# ePlan Review

## Department Name

*Quick Reference for Plan Files & Step by Step Applicant Training*

*8/2015*

RiversideCa.gov

# What is ePlan Review

ePlan Review is a workflow management system designed to provide a very efficient plan checking process while saving applicants significant time by reducing travel time, time spent at the city and money associated with the traditional paper submission process.

RiversideCa.gov

# Prerequisite

- Download ProjectDox components – this is a requirement
- Turn OFF pop up blockers for the site www.riversideca.gov/eplans  Pop Up Blocking is controlled by the tools of your internet browser under Internet Options, Privacy tab, Turn Off Pop-up Blocker
- If using Internet Explorer version 10 (check by selecting Tools on your internet browser, then About Internet Explorer), it must be operated in compatibility mode.  When on the website www.riversideca.gov/eplans click the Tools option for the internet browser, select Compatibility View Settings, then add Riversideca.gov to the Compatibility View website.

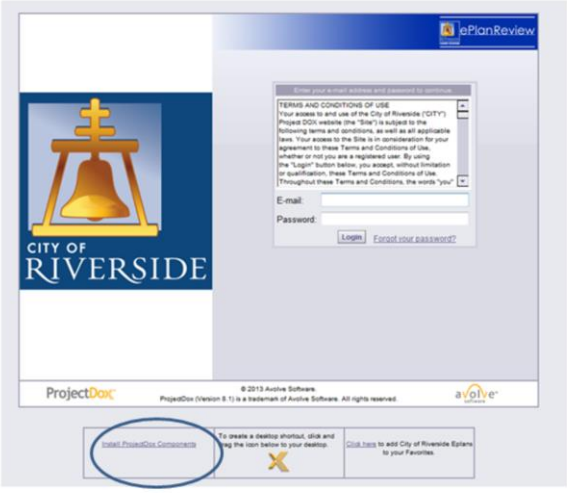
Download the components.

# First Time Users

ePlan Review needs to add a few components to your computer to operate effectively.

- Turn off Pop-Up blocker
- Install the ProjectDox Components
- Internet Explorer 10 will need to run in Compatibility Mode

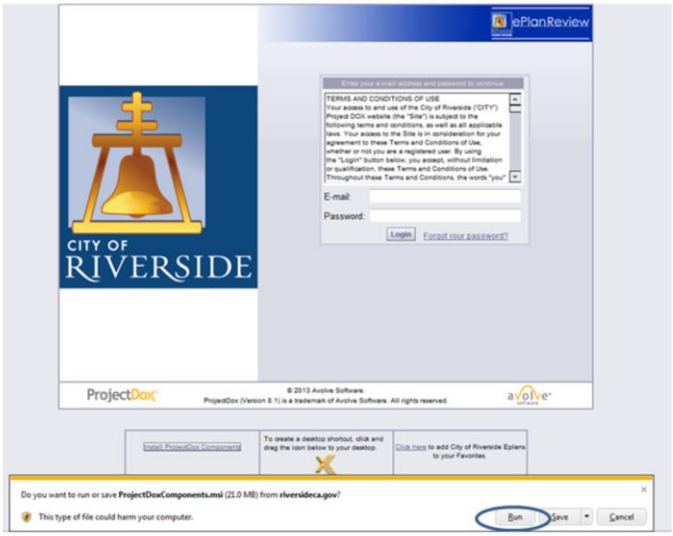
The following screens are representative of the installation process. Your experience may vary depending on your browser and computer settings.




RiversideCa.gov

ePlan Review needs to add a few components to your computer to operate effectively.
Pop-Up blockers will need to be turned off as the software operates in multiple views.
Download the components by clicking the Install ProjectDox Components link.
The following screens are representative of the installation process, your experience may vary depending on your browser and computer settings.

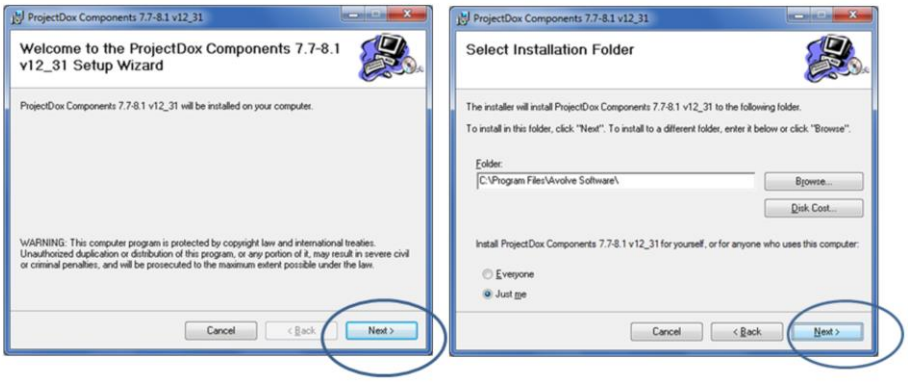
# Downloading Components



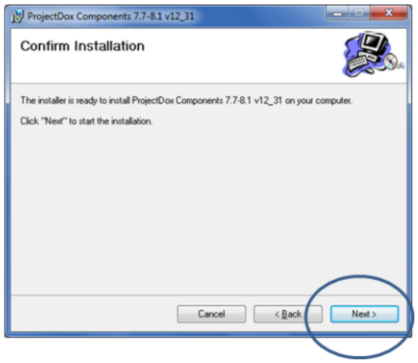

RiversideCa.gov

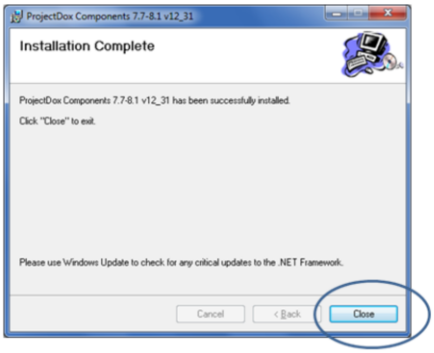
Select Run

# Downloading Components Cont.



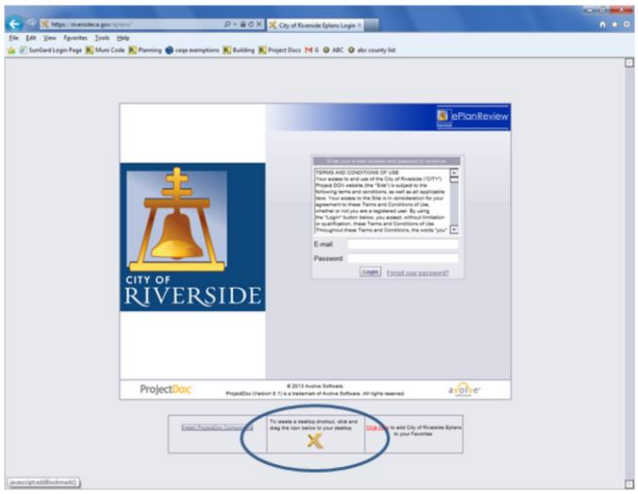
# Downloading Components Cont.



