eplans

Applicant Information Session – April 2019

Not changing what we do, but how we do it !!!

MISSISSAUGA

Topics

- Why & When are we implementing changes in ePlans?

- What's In It For Me (Applicant)?

- What you need to know?

- What you need to do?

- How to get support?

- Live Demo

ePlans Upgrade – Why & When

- ePlans system is being upgraded to continue to remain on a supported platform

- General look and feel will change

- Changes in the way Projects / Tasks are accessed

- When – Monday, April 22nd, 2019

- Differences –
  - Projects created before upgrade (minimal changes)
  - Projects created after upgrade (beneficial changes)

What's In It For Me (Applicant)?

Applicable for Projects Created After Upgrade

- Invite Owner / Associates to view projects
- Notification Emails when task is complete
- Customizable Grids
  - Project List
  - Task List
  - Changemarks
  - Checklists

- Expanded search criteria
- Identified Due Date
- Simplified eForms
- Easy access to Project Status Report from eForms
- Task specific help links
- Online Fee Payment – Auto Task Completion

What you need to know…

Applicant Dashboard - OLD

Applicant Dashboard - REVISED

Applicant Dashboard - REVISED

- 50 Projects displayed in the dashboard

- Click **"My Tasks / Projects"** button – to see your projects / tasks

- Revised Project Home Page - Click Project Name link in the **"Project"** column

- Click the **"Refresh"** button to refresh the list on the dashboard

- **Projects Created After Upgrade**
  - "Tasks" column indicates an outstanding task
  - Clicking on the button (where available) in the Tasks column will open the eForm directly
  - Count of outstanding tasks indicated in the header
  - Outstanding Tasks past due identified in "red"

- **Projects Created Before Upgrade**
  - Listed in the dashboard – but will not have a link for the Task even if a task was pending

Project/Task Dashboard - REVISED

- **3 Tabs on Project / Task Dashboard**
  - **Tasks (PF)** – Task List for Projects Created **after** the upgrade
  - **Tasks (PD)** – Task List for Projects Created **before** the upgrade
  - **Projects** – List of "Recent Projects" – **before and after** the upgrade
- "All Projects" button – to list "All Projects" that you are associated with

Project/Task Dashboard - REVISED

- **Configurable grids & Enhanced Search** on Tasks (PF) and Projects tabs
  - Columns can be hidden, resized and relocated by clicking the settings button next to the column title or by clicking and dragging the column to the desired location
  - Added search features to search on various columns in the grid
  - In the Projects grid, click **"All Projects"** button if search criteria does not return the project information

Project/Task Dashboard - REVISED

Saved Settings

- Save settings is persistent.
- Reset settings button only appears if there have been changes.
- Reset restores default settings.
- Refresh to display the settings after resetting them

