



ProjectDox[®]

ELECTRONIC PLAN REVIEW APPLICANT USER'S GUIDE



BUILDING TO OUR FUTURE





ePlan Applicant User Guide

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Introduction to ePlan

Electronic Plan Review (ePlan) is a web-based solution that allows a variety of plan and plat types to be submitted electronically, replacing the traditional paper-based review method. ePlan will improve the plan review cycle & reduce costs associated with obtaining approvals while supporting green initiatives. By electronically submitting plans and plats for review, more accurate tracking of review comments and responses, and clearer communication relating to markups on the plans can be achieved. The City of San Angelo also believes that this method will streamline both the review steps and the time necessary to complete each step, consistent with the City Council goal to improve the development process. Applicants will be able to follow their projects and understand at each step the status of each submitted project.

This manual provides basic documentation on the steps involved in the Electronic Plan Review (ePlan) process. It has been prepared as a general reference guide and is not designed to present every detail or situations on every element of the process. There are text descriptions and screen images of the step-by-step tasks necessary to complete a submittal and review using ePlan.

If at any time in the process you have questions or concerns, do not hesitate to call. Be sure to ask to speak to one of the following System Administrators:

Planning & Development Services

Rae Lineberry, Development Services Technician
rae.lineberry@cosatx.us
(325) 657-4210, #5

Aaron Vannoy, Development Services Administrator
aaron.vannoy@cosatx.us
(325) 657-4210, #5

Forms and Applications:

- Building Permits & Inspections Division (www.cosatx.us/permits);
- Planning Division (www.cosatx.us/planning); and,
- Engineering Services Department (www.cosatx.us/engineering).

NOTE: In addition to this user manual, please reference the help documentation available within the ePlan Review Web portal for further assistance.





I. Electronic Plan Submission

A. Please complete the following prior to getting started:

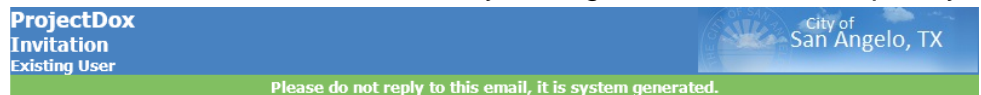
1. For the following types of plan and plat submissions, fill out the relevant application online. Applications may be submitted via email (applications must be signed and may be digitally signed). Email submittals to development.services@cosatx.us or rae.lineberry@cosatx.us.

- a. Utility plans;
- b. Drainage plans;
- c. Street construction plans;
- d. Non-residential construction plans;
- e. Fire suppression plans;
- f. Preliminary plats;
- g. Final plats; and,
- h. Replats.

B. Review the standards for naming your drawing and document files, sheet sizes, file formats accepted, etc. (Review the entire “Standards” section of this guide, pages 9-11).

II. ePlan Review Invitation

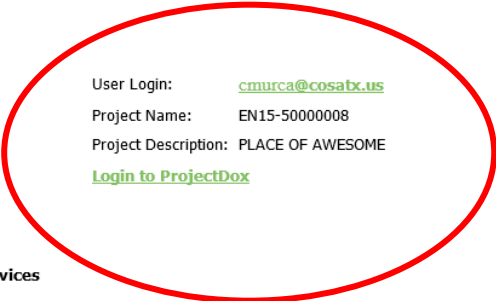
A. When your application for your project is reviewed and is deemed to meet minimum requirements, an Electronic Plan Review invitation will be sent to your e-mail address. For first time users, the invitation e-mail will contain your login information, temporary password and information about the project, including a link to the ePlan web portal.



Hello Steve Rogers:

Welcome to ProjectDox. This project invitation has been sent to you in response to your application. A project has been created to allow you to electronically upload your plans, plats, and documents for project review. To access your new project, follow the instructions below:

- 1. Click the Login link below
- 2. Enter your User Login and Temporary Password
- 3. Click on the Applicant User Guide link, here, and follow the instructions to upload your project for electronic plan review.