# Add to the Desktop

To add the software icon to your desktop

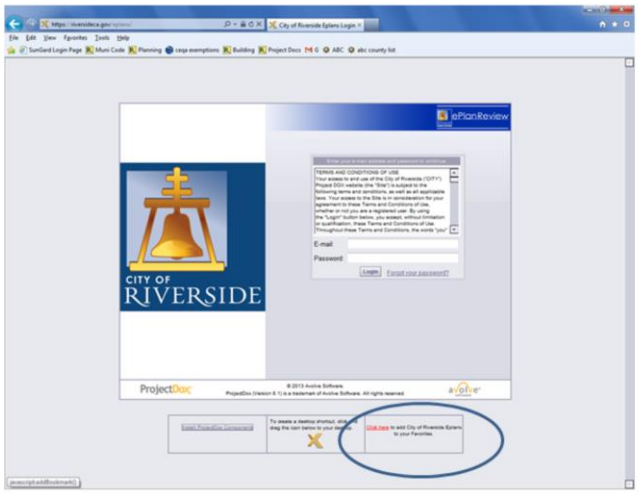



RiversideCa.gov

Click this option to add ePlan Review as a desktop link

# Add to Favorites List

To add the software to your internet browser's list of favorite sites




RiversideCa.gov

Click this option to add ePlan Review to your internet favorites list

# Quick Reference for Plan Files

Plan drawings must be signed, digitally or a scanned signature, prior to uploading.

Drawings must be loaded as single page files with the same orientation (portrait or landscape) as it would be used on a hardcopy plan.

The drawing files need to include an abbreviated reference to the drawing type (structural, electrical, plumbing – see following sheets) to assist with faster review and improved communication.

Re-submission of plan drawings MUST use the same name, the same scale and the same orientation (portrait or landscape) as the original files.

RiversideCa.gov

File Naming Standards:

Filenames for drawings submitted for ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

Extended filenames (i.e., AO.1 address of project, name of applicant – site plan) create a problem if resubmittal is required. Brief filenames are suggested (i.e.; AO.1 – site plan).

PLAN FOLDER – Must be in **Landscape** View Only

CITY OF RIVERSIDE

RiversideCA.gov

File Naming Standards:

Filenames for drawings submitted through ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

PLAN FOLDER – Must be in **Landscape** View Only

Required Files

1. An index of drawings must be included, generally on the title sheet (along with other information required by the City's checklist).

2. Cover Sheet – project cover sheet must be included in the submittal.

3. Index Sheet – project index sheet must include all plans with title designations.

Example: A002- Second Level Floor Plan.

**FILE NAMING STANDARDS:**

File names for drawings submitted for ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

| | |
|---|---|
| A0.1 – cover sheet | Survey |
| A1.0 – all site plans, including site demo plan, enlarged area site plans, etc | Civil – C1.0; C1.1; C1.2 |
| A2.0 – demo plans, floor plans, roof plans | Electrical – E1.0; E1.1; E1.2 |
| A3.0 – large scale sections | GN 1.0 – General Notes; GN1.1 |
| A4.0 - exterior elevations | Mechanical – M1.0; M1.1 |
| A5.0 – enlarged plans and sections (example: stairs, walls sections | Plumbing – P1.0; P1.1; P1.2 |
| A6.0 - details | Structural – S1.0; S1.1 |
| A8.0 – control systems | Lighting, Fire Protection, Security, Signage, landscaping, interior elevations |

CITY OF RIVERSIDE

RiversideCA.gov

**DOC FOLDER – 8 ½ X 11**

| | |
|---|---|
| Alternate Method | T24 Energy |
| Soils Report | Structural Calculations |

ALL DRAWING FILES MUST BE SAVED IN **LANDSCAPE** ORIENTATION.

THE TOP RIGHT OF ALL DRAWINGS MUST BE RESERVED FOR THE CITY OF RIVERSIDE'S ELECTRONIC STAMP.

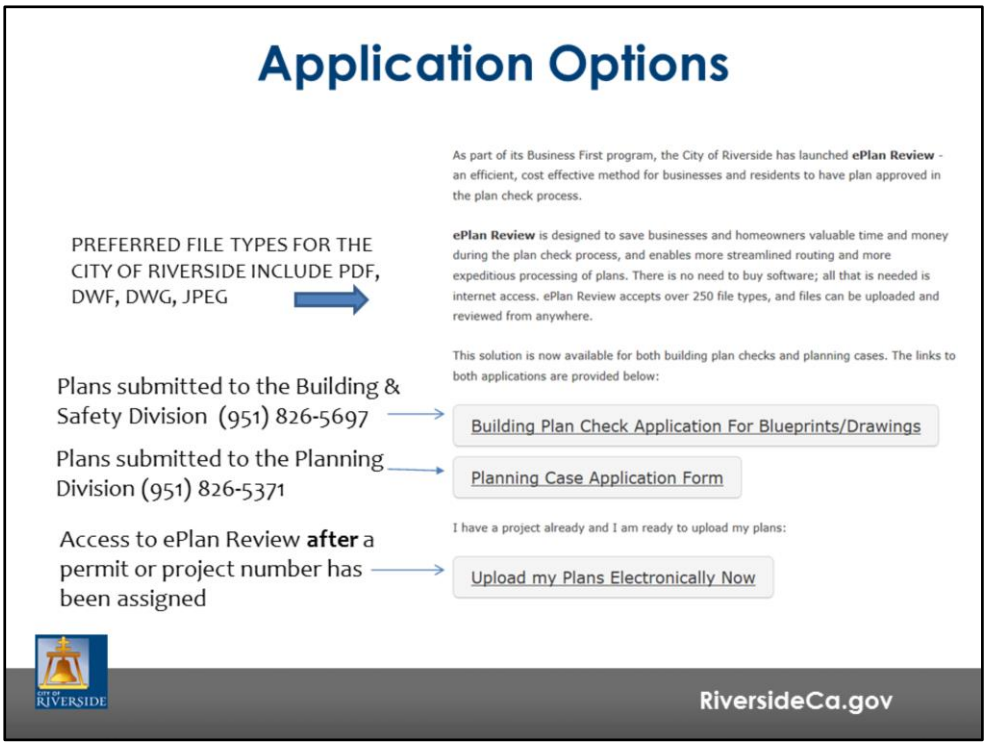
PLEASE LEAVE THE TOP RIGHT COMPLETELY BLANK ON ALL DRAWINGS

- Dimensions 2" width x 2" height

FILE TYPE STANDARDS
The preferred Plan Drawing file formats are DWF, vector PDF and print-ready DWG files. Multi-page plans are not accepted – **single pages are required.**

CITY OF RIVERSIDE

RiversideCA.gov




There are two application types. If you are unsure which type is appropriate for your project, please call our main line at **826-5371.** A third access button has been included for applicants that have completed the application and received an invitation to their project.

# Starting an ePlan Review

The ePlan Review application link is on the CDD, Building & Safety and Planning websites. ePlan Review can be initialized online by any applicant.

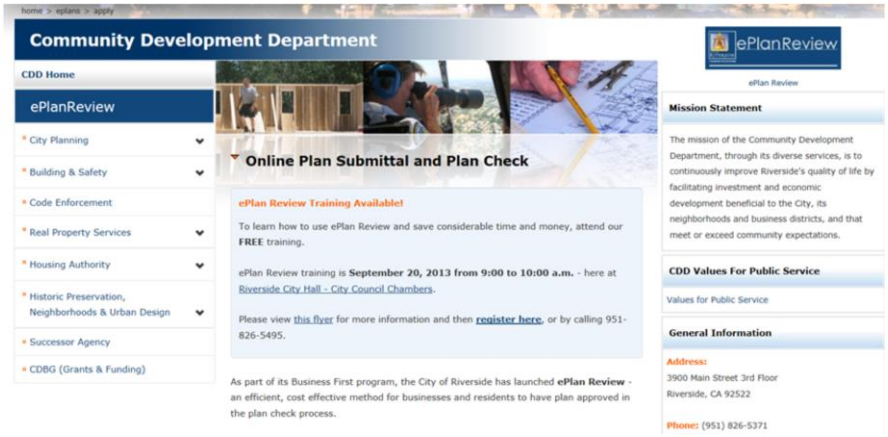
ePlan Review starts with an application to start a permit or project. Click the button to access the application page.

