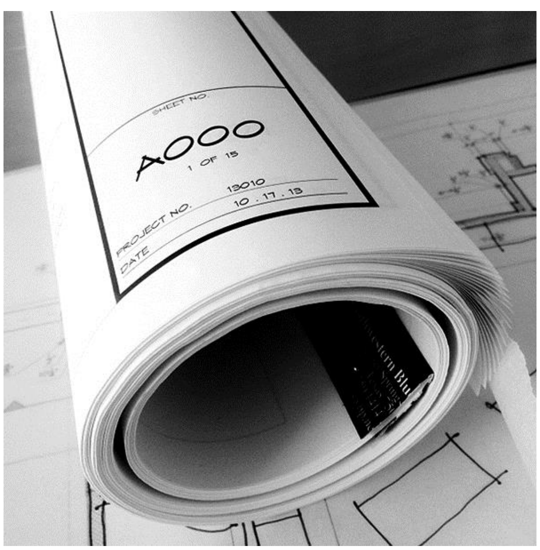
State of Minnesota

Department of Labor and Industry

Construction Codes and Licensing Division

ePlans Applicant User Guide

Uploading Plans

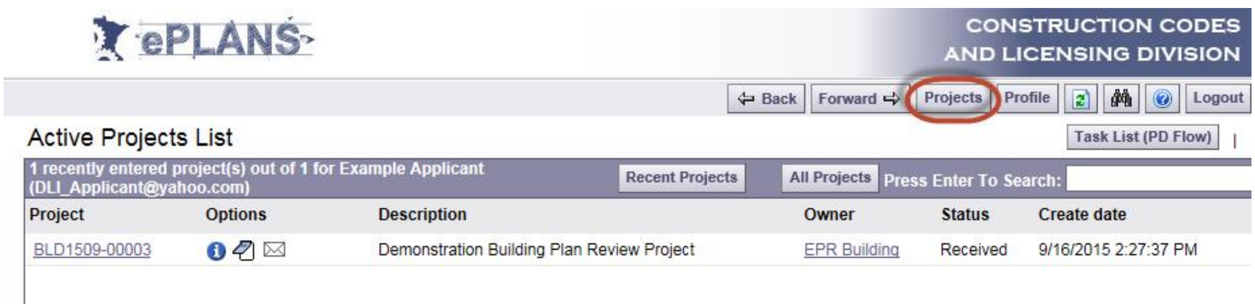


ePlans – Applicant Tasks

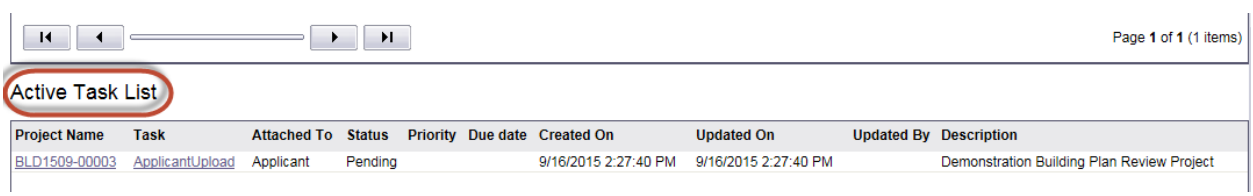
The Overview section gave a brief introduction to the ePlans workflow, a behind-the-scenes process that electronically manages participant activities and email notifications. Each activity in a workflow is referred to as a “step”. As one step completes, the ePlans workflow moves the project to the next step and automatically assigns the step to the appropriate participant. Participants include the applicant, plan reviewers and permit coordinators. The applicant is the individual that was identified on the original application for plan review. Once a workflow step has been assigned it becomes a “task” and an email notification is sent to the individual assigned to that task.

Task assignments can always be found in the Active Task List found at the bottom of the ePlans home page.

The Home page can be found by clicking the “Projects” button in the navigation bar.



You may have to scroll down on the Home page to see the Active Task List. You should refer to this list any time you log into ePlans to see if there are tasks waiting for you.

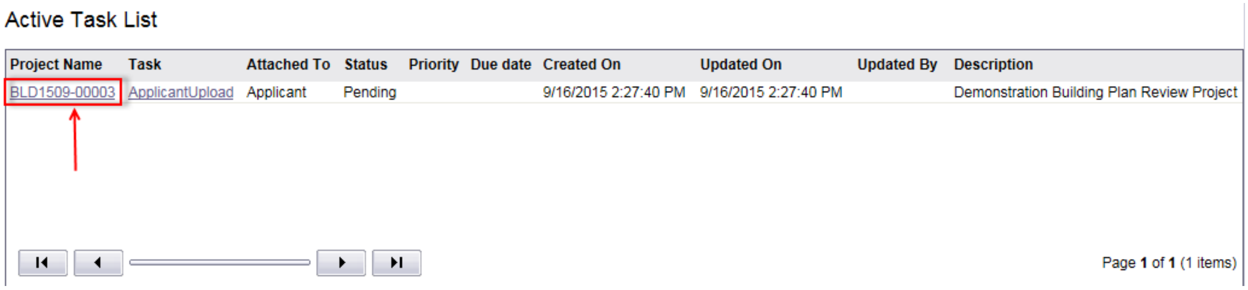


This section of the guide will provide you, the applicant, with the information you will need to complete the tasks that will be assigned to you during the ePlans workflow. Refer to the workflow diagram in the Overview section to see a visual representation of where each step occurs in the process. Workflow facilitates the collaboration between the applicant and the department ensuring that each step is completed in order. As such, you will notice that there are workflow steps that are performed by department staff as well as by the applicant.

