automatically checked back in. (Note that Check in/out permissions are only available if upload and download permissions are given to a folder.)

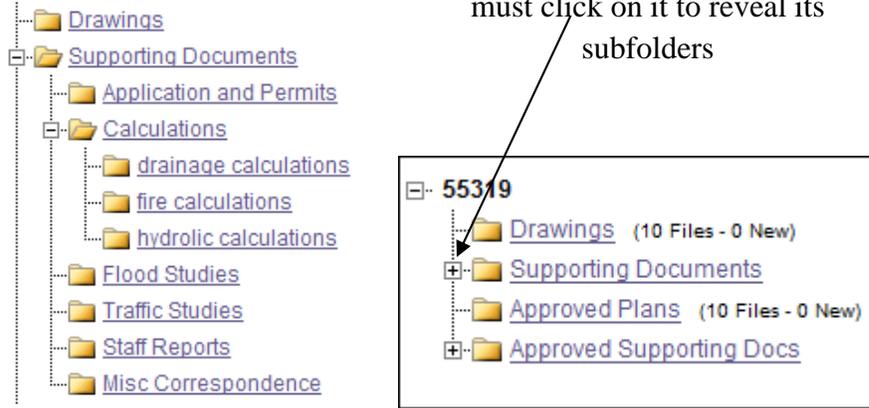
1. Click 
2. Click the project name containing the folder you want to access, and then select the folder you wish to upload files to.



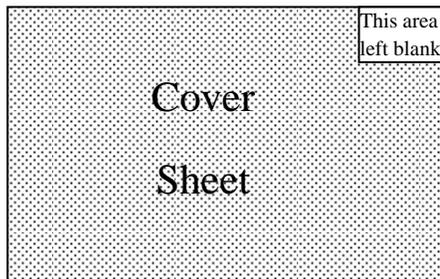
Naming and file uploading locations shall adhere to the following:

- a. Flood Studies, Calculations, and Traffic Study documents shall be uploaded in the corresponding or most appropriate folder or sub-folder within the Supporting Documents Folder as shown below. The maximum size file name is limited to 70 characters.

HINT: When you see a plus, you must click on it to reveal its subfolders



- b. **Plan Sheets - Cover Sheet for plans are required** and shall have a 4x3 blank area in the top right hand corner. This blank area is where the County Engineer's Approval stamp will be placed.

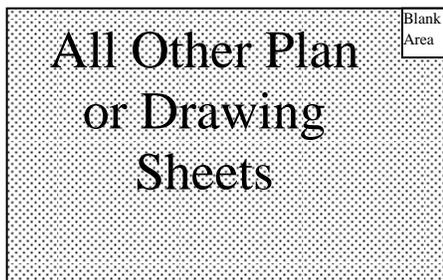


- c. **Polk County Standard Level 2 Notes** shall be placed on the Standard Notes page of the plans as follows:

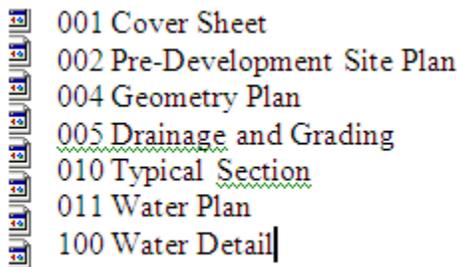
POLK COUNTY STANDARD LEVEL 2 NOTES

1. Traffic signs and pavement markings shall be installed prior to opening a new or modified road. For public roads, the applicant shall pay the cost of road traffic signs for installation by the Polk County Traffic Engineering and Operations Division.
2. The applicant shall be responsible for obtaining appropriate permits for any work in County right-of-way (Right-of-Way use permit) and to provide copies of such permits to the County Engineer.
3. All construction shall conform to the requirements of Appendix A of the Polk County Land Development Code and the Polk County Utilities Code, as applicable.
4. Changes from plans or specifications substantially affecting conformance to standards or performance of systems must be submitted in a written request by the Engineer of Record and receive written approval by the County Engineer prior to the implementation of such changes, unless otherwise provided for in the Polk County Land Development Code or the Polk County Utilities Code. Major modifications may require review and approval by the Development Review Committee. In such cases, the applicant shall submit the appropriate application and fees for a new review at the Level of the original approval, or Level 2 whichever is greater.
5. The Contractor shall notify Polk County Inspections staff (863) 534-6449, at least five (5) working days prior to commencement of construction and prior to any activity requiring inspection, including site paving.
6. To schedule the required Pre-Construction meeting, the contractor shall contact the Polk County Land Development Division, office of the County Engineer at (863) 534-6449.
7. At the completion of construction, and prior to beneficial use of any facility or system, as-built Record Drawings shall be submitted and approved in accordance with Polk County Utilities Code, Chapter 2, Part 3.01 and the Polk County Land Development Code, Appendix A, Section A406.C.

