

ePlans 3rd Party User Guide



City of Bend
Community
Development
Department

City of Bend Applicant User Guide

Introduction

To our citizens, development community and future customers, this user-friendly, innovative, web- based, paperless process will allow for the electronic submission of all your plan-related documents.

Benefits Include

- Reduced overall costs (paper, printing, transportation, storage space).
- Reduced time (delivery of documents and re-submittal documents).
- Increased efficiency and responsiveness in customer service (enhanced team work, communication and collaboration).
- Support for green initiatives.

Web-Enabled Collaboration



The following pages will provide you with all the details and information you need to join us in transforming the way you do business here at the City and the way government provides services and support for you, our customer.

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Electronic Plan Submission

Before you can complete your customer upload, please complete the following:

- Review the “Standards” section of this guide. We provide standards for naming your digital documents and files, reserved location for the City’s digital Approval stamp, acceptable file formats, etc.
- Submit your permit applications (including Deferred submittal checklist if applicable) to the City of Bend Permit Center via email. Pay any applicable plan review fees via [Click2Gov](#) or at the Permit Center, which is located on the main floor at:

710 NW. Wall St.
Bend, OR 97703
Fax: (541) 388-5519
building@bendoregon.gov

Standards

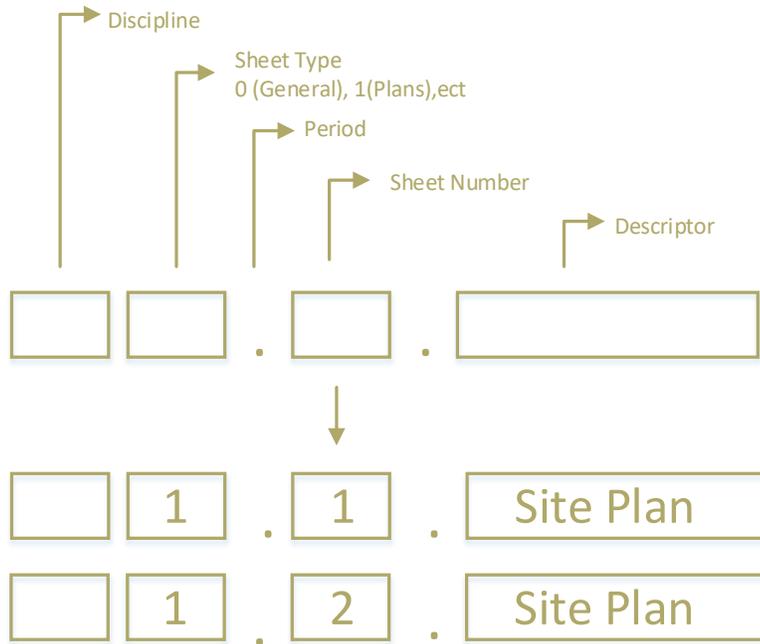
Standards allow for easy identification of drawings by naming convention: vector file types facilitate the most efficient viewing of documents. Color coding of reviewer markups provides easier visual identification of departments and disciplines.

Digital File Requirements

- Drawing Files: Each sheet / page of the drawing shall be uploaded as a separate file. Drawing files will be rejected if uploaded as a multi-page document.
- Supporting Document Files: All files required as part of the application submission, other than drawing files, e.g., Structural Calculations, Geo-Tech Reports, Easement Letters, and Certifications, shall be uploaded as individual multipage documents.
- All file names on re-submitted documents for both drawings and documents shall remain the same. Please **DO NOT** "version" or rename files when uploading resubmitted files...these files will be rejected. The ePlans software will automatically add a version number, as you will see on a later page.
- To facilitate rapid recognition and retrieval of files by our Plan Review teams, each sheet (file) name shall follow the naming requirements described on the following page. A discipline-specific prefix, page number, and suffix will allow for greater clarity and structured sorting.