RiversideCa.gov

The ePlan Review application link is on the CDD, Building & Safety and Planning websites. ePlan Review can be initialized online by any applicant. It can also be added to a current paper permit or project upon request. Call Building & Safety or Planning to request the process and provide them with an email address.

# Application Page

The application page provides a brief description of the ePlan Review process. Scroll to the bottom of this page to view the application options.

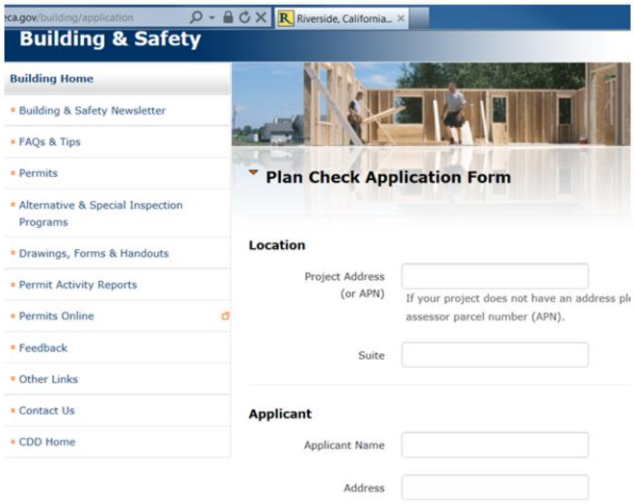



The application page provides a brief description of the ePlan Review process. Scroll to the bottom of this page to view the application options.

# Submitting to Building & Safety

The application for Building & Safety is being used for this demonstration. The same procedures apply for the Planning application. The information fields are very similar to the information requested by Building & Safety's front counter: location, applicant info, owner info and project description

Complete the application form for the Permit/Project.



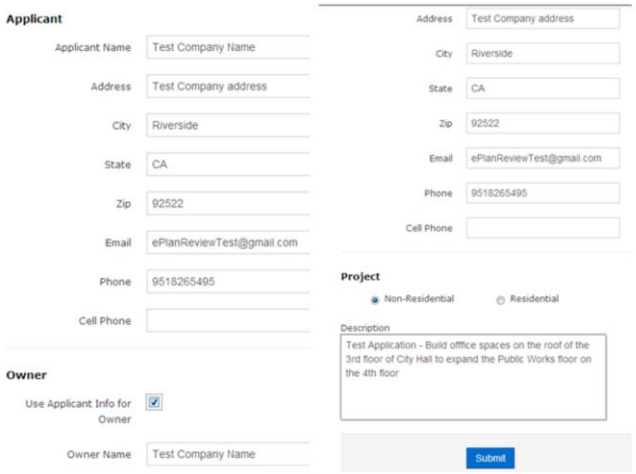

RiversideCa.gov

The application for Building & Safety is being used for this demonstration. The same procedures apply for the Planning application. The information fields are very similar to the information requested by Building & Safety's front counter: location, applicant info, owner info and project description

# Building & Safety Application Cont.

An email is required for all ePlan Reviews. This account will be used to communicate the status of the project and to request information.

If the owner is not the same as the applicant, the owner's email can also be added to the application to have equal access to the permit or project.




RiversideCa.gov

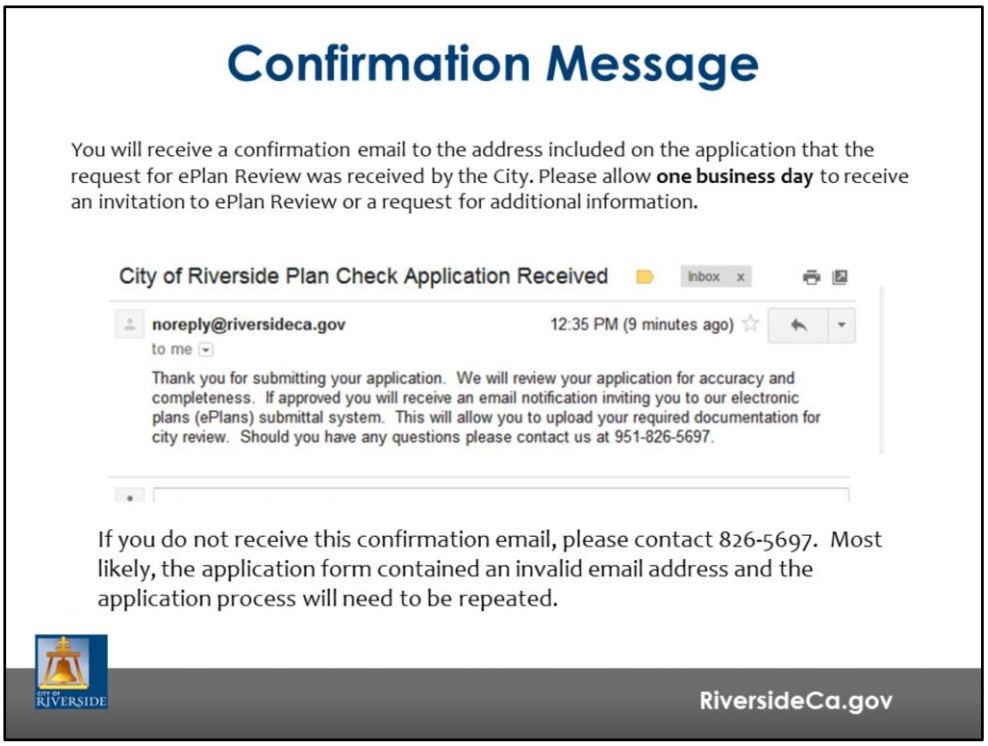
An email is required for all ePlan Reviews. This account will be used to communicate the status of the project and to request information.
If the owner is not the same as the applicant, the owner's email can also be added to the application to have equal access to the permit or project.

# After Submitting the Application

Upon submitting the application, the screen will refresh with this confirmation message.

RiversideCa.gov

Upon submitting the application, the screen will refresh with this confirmation message.




You will receive a confirmation email to the address(es) included on the application that the request for ePlan Review was received by the City. Please allow 24 hours to receive an invitation to ePlan Review or a request for additional information.

If you do not receive this confirmation email, please contact 826-5371. Most likely, the application form contained an invalid email address and the application process will be to be repeated.

## What Happens Next

City Staff will receive an email to review the online application.

- Staff will contact you if they require additional information prior to approving the start of the permit/project.
- Any locations for projects outside of the City boundaries will be returned and advised by email.
- If the information is sufficient to start the permit/project, staff will assign a permit/case number and send an invitation to start the ePlan Review process.

RiversideCa.gov

The application will be reviewed by technical, counter staff by either the Building & Safety Division or the Planning Division depending on the application submitted. Staff will carefully review the application to determine the services needed for the project and assign a permit or project case number.

# ePlan Review Invitation email

All new permits and projects in ePlan Review will start with an email invitation into the software.

A user account will be established for each email address.

