

Development Services

ESERVICES USER MANUAL

Edmonton

Updated April 2016

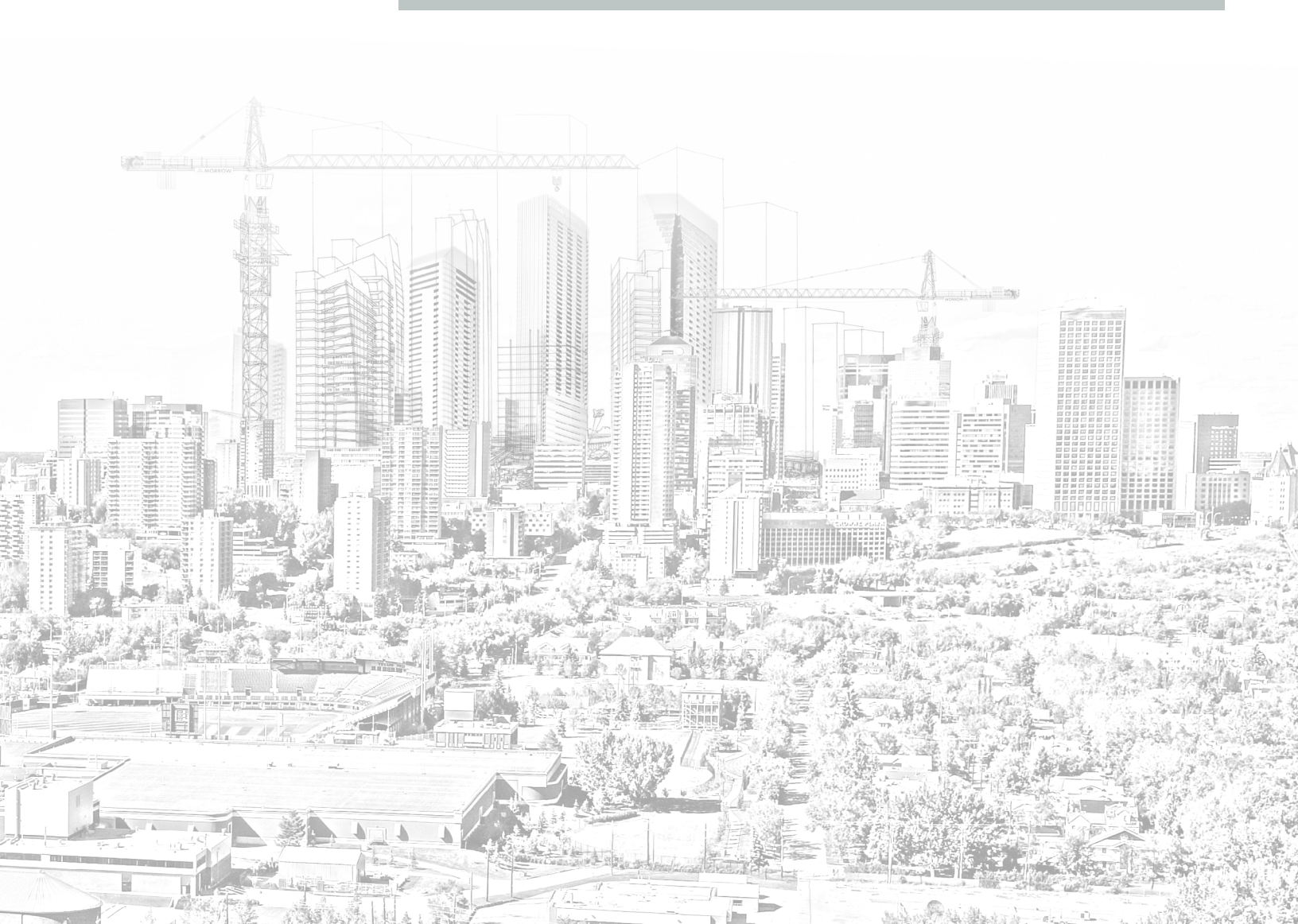


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1.0 Introduction

Effective March 31, 2016 the City of Edmonton will be using *eServices* and *ePlan* for the following:

- Requesting a Servicing Agreement
- Search for a Project
- Requesting an Inspection for a Municipal Improvement
- Requesting a CCC or FAC

AUDIENCE

This guide is intended for individuals using *eServices* – Development Coordination end user interface. Advanced technical knowledge is not needed to effectively use this information guide.

TYPES OF USERS COVERED IN THIS INFORMATION GUIDE

Developer

identified as the owner(s) of the development

Consultant

Members of the consultant organizations that provide engineering services to the developer and who manage the overall development project

Review Team Member

a member of City of Edmonton and EPCOR business units that review plans and provide inspection services during the lifecycle of the project

DC Staff

members of the Development Coordination business area

2.0 Search

2.1 SEARCH FOR A PROJECT

To find a project in the system:

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. From the Home page, select the **Search Projects** button to open the search criteria page

The screenshot shows a 'Search Projects' dialog box. The title bar is blue with a close button. The main area is white and titled 'Search for Development Projects'. It contains the following fields:

- Project Type: All (dropdown)
- Project Name: [Text Input]
- Project ID: [Text Input]
- Status: All (dropdown)
- Engineer Name: [Text Input]
- Owner: [Text Input]
- Consultant: [Text Input]

At the bottom, there are two buttons: 'Search' and 'Cancel'.

3. Enter all or part of the **Project Name** in the field and select the **Search** button
4. From the selections returned, select the project you want to open

3.0 Tasks

3.1 CLAIMING A TASK

A user will Claim a task from the Unassigned Tasks list when they are going to do the task.
An email will notify the person \ group members of new tasks

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **Unassigned Tasks** on the menu bar
3. Find the task and select the **Claim** button
4. The task will be moved from the **Unassigned Tasks** list to the **MyTasks** list

The screenshot shows the 'Unassigned Tasks' modal window in the eServices system. The modal contains a table with the following data:

Project Name	Task Description	Municipal Improvement	Date Created	Claim
McConachie Stage 12	SA Request		14/Mar/2016	Claim
Walker Stage 6	Redline Request		14/Mar/2016	Claim
redline esha	Redline Request		14/Mar/2016	Claim
redline esha	Redline Request		14/Mar/2016	Claim
Flat Hills 1	Add DC Engineers		15/Mar/2016	Claim
Edgemont 15 15	SA Request		15/Mar/2016	Claim
Consultant Springs Stage 3	SA Request		15/Mar/2016	Claim
Consultant Springs 1234567	Add DC Engineers		15/Mar/2016	Claim
Consultant Woods 15	Add DC Engineers		15/Mar/2016	Claim
Fraser Subdivision stage 20	Add DC Engineers		17/Mar/2016	Claim
Consultant Springs Stage 1 - Inspections	SA Request		17/Mar/2016	Claim