All other plan sheets must have a blank 2x2 area in the up right corner for County's Approved Sheet stamp.

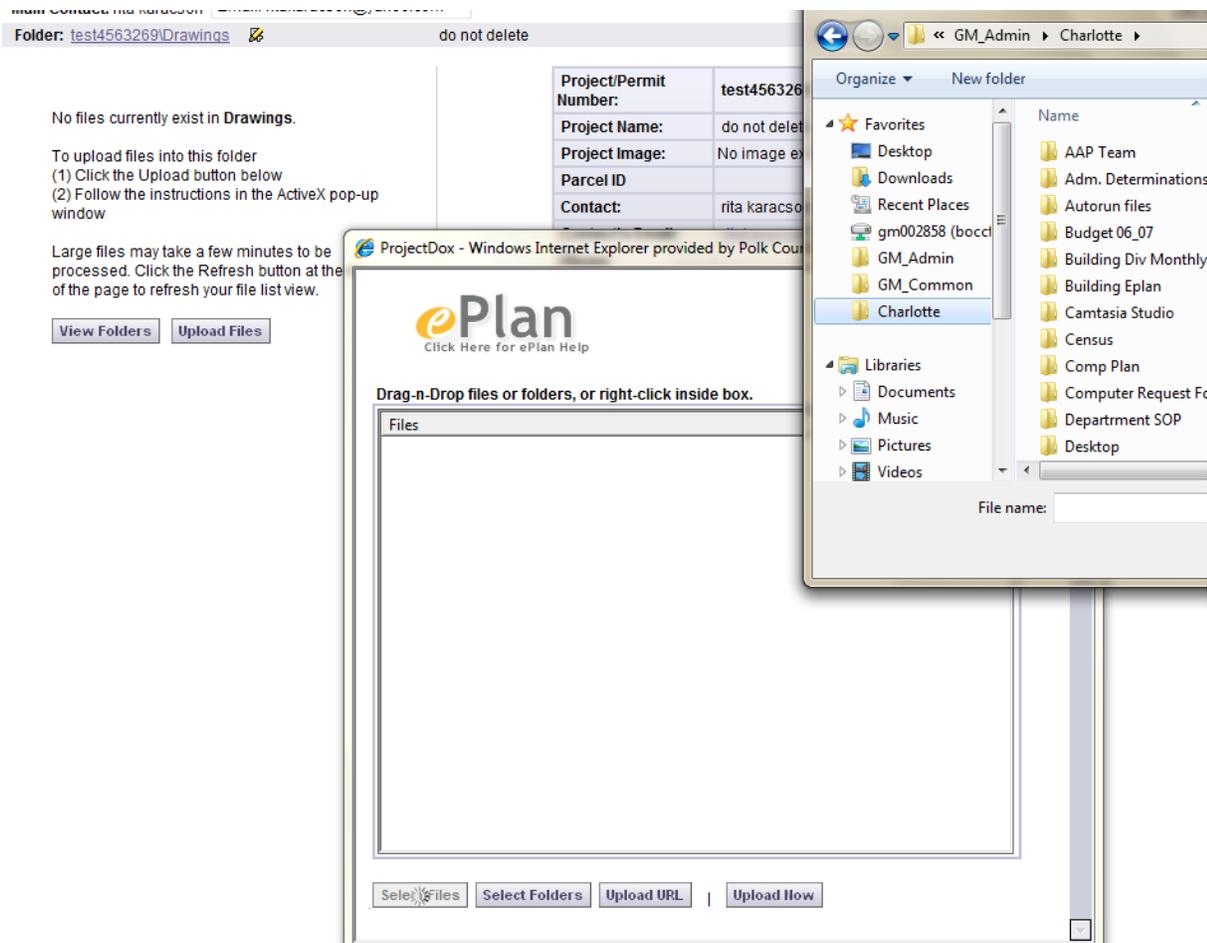


- d. **File Types** - Plans can be submitted as .dwg, .dgn, and .pdf files (.dwg, and pdf are the preferred file type with layers intact). All Plan sheets must be saved as **LANDSCAPE**. Each sheet shall be in a separate file (e.g. site plan, utility plan, landscape plan, etc.). **Do not create multiple sheets in the same file.**
- e. **Scale, Print Size and Orientation** - Plans shall be printable on 24" x 36" sheet. The scale in paper space shall be between 1"=10' to 1"=50'. A graphic scale shall be on all sheets. All Plan sheets must be saved as **LANDSCAPE**.
- f. **Plan Cover Sheet** - shall be named in such a manner so that it appears first in the list of file names when uploaded into the Drawings folder. **Tip:** naming the cover sheer 001 will usually make it appear at the top of the list of sheets (see example below).



- 3. Click the **Upload Files** button. You may need to grant permission to install the ActiveX Upload Control. The best practice is to initially click the *Install ProjectDox Components* link on the login page to install all required ActiveX controls before you begin to work.

4. In the *Select Files for Uploading dialog*, browse to and select the files you want to upload to the current folder. You can select multiple files by holding down the *Shift* or *Ctrl* keys. You can also drag and drop files into the Upload window list.



5. Click **Open** to move the files into the Files window of the upload screen. **Note:** Once the ActiveX upload control is installed, you can add files by simply opening a Windows Explorer window and using drag and drop to place the selected files into the control window. When using drag and drop to move files, the Add dialog box should be closed.
6. To gather additional files and folders for uploading to the current folder, click the **Select Files** or **Select Folders** button and continue to add files or folders to the window until you have gathered all that you wish to add.
7. To delete a file, select it then press your <Delete> key.