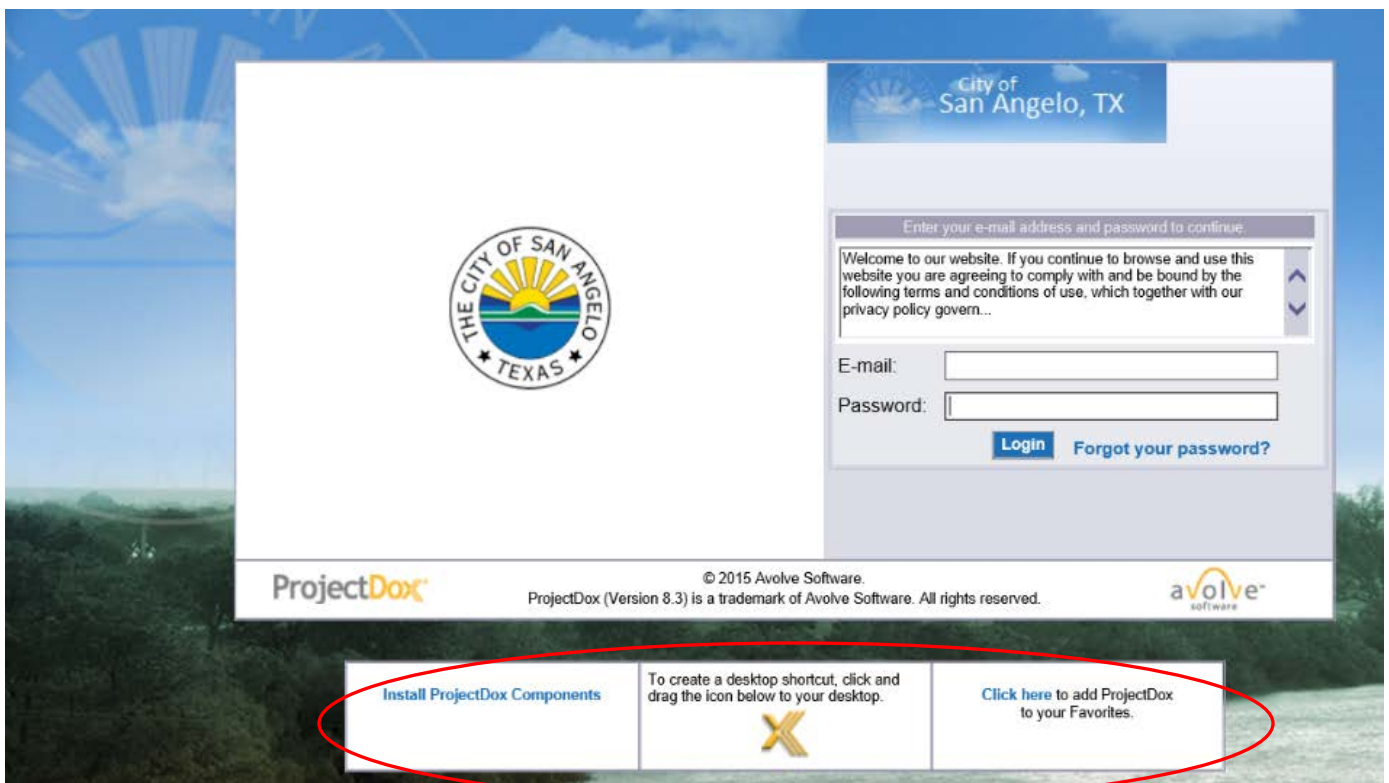


City of San Angelo
Planning and Development Services
52 W College Ave
San Angelo, TX 76903
Phone: (325) 657-4210
eplan@cosatx.us