The background shows the eServices navigation menu with 'Unassigned Tasks' selected. The footer contains the following text:

Personal information is collected under the authority of Section 33 (2) of the Freedom of Information and Protection of Privacy (FOIP) Act. It will be used for the administration and maintenance of user accounts, training programs, permitting programs, and for system enhancement purposes only. If you have any questions, please contact the Contact Planning Service Centre at 780-445-0054.

eServices at Edmonton.ca | Edmonton.ca | Privacy

Version: 1.2.3.0

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3.0 Tasks

3.2 COMPLETING A TASK

To complete a task that has been placed on the My Tasks list:

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **My Tasks** menu selection
3. Find the task and select the **Open** button. The eServices system will open task to the location where the task is to be performed
4. Complete the work identified in the task
5. Save any changes in the system as required
6. When the work has been completed and saved – the system will automatically remove the task from the **My Tasks** list

3.3 RETURNING A TASK

If a user cannot complete a task that has been Claimed – the task can be returned to the Unassigned Tasks list, making it available to be taken by another user. No notifications are sent out as a result of returning a task.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **My Tasks** menu selection
3. Find the task in the list and select the **Return** button. The task will be returned to the **Unassigned Tasks** list

4.0 Servicing Agreements

4.1 REQUESTING A SERVICING AGREEMENT

If a Servicing Agreement is required for a development project that is already in process – a servicing agreement can be requested from the project.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the project. The **My Projects** tab will show you all the projects to which you have been assigned – Or – **Search for the Project** where you want to request a Servicing Agreement
3. When the Project opens – select the **Servicing Agreement** tab
4. In the Servicing Agreement Requests grid – select **Add New Request**

Servicing Agreement Requests				
+ Add New Request				Refresh
Servicing Agreement Request Type	Organization	Requested By	Date Requested	
Servicing Agreement	Development Coordination Review Staff	barry.willing@edmonton.ca	18/Jan/2016	

5. Select the **Servicing Agreement type** required from the dropdown list
6. Select the **checkmark** button to save the Servicing Agreement request

The eServices system will create a task for the Development Coordination group that will request the creation of the Servicing Agreement.

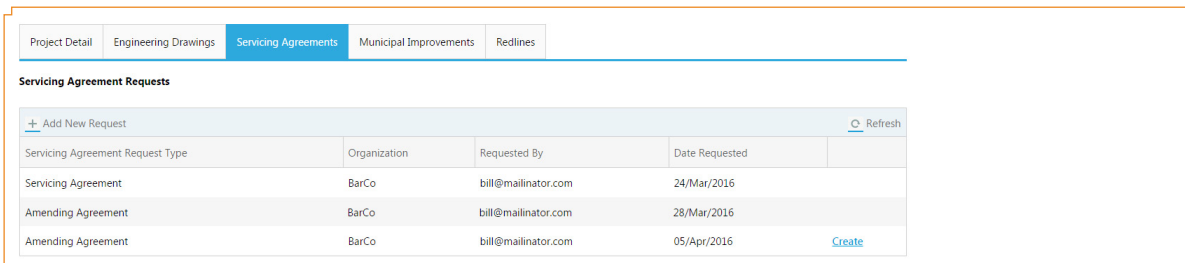
4.0 Servicing Agreements

4.2 CREATING A SERVICING AGREEMENT (DEVELOPMENT COORDINATION STAFF)

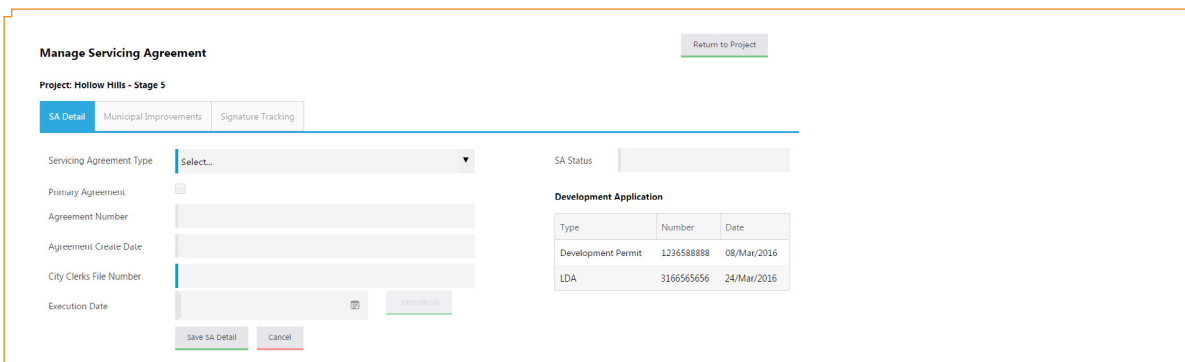
When a Servicing Agreement is requested by a consultant for a project, Development Coordination staff will receive an email informing them of a new request. A task will also be created and added to the Unassigned Task list.

To create a Servicing Agreement:

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Go to the **Unassigned Task** list
3. **Claim the Task** for Servicing Agreement Request
4. Open the **My Tasks** menu selection
5. Select **Open** on the task to create a new Servicing Agreement
6. The system will take you directly to the project and open the **Servicing Agreement tab**



7. Select the **Create** link at the end of the servicing agreement request
8. The system will open the **Manage Servicing Agreement page**



9. Select the **Servicing Agreement type** from the dropdown list
10. Select if this is the **Primary Agreement** for the project. There can only be one primary agreement per project
11. Select the **Save SA Detail** button
12. An ePlan project will be created and the Servicing Agreement workflow will be started – requesting the consultant to submit the documentation required for the Servicing Agreement. (See Submit Servicing Agreement Documentation)

4.0 Servicing Agreements

4.3 REQUESTING A SERVICING AGREEMENT FOR A DEVELOPMENT PROJECT THAT HAS NO ENGINEERING DRAWINGS

If a Servicing Agreement is required for a project that does not have engineering drawings – a new project must be created first and then a Servicing Agreement can be requested.