For first time users, the invitation will include a temporary password and a link to the ePlan Review software.

If your company has multiple users, contact Sharon Alvarez (951) 826-5697 to add multiple accounts.

Existing ePlan Review users will receive invitations to new projects but will not receive a temporary password.

**Permit Plan Check Invitation**

**Hello TEST COMPANY NAME:**

Welcome to the electronic plan check system. This project invitation has been sent to you in response to your permit request. A project has been created to allow you to electronically upload your CAD drawings & other supporting documentation for plan check review. To access your new project, follow this instructions below:

1. Click the Project Access link below
2. Enter your User Login and Temporary Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" folder for plans and "Documentation" folder for supporting documentation
5. Click the "Upload Files" button and follow the instructions to upload your CAD drawings
6. Your drawings have now been submitted for plan check review

CAD Drawing files supported are: .DWG, .DGN, .DWF, .DXF, .PDF, .TIFF, .PLT

| | |
|---|---|
| User Login | ePlanReviewTest@gmail.com |
| Temporary Password | B6C345E |
| | |
| Project Permit # | 13-2618 |
| Plan Check Coordinator | **Building & Safety Division** |
| Plan Check Coordinator's Email | building@riversideca.gov |
| | |
| Project Permit Access Link | |

Temporary Password

Permit number

Link to ePlan Review

Contact the Plan Check Coordinator if you have questions regarding this project. Please do not reply to this email.

RiversideCa.gov

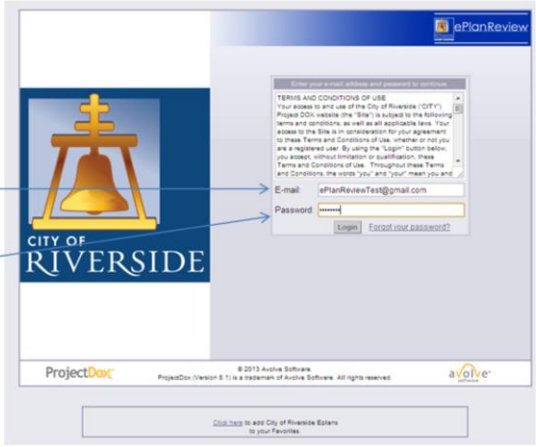
All new permits and projects in ePlan Review will start with an email invitation into the software.
A user account will be established for each email address.
For first time users, the invitation will include a temporary password and a link to the ePlan Review software.
If your company has multiple users, they can have multiple accounts.
Existing ePlan Review users will receive invitations to new projects but will not receive a temporary password.

# Access ePlan Review

The e-mail is the same as provided on the application and the same account that received the invitation email. A temporary password is provided to new ePlan users. If you forget your password, use the *Forgot your password* link. If you experience difficulty accessing your account, please call 826-5371.

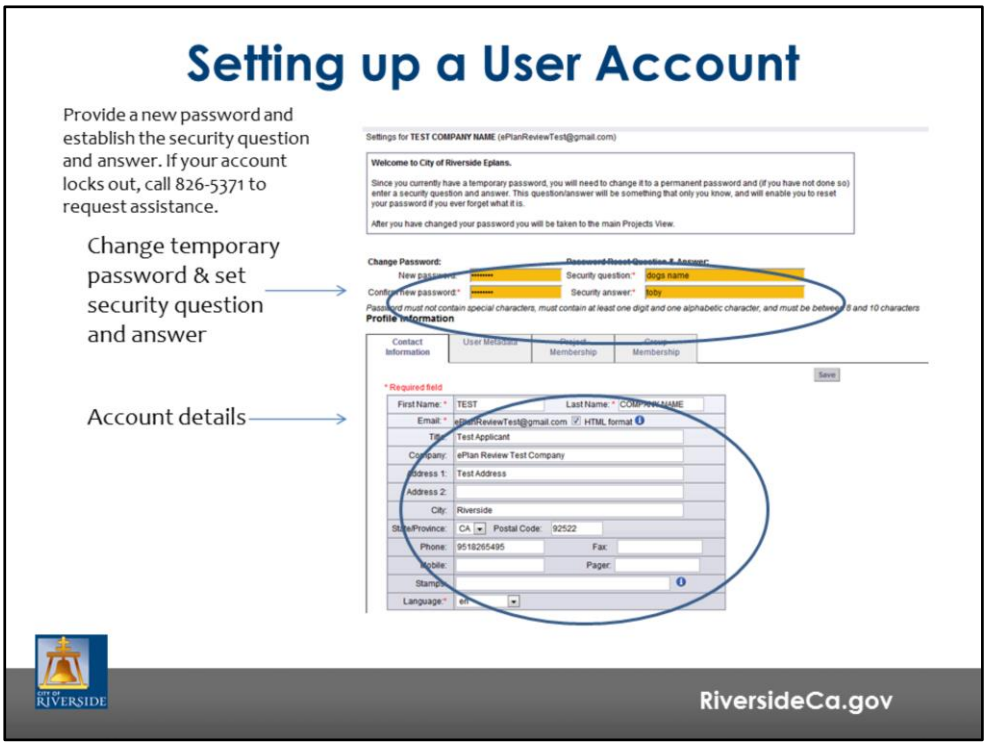
Same email as used for the application

Password




RiversideCa.gov

The e-mail is the same as provided on the application and the same account that received the invitation email. The password is the temporary one provided (new users only). If you forget your password, use the *Forgot your password* link. If you experience difficulty accessing your account, please call 826-5371.




Provide a new password and establish the security question and answer. The security question is not a drop down menu, it is a text field. The security answer must be typed exactly as listed in the box for password recovery. If your account locks you out, call 826-5371 to request assistance.

Complete the company contact information. The more information provided, the better service we will be able to provide.

## Plan Review Pre-Screening

City staff will review the drawings and documents for pre-screening.

Pre-Screening will check for receipt of all needed documentation (plan drawings, calculations, etc.) and advise the applicant of fees due. Note: If at prescreen you are DENIED, please reaccept your task and retry.

Upon receipt of all required information and the payment of fees due, staff will simultaneously route the permit or project to the applicable review disciplines.

RiversideCa.gov

Staff will review the documents, determine if additional documents are needed and advise of the amount due for the permit or project. Staff will use ePlan Review to advise the applicant (and owner if email included in the application) of the list of required information and advise regarding the amount due. An electronic payment option is not yet available, we are working on providing a solution for accepting credit cards and e-checks.

# Adding Files

Staff will prescreen each application prior to allowing applicants access to upload the plan files and documents for the permit or project. You will receive an email when ePlan Review will accept documents. This option will be turned off during the plan check process and turned back on for re-submittal.

**Please see Slides 11 – 14 for the file naming convention.**

Click the Project Access to log into the project noted in the email. If desired, click Login to ProjectDox to access your account. All projects you have started or have been invited to will be in your account.