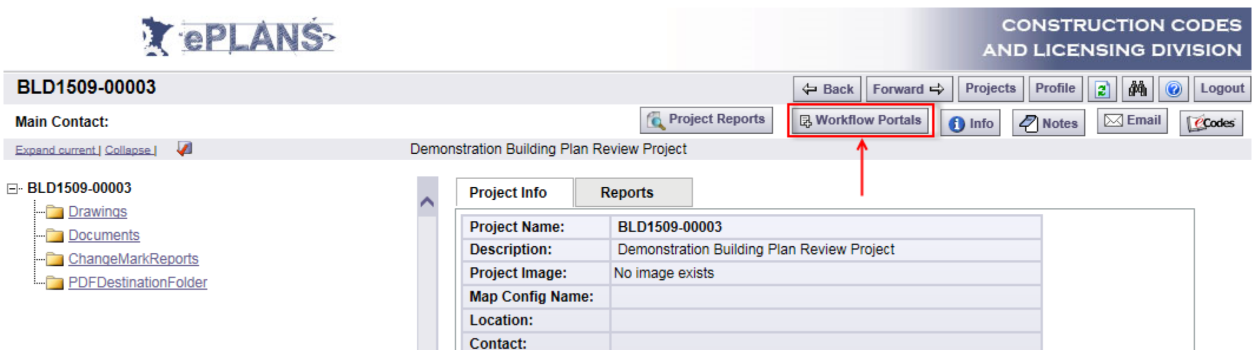
Applicant Upload

The Applicant Upload is the first step in the ePlans workflow. When this step is started, an invitation and an Applicant Upload task notification are emailed to the applicant. The invitation will contain instructions and, if you are a new user, a temporary password. If you are a new user please review the Getting Started section before proceeding.

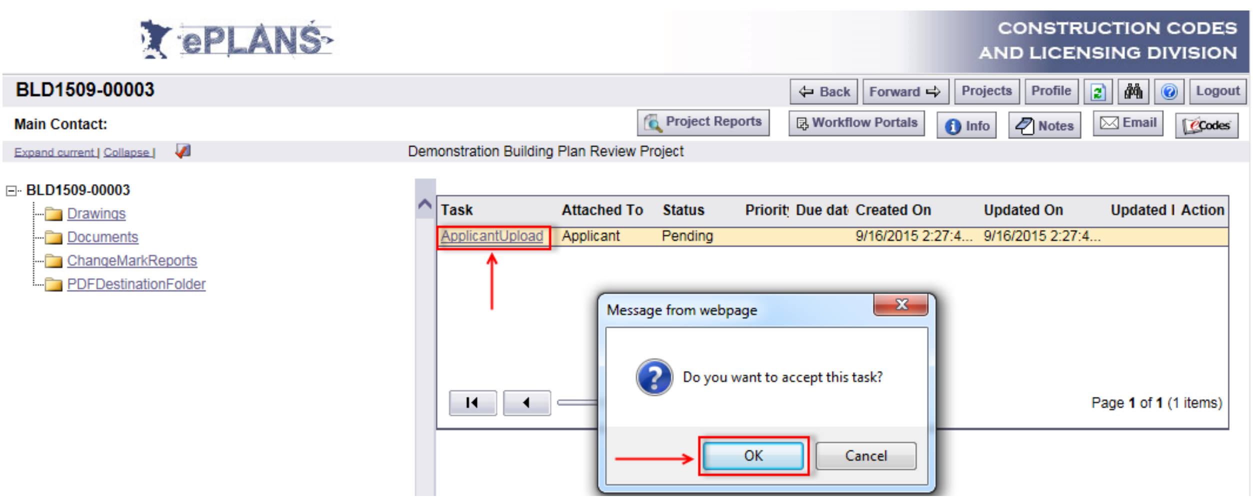
After logging in to ProjectDox locate your project in the “Active Task List”.



1. Click on the Project Name. When the project page opens click on the Workflow Portals button.

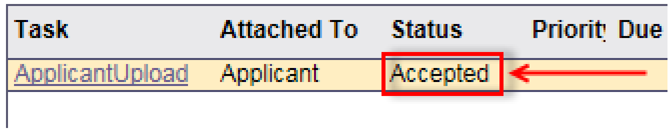


2. Click on the “Applicant Upload” task link and accept the task when prompted.

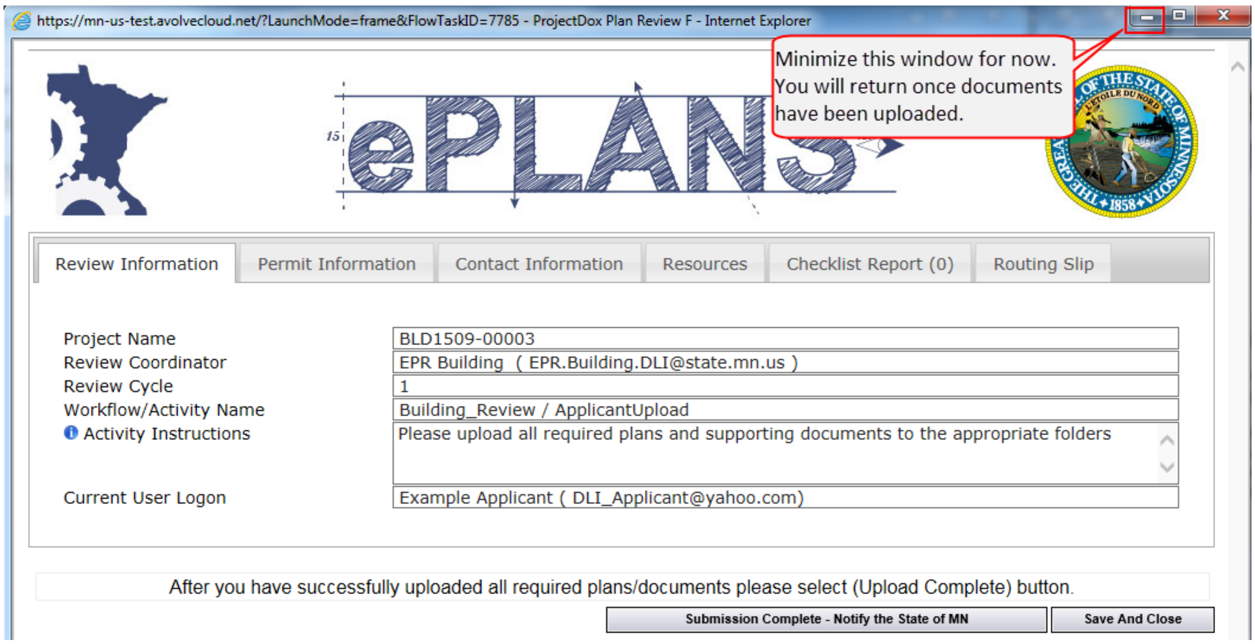


3. Once you have accepted the task, a new ProjectDox window will open. This window is referred to as an “eForm” and its purpose is to control the ePlans workflow. This form provides some basic instructions and information about the workflow step and is also used to indicate that you have completed the task.