Example

Drawing File Naming Requirements



| Discipline | Designation |
|--------------------------|-------------|
| Architectural | A |
| Civil | C |
| Contractor/Shop Drawings | Z |
| Electrical | E |
| Equipment | Q |
| Fire Suppression | FS |
| Fire Alarm | FA |
| General | G |
| Hazardous | H |
| Landscape | L |
| Mechanical | M |
| Other Disciplines | X |
| Plumbing | P |
| Process | D |
| Signs | N |
| Structural | S |
| Survey/Mapping | V |
| Telecommunications | T |

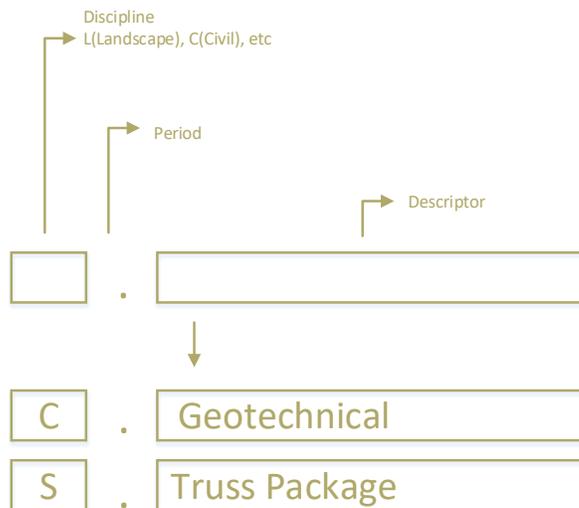
| Sheet Type | Designation |
|-----------------------------|-------------|
| General (Legend, Notes) | 0 |
| Plans (Horizontal View) | 1 |
| Elevations (Vertical Views) | 2 |
| Sections (Wall Sections) | 3 |
| Large Scale Views | 4 |
| Details | 5 |
| Schedules and Diagrams | 6 |
| User Defined | 7 |
| User Defined | 8 |
| 3D Representations | 9 |

| Descriptor | Designation |
|--|-----------------------|
| Architectural Demolition Protection And Removal | Demo |
| Architectural Elements General Architectural | General |
| Architectural Finishes | Finish |
| Architectural Graphics | Graphic |
| Architectural Interiors | Interior |
| Architectural Site | Site Plan |
| Civil Demolition Structure Removal And Site Clearing | Demo |
| Civil Grading Excavation, Grading, Drainage, Retention Ponds | Grading Drainage |
| Civil Improvements Pavers, Flagstone, Exterior Tile, Furnishings, Retaining Walls, And Water Features | Improvements |
| Civil Paving Roads, Bridges, Drives, And Parking Lots | Row |
| Civil Survey (Site) Plats, Topographic, Dimension Control | Site Plan |
| Civil Transportation Waterway Construction, Wharves, Docks, Trams, Railway Systems, And People Movers | Civil Transport |
| Civil Utilities Water, Sanitary Sewer, Storm Sewer, Power, And Communications | Utilities |
| Electrical Auxiliary Systems Alarms, Nurse Call, Security, Cctv, Pa, Music, Clock, And Program | Auxiliary |
| Electrical Demolition Protection, Termination, And Removal | Demo |
| Electrical Instrumentation Controls, Relays, Instrumentation, And Measurement Devices | Instrumentation |
| Electrical Lighting | Lighting |
| Electrical Power | Power |
| Electrical Site Utility Tunnels, Site Lighting | Utilities |
| Electrical Telecommunications Telephone, Network, Voice, And Data Cables | Telecommunications |
| Fire Detection And Alarm | Detection Alarm |
| Fire Suppression Fire Extinguishing Systems And Equipment | Suppression Equipment |
| General Contractual Phasing | Phase |
| General Informational List | General |
| General Resource | Resource |
| Landscape Demolition Protection And Removal Of Existing Landscaping | Demo |
| Landscape Irrigation | Irrigation |
| Landscape Planting | Planting |
| Mechanical Demolition Protection, Termination, And Removal | Demo |
| Mechanical Hvac Ductwork, Air Devices, And Equipment | Hvac |
| Mechanical Instrumentation And Controls | Instrumentation |
| Mechanical Piping Chilled And Heating Water, Steam | Piping |
| Mechanical Site Utility Tunnels And Piping Between Facilities | Utilities |
| Plumbing Domestic Water, Sanitary And Storm Drainage, Fixtures | Fixtures |
| Plumbing Site Extension And Connections To Civil Utilities | Site Utilities |
| Process /Plumbing Demolition Protection, Termination, And Removal | Plumbing Demo |
| Process Electrical Exclusively Associated With A Process And Not The Facility | Electrical |
| Process Instrumentation, Measurement, Recorders, Devices, And Controllers (Electrical And Mechanical) | Instrumentation |
| Process Piping, Valves, Insulation, Tanks, Pumps | Piping |
| Process Systems And Equipment For Thermal, Electrical, Materials Handling, Assembly, Refrigeration, Etc. | Systems |
| Structural Demolition Protection And Removal | Demo |

| | |
|--|--------------|
| Structural Framing Floors And Roofs | Framing |
| Structural Site | Site Plan |
| Structural Substructure Foundations, Piers, Slabs, And Retaining Walls | Substructure |