III. Logging In

A. New Users First Time Login

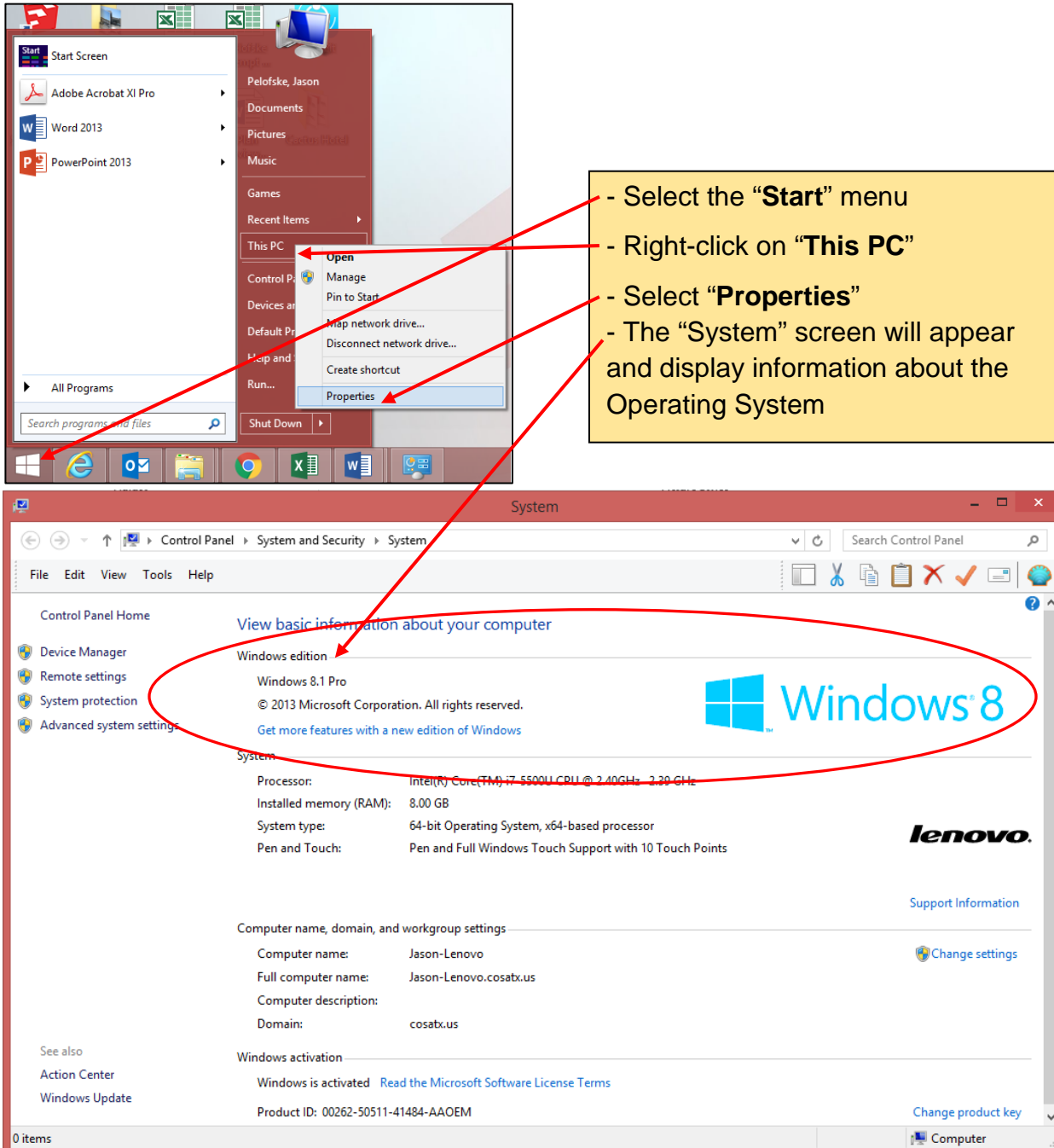
1. Prior to logging into the Electronic Plan Review web portal, the following actions must be completed:
 - a. The login page has an MSI (Microsoft Silent Install) component required to install all necessary ProjectDox ActiveX controls (see image below). This installation will only need to be done once; if you utilize a different computer it will require another installation.



- b. If your computer's operating system is Windows Vista or Windows 7, User Account Control (UAC) needs to be turned off for the installation of the ActiveX controls. For Vista instructions on how to turn off UAC, click [here](#). For Windows 7 instructions click [here](#). User Account Control may be turned back on if desired after ePlan has been successfully run and allowed to install all ActiveX controls. After the components are installed, log into the ePlan web site and allow new ActiveX components to be installed as prompted (additional prompts may appear at other points besides the ePlan login, for example when viewing a file).

NOTE: Google Chrome does not support all features of ProjectDox.

Follow these steps to show information about the computer's operating system.



The image shows two screenshots from a Windows 8.1 Pro desktop. The top screenshot shows the Start menu open with 'This PC' right-clicked, and the 'Properties' option selected. The bottom screenshot shows the 'System' control panel window, with the 'Windows edition' section circled in red. A yellow callout box with red arrows points to the 'Start' menu, 'This PC', and 'Properties' options.