8. Click  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 doing the upload, the upload date, and file size information. If you upload a file and find that the orientation isn't correct for the file type (drawings should always be landscape other supporting documents usually will need to be portrait), please call 863-534-6449 and request the sheet or file be removed from the project folder.
9. **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 of the sheet so that versioning can take place.** 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.
10. If you receive an email requesting a re-submittal, you will also receive a task on your task list once you log into e-plan. See screen shot below.



11. Click on the task to open the form. The form will contain a hyperlink to reviewer comments as well as any hyperlinks inserted by reviewers to mark ups on plans.

Hyperlink to reviewer comments

May also contain hyperlinks to mark ups on plans

Project Overview			
Project Number	54417	Primary Contact	CHARLOTTE C FILLMORE
Project Description	Proposed apartments	Primary Contact Phone	
Work Type	P_2NON	Parcel ID Number	272606-000000-022010
Process Date	2/24/2010 7:50:55 AM	Outstanding Fee Balance	400

Review Information	
Project Administrator	Rita Karacson
Review Cycle	1
Step Name	Applicant Resubmit
Step Instructions	Please resubmit the required updated files as specified in the Review process. After uploading the files into ProjectDox, click the Resubmit Complete button at the bottom of the eform to send to the Reviewers.
Current User Login	You are logged in as Charlotte Fillmore (charlottefillmore@polk-county.net).

Department Review				
Review Cycle:	1			
Review Checklist Link:	54417 - P_2NON - Staff Comments			
Step 1:	<input type="checkbox"/> I have reviewed all of the comments indicated in the comment review report. Checklist Comments Link (3)			
Step 2:	<input type="checkbox"/> I have reviewed all of the file markups indicated below.			
Review Cycle	Review Discipline	Reviewer	Status	File Markups
1	911	Brian Marshall	Approved	
1	County Engineer Lead	Steve McQuaig	Assign Only	
1	School Board	Brenda Taguri	Fail	
1	Traffic Engineering Lead	Jeffrey Alspaugh	Fail	Gone Fishing.bmp - junk Review 2/24/2010 1:59 PM

12. Read comments, make appropriate changes to plans and supporting documents and then upload into the appropriate folders using the SAME naming convention used in the previous upload.