Creating a new Project

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **Create New Project** button
3. Select – **Servicing Agreement** – *Development Coordination, Engineering Drawings are not Required*
4. Select the **Next** button
5. Enter the required project information
6. Select the **Submit Application** button

The system will create a new project and notify the Development Coordination staff to assign engineers to the project. Once the Development Coordination engineers have been assigned, the consultant can request a Servicing Agreement.

4.0 Servicing Agreements

4.4 SUBMIT SERVICING AGREEMENT DOCUMENTATION (EPLAN)

When a Servicing Agreement is created by Development Coordination, an ePlan project will be created automatically for the user who requested the Servicing Agreement to submit the documents that are required for the creation of the Servicing Agreement by Development Coordination.

The following are the steps that make up the Servicing Agreement workflow in ePlan:

- 1. Applicant Upload** – *User who requested the Servicing Agreement*
 - The ePlan Applicant Upload is the workflow task that requests the Servicing Agreement documents to be submitted for review by Development Coordination
 - The user who requested the Servicing Agreement will be sent an email from ePlan that indicates the project and task to be completed
 - Once the applicant has uploaded all the documents \ plans, the applicant upload task must be completed in ePlan to move the process on to the next step
- 2. Prescreen Review** – *Development Coordinator*
 - A Prescreen review of the documents that are submitted for a Servicing Agreement is done by the Development Coordinator assigned to the project from Development Coordination
 - Development Coordination may require additional documents or changes to submitted documents and can request from the Applicant required changes
 - When a version of the Servicing Agreement has been created and is ready to be circulated (if required), the Development Coordinator can upload the document to the ePlan project that was created for the Servicing Agreement
- 3. Begin Review** – *Development Coordinator*
 - The Development Coordinator will select the groups that will be included in the circulation of the Servicing Agreement
- 4. Department Review** – *Draft Agreement Review*
 - The Department review of the Servicing Agreement will be done by the groups selected in the Begin Review workflow step. Comments \ markups can be made by the departments
- 5. Review QA** – *Development Coordinator*
 - The Development Coordinator will do a Quality Assurance review of the document after the departments have approved the Servicing Agreement documents
- 6. Release to Applicant** – *Development Coordinator*
 - The Development coordinator can release the Servicing Agreement to the Applicant \ Developer when required

The final Servicing Agreement will be circulated manually to obtain signatures from the Developer, City of Edmonton – Law Department and Development Coordination.

4.0 Servicing Agreements

4.5 ADDING A MUNICIPAL IMPROVEMENT TO A SERVICING AGREEMENT

Municipal Improvements can be added either before or after a Servicing Agreement has been Executed. If the improvements are added before the servicing agreement is executed, they can be removed from the list. If a municipal improvement is added after the Servicing Agreement has been executed, the only way to remove it from a servicing agreement is to Cancel the improvement.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the project that you want to edit
3. Select the **Servicing Agreement tab**
4. Select the **link** to the Servicing Agreement you want to edit

Project Detail | Engineering Drawings | **Servicing Agreements** | Municipal Improvements | Redlines

Servicing Agreement Requests

+ Add New Request Refresh

Servicing Agreement Request Type	Organization	Requested By	Date Requested
Servicing Agreement	BarCo	bill@mailinator.com	24/Mar/2016
Amending Agreement	BarCo	bill@mailinator.com	28/Mar/2016 Create

Servicing Agreements

Refresh

Agreement Number	Servicing Agreement Type	Status	Primary	Date Created	Created By
SAS0036	Precedent Servicing Agreement	SA Executed	<input checked="" type="checkbox"/>	24/Mar/2016	barry.willing@edmonton.ca

5. The Manage Servicing Agreement form will open

(continued →)

4.0 Servicing Agreements

6. Open the **Municipal Improvement** tab

The screenshot displays the 'Manage Servicing Agreement' interface. At the top right, there is a 'Return to Project' button. Below the title, the project is identified as 'Project: Hollow Hills - Stage 5'. A metadata section lists: Servicing Agreement Type (Precedent Servicing Agreement), Agreement Number (SA50038), Agreement Create Date (28/Mar/2016), and SA Status (Assessment Requested). The interface features three main tabs: 'SA Detail', 'Municipal Improvements' (which is selected and highlighted in blue), and 'Signature Tracking'. Under the 'Municipal Improvements' tab, there is a sub-menu with options: 'All', 'Cancelled', 'Water' (selected), 'Drainage', 'Parks', 'Transportation', 'Power', and 'Enhanced'. The main content area is split into two columns. The left column is a list of 'Municipal Improvement' items: 'UAT Uvaraj - Water Defloridation', 'Fire Hydrant Installation', 'Flush Point Installation', 'Hydrant Relocation', 'Hydrant Removal', 'Off-Site Water Distribution System', 'Pressure Reducing Valve', 'Temporary Flush Valve', and 'Temporary Hydrant'. The right column is a table with headers 'Selected Municipal Improvement' and 'Description', currently displaying 'No records to display.' Arrows on the right side of the list indicate the ability to move items between the two columns.

7. Select the tab of the Municipal Improvement category to find the improvements that can be added to the Servicing Agreement
8. Select a Municipal Improvement and then select the arrow to move it to the Selected Municipal Improvement grid (right hand side)
9. Only one improvement can be selected and moved at a time
10. To remove an improvement from the list, select the improvement in the right side grid and then select the arrow to move it out of the list
11. To view all of the improvements that have been selected – select the All tab

4.0 Servicing Agreements

4.6 ADDING MORE THAN ONE MUNICIPAL IMPROVEMENT OF THE SAME TYPE

A Municipal Improvement can be added 2 or more times to a Servicing Agreement. The system will request a unique description be added to each instance of the duplicate improvement.

Municipal Improvement - Add unique description

Municipal Improvement	Description
Pressure Reducing Valve	
Pressure Reducing Valve	

Save Cancel

4.0 Servicing Agreements

4.7 EXECUTING A SERVICING AGREEMENT

A servicing Agreement must be Executed in order to have the system create the Municipal Improvements that have been identified on the Servicing Agreement.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the project that you want to edit
3. Select the **Servicing Agreement** tab
4. Select the link to the Servicing Agreement you want to edit
5. Move to the **SA Detail** tab

6. **Use the Calendar** to select the date you want to enter as the Execution Date and then select the **Execute SA button**
7. The Municipal Improvements that have been selected for this Servicing Agreement will now be created and able to be viewed on the Municipal Improvements tab on the main project page

Municipal Improvements can be added to a Servicing Agreement after it has been executed by using the same steps as before it was executed. Improvements cannot be removed from the Servicing Agreement after it has been Executed. The improvements can be cancelled on from the Municipal Improvements form.

