Upload Plans

Plans may be uploaded to a project when a project is created.

If uploading plans when creating a new project:

1. Open "Permits & Inspections" 

   Note: If left-hand sidebar is collapsed,
   click "Toggle Menu Visibility" icon to expand.

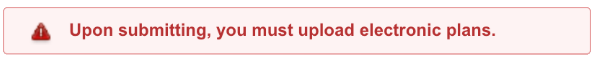
   

2. Click "Create New Project" 

3. Complete the required fields for creating a project

   Note: For more information about creating a project, see [Create a Project.]

4. If the project requires plans to be uploaded, this message will appear at the bottom of the screen:



5. Click "Create Project"

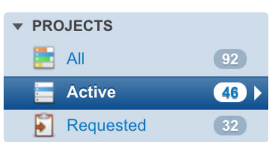
If uploading plans to a project that has already been created:

1. Open "Permits & Inspections" 

   Note: If left-hand sidebar is collapsed,
   click "Toggle Menu Visibility" icon to expand.

2. Click "Active" under "Projects"



3. Browse the listings or use the search tool to find the project to archive

   Note: By clicking "Project No." the search filter may be changed to "Title", "Description", "Address", or "Contact Name".

4. Click the "ID" number of the project

5. Click "Upload" in the upper right-hand corner of the project 

To upload plans:

6. Click the "Upload" button to the right of a plan category and select the files, OR

7. Drag & drop files into the correct plan category

   Note: Uploading plans may be completed at a later time by clicking "Complete Later" at the bottom of the page. If a plan set looks blurry visit the [Solving Blurry Images] Help Desk article. Uploaded EPR documents are limited to 100 pages.

8. Before continuing, ensure that plans have been uploaded for all required categories

   Note: Required categories have an asterisk (*). Click the "Edit" button next to "Plan Categories" to unassign or assign categories set on this project template. To remove an uploaded sheet hover over a sheet to unassign and click the red "X" to remove the sheet. Or click the blue "Delete" button at the top, choose a category, and click "Yes, Delete All". (This will permanently delete the uploaded sheets for the selected category.)

9. Click “Continue”

   Note: See Upload Supporting Documents for the next step of the upload process.

Adapted from MyGov Help Desk articles for use by the City of Crowley's customers.

Upload Supporting Documents

This is the second step of the upload plans process. If the project does not require supporting documents, skip this step and go to Stage Sheets.

Please Note:

- Each supporting document may accept different file types. Accepted file types are listed under each "Upload a Document" button.
- Required supporting documents have an asterisk (*) and must be uploaded before continuing.

1. Click "Upload" next to the support document title and choose files, OR

2. Drag & drop files next to the support document title

3. Click "Continue"

   Note: See Stage Sheets for the final step of the upload process.

Stage Sheets

This is the final step of the upload plans process. For each uploaded sheet, these fields must be complete:

- Sheet ID
- Sheet Title
- Drawing Date

Current Category

The sheets that are listed in the sidebar on the left are determined by the selected category on the right under "Current Category". Below this dropdown box you will see the number of sheets that have missing items or are "Not Completed" for the selected category. The "Continue" button will be disabled until all sheets are completed for all categories.

Missing Information

The red status bar at the top of the staging area displays the missing items or duplicate IDs for the visible sheets. The visible sheets are determined by the "Current Category" filter. The “Continue” button will be disabled until all of the numbers in the status bar are “0”. Click any of the missing items to filter the sheets by missing information.

Increment Sheet ID

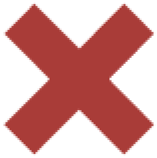
Clicking the "Increment" button next to "Sheet ID" will allow you to increment for all visible sheets. Use any numerical value such as 1, 1.0, 1.01, 0001., -1, -1.0, -1.01, or -0001. After clicking "Increment", the visible sheets will be updated with the set increment.

Rotate a Sheet

Click the rotate button to rotate a sheet.

Remove a Sheet

Hover over a sheet and click the red "X" to remove the sheet.



Edit Categories

Click the "Categories" tab next to the "Fill in Fields" tab and click "Edit". Click the assign button to add the categories to the project or click the unassign button to remove the categories from the project.

NOTE: All the categories available to add to the project are set in Module Administration. A category cannot be removed if any sheets are uploaded to the category.

1. Select a sheet from the "Current Category" dropdown box in sidebar to the right
2. Type in a “Sheet ID” or automate

   Note: Automating the sheet ID, sheet title, or drawing date allows you to make changes on one sheet that will apply to many. See the Staging Automation article for more details.

3. Type in a “Sheet Title” or automate
4. Select a “Drawing Date” or automate

   Note: After you have selected the “Drawing Date”, click “Apply to All” to apply the same date to the sheets listed in the left sidebar.

5. Click the dropdown button in the left hand sidebar to quickly review an edit any remaining fields 
6. After all of the fields have been filled out for each sheet and required categories added, click “Continue”

7. Review the sheets for accuracy of information
8. To edit sheets, click “Edit Plans”

9. To finish, click “Submit Plans”

Staging Automation

When on the third step of the upload plans process (Stage Sheets), the automate tool is available for you to quickly fill in all required information.

For the fill-in fields “Sheet ID”, “Sheet Title”, and “Drawing Date”:

1. Click “Automate” next to any of the above listed fill in fields

   Note: See the video in MyGov University to watch a video demonstrating the use of the automate tool.

2. Find the correct area on the sheet:

   a. Zoom in and out with your mouse’s scroll or click the “+” or “-“ buttons

   b. Double click to click and drag the plan around

   c. Double click to return to the automate tool

3. Click and drag to select the correct text

   Note: Ensure the selection is large enough to account for text on other sheets.

4. To apply the selection to only sheets that are missing the information, ensure the toggle switch is set to "Missing"

5. To apply the selection to all sheets, ensure the toggle switch is set to "All Sheets"

6. To accept the selection, click the green checkmark 

7. Click the red “x” to the right of “Automate” to exit out of the automate tool 

The selected area will apply to sheets listed in the left sidebar. Use the “Missing” filters at the top of the page to change the sheets listed in the left sidebar. Changes made using the automate tool will only apply to these sheets.