- Select the **"Start"** menu
- Right-click on **"This PC"**
- Select **"Properties"**
- The **"System"** screen will appear and display information about the Operating System

System

Control Panel > System and Security > System

View basic information about your computer

Windows edition

Windows 8.1 Pro
© 2013 Microsoft Corporation. All rights reserved.
[Get more features with a new edition of Windows](#)

System

Processor: Intel(R) Core(TM) i7-5500U CPU @ 2.40GHz 3.39 GHz
Installed memory (RAM): 8.00 GB
System type: 64-bit Operating System, x64-based processor
Pen and Touch: Pen and Full Windows Touch Support with 10 Touch Points

lenovo.

[Support Information](#)

Computer name, domain, and workgroup settings

Computer name: Jason-Lenovo
Full computer name: Jason-Lenovo.cosabx.us
Computer description:
Domain: cosabx.us

[Change settings](#)

See also

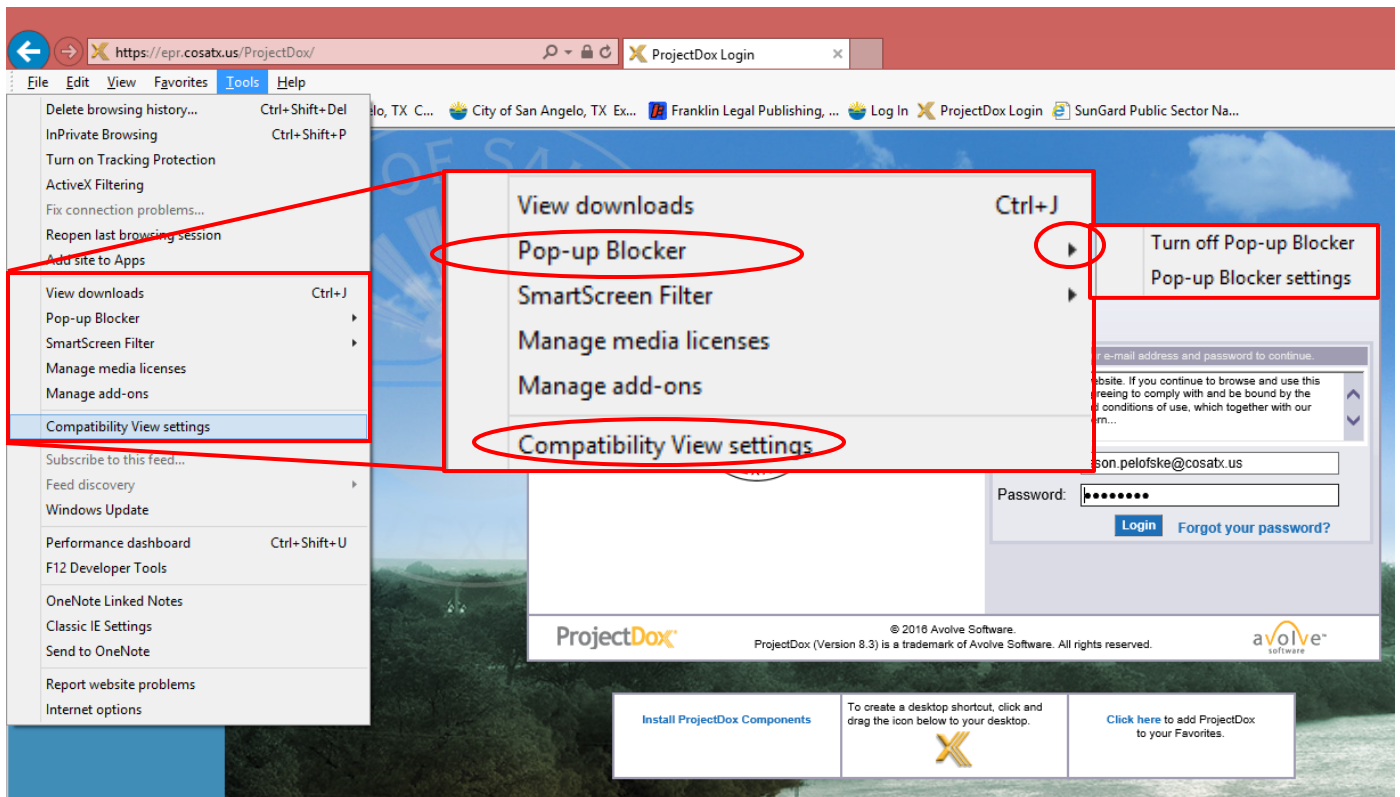
Action Center
Windows Update

Windows activation

Windows is activated [Read the Microsoft Software License Terms](#)
Product ID: 00262-50511-41484-AAOEM [Change product key](#)