4.0 Servicing Agreements

4.8 CANCELLING A MUNICIPAL IMPROVEMENT

A municipal improvement can be cancelled if it is no longer required on a Servicing Agreement. The Municipal Improvement will remain in the system but will no longer be able to be used.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the project that you want to edit
3. Select the **Municipal Improvements tab**
4. **Select the link** to the Municipal Improvement you want to cancel
5. Select the **Cancel MI** button to cancel the improvement

The screenshot shows a web interface for managing municipal improvements. At the top, there are navigation tabs: 'Development Coordination', 'My Tasks', 'Unassigned Tasks', 'All Assigned Tasks', and 'Help Videos'. The main content area is titled 'Hollow Hills - Stage 5'. On the right side, there are two buttons: 'Cancel MI' (highlighted in red) and 'Return to Project'. Below the title, there are several input fields for project details:

MI Name:	Temporary Water Main Abandonment	Created Date:	March 28, 2016
Description:		Status:	In progress
Department Responsible:	EPCOR Water	SA Type:	Precedent Servicing Agreement
Review Team:	EPCOR Water Services	SA Executed Date:	March 01, 2016
		CCC Issued Date:	
		MI Operational Date:	

At the bottom right, there is a 'Save' button.

6. The system will ask for a **confirmation** that you want to Cancel the improvement
7. The Improvement will be cancelled

The Cancelled improvements will remain on the list of improvements and will have a status of cancelled. When you open a cancelled improvement – a message will be displayed showing who cancelled the improvement and the date it was cancelled. Cancelled municipal improvements cannot be opened to be used again.

4.0 Servicing Agreements

4.9 SIGNATURE TRACKING FOR A SERVICING AGREEMENT

Signature Tracking is a feature that allows the development Coordination administrative staff to track where the Servicing Agreement is in the manual signature process.

To track the steps in the Servicing Agreement Signature process:

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the project
3. Select the **Servicing Agreement tab**
4. **Select the link** to the Servicing Agreement you want to manage
5. Move to the **Signature Tracking tab**
6. Select **Add New Signature Step**

The screenshot shows the 'Signature Tracking' tab selected. At the top, there are tabs for 'SA Detail', 'Municipal Improvements', and 'Signature Tracking'. Below the tabs is a '+ Add New Signature Step' button and a 'Refresh' button. A table with the following columns is visible: 'Signature Step', 'Date', and 'Entered By'. Below the table, it says 'No records to display.' At the bottom, there is a 'Complete' button, a 'Completed By:' field, and a 'Date:' field.

7. **Select the Signature Step from the dropdown** list and enter the date that the action took place. The date can be in the past

This screenshot shows the dropdown menu for the 'Signature Step' column. The dropdown is open, showing a list of options: 'Date Final SA sent to Developer', 'Date SA returned from Developer (signed)', 'Date Sent to Law for Signature (to Form)', 'Date Returned from Law', 'Date Signed by Engineer', 'Date Signed by Lead Engineer', and 'Date Signed by Director'. The 'Date' column has a date picker icon. The 'Entered By' column is empty. The 'Complete' button and 'Date:' field are also visible at the bottom.

8. **Select the check to save** the entry
9. A step can be repeated more than one time if necessary
10. If all of the signatures have been obtained, the user can complete the Signature tracking process by selecting the Complete button. No additional steps can be added to the Signature tracking after it has been completed.

5.0 Inspection Requests

When construction of the Municipal Improvement has been substantially completed, a consultant can request an inspection for the municipal improvement. There are two parts – the Inspection Request, where information related to the municipal improvement is entered, and the Inspection Disclaimer, where a Authorized Signatory will complete the Inspection Disclaimer and then Submit the inspection request to the review team responsible.

5.1 INSPECTION REQUEST

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the Project where the Municipal Improvement resides
3. Select the **Municipal Improvements tab** to show all the improvements associated with the project

Municipal Improvement	Servicing Agreement	Date	CCC Req.	CCC Issued	FAC Req.	FAC Issued	Status
Water Main Abandonment	Precedent Servicing Agreement	3/28/2016 1:51:05 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In progress
Temporary Water Main Abandonment	Precedent Servicing Agreement	3/28/2016 1:51:10 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cancelled
Temporary Flush Valve	Precedent Servicing Agreement	3/28/2016 1:51:14 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In progress
Arterial Roadway Water Transmission System	Precedent Servicing Agreement	3/28/2016 1:51:18 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress
Bioswales	Precedent Servicing Agreement	3/28/2016 1:51:26 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress
Bioswale Landscaping	Precedent Servicing Agreement	3/28/2016 1:51:30 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress
Arterial Roadway Lighting System	Precedent Servicing Agreement	3/28/2016 1:51:35 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress
Electrical Distribution System	Precedent Servicing Agreement	3/28/2016 1:51:39 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress
Off-Site Water Distribution System	Precedent Servicing Agreement	3/28/2016 5:10:21 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In progress

4. **Select the Municipal Improvement** from the list to open the CCC (FAC) management page
5. Select the **Request CCC (FAC)** button in the CCC (FAC) Inspections area

Requested By	Date Requested	Status	Status Date	Expiry Date	Expired
No records to display.					

Request CCC Inspection

(continued →)

5.0 Inspection Requests

- The Inspection Request form will be opened

The screenshot shows a web application window titled "Inspection Request" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Project:** Hollow Hills - Stage 5
- Municipal Improvement:** Water Main Abandonment
- Responsible Department:** EPCOR Water
- Date Submitted:** (empty field)
- Requested By:** (empty field)
- Inspection Type:** CCC Inspection
- Status:** (empty field)
- Expiry Date:** (calendar icon)

Below the main form is a horizontal navigation bar with three tabs: "Inspection Request" (active), "Inspection Disclaimer", and "Inspection Result".

Under the "Inspection Request" tab, there are two more fields:

- Contractor:** (empty field)
- Authorized Signatory:** (empty dropdown menu)

At the bottom right of the form are two buttons: "Cancel / Close" and "Save Inspection Request".