Supplemental File Naming Requirements

Below is an example of supplemental files naming requirements, each file can be uploaded as one document and do not need to be broken into individual sheets. Please group these supplemental files into their respective categories.

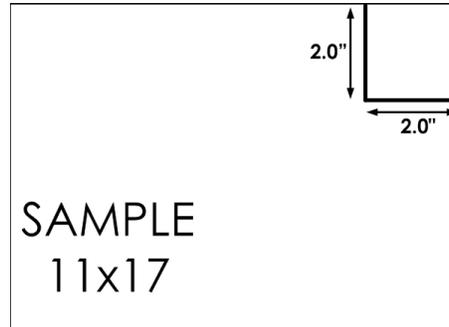
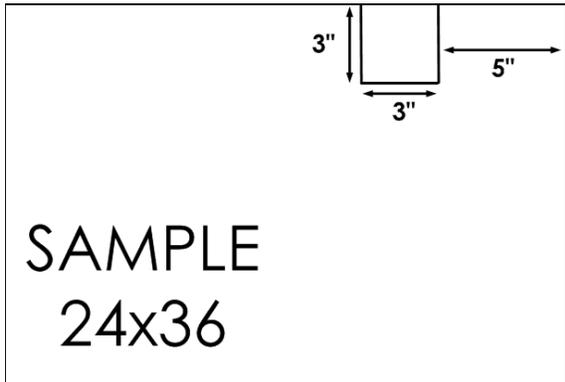


Border and Reserved Space Standards

It is virtually impossible to predict each individual or company's unique border sizes and title block areas. As a result, the following locations are offered as guides to ensure that when printed, the Approval Stamp is visible and not truncated.

| Sheet Size | Stamp Location | Reserved Space |
|------------|--|----------------|
| | | (Dimensions) |
| 8.5" x 11" | Upper right corner | 2.0" x 2.0" |
| 11" x 17" | Upper right corner | 2.0" x 2.0" |
| 24" x 36" | 5" from upper right edge of page inset to 8" Top edge inset down 3" | 3.0" x 3.0" |
| 36" x 48" | 5" from upper right edge of page inset to 8" Top edge inset down 3" | 3.0" x 3.0" |

- An area located at the top right corner of all drawings shall be reserved for the City of Bend electronic stamp. Our stamp location will allow for a ½" border.



File Type Standards

- Supporting Documents: Searchable PDF files are preferred for calculations, reports and other non-drawing files.
- Drawing files: Must be .PDF
 - Files must be 2D “print ready”, i.e., set up properly for printing with title block, no extra data outside the print page area, etc.
 - Files must be properly oriented in landscape view.

The following table highlights acceptable formats.

| | |
|----------------------|-------------------|
| Drawings | .PDF |
| Supporting Documents | .PDF, .TIFF, .PLT |

Electronic Stamps and Signature Standards

- All files must be electronically stamped with a signature per Oregon Statutes and Oregon Administrative Rules. There are specific provisions for electronic signatures within the Rules and Regulations. Architects and Engineers are required to meet. The following links are provided for further information:

Architects: ([Oregon Secretary of State Archives Division](#))

Engineers: ([Oregon Secretary of State Archives Division](#))

- Electronic stamps and signatures shall be inserted as a JPEG image.

Folder Structure Standards

- All drawing files and supplemental files shall be uploaded into the “Review Docs” folder for each project. All other files shall be uploaded to the “Documentation” folder.
- All responses to any corrections requested by plan examiners shall be uploaded to the “Review Docs” folder.
- All deferred submittals will go into the “Deferred Upload” folder. Applicants will have view rights only to deferred sub-folders.
- All file names on re-submitted documents (responses) for both drawings and supplemental files shall remain the same. **Please DO NOT version or rename files when uploading resubmitted files...these files will be rejected.**
- The “Final” folder contains all City of Bend stamped and approved drawings and documents.