0 items Computer

- c. Internet Explorer 10 requires Compatibility View be enabled on the ePlan Login Screen. Internet Explorer will remember this choice for future visits. Failing to enable Compatibility View will result in numerous errors, the most prominent being the inability to login. Instructions on how to enable this can be found on the following Microsoft Web Page by clicking [here](#). Go to the “Tools” menu and then select “Compatibility View Settings” to enable compatibility (see below).



- d. Electronic Plan Review uses pop-up windows (windows with no toolbars). If you log in but no ePlan window appears, you probably have a pop-up blocker in use that is preventing the main project window from opening. You will need to disable pop-up blocking in order to utilize the ePlan application. (Pop-up blockers allow you to disable pop-up blocking for specified sites if you wish to leave it on and exclude ePlan). Go to the “Tools” menu and then select “Pop-up Blocker” to enable pop-ups for ProjectDox (See above).



2. To sign in, enter your e-mail address and temporary password provided in your invitation email and click the "Login" button, as shown in the image below:

A screenshot of a login form. At the top, it says "Enter your e-mail address and password to continue." Below that is a scrollable area with a welcome message: "Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use, which together with our privacy policy govern...". There are two input fields: "E-mail:" and "Password:". Below the password field is a blue "Login" button, which is circled in red, and a link that says "Forgot your password?".

3. You will be prompted to enter a new password and account information. All fields in yellow are required. Click on the "Save" button to save your profile.

Settings for DONALD DUCK (PCARDS@STPETE.ORG)

Welcome to Electronic Plan Review.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

After you have changed your password you will be taken to the main Projects View.

Change Password:

New password:*

Password Reset Question & Answer:

Security question:*

Confirm new password:*



Security answer:*

Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 16 characters

REMEMBER!

Passwords are case-sensitive.

Profile Information

Contact Information	User Metadata	Project Membership	Group Membership
<input type="button" value="Save"/>			
* Required field			
First Name: *	DONALD		Last Name: * DUCK
Email: *	PCARDS@STPETE.ORG <input checked="" type="checkbox"/> HTML format 		
Title:			
Company:			
Address 1:			
Address 2:			
City:			
State/Province:	<input type="button" value="v"/>	Postal Code:	<input type="text"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/> 		
Language: *	en <input type="button" value="v"/>		

B. Existing Users

1. If you are a returning user, login to ePlan with your full e-mail address and password.
2. If you have forgotten your password, click on the “Forgot Password” button so that you can retrieve it through your security question.

NOTE: No one can see your password or security question answer. If you cannot access your account after trying to retrieve your account information, contact us at development.services@cosatx.us, to have your password reset. An email will be automatically generated and sent to the account holder's email address with a temporary password.

IV. Standards

A. Plan File Naming Standards

1. Drawings

- a. To maximize plan review efficiency we require an index page that clearly names the sheet and location number.
- b. All file names will begin with an ePlan three digit number that flows in sequence. Example: 001, 002, 003, etc. **IMPORTANT NOTE:** *The plan Cover Sheet must always begin with 001 and the Index Sheet must always begin with 002 (unless combined with the Cover Sheet).*
- c. The second part of the file name will be any alpha-numeric number you have assigned to each page. Example: L1 Landscaping, E1 Electrical, etc.
- d. The third part of the file name will be the title that you have given each sheet. Example: Building Elevation Detail, Electrical Riser, Site Lighting, Foundation, etc.

TIP!

Use a decimal to insert a plan page into the existing plans in the order you wish it to appear.

Example:

001 CS Cover Sheet and Index
 001.5 C.5 Inserted Page
 002 C1 Site Plan

Example: Sheet names using the requested ePlan numerical sequence with your individual alpha-numeric sheet # and sheet titles:

ePlan sequence number **Your Alpha-Numeric Sheet #** **Your Sheet Title**

001 CS Cover Sheet and Index

002 C1 Site Plan



File names cannot include special characters (i.e. @, %,*,#, etc.)