Task Dashboard - REVISED

Tasks (PF) – Project Tasks created After Upgrade
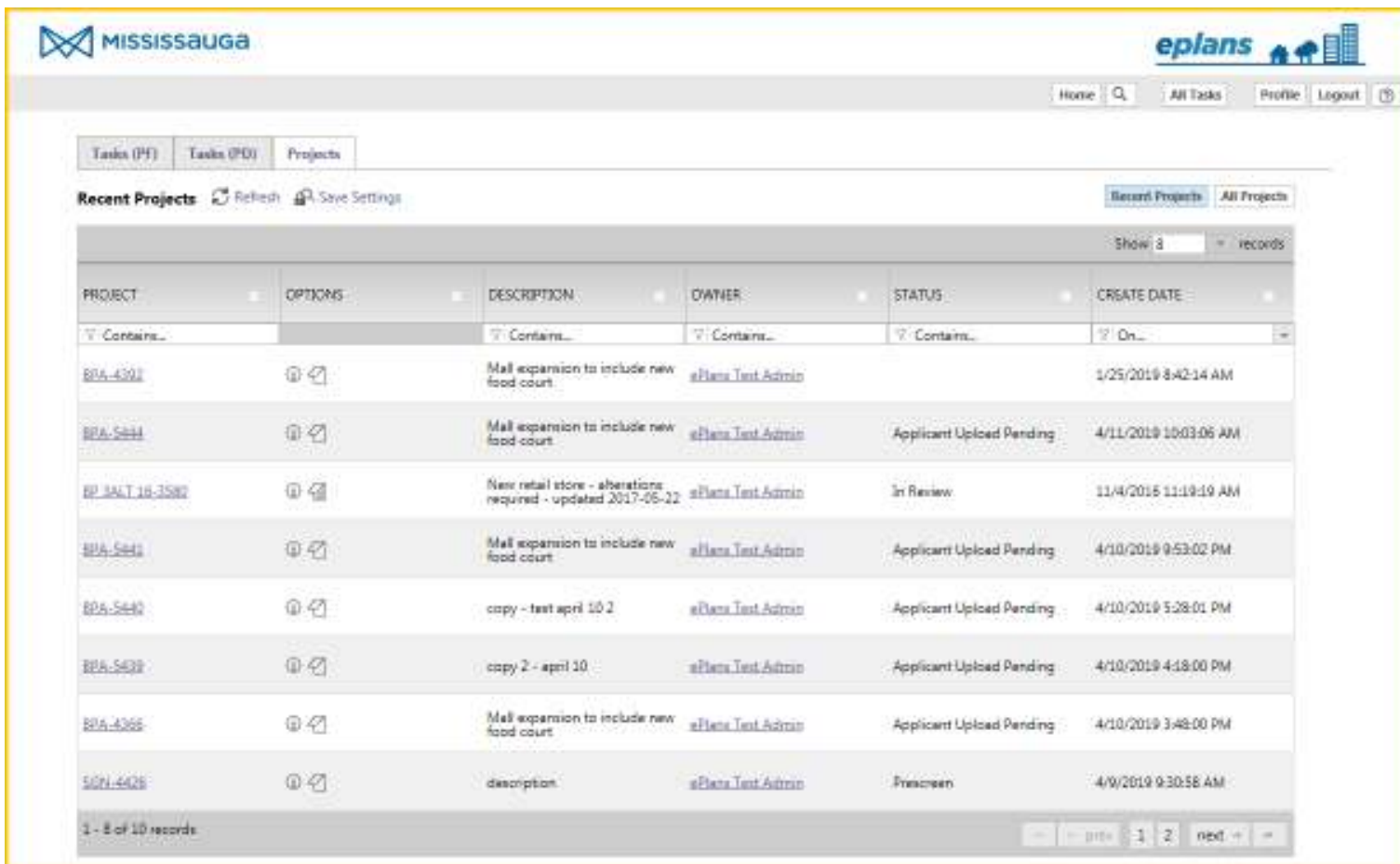
Task Dashboard - REVISED

Tasks (PD) – Project Tasks created Before Upgrade

Project Dashboard - REVISED

Projects List – Before & After Upgrade Projects Included

All Tasks – Consolidated View

Project/Task Dashboard - Buttons

Home • Returns you to the last visited tab on your Projects / Tasks Dashboard – Tasks (PF), Task (PD), Projects

Q • Advanced search feature to search by File Names across all projects (rarely used)

All Tasks • Consolidated View of ALL Tasks for Projects created before and after the upgrade

