Bringing Paperless Plan Review to Reality
A technology and process checklist for local governments

Big Project Files, Complex Review Processes

For both local governments and developers, it's critical to catch all issues with a building or site plan before it is approved. Yet the traditional way of reviewing plan sets — in paper form only — presents many challenges for planning departments.

The first challenge is simply handling, storing and tracking the often large and unwieldy plan sets and project files. Maps and architectural drawings, construction specifications and permit documents, site photos and testing records — all are among the many and varied document types that are necessary to review and store for every development project.

Typically, multiple sets of these paper plans are necessary because many people across departments need to review different aspects of a proposed development. With so many documents in so many hands, it's difficult to track the current status of who is reviewing what. Even when planners get all the paper documents they need, there's no easy way for them to collaborate or record their comments in a cohesive and consistent way during plan reviews.

And these challenges aren't just for the first round of reviews. In subsequent review cycles, it's also difficult to verify just by looking at paper plans that the developer has made all requested changes and hasn't added new items.

Paper plans are also a burden for developers. Producing large, multiple-copy paper plan sets is costly and time consuming. And when developers need to do the legwork of retrieving copies of permits and documents from other departments, they will likely perceive the local government as unfriendly to business.

It's clear that reviewing, tracking and managing development plans on paper leads to extra and avoidable cost, time, effort and frustration for planning staff and developers alike. The obvious answer is to store and access development plan sets online, but it must be done in a well-thought-out way.

How Digital Documents Transform Plan Reviews

Many of the drawings, specifications and other documents for development projects are already available in electronic form, albeit in a variety of formats. Beyond the basic ability to accept, view and store these diverse electronic files, a planning department needs a broader enterprise content management (ECM) solution that applies technology to improve planning processes in three essential areas.

Document management. An ECM system manages and stores all project documents and files in a central digital repository. The system accepts numerous file formats and associates all files related to a particular project, making them easily accessible to every employee who needs to review them. Centralized, digital files mean no more lost documents, no more multiple copies, and no more large flat files and drawing tubes.

Review management. Some ECM systems offer digital tools that help planners do their work with greater ease and efficiency. For example, an electronic commenting tool standardizes comments and collects the notations made by each reviewer on a single electronic drawing or document so planners can easily see what's been covered. Once all comments have been entered, the ECM system uses them to generate the formal review letter to the developer.

For the planning coordinator, the ability to define automated workflows in the ECM system helps to ensure the right documents go to the right people at the right time. A system dashboard shows the current status of each review process to keep everyone on schedule.

Developer communications. An ECM system can integrate with a Web portal that allows developers to submit plans and other project documents electronically. After each review cycle, the developer can download the comments letter and marked-up plans. The portal also creates a central point of communication between developers and planning staff.

As these uses show, implementing an ECM system does more than simply reduce paper. More significantly, it transforms how reviews are completed and how planning staff serve developers and citizens.

Streamlined Planning Reviews Benefit Government and the Community

Streamlining the planning process involves the right ECM solution and a willingness to adopt new approaches to review activities. The payoff is that the local planning department can improve its internal operations and services to constituents.

Centralized document storage. Electronic storage eliminates expensive file space for paper plan sets while providing better document control and access. Over the long term, an ECM system also enables easier retrieval of documents or images for site maintenance and emergency response purposes. For projects that have significant community impact, selected documents can be posted on the government website for viewing by citizens and the media, including access via mobile devices.

Better review management. Automated workflows and review tracking help to improve the efficiency, timeliness and completeness of the entire review process.

Coordinated review comments. Reviewers in multiple departments can see each other's comments and work collaboratively to resolve issues, resulting in a definitive and consistent response to the developer.
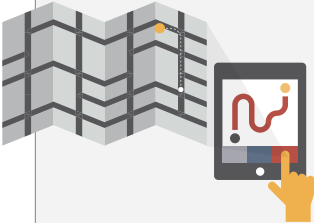
Easier compliance. Digital documents, automated routing, and electronic comments and sign-offs make it easier to comply with required document submissions and mandatory review timeframes.

Improved service to developers and citizens. A Web portal for document submission and streamlined plan reviews reduce the time until plan approval. In turn, faster approvals reduce delays and costs for developers as well as for citizens who must submit plans for residential remodeling projects.

The Foundation for Collaborative Community Development

Paperless planning isn't just about making internal processes more modern and efficient. It's also an essential foundation for the next transformation: to community development activity that is truly a collaboration with local developers, businesses and citizens.

Key Features for Plan Review Solutions

Document Management	✓ Provides a single collection and storage point for documents with configurable access by employees in multiple departments
	✓ Manages multiple document types and file formats, including GIS maps, CAD drawings, photos and videos, text documents and electronic forms
	✓ Integrates with other government systems to allow easy retrieval of permits and other documents required for the project file
	✓ Offers security and authentication controls to protect integrity of documents and review processes
	✓ Supports mobile user access from a smartphone or tablet
Web Portal	✓ Supports electronic forms and the ability to upload and download documents, images and other files individually or as part of a complete plan set
	✓ Allows developers and citizens to check on review status without calling the planning office
Plan Review and Commenting Tools	✓ Includes viewer software and commenting tools that handle architectural drawings and other document types
	✓ Provides revision and comment locking tools for review management and audit trail purposes
Workflow Automation	✓ Enables flexibility to define the right workflow, document handling activities and notifications based on the reviews needed for each project
	✓ Gives the planning coordinator a dashboard for monitoring the status of each review task and tracking the review schedule

OnBase®
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One of the world's largest independent ECM software vendors, Hyland Software is the developer of OnBase. An award-winning suite of document and process management solutions, OnBase has a proven record of solving problems resulting from time consuming, costly and error plagued manual tasks. Available on-premises or as software as a service (SaaS), OnBase installs quickly, cost effectively and is designed to grow with organizations. Today, people at more than 11,000 organizations in 67 countries have the time to do the things that really add value thanks to OnBase. For these and other successes in its 22 year history, Hyland Software is a Leader in the Gartner Magic Quadrant for Enterprise Content Management, 2012. For more information, visit **www.hyland.com and www.hyland.com/government**