2. Documents

- a. Documents that contain multiple pages (truss engineering, energy calculations, product approval forms, geotechnical reports, stormwater reports, etc) may be uploaded as multi-page PDF files and the file name shall indicate what the document is.
- b. Separate document types shall be uploaded as separate files. (cost breakdown sheet, application, energy calculation sheet, etc.).

B. File Type Standards

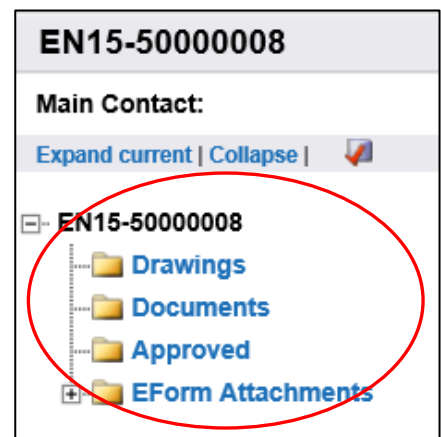
1. ONLY searchable PDF files are accepted for calculations, reports and other supporting plan documentation (non-drawing files). PDF's that are not searchable and uploaded will result in rejection of the submission.
2. Both vector PDF and Design Web Format (DWF) files will be accepted for drawing files. Since AutoCAD software is commonly used to create drawing files, converting a DWG to a DWF, file-print, ready is the preferred secured file format. Files must be 2D DWF file-print ready. The DWF must be saved as Auto CAD version 10 or lower format. ePlan does not support 3D DWF files at this time.
3. If you choose to create PDF files, you will need to convert your AutoCAD files to a Vector PDF. It is recommended that drawings created in AutoCAD are converted to a Vector PDF within the AutoCAD program itself. In addition, the newest Adobe Acrobat (not the free version of Adobe Reader) will accommodate the creation of a Vector PDF.

WHY VECTOR PDF'S?

Vector based PDF's can be scaled by any amount without any degrading image quality. It allows the plans to be reviewed in a much higher level of clarity on a computer screen.

C. Folder Structure Standards

1. All project application forms must be uploaded into the "Documents" folder for each project.
2. All drawings must be uploaded into the "Drawings" folder for each project.
3. All applications and supporting documents and any of their associated reports must be uploaded into the "Documents" folder for each project. Sample document types would be truss engineering, energy calculations, product approval forms, geotechnical reports, cost breakdown worksheet, reports, cotice of commencement, etc.

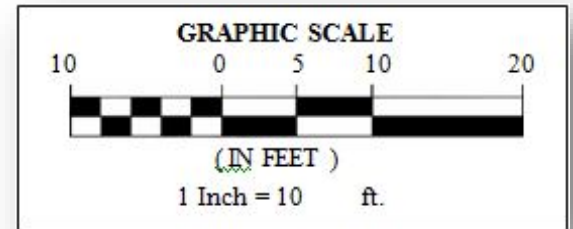


4. The "EForm Attachments" folder is not used for uploading files.
5. All approved plans and documents will be found in the Approved folder. Approved documents will have a City of San Angelo stamp affixed to them. This folder will also

contain the job placard, permit summary and any conditions of approval documents that need to be on site.

D. Graphic Scale Standards

1. DWF, DWG and PDF plan pages should be properly oriented in landscape mode for efficient review.
2. Each sheet must have a typical graphic scale as shown in the image to the right.
3. When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
4. All plans must be drawn to scale.



E. File Sheet Size and Orientation Standards

1. For planning projects, all drawing files must be drawn and formatted for a minimum horizontal 24" x 36" sheet file, except plats which are drawn to a 20"x24" sheet file.
2. For building permits, all drawing files must be drawn and formatted for a minimum horizontal 24" x 36" sheet file or horizontal 11" x 17" sheet file for smaller scale jobs (pool enclosures, pools, termite repairs, etc.).
3. Plan pages shall be properly oriented in landscape mode for an efficient review.