- Complete the Inspection Request** by filling in the information requested:
 - Contractor** – enter the name of the Contractor
 - Authorized Signatory** – from the drop down list, select the person who can sign the Inspection Disclaimer
- Select the **Save Inspection Request** button

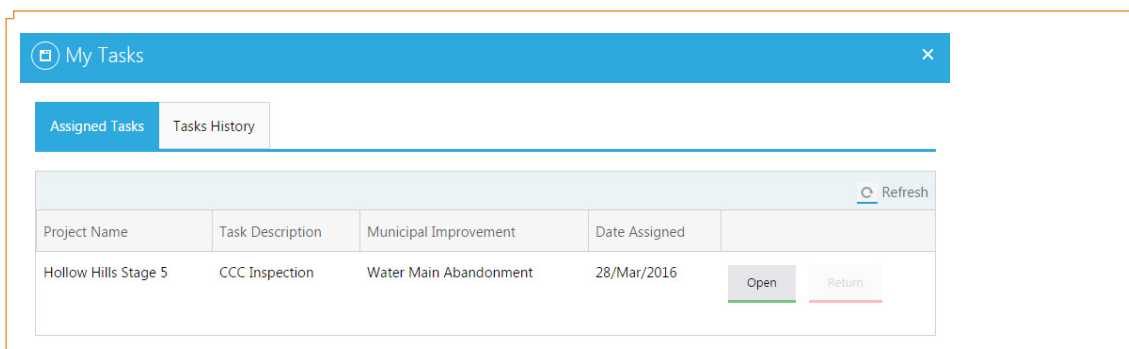
The system will notify the person identified as the Authorized Signatory to sign the Inspection Disclaimer. A task will be created and placed on their My Tasks list

5.0 Inspection Requests

5.2 INSPECTION DISCLAIMER

The person who has been identified on the Inspection Request as the Authorized Signatory must complete the inspection disclaimer for the municipal improvement before the inspection request is submitted to the review team to do the inspection.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Go to the **MyTasks** menu selection
3. **Select the Task** to sign the Inspection Disclaimer



4. Select the **Open** button – the system will take you to the project and open the Inspection Disclaimer form to complete the disclaimer process
5. Check the **Disclaimer check box**

(continued →)

5.0 Inspection Requests

6. Select the **Submit Inspection Request** button to submit the request to the Review Team responsible for doing the inspection

Inspection Request [X]

Project: Hollow Hills - Stage 5

Municipal Improvement: Water Main Abandonment

Responsible Department: EPCOR Water

Date Submitted:

Requested By: Bill Kelly

Inspection Type: CCC Inspection

Status: Assigned

Expiry Date: [Calendar Icon] [Extend Expiry Date] [Expire Now]

Inspection Request | **Inspection Disclaimer** | Inspection Result

Disclaimer Status: Not Signed

Disclaimer: Please check this box and save Inspection Request.

I, **Bill Kelly** OF THE FIRM **BarCo** ("CONSULTING ENGINEERS") HEREBY CERTIFY THAT THE MUNICIPAL IMPROVEMENT WORK NOTED HEREIN MEETS ALL REQUIREMENTS FOR A CONSTRUCTION COMPLETION CERTIFICATE AS SPECIFIED IN THE SAID SERVICING AGREEMENT MENTIONED ABOVE, AND CONSTRUCTED AS FAR AS CAN BE PRACTICALLY ASCERTAINED ACCORDING TO THE CITY OF EDMONTON DESIGN AND CONSTRUCTION STANDARDS IN COMPLIANCE WITH THE REQUIREMENTS OF THE SAID SERVICING AGREEMENT, I HEREBY, RECOMMEND THIS MUNICIPAL IMPROVEMENT FOR APPROVAL OF THE CONSTRUCTION COMPLETION CERTIFICATE BY THE CITY OF EDMONTON.

[Cancel / Close] [Submit Inspection Request]

7. The eServices system will create an **ePlan project** and notify the user who requested the inspection request to Submit Inspection Documents – through the ePlan Inspection Documents workflow

5.0 Inspection Requests

5.3 CHANGING THE AUTHORIZED SIGNATORY ON AN INSPECTION REQUEST

If the person who has been identified to sign the inspection disclaimer can no longer sign the disclaimer and must be changed, a consultant can change the Authorized Signatory by selecting a different person from the drop down list and selecting Save Inspection Request. A new Task will be placed on the My Tasks list of the person assigned and the task assigned to the previous person will be removed.

5.4 ADDING AN ORGANIZATION CONTACT TO THE SIGN DISCLAIMER LIST

An Inspection Disclaimer can be signed by those contacts who have been identified as being able to sign the disclaimer.

The contact must be identified in the eServices system to show up on the list when the Authorized Signatory is added to the inspection request.

You must be an OrgAdmin to control your organization details/users.

Contact development.coordination@edmonton.ca to get **OrgAdmin permissions** set on your account.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **Development Coordination** menu item
3. Select the **Organizational Details** menu item
4. Select the **Organization Contacts** tab

The screenshot shows the 'Manage Organization Profile' interface for 'BarCo'. The 'Organization Contact(s)' tab is selected. Below the tab are two contact entries in a table:

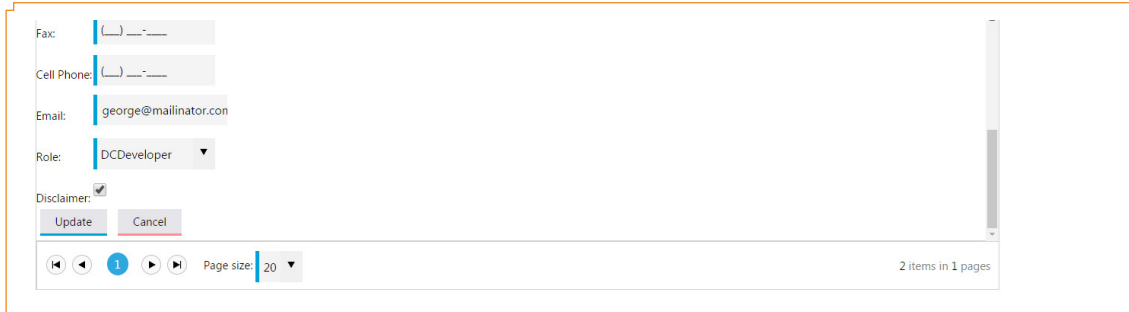
First Name	Last Name	Position	Phone	Fax	Cell Phone	Email	Portal User Name	Role	Source Organization
Bill	Kelly	Commercial Desig	(635) 465-4654	() - - -	() - - -	bill@mailinator.cc	bill@mailinator.cc	DCConsultant	BarCo
George	Kelly	Commercial Deve	(968) 352-1564	() - - -	() - - -	george@mailinat	george@mailinat	DCDeveloper	BarCo

5. Select the **Edit** button for the person you wish to edit

(continued →)

5.0 Inspection Requests

- When the edit opens – check off the **Disclaimer check box** (last field on the contact record)



- Update** the contact record

5.5 SUBMIT INSPECTION DOCUMENTS (EPLAN)

Inspection documents must be submitted before inspections will take place. eServices \ ePlan will notify the user who requested the inspection to submit the Inspection Documentation for the municipal improvement. The following workflow steps make up the Inspection Documents workflow.

