

Customer Guide: Uploading Project Files - Plan Review (EPM)

Software Requirements:



■ BROWSER: Internet Explorer 9 or higher (Web portal and EPM submittals)

*The EPM system is optimized to be used in this browser. Others may appear to function but can often result in unpredictable errors or results.

□ PDF EDITOR: Adobe Acrobat Reader 9 or higher (completing all fillable forms)

Project applications may not be accepted or will generate errors (internally) if filled out using any other PDF editor.

Using IE 9 or higher ... go to the Code Enforcement website: www.meckpermit.com. (Experienced users can go directly to the EPM website.)

Select Architects & Engineers button.

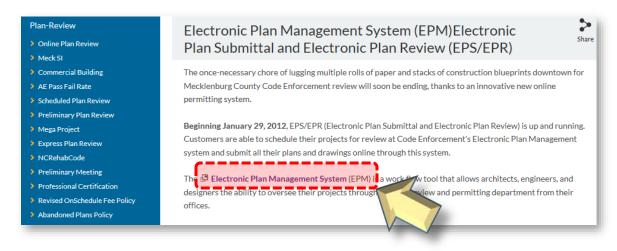


On the Architect & Engineer Tool Box page, you will see links to FORMS, EPM (Electronic Plan Management) as well as linkable topics

on lots of

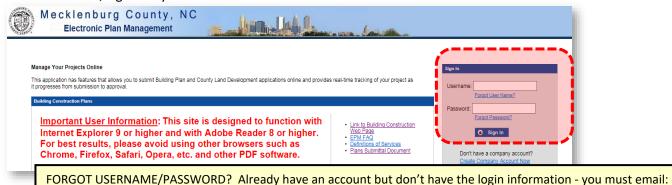


2 At this page, under "Plan Review Options", select "Electronic Plan Management" and you will be taken to the On Schedule Plan Review page. Here you will find essential information on electronic submittal, processes and packaging. Scrolling to the bottom of that page you will find links to FAQ's as well as several training modules or customer guides on things like "Creating an Account in EPM/Managing Users", "Submitting an Onschedule Application", "Accessing Approved Package" and "Customer Guide to Successful Plan Submission/Gating", etc. When ready to begin the process of applying and submitting for a commercial plan review, select the Electronic Plan Management System link and you will be directed off the Mecklenburg County website and directly to the EPM website.





3 At the EPM site, sign into your dashboard ...



On your dashboard, if you have already submitted the project application you can go directly to the ACTIVE

CE-TECH.Triage@mecklenburgcountync.gov so a work ticket can be established and your account reset.

PROJECTS tab, select the project and skip to next step. Otherwise, you need to upload a project application to get a project number and a portal to upload plan review EPM Dashboard documents. Home Open Actions | Active Projects | Build ☐ Review <u>Customer Guide</u>: <u>Submitting a Project</u> Application for guidance on this process. Announcements ity, Mecklenburg NC ANNOUNCEMENTS: On this HOME Electronic Place ement PAGE, you will find updates and EPM Dashboard announcements. Scrolling through will link you to important planning information like Lead Time Charts and will open again at the dashboard to add project documentation once the review schedule has been ACCEPTED WHAT ARE THE SCHEDULE LEAD TIMES? For the benefit of all projects, your schedule is received. Our goal is to be ready to review your project when you are ready to submit – that works best when a project manager plans and projects when all documents will be complete and ready for plan review. Use the DATE DRAWINGS WILL BE READY field in the application and outuantly your application as soon as possible. The more lead time you give your coordinator to reserve a schedule, the better chance we will be waiting on you — instant of you waiting on Code Enforcement.