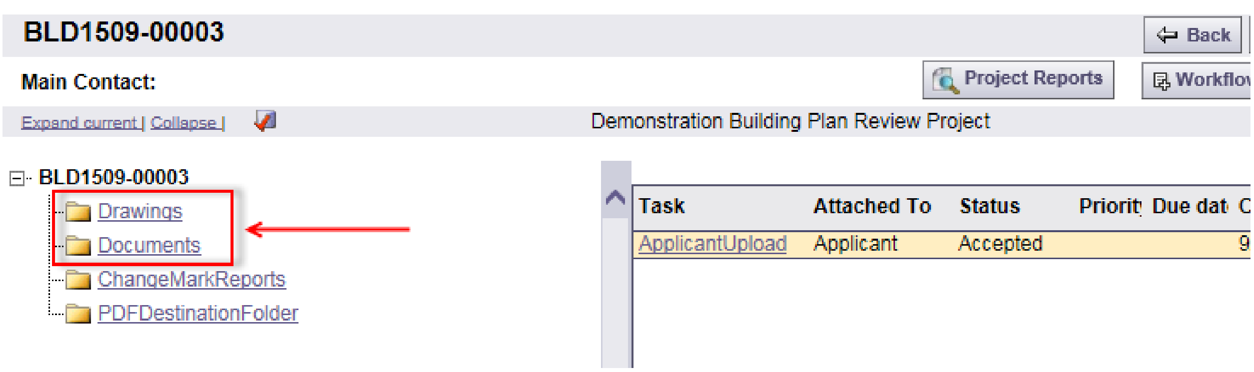
   Also notice in the image above that the task Status is “Pending”. This indicates that you have not accepted the task yet. When you accept the task, by clicking “OK” in the pop up window, you will notice that the task’s status has changed to “Accepted”.



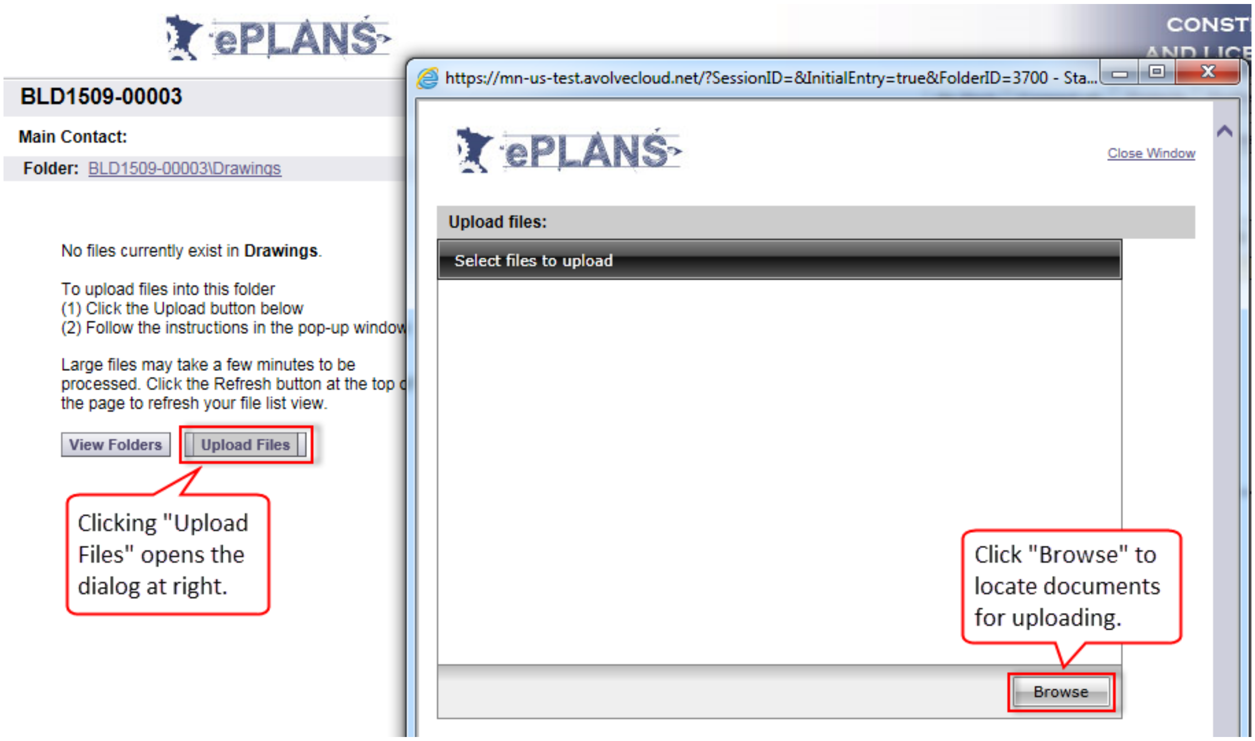
4. Minimize the eForm so that you can see the ePlans project window. When you have finished the upload you will return to this form to complete the task. If you complete the submission now you will be prevented from uploading plans. If you mistakenly close the eForm you can re-open it by clicking on the task link on the project page, just like you did in step 2 above.



Once the eForm is minimized you will see the project page. The left side of this page will show the project's folder structure. The following steps will guide you through uploading electronic construction documents to the "Drawings" and "Documents" folders. Please refer to the Submission Guidelines section of the User Guide for information about required documents, document formats and naming conventions.