Sample email:

ePlanReview

**Upload Confirmation Task Assignment**

**Attention TEST:**

When you have completed your upload, please you have completed your upload, please Login to ProjectDox and complete the "Upload Confirmation" task.

| | |
|---|---|
| Project: | 13-2618 |
| Description: | Test Application - Build offfice spaces on the ro |
| Task: | ApplicantUpload |
| Assigned by: | Carlie Myers |
| | Project Access \| Login to ProjectDox |

RiversideCa.gov

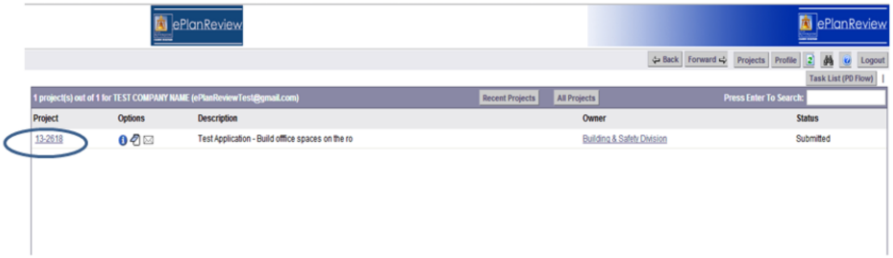
Staff will prescreen each application prior to requesting applicants upload the plan files and documents for the permit or project. You will receive an email when ePlan Review will accept documents. This option will be turned off during the plan check process and turned back on for re-submittal.

Click the Project Access to log into the project noted in the email. If desired, click Login to ProjectDox to access your account. All projects you have started or have been invited to will be in your account.

# Adding Files Cont.

Click the project to open the folders. If you have more than one project in ePlan, all will be listed.

Sample dashboard in ePlan Review:

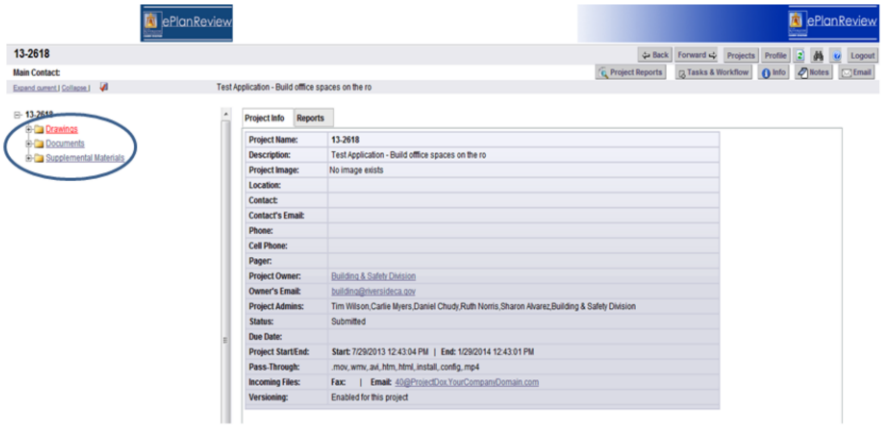



RiversideCa.gov

Click the project to open the folders.

# Adding Files Cont.

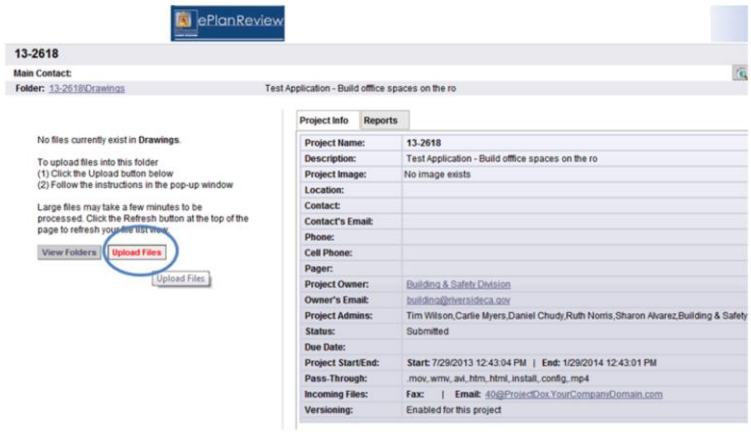
Select the appropriate file folder for each document type.



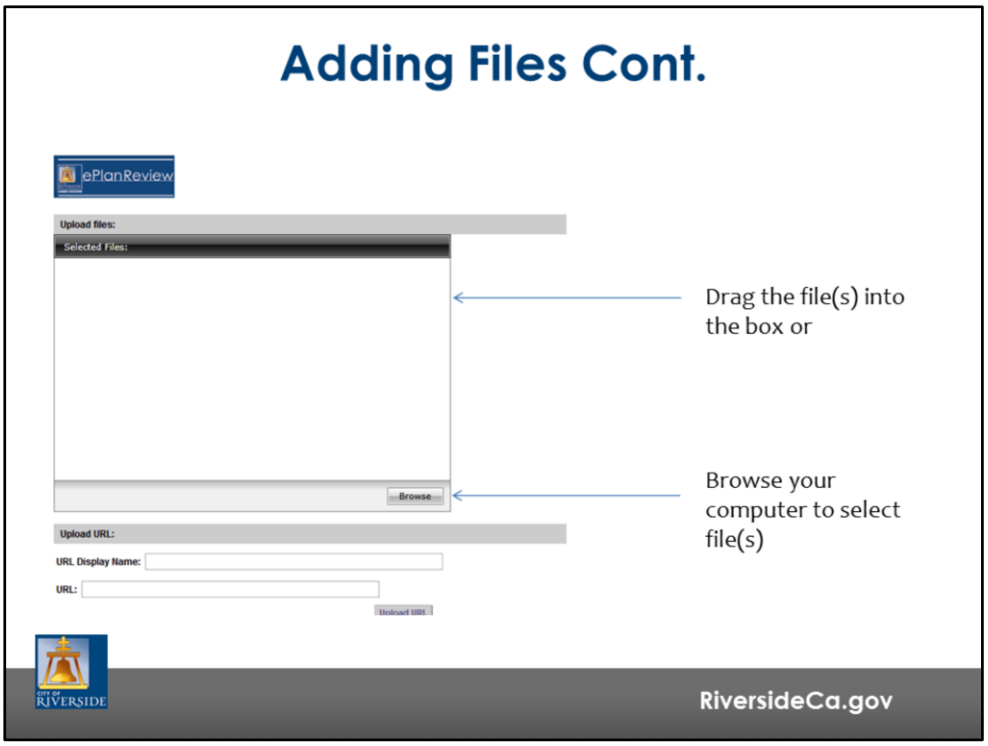

RiversideCa.gov

Select the appropriate file folder for each document type.

# Adding Files Cont.



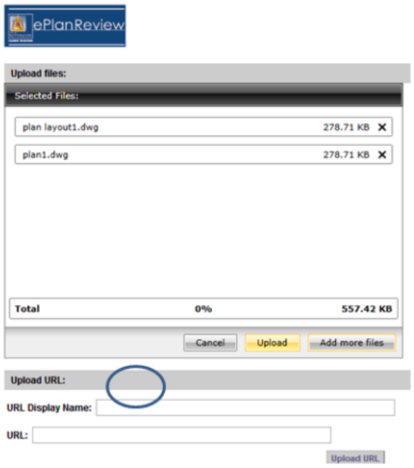

Click Upload Files




Files can be uploaded by either dragging them from your desktop into the Selected Files box or by browsing for files on your computer.

# Adding Files Cont.

The files to be uploaded will be listed in the Selected Files box. When ready, click Upload to add all documents into the project/permit




RiversideCa.gov

The files to be uploaded will be listed in the Selected Files box. When ready, click Upload.

# Confirm Upload Complete

You will receive an email requesting confirmation that the files loaded into the project are the complete set needed for submission. This process is how you communicate with staff that you are ready to begin the plan check process.

Sample email:

ePlanReview

**Upload Confirmation Task Assignment**

**Attention TEST:**

When you have completed your upload, please you have completed your upload, please Login to ProjectDox and complete the "Upload Confirmation" task.