Drawing Scale Standards

- All plans must be drawn to scale.
- All drawings must be calibrated. This calibration shall be saved in the drawing ensuring it is available to the reviewer.
- Each sheet must have an independent scale, i.e., 1in = 80ft or 1/8in = 1ft.
- When more than one scale is used on a sheet, an independent scale must accompany the applicable detail.

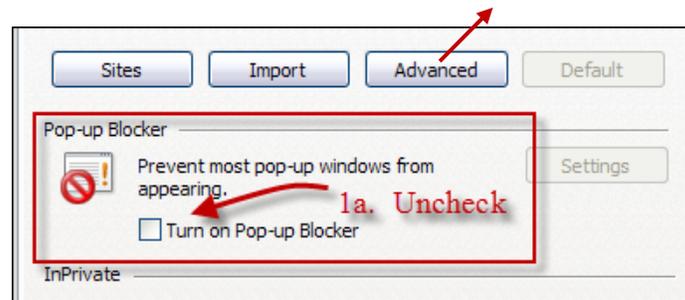
Logging on to ePlans

Logging In: New Users

1. Prior to logging into the ePlans application, the following actions must be completed:

Note: The instructions and examples shown using Internet Explorer on a PC, and your experience may vary when connecting via a different browser.

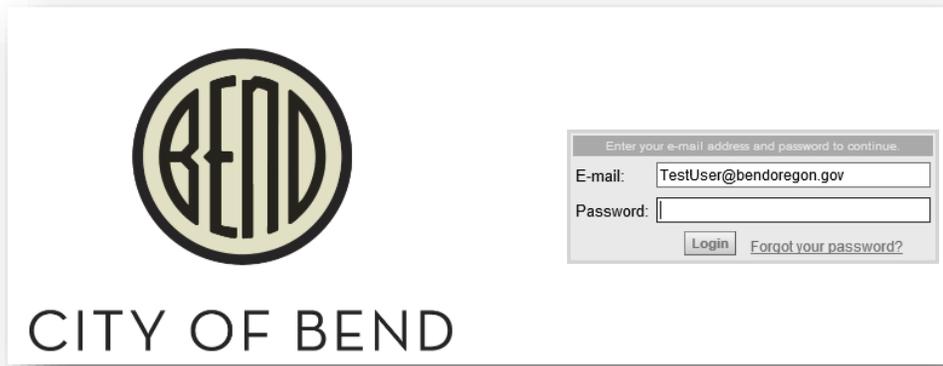
1.1 If your computer has pop-up blockers installed, you will need to disable pop-up blocking in order to utilize ePlans. Disabling pop-up blocking will be required for each login instance, unless you select the “always allow pop-ups” option (recommended).



1.2 The login page has an MSI (Microsoft Silent Install) component required to install all necessary ePlans ActiveX controls. This installation will only need to be done once; if you utilize a different computer it will require another installation for each computer (see below).
1.3 You can drag the shortcut to your desktop or add to favorites (see below).



- 2 Log in by entering your email address and temporary password (provided in the invitation email) and click the “Login” button.



- 3 After logging into ePlans click the “Profile” button located in the upper right of the page.



- 4 Enter your new password and personal account information. Items with a **red *** are required fields. Explore the tabs “Project Membership” and “Group Membership”. These will provide information about the projects you are able to access. Be sure to click on the “Save” button to save your profile.

- 5 Store your login, passwords and security question answer in a secure location so they may be retrieved at a later date.

Logging In: Existing Users

If you are a returning user, log in to ePlans with your full email address and password. If you have forgotten your password, click on the “Forgot Password” button to see your security questions (your first and last name must match exactly how it was initially created in the previous step). Your password can also be reset at that time.



CITY OF BEND

Enter your e-mail address and password to continue.