Profile • Update your personal information – except your Email Address

Logout • Log out from ePlans – closes your ePlans session

Project Home Page - REVISED

The first screen presented is the Task List

Project Tasks • Project Tasks button: select to view Task List

- Projects created **Before** upgrade
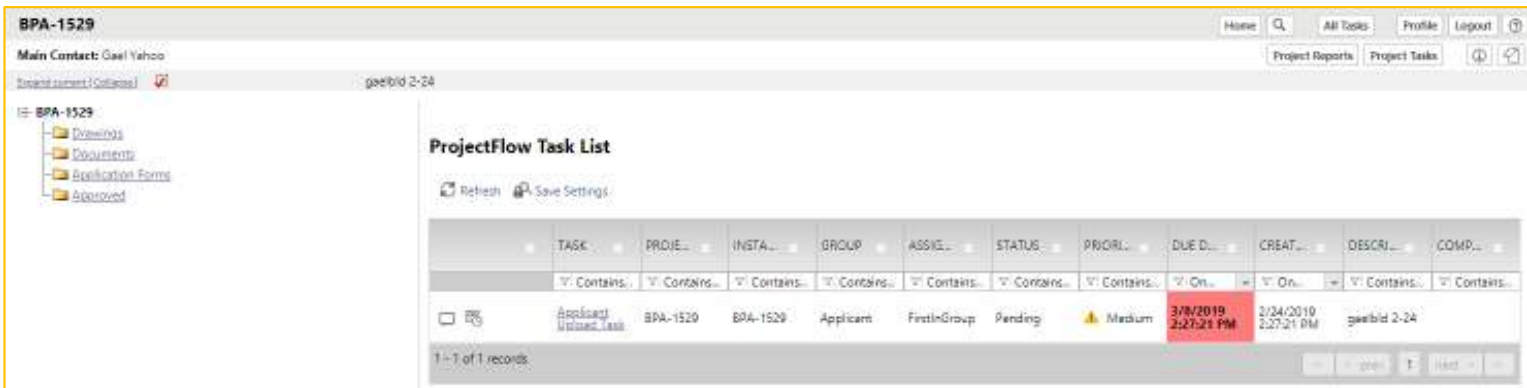
- Projects created **After** upgrade

eForm/Task Changes
Projects Created **After** the Upgrade

eForm Tabs

- Project Information

Project Information	Project Status Report	Help	Add User to Owner Group

APPLICATION NO	BP 3BLD 19-87
APPLICATION TYPE	CITY / ALTERATION TO EXISTING BLDG
ADDRESS	300 CITY CENTRE DR
UNIT NO	
COMPLETE SUBMISSION	No
FEE ($)	$15,000.00
FEE RECEIVED ($)	$15,000.00
OUTSTANDING FEE ($)	$0.00
DESCRIPTION	Floor Renovation for OFC

- Help - useful links

Project Information	Project Status Report	Help	Add User to Owner Group

- How to: Applicant Resubmit
- ePlans Submission Standards
- Required Drawings & Documents
- How to: Version Drawings