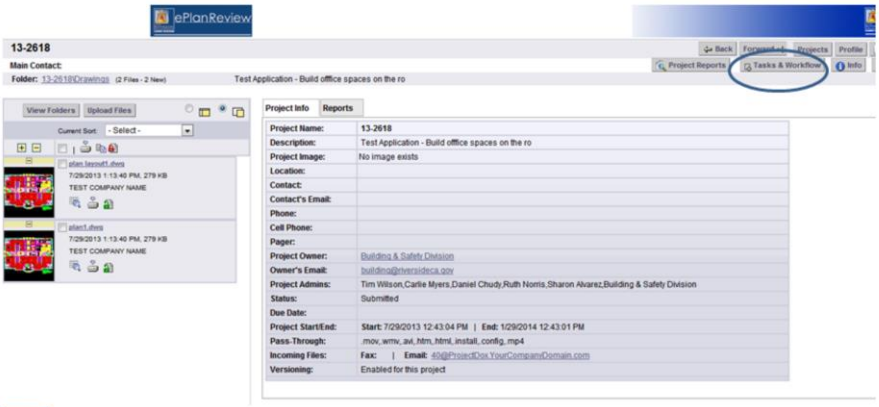
| | |
|---|---|
| Project: | 13-2618 |
| Description: | Test Application - Build offfice spaces on the ro |
| Task: | ApplicantUpload |
| Assigned by: | Carlie Myers |
| Project Access \| Login to ProjectDox | |

RiversideCa.gov

You will receive an email requesting confirmation that the files loaded into the project are the complete set needed for submission. This process is how you communicate with staff that you are ready to begin the plan check process

# Starting the Plan Review

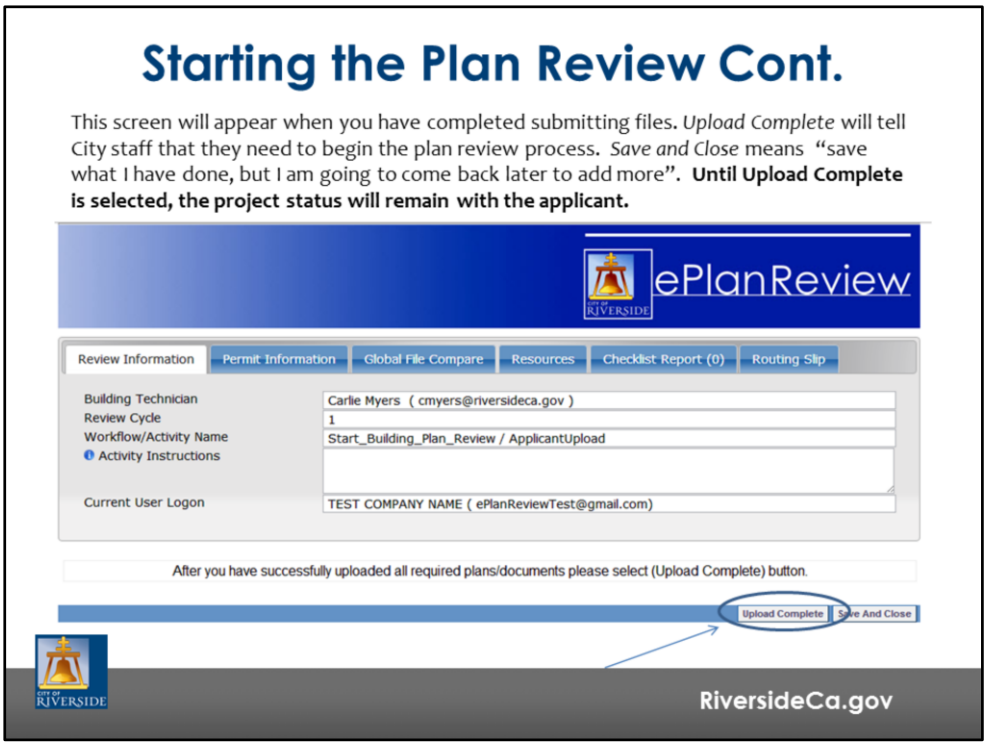
You will see the files uploaded for the permit or project. When you are done loading, click the *Tasks and Workflow* option. Tasks and Workflow control the file permissions for the plan check process.




CITY OF RIVERSIDE

RiversideCa.gov

You will see the files uploaded for the permit or project. When you are done loading, click the Tasks and Workflow option. Tasks and Workflow tell ePlan Review that you have completed uploading the necessary files.




This screen will appear for you to advise that you are done submitting files. *Upload Complete* will tell City Staff that they need to begin the plan review process. *Save and Close* is equal to saying "save what I have done, but I am going to come back later to add more". Until *Upload Complete* is selected, the project status will remain with the applicant.

# Plan Check

Each reviewer will have the opportunity to review, make comments, request changes, and/or provide conditions to the applicant.

When **all** required reviewers have completed the plan check task, the list of comments, corrections and or conditions will be sent by City staff to the applicant via email.

The applicant will have access to review each mark up and make the required adjustments to the plan or documents. Applicants will now have access to upload new files to the permit or project.

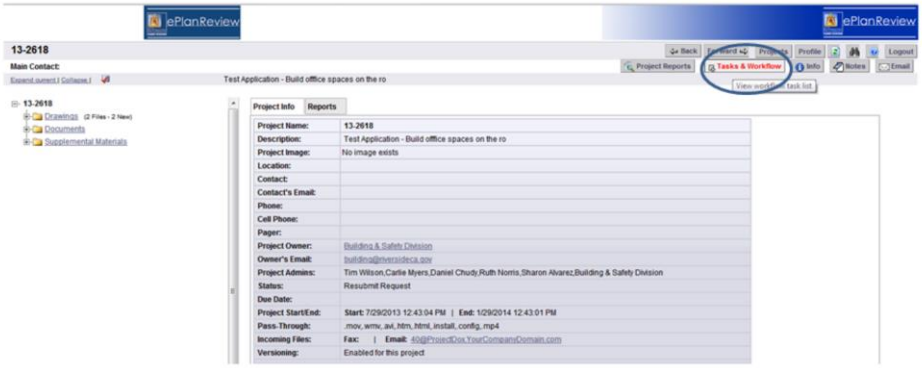
Only plan files with corrections need to be re-submitted. **Resubmitted files must have the same file name as the original document.** (See sheets 11 - 14). ePlan Review will version each file, putting the most recent on top, thus providing plan check staff with a faster, more efficient review process.

RiversideCa.gov

The paper plan review process will be routed to each department via ePlan Review. All plan check will be done at the same time and allow the different departments view only access to the conditions or corrections of each other. Upon final plan check from all required departments, the list of corrections/conditions/markups will be emailed to the applicant. The applicant will then be able to log into ePlan Review to see the requested corrections and make those changes to the plans. Resubmission of the files requires using the exact file name as originally uploaded to the project. This feature provides all of the plan reviewers an immediate versioning and thus expedites the plan review process.