E-mail:

Password:

[Forgot your password?](#)

Finding Your Project

To run a project report you must find and enter the project in question. Any recent project will end up in the "Active Project List". This list will display a maximum of 15 projects. If you have more than 15 projects you must load the next tab until you find the desired project.

| Project | Options | Description |
|---|---------|--|
| WF TEST BP-14-5030-SFD 61084 BACHELOR VIEW RD | | NEW SFD W-GARAGE L1000 |
| BP-14-1512-SFD 540 SE GLENEDEN PL | | SFD WITH GARAGE LOT01 |
| WF TEST Planning | | New Workflow BETA |
| BP-15-0146-SFD 20228 NW BRUMBY LN | | New Workflow Test - NEWSFD-GARAGE RES |
| BP-14-4923-COMM 706 NE GREENWOOD AVE | | RETAIL SHELL BUILDING COMM |
| BP-14-5215-CRML 61292 S HWY 97 SUITE 130 | | New Workflow Test - CIBELLI'S PIZZA COMM |
| BP-14-2360-CRML 20545 MURRAY RD | | PRO BUILD LUMBER PRODUCTS COMM pz 14-567 |
| BP-08-3296-RADD 3773 NW SUMMERFIELD | | ADDTN-FAMRM, DINRM, ENTRY*PAPER* |
| BP-08-3097-RADD 62630 LARKVIEW RD | | SUNROOM ADDITION *PAPER* |
| BLD Dev | | **DO NOT DELETE** |
| BP-14-2545-GRDR 19800 TOUCHMARK WAY | | HWA MARK DOUGLAS - PZ 13-0453 |
| PZ-12-0188 WOODHILL HOMES-VARIANCE | | - WOODHILL HOMES-VARIANCE |

Sometime finding a specific project can be confusing if you have been added to multiple projects. ePlans allows users to find projects via the search bar in the upper right of the screen.

City of Bend ePlans

Back Forward Projects Site-Wide Reports Profile Logout Admin

Task List (PD Flow) Create Project View Archived Projects

ts Press Enter To Search:

Enter the application year, a hyphen, and the application number into the search field and press enter to filter the list.

City of Bend ePlans

← Back Forward → Projects Site-Wide Reports Profile Logout Admin

Task List (PD Flow) | Create Project | View Archived Projects

Press Enter To Search: 14-5030

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Active Projects List

1 found project(s) out of 1

| Project | Options | Description |
|---|---------|------------------------|
| WF TEST BP-14-5030-SFD 61084 BACHELOR VIEW RD | | NEW SFD W-GARAGE L1000 |

Access the project by clicking on the project links.

Running Reports

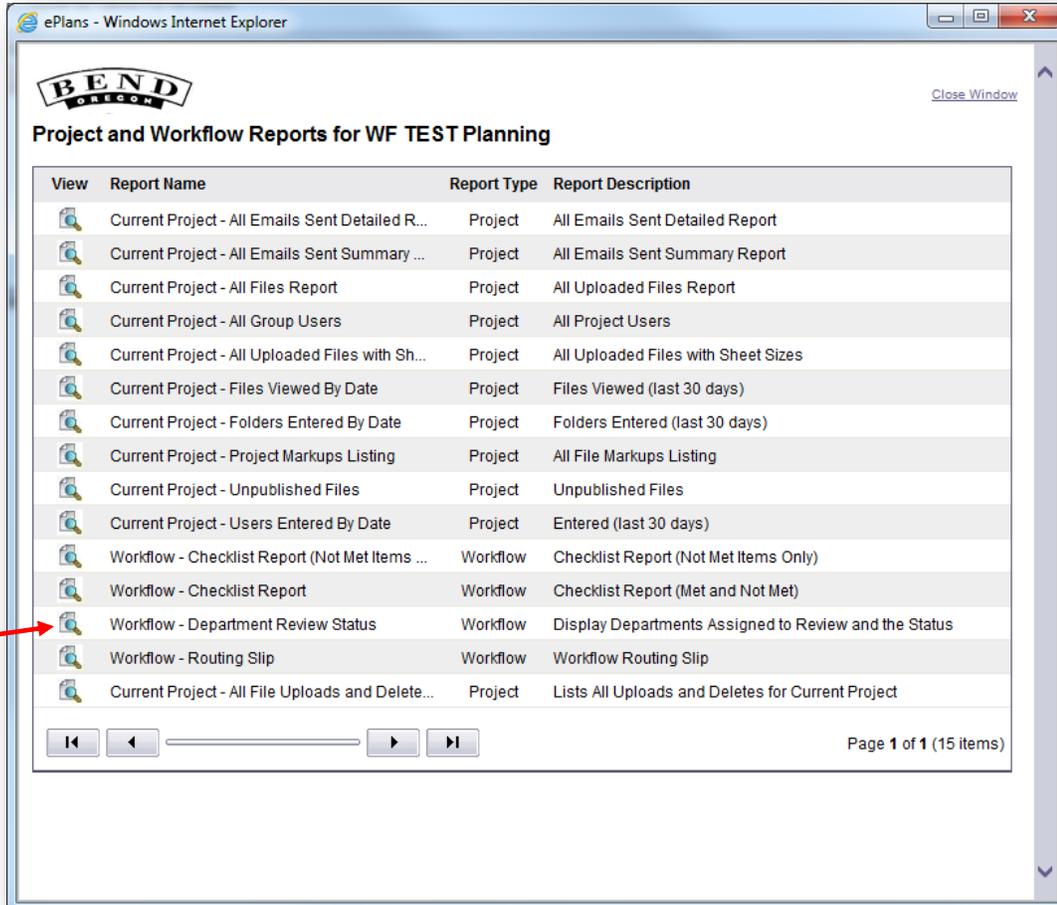
The City of Bend has several canned reports that can be used to track the progress of your project. These reports allow the 3rd party or submitter to find information such as automated emails sent, including the time and day and recipient, what files were uploaded and when, which files have been viewed, changemarks (markups) requested by City of Bend Staff, checklist items, and routing slips that show who had was assigned workflow step and how long they took to complete the step.