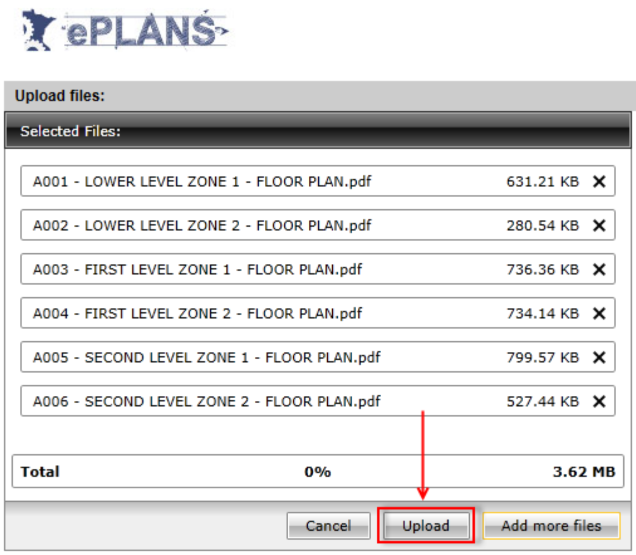


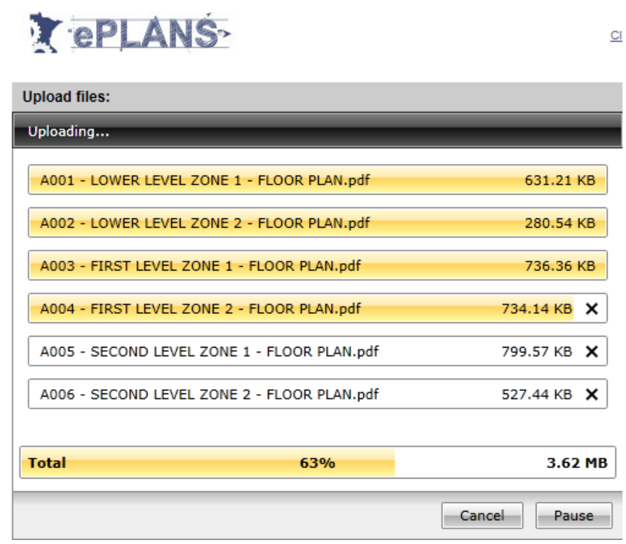
5. Click on the desired folder and then click the “Upload Files” button. Design drawings go into the “Drawings” folder and supporting documents, schedules, calculations, etc., go into the “Documents” folder. The following steps must be repeated for each folder.



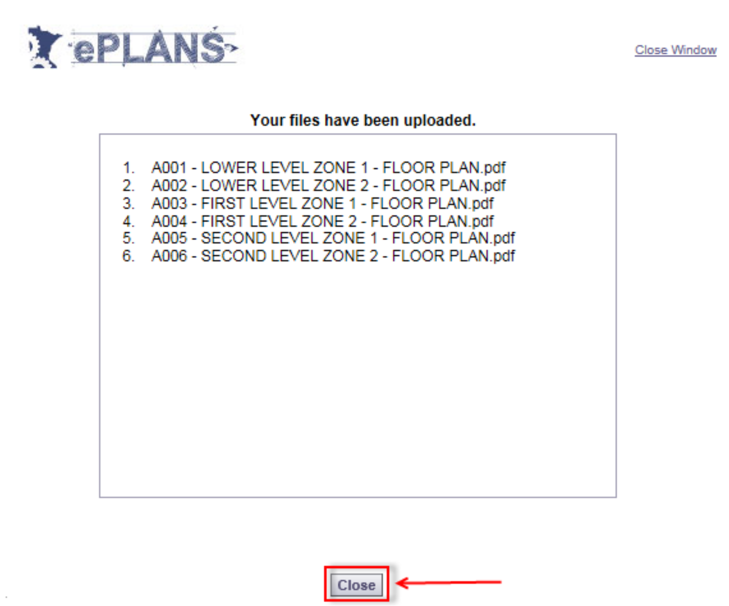
6. When the popup window opens, click the “Browse” button to locate files on your local machine or network. Select the files you would like to upload and then click the “Upload” button. The window will change and start displaying the progress of your upload.

   Note: The upload window shown below requires the Silverlight component described in the System Setup section of the User Guide. If you do not have Silverlight installed you will see a simpler upload window that will also allow you to upload 5 documents at a time.