# Accepting the Task for Corrections

Tasks and Workflow will start the process

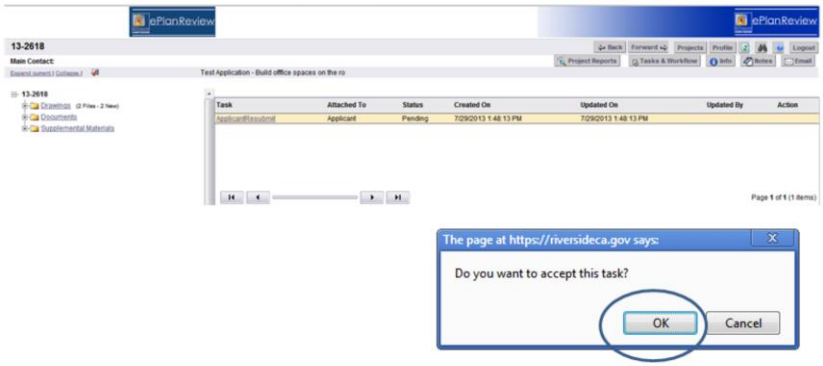



RiversideCa.gov

Tasks and Workflow will start the process

# Accepting the Task for Corrections Cont.

Click OK to accept the task. This feature is included for applicants that have provided project access to multiple staff members or other vested parties involved in the project. Accepting the task moves the workflow to the responsible user.




RiversideCa.gov

Click OK to accept the task. This feature allows companies to have multiple staff members or other vested parties involved in the project. Accepting the task moves the workflow responsible to the user clicking OK.

# Review Corrections

This sample email advises that the plan check process has been completed and corrections are needed. Access the project to view the corrections.

ePlanReview

**Review Correction Request Task Assignment**

**Attention TEST:**

Your plan review submission for Project: **13-2618** has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.

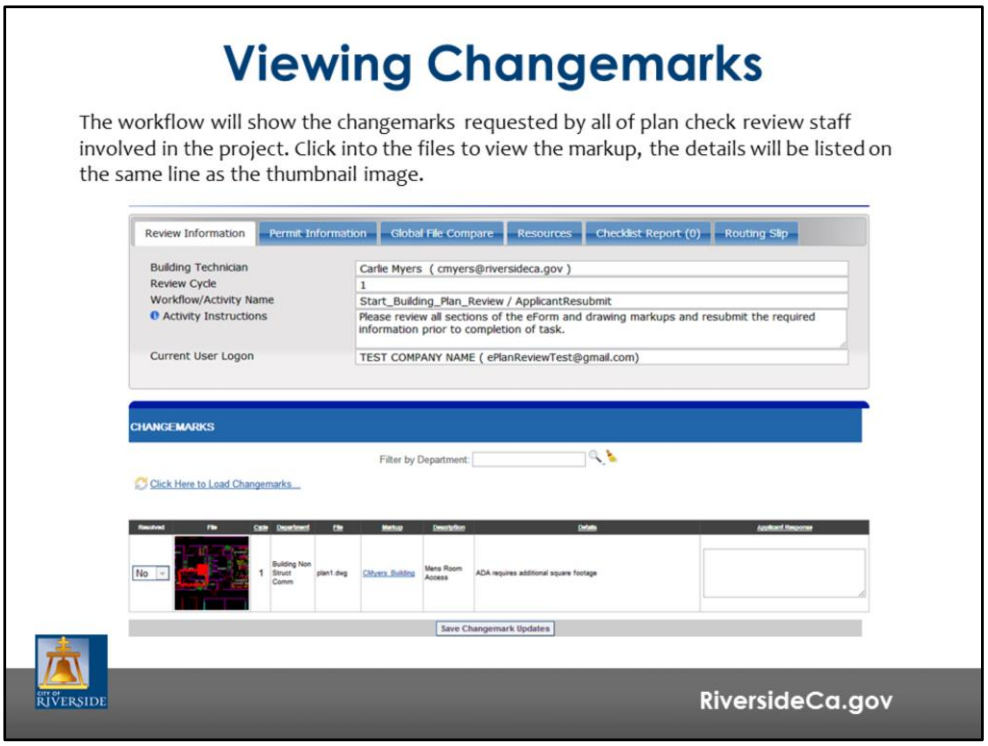
Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

| | |
|---|---|
| Project: | **13-2618** |
| Description: | **Test Application - Build offfice spaces on the ro** |
| Task: | **ApplicantResubmit** |
| Assigned by: | **Carlie Myers** |
| Project Access \| Login to ProjectDox | |

RiversideCa.gov

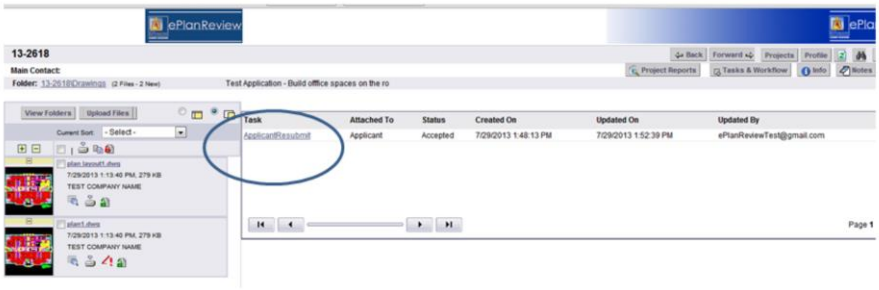
This sample email advises that the plan check process has been completed and corrections are needed. Access the project to view the corrections.




The workflow will show the changemarks requested by all of plan check review staff involved in the project. Click into the files to view the markup, the details will be listed on the same line as the thumbnail image.

# Project Status when Pending Corrections

The status of the workflow will change back to the applicant to re-submit files.

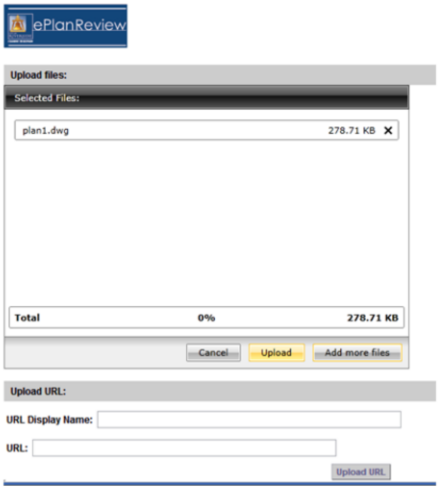



RiversideCa.gov

The status of the workflow will change back to the applicant to re-submit files.

