ELECTRONIC SUBMITTAL TRAINING

Creating an EPM Account and Managing Users
Creating an Account and Managing Users …

The **Electronic Plan Management System (EPM)** is an online work flow tool that allows architects, engineers, and designers the ability to oversee their projects as they go through the plan review and permitting process. All pertinent information related to the project is visible on a web-based “dashboard” – with real time updates. Users can watch and manage their project as it progresses from estimation, scheduling, gating, plan review and on to approvals and permitting.

The Mecklenburg County, NC EPM site can be found at: [http://epm.mecklenburgcountync.gov/](http://epm.mecklenburgcountync.gov/)

The first step to working in EPM is to establish an account so that you will access to a dashboard …
Creating an Account and Managing Users ... 

On the EPM website, click here to create a company account for the first time.

Once a company account is established, individual users (project managers) may be added and deleted as needed for that company.
Creating an Account and Managing Users ...

Start by entering the company’s legal name. This should be the company name as it appears on letters, plans, reports, etc. Click CONTINUE.

Following the directions on the next screen, you will note that (in this example) any firm with “Smith” in it, is listed.

If yours is listed (albeit maybe in another, slightly different format – i.e. “Smith Design”, etc.) then the company already has an account and you would need to go to the client administrator (person who set up the account) to have them add you as a new USER and assign you a specific username/password.

If you do not have access to the client administrator account username/password: Send an email to CE-Tech.Triage@mecklenburgcountync.gov with the following information/document:

- Owner of the company must provide a letter, on company letterhead, requesting to gain access to the specific account, the letter must provide the following information:
  - Provide the current Client Administrator’s full name
  - Why the owner is requesting access to the account. i.e. The Client Administrator is no longer with the company
  - Statement request CE-Tech Triage reset the password on the account

- If your company is not listed, click CONTINUE ...
Creating an Account ...

Once you’ve confirmed that there is no pre-existing company account, continue with completing the required information (red asterisked fields) on the CREATE COMPANY ACCOUNT page.

*As system generated communications coming from EPM (email notices) will only be sent to the contact information provided here, please double check addresses, phone numbers and email addresses.

The CLIENT ADMINISTRATOR will have permissions to make changes to the account, add/delete users, and grant/limit security rights to users.

The CLIENT ADMINISTRATOR may have many different roles – please check all that apply, including professional NC license numbers when that question pops up (if applicable).

*Be sure to make note of your username and password (case sensitive).

When all required information is complete, click SUBMIT.
Creating an Account...

Once information is verified (should happen immediately), EPM will greet you by opening directly to the EPM login page. You can begin signing into your dashboard to submit project applications.
Managing Users ...

Once signed into your dashboard you can apply for a plan review by selecting **SUBMIT BUILDING CONSTRUCTION PLAN APPLICATION**, under your TOOL BOX (review the training module “Submit a Project Application” for more details).

Need to make changes to your account? Select **MANAGE YOUR ACCOUNT**, under your TOOL BOX.

Select **UPDATE COMPANY PROFILE** if changes need to be made to the firm’s address or other contact information.

Select **USER MANAGEMENT** to add/delete or manage security settings for users.
Managing Users ...

Here you can make changes to either EMPLOYEES or CONTRACTORS who you might want to have access to upload project applications, manage the submittal process or to have access to APPROVED STAMPED DRAWINGS once a plan review has closed.

ADD, EDIT, or DELETE
Managing Employee Users ...

For employees of your company select **ADD EMPLOYEE** and complete all required information. When adding new users be sure to assign “roles” (security levels):

- **Client Administrator** = Full rights to edit the company account and to make edits to- or add other users.
- **Client Regular User** = Will be able to log in to an EPM dashboard and submit project applications and files.
- **Client Read Only** = Will be able to log in and access all information but cannot submit project applications or files.

Employee users will have full access to ALL PROJECTS on a company’s account/dashboard. EPM does a great job of tracking each activity and who has done what/when but the project manager will be responsible for all user’s usage or representation on a project as if the action was done under their direct supervision.
Managing Contract Users ...

To set up contract users, enter their information under **ADD CONTRACTOR** in much the same way that you did when you used **ADD EMPLOYEE**.

Why add a contractor? This could be for members of a design team (that are not employees of your company), owners, general contractors or anyone else you are collaborating with. By setting them up as a contract user you will provide them a username and password into your company dashboard but will be able to securely identify and limit the specific projects they will have rights to. Some examples of why this may be of use to you:

- You want an owner to have access to the project history
- You want a non-employee designers to have direct access to review comments or to upload files – particularly if working within the INTERACTIVE REVIEW process.
- You want to give the general contractor the ability to go in and download the APPROVED STAMPED PACKAGE once plan review has been completed and permits are issued.

Setting up contract users is completely at the client administrator’s discretion. EPM does a great job of tracking each activity and who has done what/when in the HISTORY but the project manager will be responsible for all user actions or representation on the dashboard as if it were done under their direct supervision.
Managing Contract Users...

To identify and limit the project(s) a contract user will have access to on your company’s dashboard, after adding them as a user, go back to the ADMINISTRATION page and select ASSIGN CONTRACTORS TO PROJECTS.

Select contract user from the drop down menu. A full listing of all company ACTIVE PROJECTS will be available. Select only the ones you want them to have access to and click SAVE.

When complete, check for this notice to appear on the screen.

In this example, Sally Builder (GC) will now have full access to the projects you have indicated.
If a user forgets their username or password, they can simply select **FORGOT USER NAME** or **FORGOT PASSWORD** at the EPM Sign-In page. This only works if using the email address assigned to that user (or your client administrator can go in and reset or remind their user). This does not work if a company has lost track of the “client administrator” and need to reset that ….

You have successfully completed the training module designed to guide through creating an EPM account and managing its users.

If you have additional questions, please contact a Project Coordinator or Controller at **980-314-CODE**.