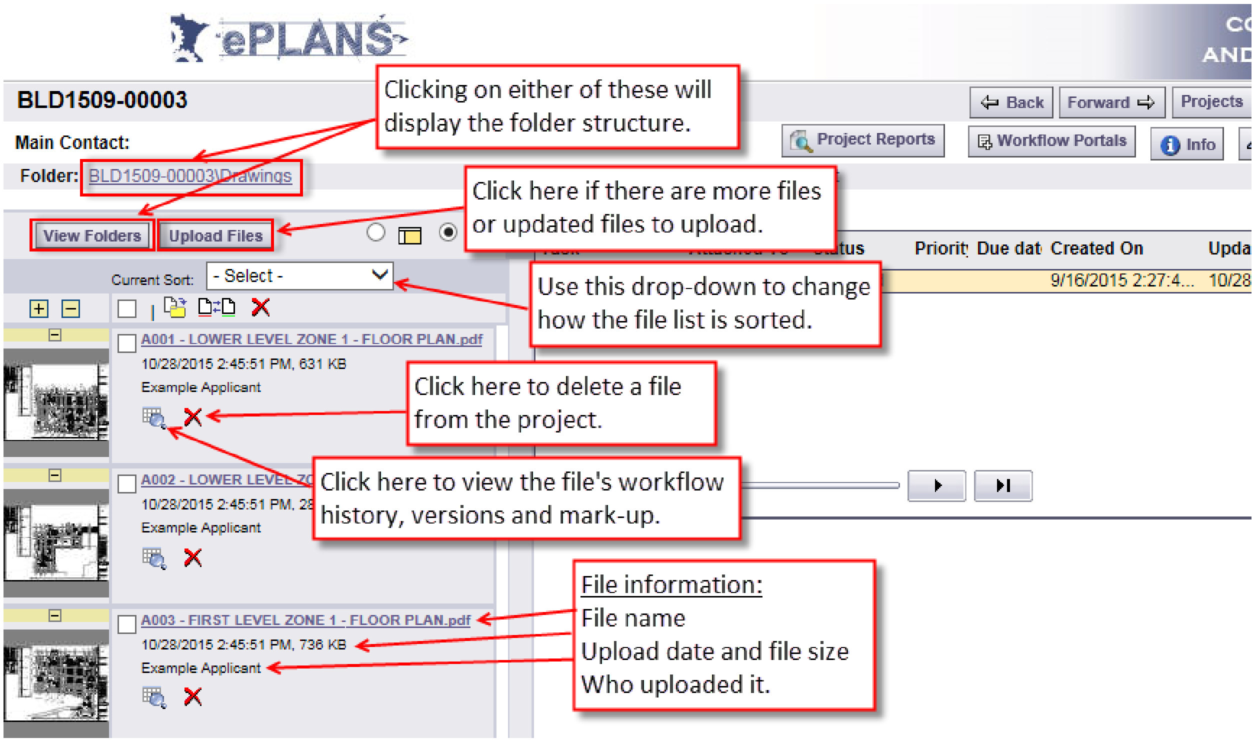




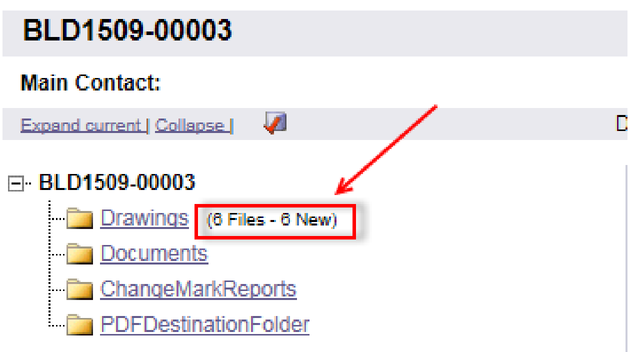
7. Once the files have been uploaded, click "Close" in the confirmation dialog shown below.



8. Successfully uploaded files will appear in a list under the folder you selected. Refer to the image below for tips on what you see or do with this file list.



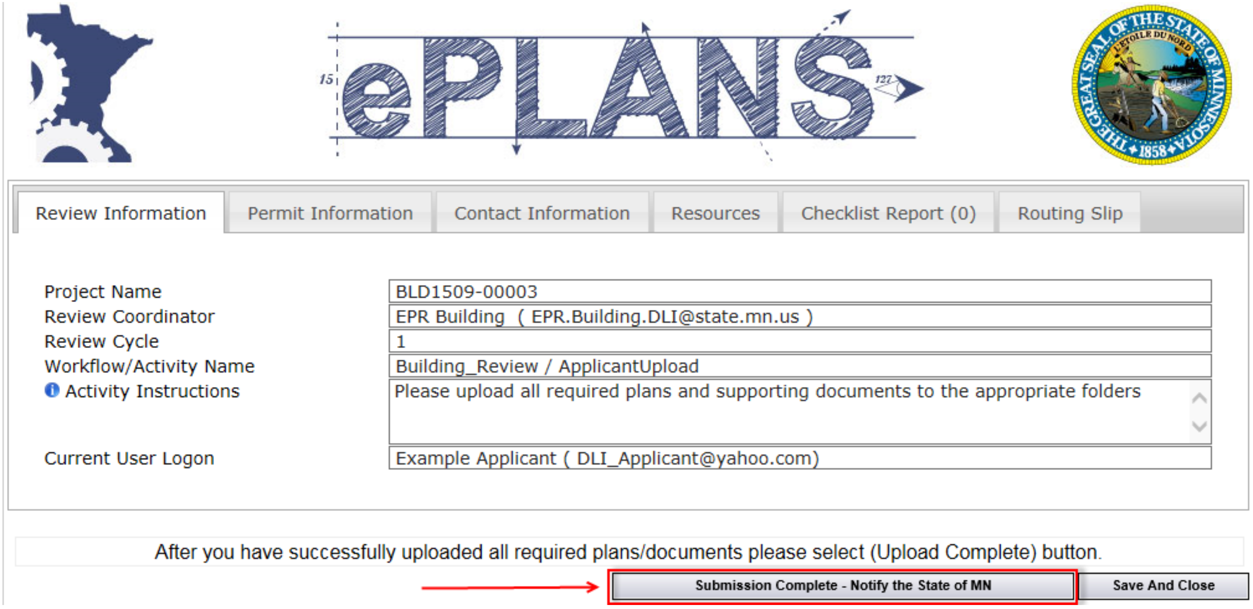
Clicking the "View Folders" button or the link above it will return you to the folder view. The folder view has been updated to show how many files are in each folder.



9. Once all files are uploaded you need to complete the Applicant Upload workflow step. This is very important! If you do not complete this step the workflow will not advance and the department will not be notified that your project is ready to be reviewed.

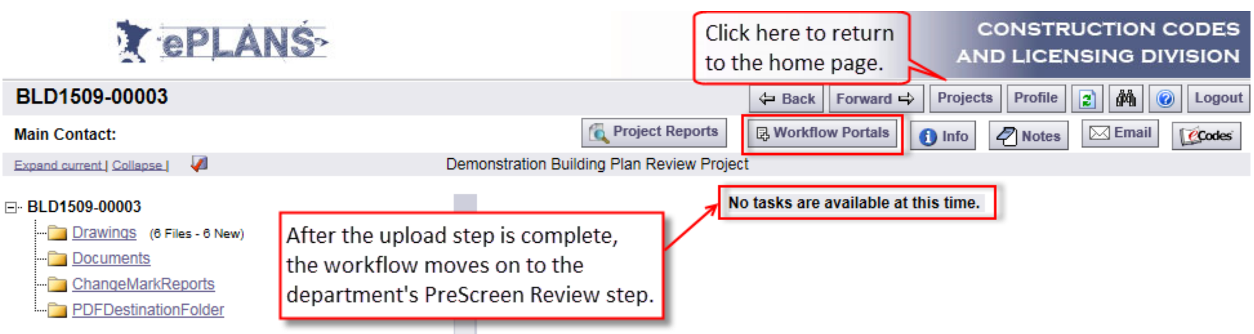
   Complete the process by opening the eForm that was minimized in step 4. If the eForm was inadvertently closed, re-open it by clicking on the task as you did when following steps 1 and 2.