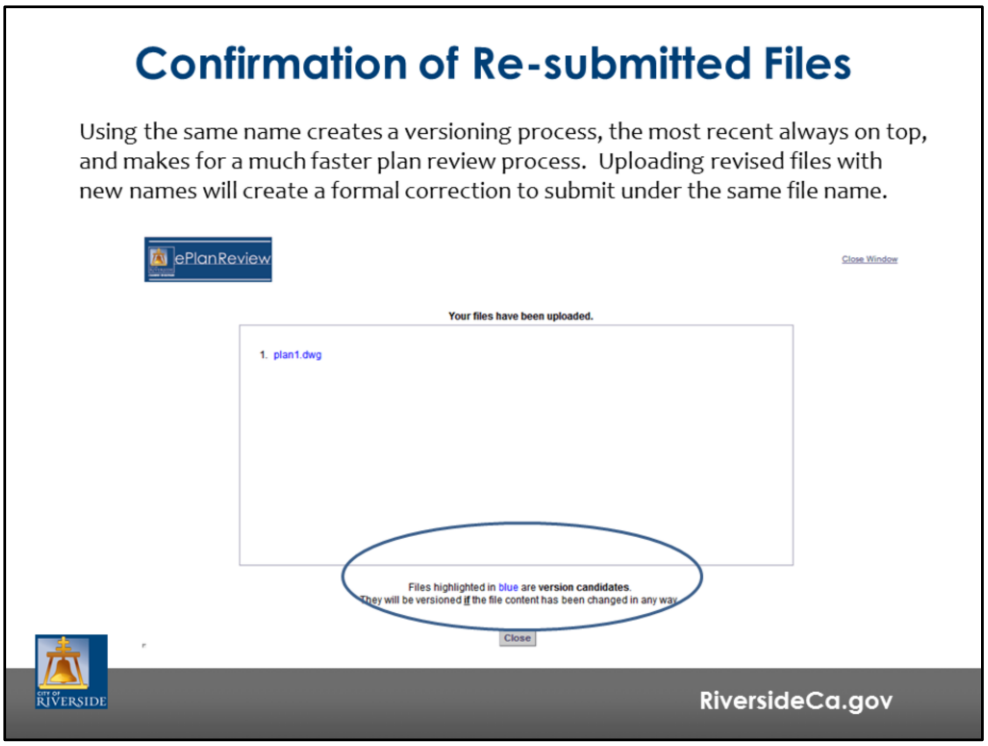
# Uploading Corrected Files

The process to re-upload files is exactly the same as the original file upload. **Revised files MUST use the same file name, orientation (portrait or landscape) and scaling for re-submission.**




RiversideCa.gov

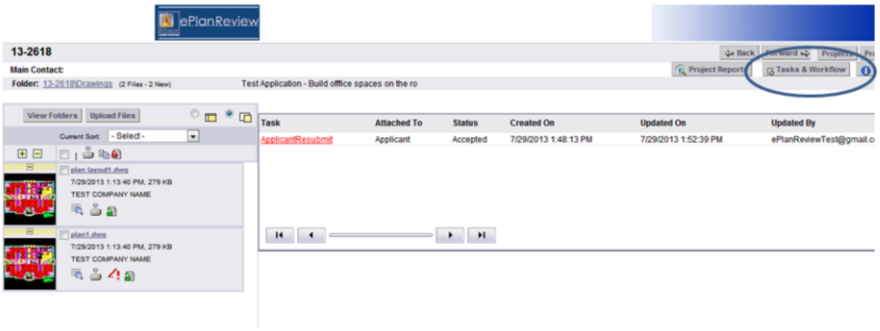
The process to upload file is exactly the same as the original file upload. Revised files MUST use the same file name for re-submission.




Using the same name creates a versioning process, the most recent always on top, and makes for a much faster plan review process. Uploading revised files with new names will create a formal correction to submit under the same file name.

# Complete the Re-Submission

When all of the corrected files have been loaded, you will need to advise staff that your portion of the process has been complete. Click the Tasks & Workflow button



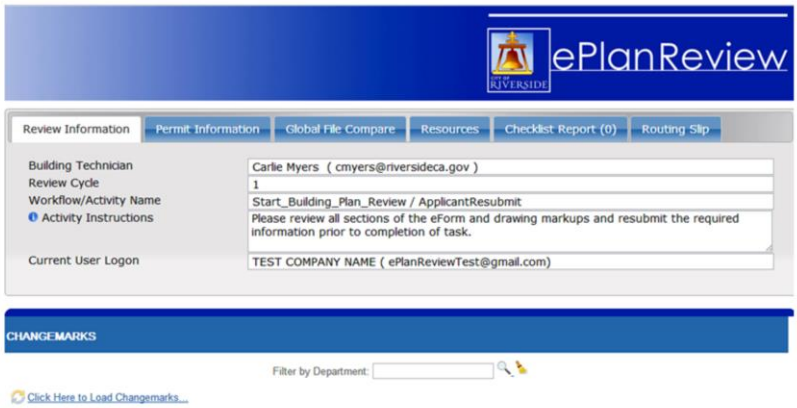

RIVERSIDE

RiversideCa.gov

When all of the corrected files have been loaded, you will need to advise staff that your portion of the process has been complete. Click the Tasks & Workflow button

# Completing Re-Submission

A very similar form to one used for the first submittal will require confirmation from the applicant that they are done uploading files. Scroll down this form to the screen listed in the next slide.

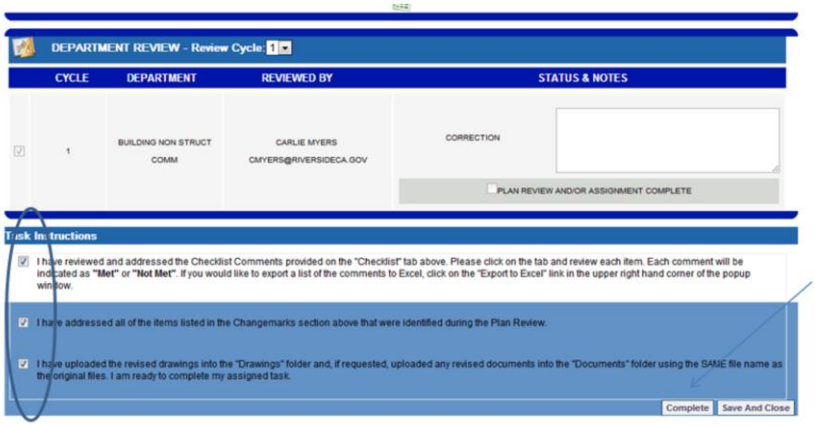



RiversideCa.gov

A very similar form to one used for the first submittal will require confirmation from the applicant that they are done uploading files. Scroll down this form to the screen listed in the next slide.

# Final Step for Re-Submission

The workflow will require confirmation that the checklist items were met. When done, click Complete to start plan check. This process will repeat until the project is deemed approved. Approved permits and projects are Stamped and the files will move into an Approved Files (folder not visible until approved).




RIVERSIDE

RiversideCa.gov

At the re-submission stage, the workflow will require confirmation that the checklist items were met. When done, click Complete, to advise staff that the resubmitted files are ready for plan checking. The Save and Close button is the same as “I’m saving the current process, I am closing the application, I will be back later to click Complete”.
If additional corrections are needed from the first submittal, the same cycle will repeat until the project is deemed approved. Approved permits and projects are Stamped.

# Stamped Plans

An email will be sent to the applicant(s) advising that the permit or project has been approved. Once the permit fees have been paid, the plans will be stamped and released for duplication. All approved files will be in a file labeled "*Approved files*". The stamped plans include the permit or project number. All approved files will be available for downloading by the applicant(s). A stamped printed copy of the plans shall be made available at the job site for the Building Inspector's visit and inspection review.

ePlanReview

**New Batch File Stamp Notification**

One or more files have been batch stamped and added to the project listed below.

| | |
|---|---|
| Project: | **13-2618** |
| Path: | **13-2618\Approved** |
| Stamped by: | **Carlie Myers** |

Stamped Files Access | Login to ProjectDox

**Original files that were stamped:**

1. plan layout1.dwg
2. plan1.dwg

RIVERSIDE

RiversideCa.gov

An email will be sent to the applicant(s) advising the permit or project has been approved. All approved files will be moved to a file folder in the project labeled "Approved files". The stamped plans will include the permit or project number.

# City Contact Info

For questions, concerns, password reset, additional user accounts, file concerns, please contact:

- Building & Safety Division: Building Permit Technician Sharon Alvarez at sjalvarez@RiversideCa.gov or (951) 826-5697
- Planning Division: Senior Planner Travis Randel at trandel@RiversideCa.gov or (951) 826-5371

RiversideCa.gov