How to run reports

1. While inside of the project click the “project reports” button, in the upper right of the screen.



- After clicking the “project reports” button  to run the desired report.

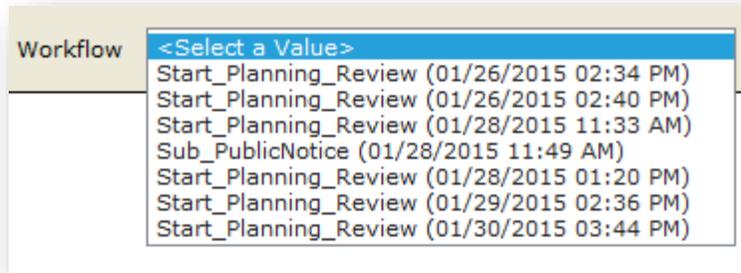


Project and Workflow Reports for WF TEST Planning

| View | Report Name | Report Type | Report Description |
|------|--|-------------|---|
| | Current Project - All Emails Sent Detailed R... | Project | All Emails Sent Detailed Report |
| | Current Project - All Emails Sent Summary ... | Project | All Emails Sent Summary Report |
| | Current Project - All Files Report | Project | All Uploaded Files Report |
| | Current Project - All Group Users | Project | All Project Users |
| | Current Project - All Uploaded Files with Sh... | Project | All Uploaded Files with Sheet Sizes |
| | Current Project - Files Viewed By Date | Project | Files Viewed (last 30 days) |
| | Current Project - Folders Entered By Date | Project | Folders Entered (last 30 days) |
| | Current Project - Project Markups Listing | Project | All File Markups Listing |
| | Current Project - Unpublished Files | Project | Unpublished Files |
| | Current Project - Users Entered By Date | Project | Entered (last 30 days) |
| | Workflow - Checklist Report (Not Met Items ... | Workflow | Checklist Report (Not Met Items Only) |
| | Workflow - Checklist Report | Workflow | Checklist Report (Met and Not Met) |
| | Workflow - Department Review Status | Workflow | Display Departments Assigned to Review and the Status |
| | Workflow - Routing Slip | Workflow | Workflow Routing Slip |
| | Current Project - All File Uploads and Delete... | Project | Lists All Uploads and Deletes for Current Project |

Page 1 of 1 (15 items)

- After clicking the button you will be prompted to choose a workflow. In most cases there will be only one workflow to choose. If multiple workflows are running use the date and time reference to choose the workflow.



Workflow

- <Select a Value>
- Start_Planning_Review (01/26/2015 02:34 PM)
- Start_Planning_Review (01/26/2015 02:40 PM)
- Start_Planning_Review (01/28/2015 11:33 AM)
- Sub_PublicNotice (01/28/2015 11:49 AM)
- Start_Planning_Review (01/28/2015 01:20 PM)
- Start_Planning_Review (01/29/2015 02:36 PM)
- Start_Planning_Review (01/30/2015 03:44 PM)

- Click the view report button to launch the report.