[Code Enforcement's weekly updated LEAD TIME CHART] **Project Formatting & Submittal** Packaging Requirements as well as ₹<u>\$</u>} Man other plan review processes and usage & Sear guides. R My P PACKAGING GUIDELINES INTERACTIVE REVIEW PROCESS FAQ SUBSEQUENT REVIEW CYCLE SUBMITTAL GUIDELINES (Re-reviews) low are the TOP submittal mistakes applicants are making – leading to delays, pol-jects. (Scroll to the bottom for more details and information on other processes): Mecklenburg County, NC **Electronic Plan Management** MOST FREQUENT SUBMITTAL DEFECTS
SHEET INDEXING: An Excel database hardcod **Project Details 5** At the **ACTIVE PROJECTS** tab, click on the new project Project Name: Domino's Store #5552 (#3689 Address: number and that project's dashboard will open. Under Review Type: Team Score: TOOLBOX, open the FINISH SUBMITTING PACKAGE page. Project Status: **6** Directions on this page will guide user as to where and Toolbox Review Status how to ADD FILES: History Assessment Cycle: 1 V Graphical View No appointments have been scheduled yet. **Drawing Files and Sheet Index** View Notes Select your project files clicking on the "Add File" button. You can select multiple files at a time by submitted Files Once you have selected the files, click on the Open button to start uploading the files to the select Finish Submitting Package Application Submitted Note: Only PDF files can be uploaded and the size of any PDF file has to be less than 40 MB. Sheet Index is required for all On Schedule and RTAP projects. You can download the sheet index template from here. If you do not see the "Add File" button below, you may need to install the latest version of Adobe Flash Player and then refresh this page again. Add File 🕕

As you are adding files, be sure that all uploads have completed (nothing pending or spinning) and that the

UPLOADED DRAWING/PROJECT FILE box contains all the files you intended (no duplicates and nothing missing) including your SheetIndex.XLSX file.

File Size File Type File Name SheetIndex SheetIndex.xlsx 25 KB ProjectFile Address Verification.pdf 36 KB ProjectFile Architectural Int2.pdf 28.14 MB ProjectFile Building Permit Application.pdf 1.07 MB 279 KB ProjectFile BUILDINGPERMIT.pdf

3 Only after confirming the uploaded files ... hit **SUBMIT**.

Please be sure that you have uploaded all the files necessary for your submis:
You will not be able to submit additional drawings after you click Submit.

If you realize you need to submit additional files after you have clicked Submit, please contact an OnSchedule Coordinator for assistance

After you have finished uploading your project files click the "Submit" button.

Submit

Submit

NOTE: This action closes the submittal portal (the GATE) to you and then opens it up for Mecklenburg County Staff. The **PROJECT STATUS** will change from **WAITING FOR PACKAGE SUBMISSION** (GATE open to you) to **GATE OPEN** (GATE closed to you and open to Code Enforcement for processing).



*Pay careful attention to the result of this action because if there is something wrong, the system will provide feedback (example) ...

The sheet index contains following errors. Please correct them and re-upload the updated sheet index.

A Sheet index does not contain any valid data.



*If files upload successfully, EPM will go back to the project's dashboard home page and you should see the PACKAGE SUBMITTED under the **HISTORY** section ...



... and you will see all the files as you have uploaded them under the **SUBMITTED FILES** page.

EPM dashboards are always real-time information. You see what county staff sees. If the package has not uploaded as intended, contact your coordinator so that they can arrange to open the GATE for you to make corrections/additions.

Toolbox

History
Graphical View
View Notes

Submitted Files
Finish Submitting Package
Resubmit Package
Resubmit Package
Resubmit Interactive Review
Files

Change Project Manager
Plans Ready On
Self Schedule
Accept / Reject Review Date
Cancel Review

Application F	orm Project	368713.pdf	Grady Smith	Sep 02, 2	016	735 KB	
alandad Denvis	ng/Project Files						
pioaded Drawir	ig/Project Files						
Assessment Cycle: 1 🗸							
File Type	F	ile Name	Subn	nitted By	Submit	ted On	File Size
Project File	Address Ver	ification.pdf		-	Sep 02,	2016	36 KB
Project File	Architectural	Int2.pdf	Grady	Smith	Sep 02,	2016	28.14 MB
Project File	Building Per	mit Applicati	on.pdf Grady	Smith	Sep 02,	2016	1.07 MB
Project File	BUILDINGPE	RMIT.pdf	Grady	Smith	Sep 02,	2016	279 KB
Sheet Index	Copy of Cop	y of Sheetlr	ndex.xlsx Grady	Smith	Sep 02,	2016	26 KB

Submitted By Submitted On File Size

File Name

THE SHEET INDEX: The Sheet Index is a database that is hardcoded into a project - a critical component of tracking during review and the final approved package going to the field. Its information must always reflect each sheet in the construction documentation package accurately. ONLY the drawing names, latest issue/revision dates, and revision numbers of final construction plan documents should be listed.

Cancel Project

When modifying an already loaded Sheet Index, you will not be able to first remove the existing file. (Notice, no red x to remove this file as with all the other file types.) Simply ADD the new one as you reload and resubmit. The system will over-write the existing XLSX file.