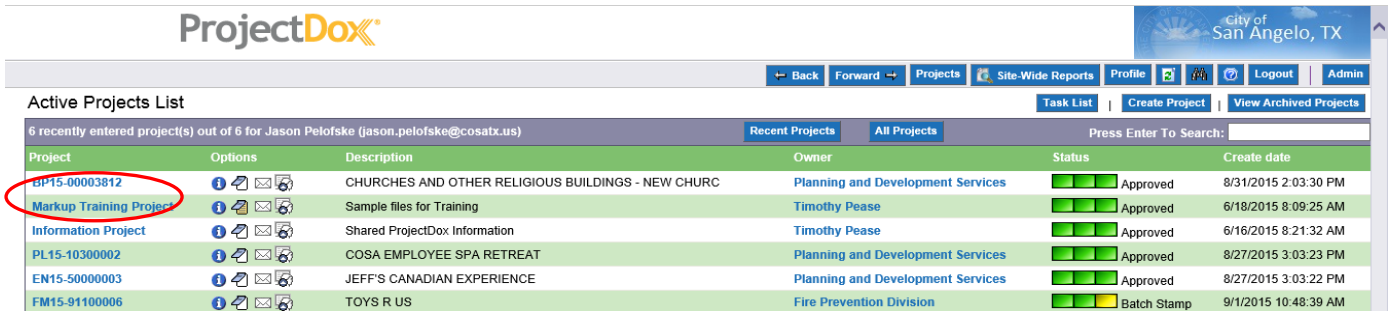
V. Uploading Plan Drawings & Documents































A. When you have successfully logged in to ePlan, the Active Projects screen will display. Any projects for which you have access will display in this list. Any outstanding tasks that require your action are displayed in the Active Task List.

TIP!

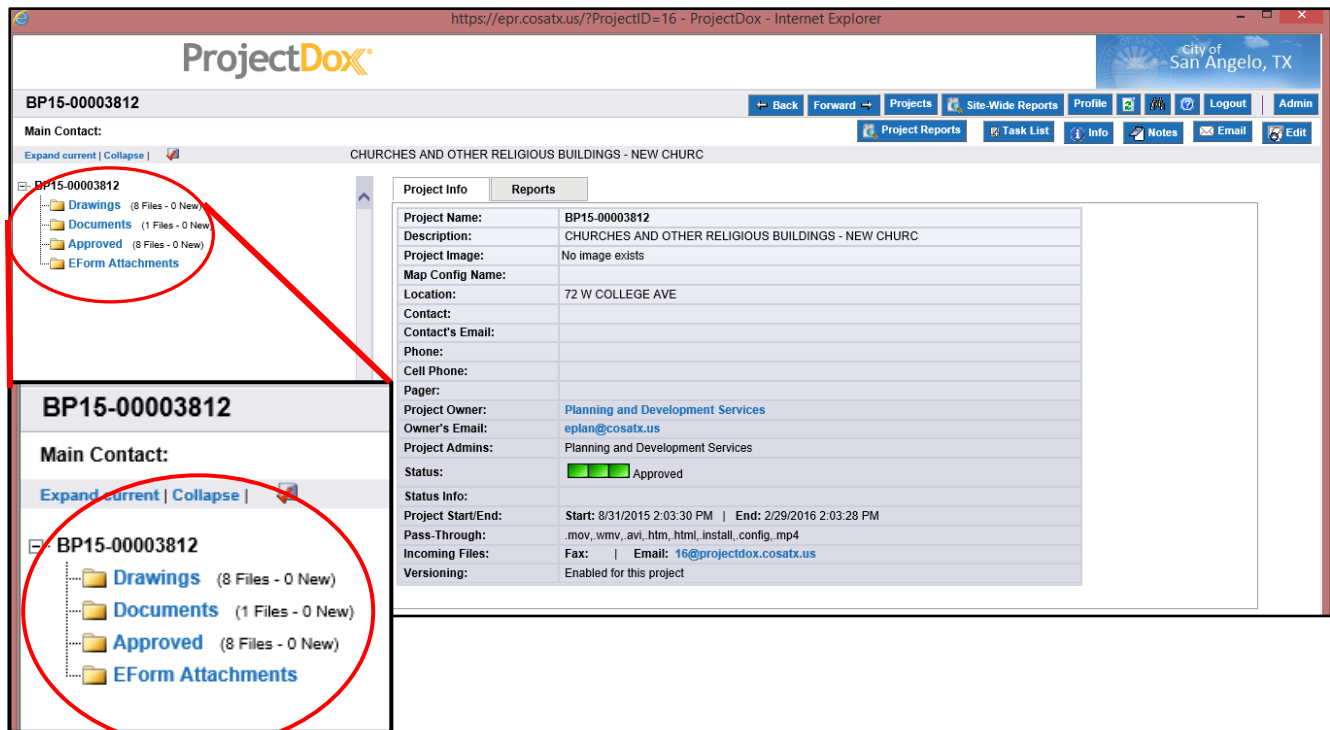
Please read this entire section before attempting to upload.