- Applicant Upload** – *User who initiated the inspection request*
 - The ePlan Applicant Upload is the workflow task that requests the inspection documents to be submitted for review by the Review Team who is responsible for the Municipal Improvement.
- PreScreen Review** – *review team responsible for the Municipal Improvement*
 - When the ePlan Applicant Upload task has been completed – the workflow will be passed to the Review Team that is responsible for the review of the documents. ePlan will notify the members of the ePlan group responsible that inspection documents have been submitted and are ready for review. A member of the group will take the task to review the documents and if the documents are satisfactory will complete the task – which is the final task in the Inspection Documents workflow.
 - If the documents are incomplete or need revision – the Review Team member will make comments on the task indicating what action needs to take place and then return the workflow to the Applicant to make the appropriate changes.

6.0 Review Teams Inspection Management

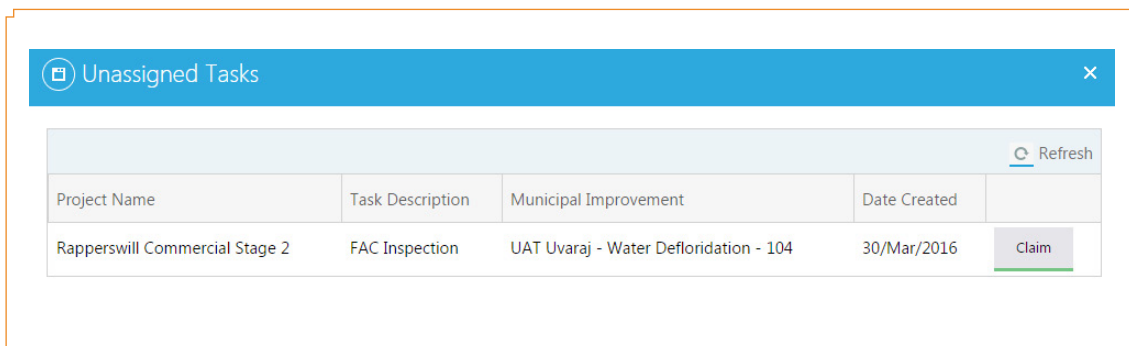
6.1 INSPECTION REQUESTS

When an inspection is requested by the consultant, an email will be sent to each of the members of the review team notifying them of the task. A task will be created and placed on the Unassigned Task list for the review team responsible to be able to claim.

6.2 CLAIMING AN INSPECTION TASK

An email will notify the person \ group members of new tasks that have been assigned to the review team group. A user will Claim the task from the Unassigned Tasks list.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Select the **Unassigned Tasks** on the menu bar
3. Find the task and select the **Claim** button



4. The task will be moved from the Unassigned Tasks list to the MyTasks list of the user who claimed the task

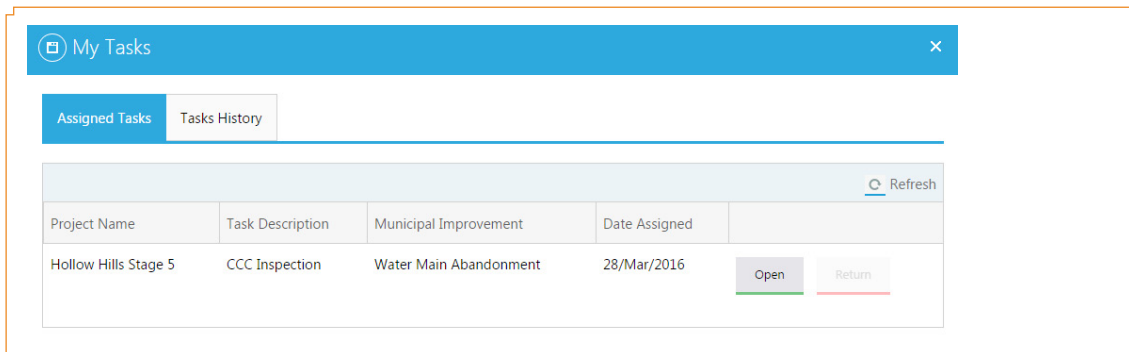
6.0 Review Teams Inspection Management

6.3 INSPECTION RESULTS

The Review Team responsible for an Inspection will be notified that a task has been created for the inspection. A member of the review team will Claim the task from the Unassigned task list. After the inspection documents have been submitted (ePlan), the reviewing organization will do the inspection. The results of the inspection will be communicated directly to the Consultant.

The Review team member will then complete the task in eServices

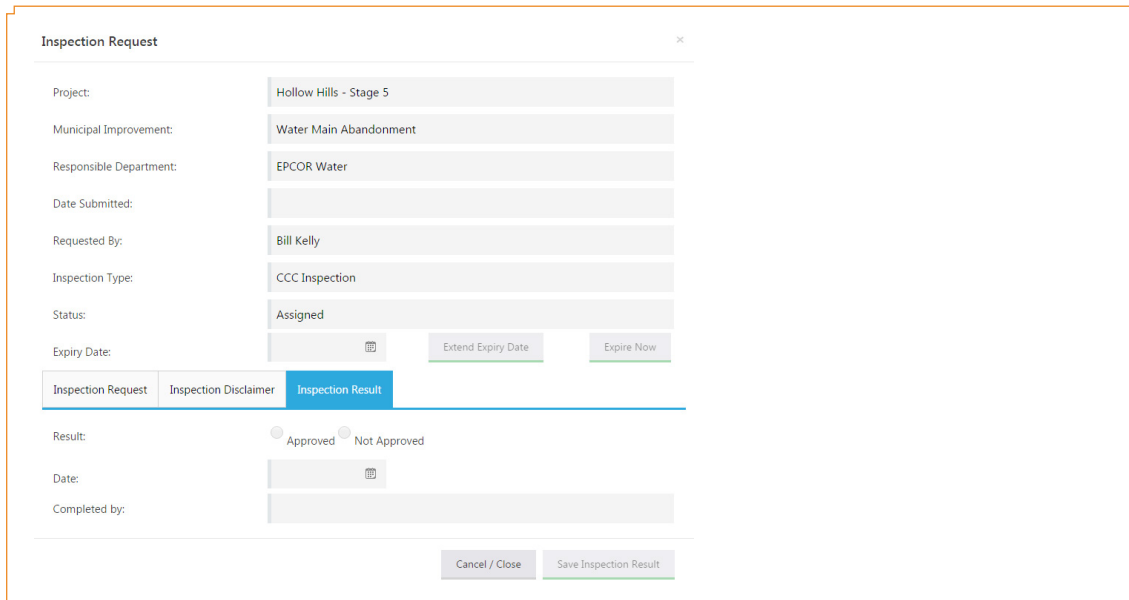
1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. Go to the **MyTasks** menu selection
3. **Find the task** to complete the Inspection Results