   Click the button labelled "Submission Complete – Notify the State of MN". This will complete your assigned Applicant Upload task and advance the workflow to the Prescreen Review step, which is completed by the department.

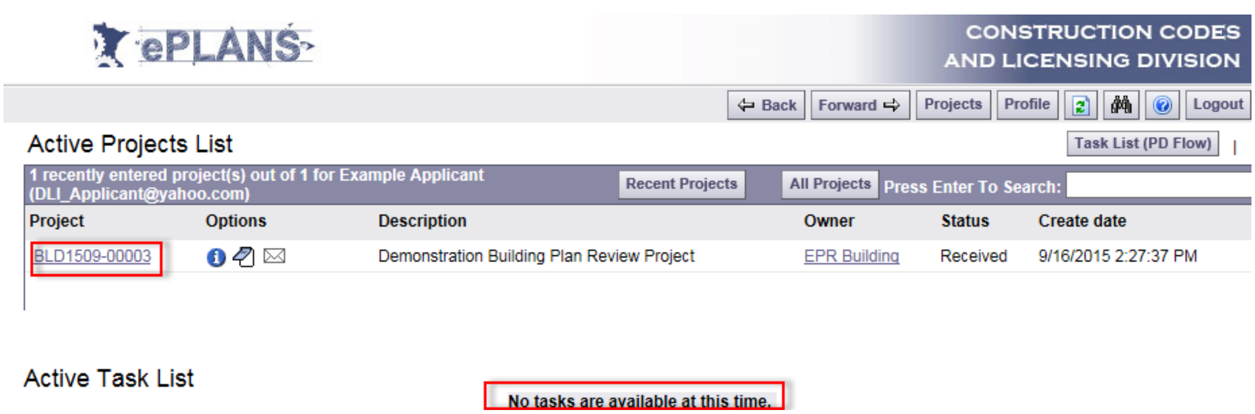


After completing this task you will see that the status of the project has change and you no longer have and active task assigned to you.

The Workflow Portals section of the project page shows that "No tasks are available at this time".



Click the "Projects" button to return to the home page. You will see your project in the Active Projects List but the project is no longer in the Active Task List because you have completed the task that was assigned to you. You may have to scroll down to see the Active Task List.



Plan Review Queue

Plan review projects go into an internal queue after the Applicant Upload step is completed and the department verifies that a complete set of plans that meet the submission guidelines was submitted. The next available plan reviewer will take a project from the queue on a first in, first out basis. Depending on the number of projects in the plan review queue, it may take a few days to a few weeks before a plan reviewer begins reviewing a project.

Applicant PreScreen Resubmit

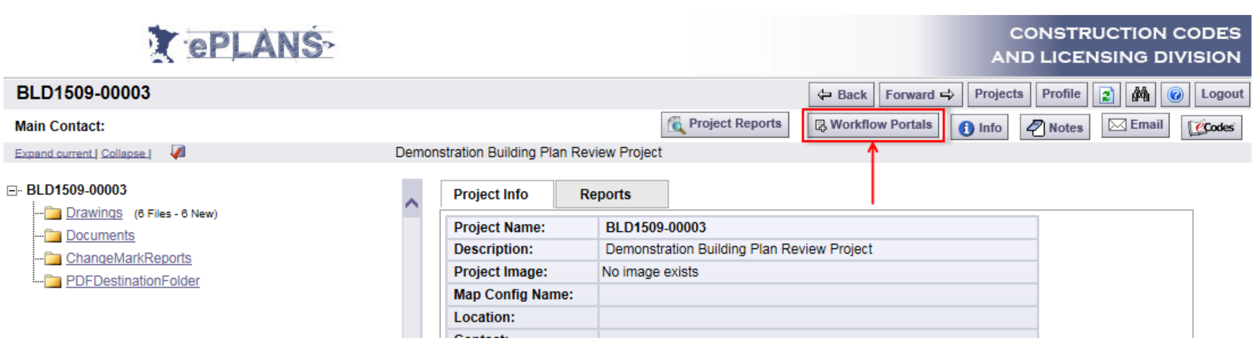
After the applicant completes the Applicant Upload step the department performs a cursory review of submitted documents to see if they conform to the department's submissions guidelines. Please refer to the Submission Guidelines section of the User Guide for details. If issues were found by the department the submission will be rejected and the applicant will be assigned a PreScreen Resubmit task. The purpose of this task is for the applicant to make corrections based on prescreen comments and to upload corrected or missing documents. If the submission passes the prescreen step then the project will move into the plan review queue.

As an applicant, you will be notified via email if you were assigned a PreScreen Resubmit task. After logging in to ProjectDox, scroll down on your home page to see the "Active Task List". There you will see that a PreScreenResubmit task is pending.