- Add User to Owner Group

Project Information	Project Status Report	Help	Add User to Owner Group

Add Group Members

First Name	Last Name	Email	Invite to Group	
			Owner-Associates ▾	Invite User

Remove Group Members

Remove from Group	User	
Owner-Associates ▾	▾	Remove User

– Ability to Add and Remove users from the Owner/Associates Group

*Projects created **After** upgrade*

eForm Tabs

- Project Status Report run from the eForm

*Projects created **After** upgrade*

Upload Files Directly from eForm

- Eliminates the requirement to upload directly into ProjectDox folders
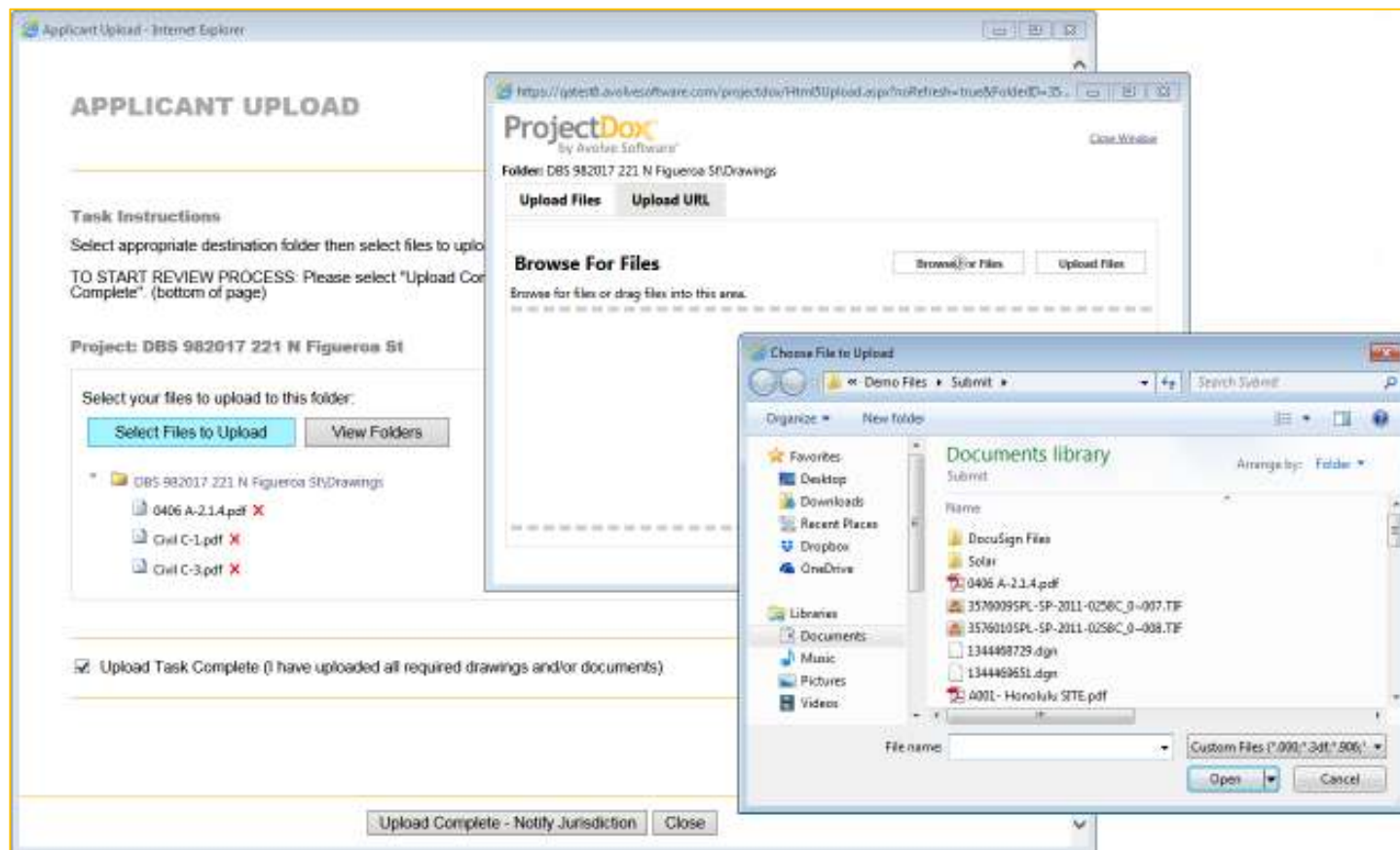
*Projects created **After** upgrade*

Fee Payment Task – (= / Less than $10,000)

- After Accepting the Fee Payment task, the task window will load with Billing Information and Amount Due

- After submitting credit card information, if the payment is successful, the task/eForm will automatically close.
  - This could take 10-15 seconds to process.

- If the payment was not successful, the task/eForm will not auto-close

Fee Payment Task – (More than $10,000)

- Fee Payment received at the counter / via mail and processed in office

- Accepting / opening the eForm / task prior to processing the fee in the office will generate an error when the fees exceed $10,000

- Accept the Fee Payment task, the task window will load with eForm – if Outstanding Fees shows $ 0.00

- If Outstanding Fees shows $0.00 – proceed to complete the task

*Projects created **After** upgrade*

Changemark and Checklist Viewers

- Revised Changemark and Checklist Viewers are accessible from the task/eForm

- Select the button to open the Viewer(s)

  | View/Edit Changemark Items (2) | View/Edit Checklist Items (4) |

- The button will display the count of Changemarks (2) and Checklists (4) for the review cycle

- Run reports from the Viewer(s)

*Projects created **After** upgrade*

Changemark Viewer

- Select the View/Edit Changemark Items button to open the Viewer

  View/Edit Changemark Items (2)