(continued →)

6.0 Review Teams Inspection Management

4. Select the **Open** button – the system will take you to the project and open the Inspection Result form to enter the Inspection results



The screenshot displays a web application window titled "Inspection Request" with a close button (X) in the top right corner. The form is divided into two main sections. The top section contains the following fields and values:

- Project: Hollow Hills - Stage 5
- Municipal Improvement: Water Main Abandonment
- Responsible Department: EPCOR Water
- Date Submitted: (empty)
- Requested By: Bill Kelly
- Inspection Type: CCC Inspection
- Status: Assigned
- Expiry Date: (empty) with buttons for "Extend Expiry Date" and "Expire Now"

The bottom section is titled "Inspection Result" and contains the following fields and options:

- Result: Radio buttons for "Approved" (selected) and "Not Approved"
- Date: (empty) with a calendar icon
- Completed by: (empty)

At the bottom of the form are two buttons: "Cancel / Close" and "Save Inspection Result".

5. Select the result of the inspection – **Approved or Not Approved**
6. **Enter the date** that the Inspection was completed – the inspection date can be in the past.
7. Select the **Save Inspection Result** button

If the Inspection is Approved:

- eServices will apply for the CCC \ FAC automatically
- The CCC–FAC Review workflow in ePlan will be started for the submission of CCC \ FAC documentation. See workflow process in Submit CCC \ FAC documentation (ePlan)

If the Inspection is Not Approved:

- a record of the Inspection will be kept and can be viewed on CCC \ FAC pages
- the consultants will be able to re-apply for another inspection

7.0 Submit CCC \ FAC documentation

When an Inspection has been approved for a Municipal Improvement, an ePlan project is created and a workflow started to manage the documentation that is required for issuing the CCC \ FAC. The following Workflow steps are part of the CCC \ FAC documentation review.

1. **Applicant Upload** – *User who initially requested the inspection*
 - The ePlan Applicant Upload is the workflow task that requests the documents for the CCC \ FAC to be submitted for review by those groups who are responsible for issuing the CCC \ FAC
2. **Prescreen Review** – *Engineering Technicians*
 - A Prescreen review of the documents that are submitted is done by the Engineering Technicians from Development Coordination
3. **Begin Review** – *Engineering Technicians*
 - The Engineering Technicians will start the Review of the documentation by selecting those groups that need to review the documentation
4. **Department Review** – *Department groups Assigned for Municipal Improvement*
 - Each of the assigned groups will review the documentation. When all standards have been met, the group(s) will approve the documentation
5. **Release to Applicant /Batch Stamping** – *Development Coordinator*
 - The Development Coordinator for the project will issue the CCC \ FAC for the municipal improvement. The CCC \ FAC document will be created by the eServices system and then be batch stamped through the ePlan system to identify the user, date and project the CCC \ FAC belongs to
 - The CCC \ FAC will then be released to the Consultant \ Developer through a notification from ePlan
 - The CCC \ FAC will be available for download but will be kept on the ePlan system

7.0 Submit CCC \ FAC documentation

7.1 PRESCREEN CORRECTIONS – CCC – FAC REVIEW WORKFLOW IN EPLAN

When the documentation that has been submitted through the CCC / FAC ePlan workflow does not meet the review team requirements to issue a CCC or FAC, it can be Returned to the Applicant to do PreScreen Corrections. This step will allow the applicant to correct the documentation or provide additional documentation with information on what the deficiencies / problems are with the documentation / inspection.

If the review team determines that a new inspection is required, the current inspection for the municipal improvement must be expired. See Changing the Expiry Date of an Inspection.

7.2 CHANGING THE EXPIRY DATE OF AN INSPECTION

When an Inspection is approved, the system will calculate the expiry date of the inspection. Users with the appropriate authority can change the expiry date.

1. Login to the eServices system (<https://eservices.edmonton.ca>)
2. **Search \ Open** the Project where the Municipal Improvement resides

(continued →)

7.0 Submit CCC \ FAC documentation

3. Select the **Municipal Improvement tab** on the project
4. Select the municipal improvement
5. When the municipal improvement opens you will be shown the CCC/FAC management page. **Select the Inspection** where you need to change the Expiry date, the system will open the Inspection screen where you can change the Expiry date of the inspection
6. To immediately expire an inspection select the **Expire Now** button
7. To extend an inspection, change the expiry date for the inspection to the required date and then select the **Extend Expiry Date** button

Inspection Request

Project: Inspection Heights - Stage 2

Municipal Improvement: Flush Point Installation

Responsible Department: EPCOR Water

Date Submitted: March 17, 2016

Requested By: Bill Kelly

Inspection Type: CCC Inspection

Status: Approved

Expiry Date: 4/25/2016 [Extend Expiry Date](#) [Expire Now](#)

[Inspection Request](#) [Inspection Disclaimer](#) [Inspection Result](#)

Contractor: Construction

Authorized Signatory: Bill Kelly

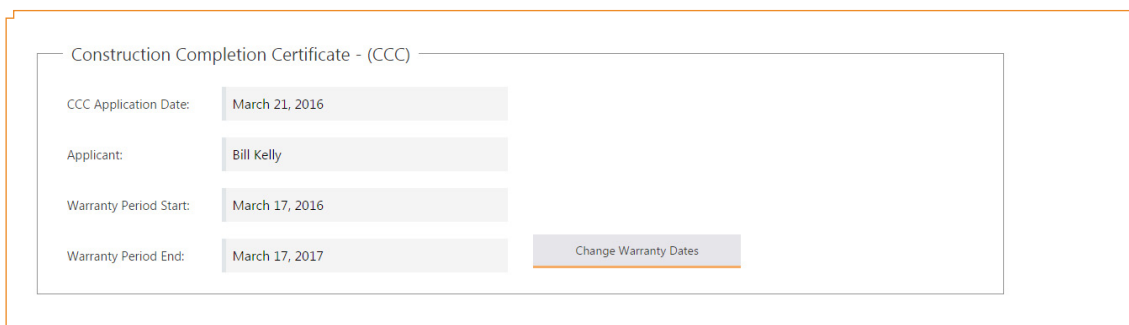
[Cancel / Close](#) [Save Inspection Request](#)

7.0 Submit CCC \ FAC documentation

7.3 CHANGING WARRANTY PERIOD DATES ON A MUNICIPAL IMPROVEMENT

The dates for the Warranty period can be changed on the Construction Completion tab on the municipal improvement. The dates can be changed until the CCC has been issued.