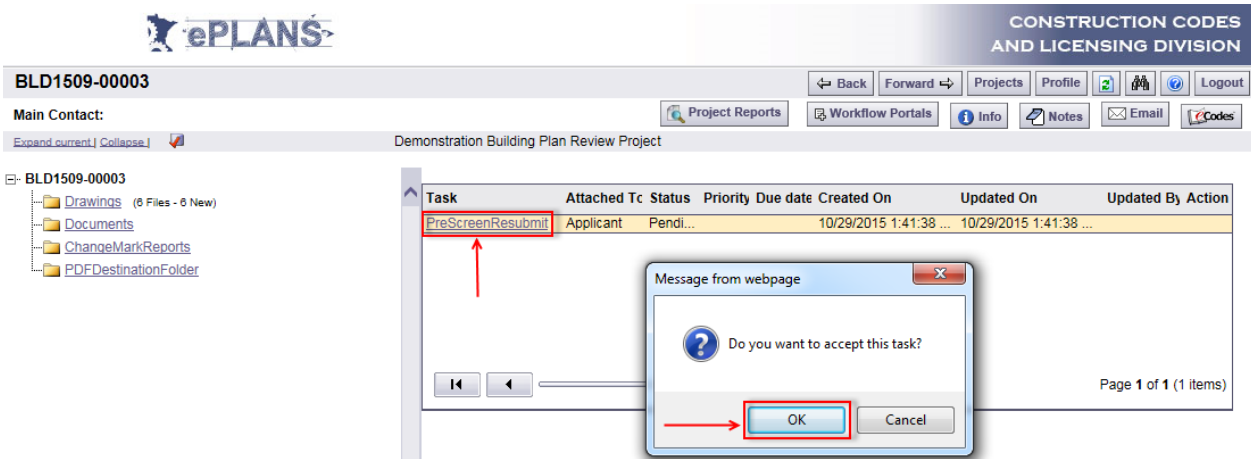
Active Task List

Project Name	Task	Attached To	Status	Priority	Due date	Created On
BLD1509-00003	PreScreenResubmit	Applicant	Pending			10/29/2015 1:41:38 PM

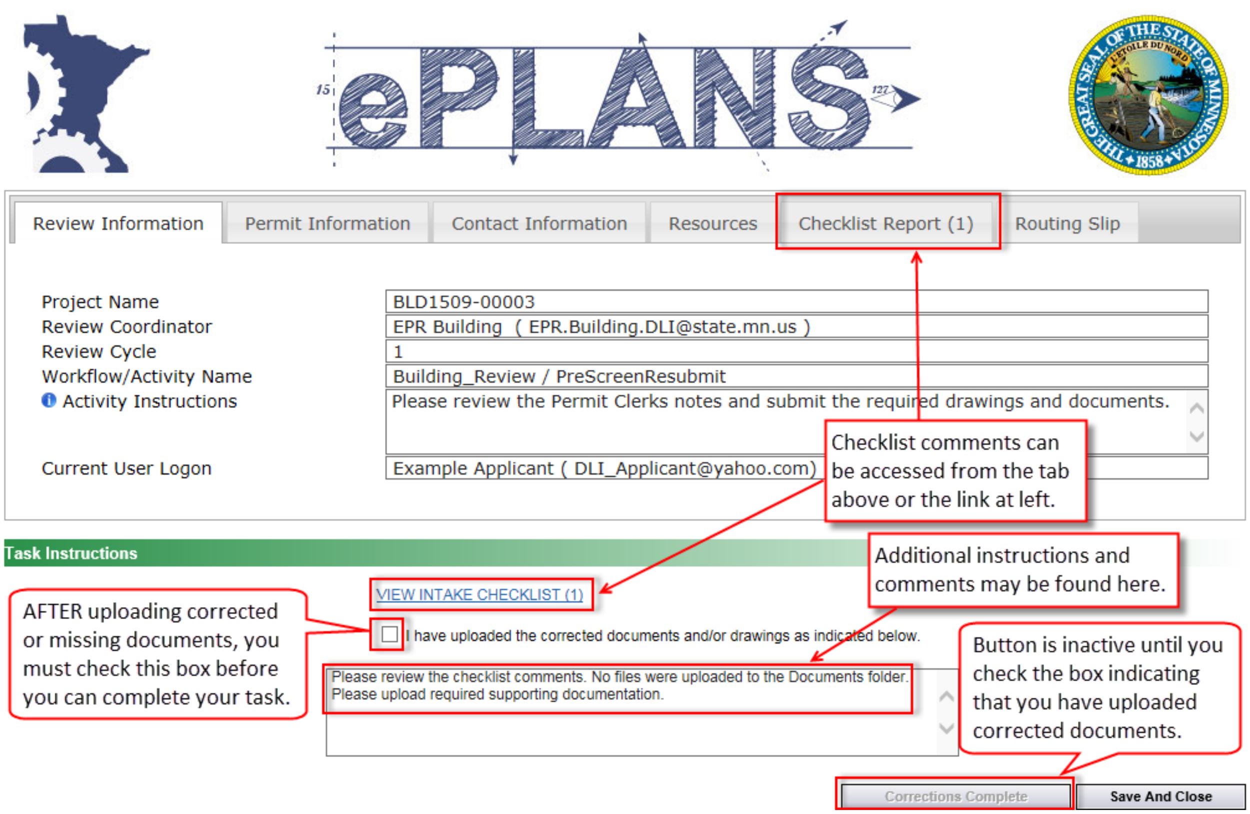
1. Click on the Project Name and then on the Workflow Portals button when the project page opens.



2. Click on the “PreScreenResubmit” task link and accept the task when prompted.

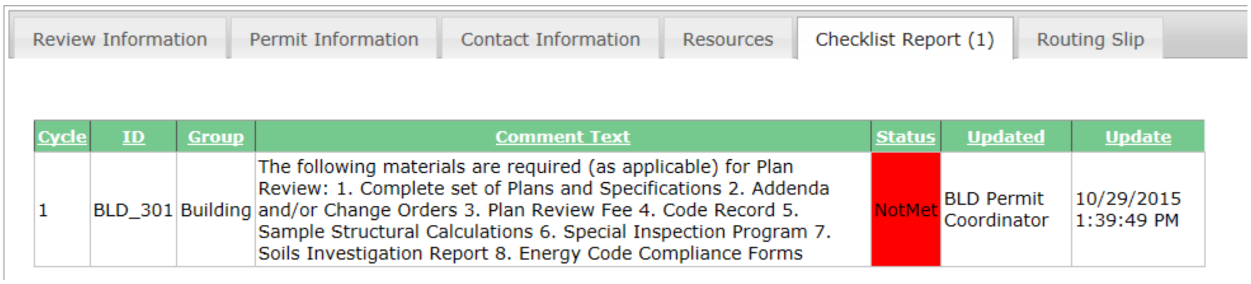


3. Once you have accepted the task, the associated eForm will open. This form will provide you with the feedback you need to resolve the issues that were found by the department in the PreScreen Review step. The eForm has two methods of providing feedback.