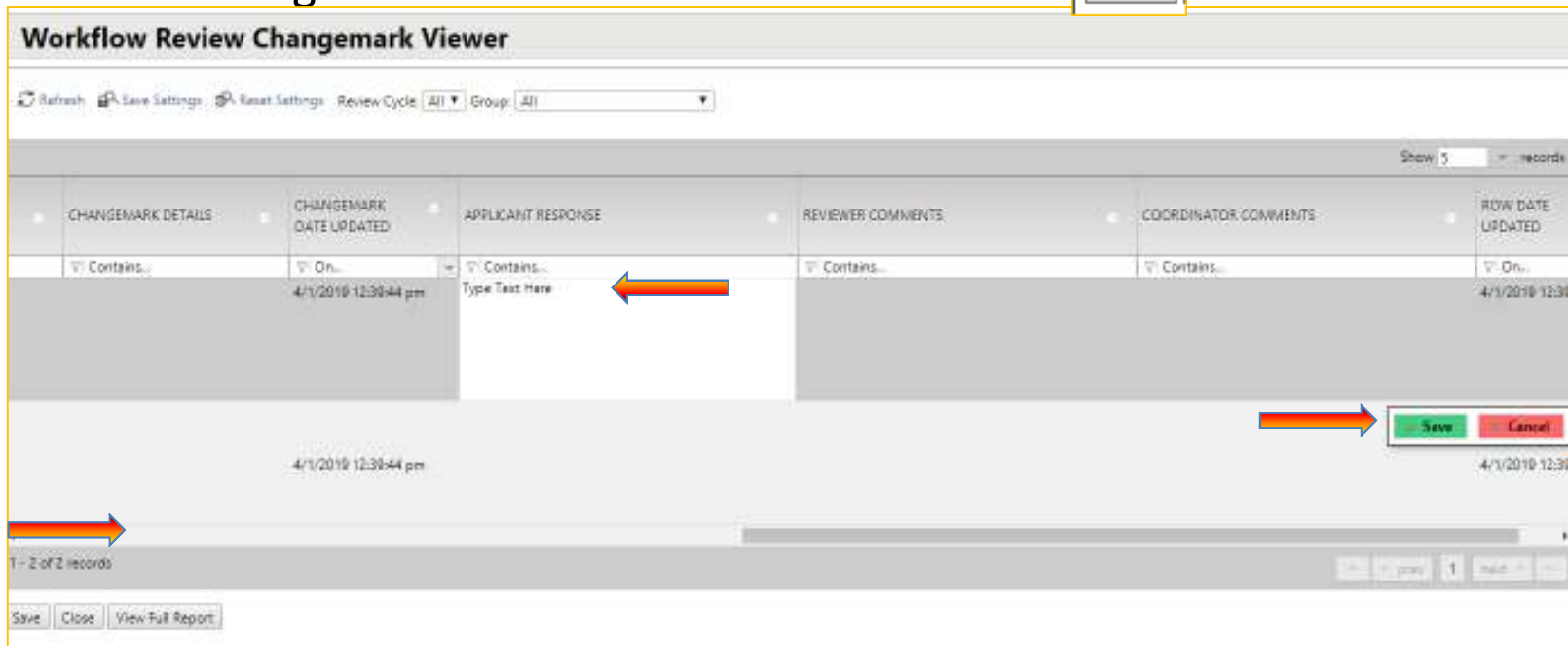- Scroll window to the right for additional columns

- Run changemark report

*Projects created **After** upgrade*

Changemark Viewer

- Applicant Response to Changemarks
  - Click into row to add comments in Applicant Response column
  - Save comments for the row by clicking Save
  - Change all desired rows and then Click Save

*Projects created **After** upgrade*

Changemark Viewer

- Filter Changemarks by:
  - Review Cycle
  - Group
- Click on MARKUP NAME link to open the file with the changemarks

*Projects created **After** upgrade*

Checklist Viewer

- Select the View/Edit Checklist Items button to open the Viewer

  View/Edit Checklist Items (4)

- Scroll window to the right for additional columns
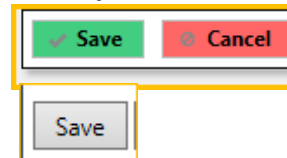
- Run checklist report