1. Login to the eServices system (<https://eservices.edmonton.ca>) and find the project you want to modify
2. Select the **Municipal Improvement tab** on the project and select the municipal improvement
3. Go to the **CCC tab** and move down the page to the **CCC information**
4. Select the **Change Warranty Dates** button



Construction Completion Certificate - (CCC)

CCC Application Date: March 21, 2016

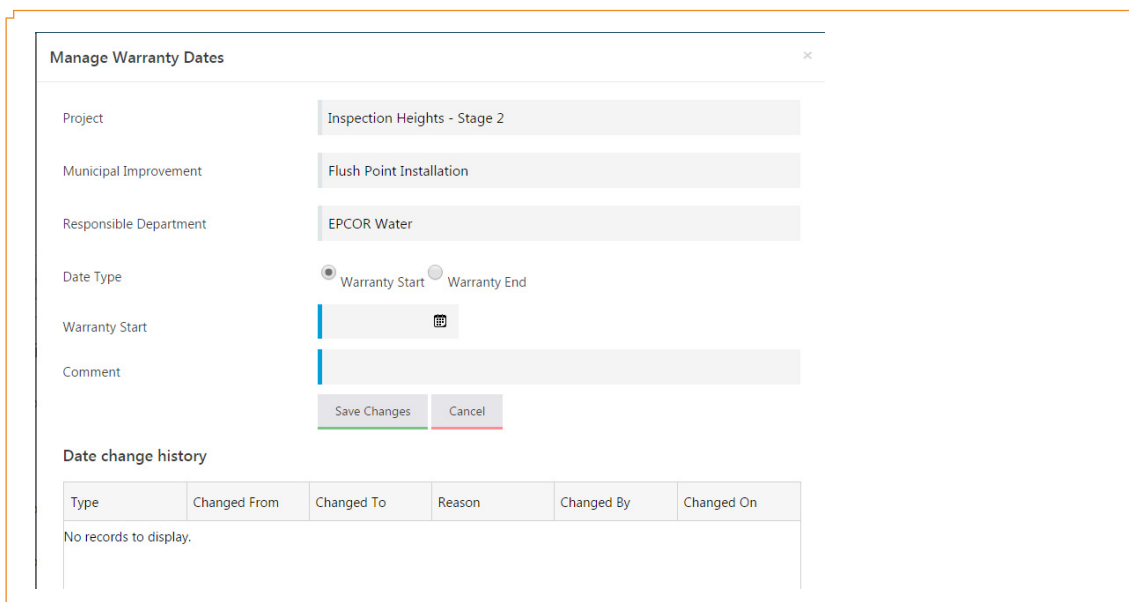
Applicant: Bill Kelly

Warranty Period Start: March 17, 2016

Warranty Period End: March 17, 2017

Change Warranty Dates

5. The **Manage Warranty Dates** screen will open
6. Select if you want to **change the Warranty Start or Warranty End date**
7. **Enter the reason** why the date is being changed in the Comment field
8. Select the **Save Changes** button



Manage Warranty Dates

Project: Inspection Heights - Stage 2

Municipal Improvement: Flush Point Installation

Responsible Department: EPCOR Water

Date Type: Warranty Start Warranty End

Warranty Start: [Calendar icon]

Comment: [Text area]

Save Changes Cancel

Date change history

Type	Changed From	Changed To	Reason	Changed By	Changed On
No records to display.					

(continued →)

7.0 Submit CCC \ FAC documentation

If you change the Warranty Start date, the system will recalculate the Warranty End date based on the length entered in the system for that municipal improvement type. (i.e. if the Warranty period is 2 years, the system will recalculate the Warranty End date to 2 years from the new Warranty Start date.)

If you change the Warranty End date – only the Warranty End date will be changed. The Warranty End date can be extended or shortened depending on the business need.

7.4 ERROR MESSAGES

*"Inspection workflow in ProjectDox is not complete yet.
Please complete the workflow to proceed further."*

This error message is provided by eServices when the Inspection workflow in ePlan has not yet been completed. The workflow must be completed before the Inspection results can be entered.

8.0 Definitions

ePlan Projects

ePlan projects are used to gather plans and documentation from the consultants at the following stages of the Development Coordination processes:

Engineering Drawing Review

Submission of plans and documents and the circulation and approval of the documents relating the Engineering Drawing Review.

Servicing Agreements

Submission of plans and documents that facilitate the creation of the Servicing Agreement by Development coordination.

Inspection Documentation

Submission of Inspection documentation for a municipal improvement. Circulation of the documentation to the review team responsible for the municipal improvement

Development Application

A Development permit number or LDA number that relate to the project

My Projects tab

All projects that you are named on will show in the My Projects tab of the Home page

All Active Projects tab

All projects that are related to your organization will be shown in the All Active Projects tab. This will allow you to access every project your organization is related to even if you are not named on the project.

Completed Projects tab

All projects that have been Completed will be shown on this tab.

Development Coordination – menu bar

This menu selection will provide the user access to all areas of the system to which they have been assigned

My Dashboard

This selection will take the user to the Home page

Project Detail – project page

This page shows the information about the project, including Owners, Consultants and Development Coordination engineers that have been assigned to the project.

Engineering Drawing tab – projects

This tab will show the ePlan project(s) that have been created for the project. A link is provided to ePlan so the user can move directly to the ePlan project.

Servicing Agreements tab – projects

This tab contains a grid for the consultants to request a Servicing Agreement for the project. This is also a list of Servicing Agreements that have already been created for the project. Selecting the Servicing Agreement number link will open the Servicing Agreement information.

Municipal Improvements tab

This tab will show all the municipal improvements that have been created for the project. The improvements can be sorted by selecting the column names

Redlines

The Redlines tab will allow the consultants to request a Redlines for the project, and will show all current Redline requests that have been requested.