4. Before making corrections and resubmitting documents, view the comments that were made by the department’s prescreen reviewer. These comments are found in the text box at the bottom of the eForm.

5. If “checklist” comments were included you will see a count in the “Checklist Report” tab as well as in the link labelled “View Intake Checklist”. The tab and the link will lead you to the same place where you must respond if checklist comments were made. In the example above the “(1)” following the tab and the link text indicate that one comment was made and must be responded to. Click the tab labelled “Checklist Report” to view comments that will help you understand why your initial document upload was rejected.



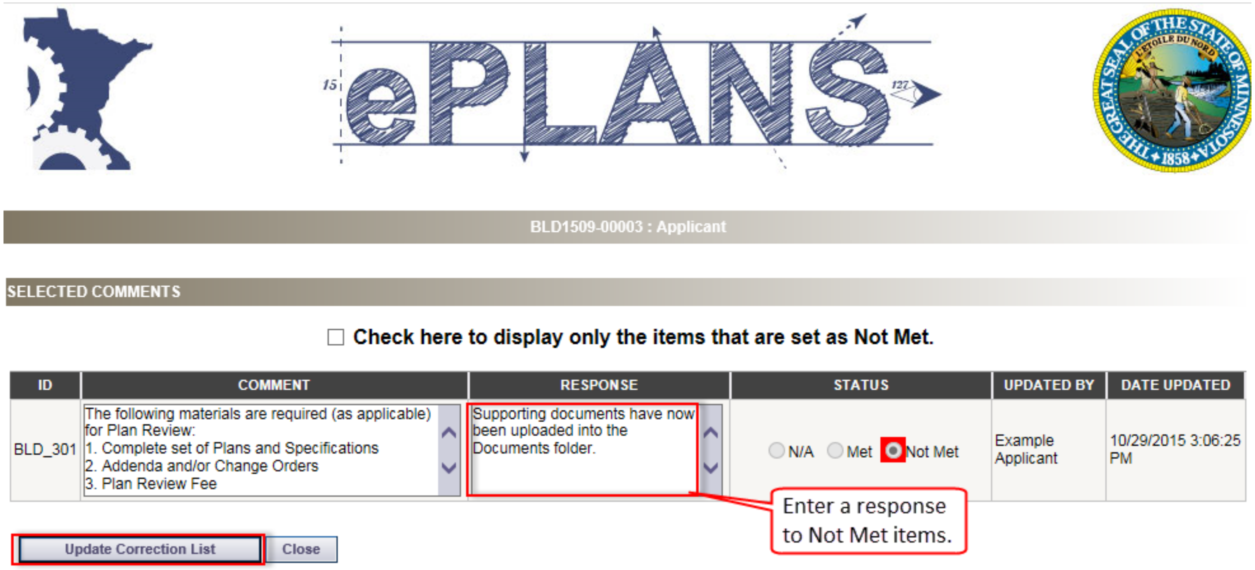
Cycle	ID	Group	Comment Text	Status	Updated	Update
1	BLD_301	Building	The following materials are required (as applicable) for Plan Review: 1. Complete set of Plans and Specifications 2. Addenda and/or Change Orders 3. Plan Review Fee 4. Code Record 5. Sample Structural Calculations 6. Special Inspection Program 7. Soils Investigation Report 8. Energy Code Compliance Forms	NotMet	BLD Permit Coordinator	10/29/2015 1:39:49 PM

6. Consider the comments from the previous steps and make the necessary corrections or provide the missing information. Issues will commonly be related to missing documents, drawing orientation, or failure to follow file naming conventions.

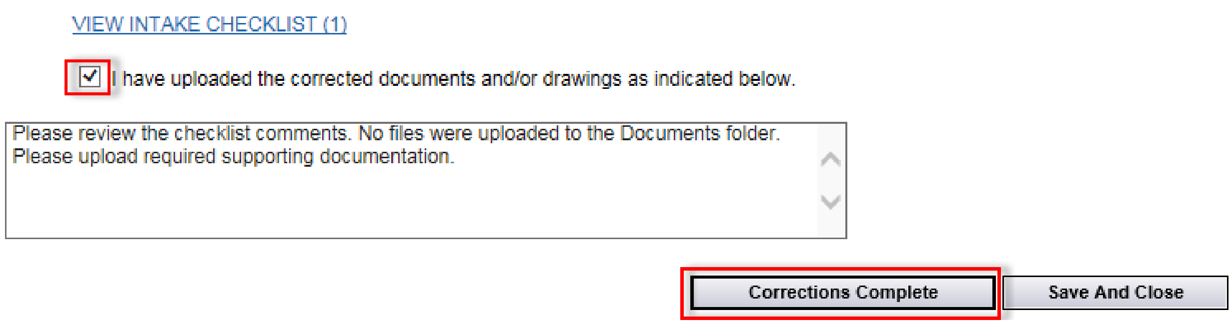
7. Upload revised or missing documents following the same procedures used in steps 4-7 in the Applicant Upload section of this user guide. Please delete previously uploaded files if documents were renamed and uploaded to conform to naming conventions. If files are in the folder under two different names it will cause confusion and could delay the plan review.

8. After completing the upload you must respond to the checklist items. To do this click on the link labelled “View Intake Checklist”. Review the information in the Comment column and type a Response in the adjacent column for each checklist item that has a status of “Not Met”. Comments that have a status of “N/A” are informational only.

   When you have responded to each comment, click the “Update Correction List” button. You can then click on the “Close” button.



9. After you have finished uploading corrected or missing documents and have responded to checklist items you can complete your task and send the project back to the department for review. To complete this task you must first check the checkbox on the eForm that indicates that you have seen the prescreen comments and responded appropriately. Check the box and click the “Corrections Complete” button.



This will complete your assigned Prescreen Resubmit task and advance the workflow to the Prescreen Review step, which will be completed by the department. If no further issue are identified the project will move to the plan review queue.