13. After addressing comments and uploading revised files as instructed above, check the boxes then click the “Resubmit Complete” button.

Check boxes after uploading revised files.....then, click Resubmit Complete.

Step 1: I have reviewed all of the comments indicated in the comment review report. [Checklist Comments Link \(3\)](#)

Step 2: I have reviewed all of the file markups indicated below.

Review Cycle	Review Discipline	Reviewer	Status	File Markups
1	911	Brian Marshall	Approved	
1	County Engineer Lead	Steve McQuaig	Assign Only	
1	School Board	Brenda Taguri	Fail	
1	Traffic Engineering Lead	Jeffrey Alspaugh	Fail	Gone Fishing.bmp - junk Review 2/24/2010 1:59 PM

Revised Document Upload

Step 3: I have uploaded the revised drawings into the “Drawings” folder, using the **SAME** file name as the original documents.

Instructions:

1. Review the Comments and Markups in the above “Department Review” table. Check the box to indicate that you have addressed all issues.
2. Review the “Comments List” items in the attached document above. Check the box to indicate that you have addressed all issues.
3. Upload your **REVISED** drawings into the “Drawings” folder, using the **SAME** file name as you used before so the drawings will be versioned by ePlan. Check the box to indicate that you have done so.
4. Click the “Resubmit Complete” button. This will notify the Administrator that your revised drawings have been uploaded into the project.

Note: To exit this form before completing all of the steps, click the “Close Form” button. This will leave this as a Task on your Task List.

If you have any questions, please call **863-534-6449**.

Resubmit Comments to Applicant

Project Administrator Response

Resubmit Complete Close Form Print Form

14. Once your plans have been approved, you will receive an email notification with instructions to download the approved plans. These plans along with any outstanding fees must be brought to the County for final signing and receipt.



When printed, all approved plan sheets must show the County's Approved Plan Sheet stamp in the lower right hand corner (refer to page 5 of this document for drawing/plan sheet requirements).

In Need of Assistance or have questions?

Call Land Development Division Processing Section 863-534-6449 to speak to an ePlan Project Administrator.

NOTES BUTTON



To notify the Project Administrator that all required documents have been uploaded and that you are ready for the Pre-Screen process to start, please follow these simple steps in using “Notes.”

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



The screenshot shows the ePlan interface for a project named 'TESTPAGER'. The main contact is 'CHARLOTTE FILLMORE'. The project name is 'DO NOT DELETE GERI'. The interface includes a navigation menu on the left with folders like 'Application and Permit Documentation', 'Plans', 'Supporting Plan Documents', 'Site Plans', 'Approved Application and Permit Documentation', 'Approved Plans', 'Approved Supporting Plan Documents', 'Revision After Issue', and 'Approved Revision After Issue'. The main content area displays project information and reports. The 'Notes' icon in the top right navigation bar is highlighted with a red arrow.

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

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



[Close Window](#)

View Topics

Project: TESTPAGER
Owner: Building Division

[Add Topic](#) [Reports](#)

No topics have been created yet.

III. Select the appropriate topic from the “Category” drop down menu.

The screenshot shows a web form with the following elements:

- Author:** Charlotte Fillmore
- Category:** Ready for Pre-Screen. All required documents uploaded (with a dropdown arrow)
- Subject:** Upload Finished
- Project Name:** A text area containing the text "I'm ready for the review process to begin." with a vertical scrollbar on the right.
- Buttons:** "Save" and "Save & Prepare Email" located at the bottom of the form.

Two arrows point from the text instructions to the "Category" dropdown menu and the "Project Name" text area.

IV. Enter a subject.

V. Enter information in the Project Name area (it serves as the body of the email)

VI. Press the Save & Prepare Email button

Subject: * Upload Finished

Body: *
I'm ready for the review process to begin.

Users/Groups that will be emailed: *

<input type="checkbox"/>	Name
<input type="checkbox"/>	Non Group Members
<input type="checkbox"/>	Applicant
<input type="checkbox"/>	Applicant Invited User
<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
<input type="checkbox"/>	QA

- VII. Expand the Project Administrator Group by pressing the  plus button, then place a check in the box next to "Project Administrator" that you wish to receive notification
 - VIII. Press Send
-