5. This will bring up the report

Project Workflow

1 of 1 100% Find | Next Select a format Export



Current Project - Workflow Routing Slip
WF TEST BP-14-5030-SFD 61084 BACHELOR VIEW RD

| Task Name | Status | Created | Updated | Group | User | Cycle | Completed | | | | |
|-------------------|----------|------------------------|------------------------|-------------|------|-------|------------------------|------|-------|-----|-----|
| | | | | | | | Date | Days | Hours | Min | Sec |
| ApplicantUpload | Complete | 12/18/2014 12:24:37 PM | 12/19/2014 1:13:59 PM | | | 0 | 12/19/2014 1:13:59 PM | 1 | 0 | 49 | 22 |
| PreScreenReview | Complete | 12/19/2014 1:14:00 PM | 12/19/2014 1:33:32 PM | A_PreScreen | | 0 | 12/19/2014 1:33:32 PM | 0 | 0 | 19 | 32 |
| AssignTechnician | Complete | 12/19/2014 1:33:32 PM | 12/19/2014 1:34:58 PM | A_TechLead | | 0 | 12/19/2014 1:34:58 PM | 0 | 0 | 1 | 26 |
| AssignReview | Complete | 12/19/2014 1:34:58 PM | 12/19/2014 1:39:03 PM | | | 0 | 12/19/2014 1:39:03 PM | 0 | 0 | 4 | 5 |
| DepartmentReview | Complete | 12/19/2014 1:39:03 PM | 12/19/2014 1:43:25 PM | | | 1 | 12/19/2014 1:43:25 PM | 0 | 0 | 4 | 22 |
| ReviewQA | Complete | 12/19/2014 1:43:25 PM | 12/19/2014 1:44:01 PM | | | 1 | 12/19/2014 1:44:01 PM | 0 | 0 | 0 | 36 |
| ApplicantResubmit | Complete | 12/19/2014 1:44:01 PM | 12/19/2014 3:01:14 PM | | | 1 | 12/19/2014 3:01:14 PM | 0 | 1 | 17 | 13 |
| ResubmitReceived | Complete | 12/19/2014 3:01:14 PM | 12/19/2014 3:03:42 PM | | | 1 | 12/19/2014 3:03:42 PM | 0 | 0 | 2 | 28 |
| DepartmentReview | Complete | 12/19/2014 3:03:42 PM | 12/23/2014 10:09:36 AM | | | 2 | 12/23/2014 10:09:36 AM | 3 | 19 | 5 | 54 |
| ReviewQA | Complete | 12/23/2014 10:09:36 AM | 12/23/2014 10:10:15 AM | | | 2 | 12/23/2014 10:10:15 AM | 0 | 0 | 0 | 39 |
| ApplicantResubmit | Complete | 12/23/2014 10:10:15 AM | 12/23/2014 11:27:20 AM | | | 2 | 12/23/2014 11:27:20 AM | 0 | 1 | 17 | 5 |
| ResubmitReceived | Complete | 12/23/2014 11:27:20 AM | 12/23/2014 11:28:17 AM | | | 2 | 12/23/2014 11:28:17 AM | 0 | 0 | 0 | 57 |
| DepartmentReview | Complete | 12/23/2014 11:28:17 AM | 12/23/2014 11:28:56 AM | | | 3 | 12/23/2014 11:28:56 AM | 0 | 0 | 0 | 39 |
| ReviewQA | Complete | 12/23/2014 11:28:56 AM | 12/23/2014 11:30:07 AM | | | 3 | 12/23/2014 11:30:07 AM | 0 | 0 | 1 | 11 |
| BatchStamps | Complete | 12/23/2014 11:30:07 AM | 12/23/2014 11:30:43 AM | | | 3 | 12/23/2014 11:30:43 AM | 0 | 0 | 0 | 36 |
| Issuance | Complete | 12/23/2014 11:30:43 AM | 12/23/2014 11:31:19 AM | | | 3 | 12/23/2014 11:31:19 AM | 0 | 0 | 0 | 36 |

6. This file can be exported by selecting the desired file type and clicking the “Export” button.