*Projects created **After** upgrade*

Checklist Viewer

- Applicant Response to Checklists
  - Click into row to add comments in Applicant Response column
  - Save comments for the row by clicking Save
  - Change all desired rows and then Click Save

*Projects created **After** upgrade*

Checklist Viewer

- Filter Checklists by:
  - Review Cycle

*Projects created **After** upgrade*

Applicant Corrections Task

Review Comments

- Ability to Respond to Reviewer Comments
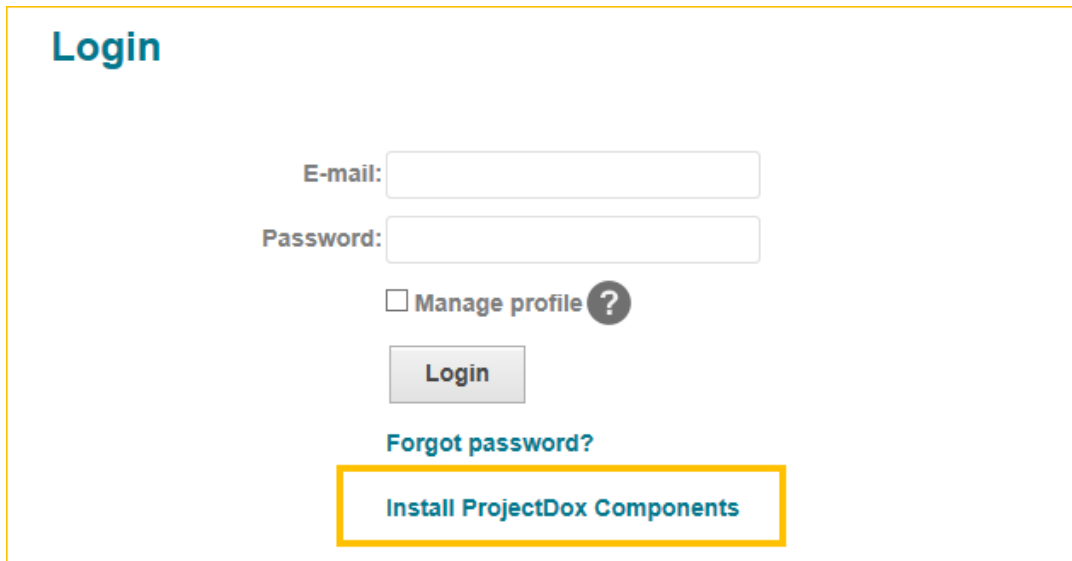
Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
BLDG ENG PLAN EXAMINER	Jolanta - Reviewer Wasilonek jolanta_review@mississauga.ca	Approved		Type Text Here
DEVELOPMENT SERVICES	Jolanta - Reviewer Wasilonek jolanta_review@mississauga.ca	Approved		Type Text Here
HERITAGE	Jolanta - Reviewer Wasilonek jolanta_review@mississauga.ca	Approved		Type Text Here
ZONING PLAN EXAMINER	Jolanta - Reviewer Wasilonek jolanta_review@mississauga.ca	Withheld		Type Text Here
PLUMBING PLAN EXAMINER	Gael Baughman gbaughman@avolvesoftware.com	Withheld		Type Text Here

Projects created After upgrade

Applicants using Internet Explorer Browser
What you (Applicant) need to do…

Action Items Applicant

- **Internet Explorer Browser Users Only**
  - Install NEW ProjectDox Components **on or after April 22, 2019**

  - Add eplans.mississauga.ca to Trusted Sites

ePlans Support Information…

![Mississauga logo]

ePlans Support

- **Online Help Guides**
  - Links to Help Guides posted on the ePlans Login Page
  - Task Specific help links available in eForms for Projects created on or after April 22, 2019

- **Email:** eplans.techsupport@mississauga.ca

- **Phone:** 905 – 615 4311

- **In person** at Planning & Building Customer Service Centre, Mississauga City Hall, 3rd Floor (Parking Elevators)

MISSISSAUGA

For being a valued partner & embracing ePlans to the fullest...

... Your continued support helps make ePlans a success!