B. To access your project and upload your plans, you will need to select the specific project in the Active Project List by clicking on the project number. The projects are listed in order by application number ex. BP15-00001234. Prefixes with BP are Building Permits & Inspections, PL for Planning, & EN for Engineering projects.




Project	Options	Description	Owner	Status	Create date
BP15-00003812	   	CHURCHES AND OTHER RELIGIOUS BUILDINGS - NEW CHURC	Planning and Development Services	 Approved	8/31/2015 2:03:30 PM
Markup Training Project	   	Sample files for Training	Timothy Pease	 Approved	6/18/2015 8:09:25 AM
Information Project	   	Shared ProjectDox Information	Timothy Pease	 Approved	6/16/2015 8:21:32 AM
PL15-10300002	   	COSA EMPLOYEE SPA RETREAT	Planning and Development Services	 Approved	8/27/2015 3:03:23 PM
EN15-50000003	   	JEFF'S CANADIAN EXPERIENCE	Planning and Development Services	 Approved	8/27/2015 3:03:22 PM
FM15-91100006	   	TOYS R US	Fire Prevention Division	 Batch Stamp	9/1/2015 10:48:39 AM

C. Click on the project number and you will see the project info screen:

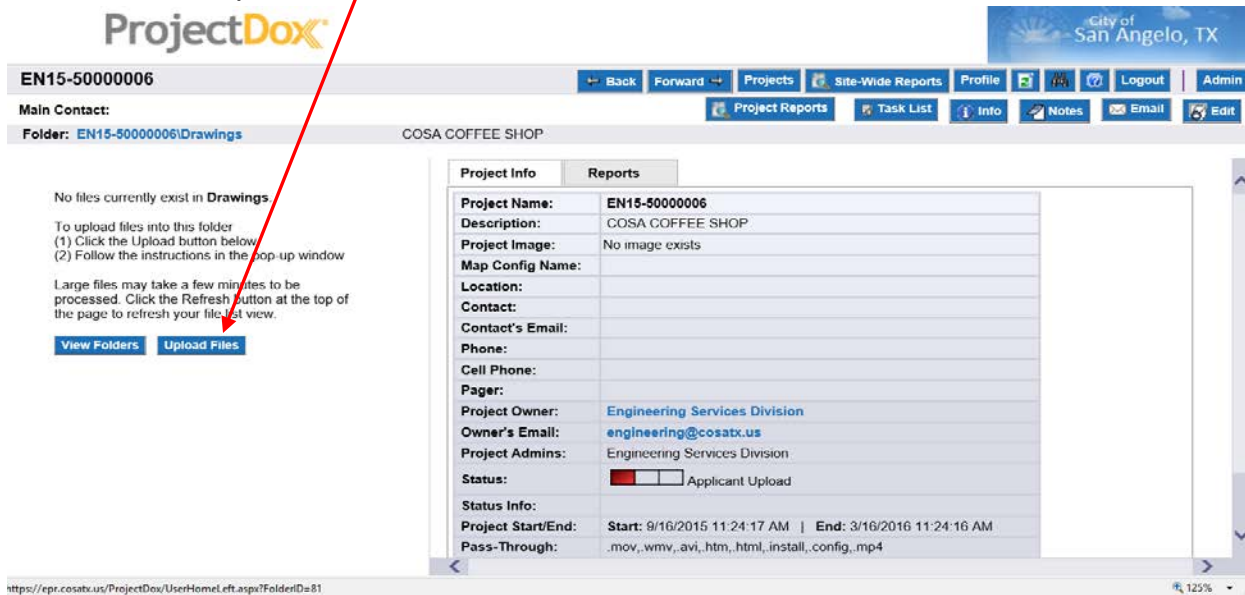


The screenshot shows the project info screen for project BP15-00003812. The left sidebar contains a file tree with folders for Drawings (8 Files - 0 New), Documents (1 Files - 0 New), Approved (8 Files - 0 New), and EForm Attachments. The main content area displays project details:

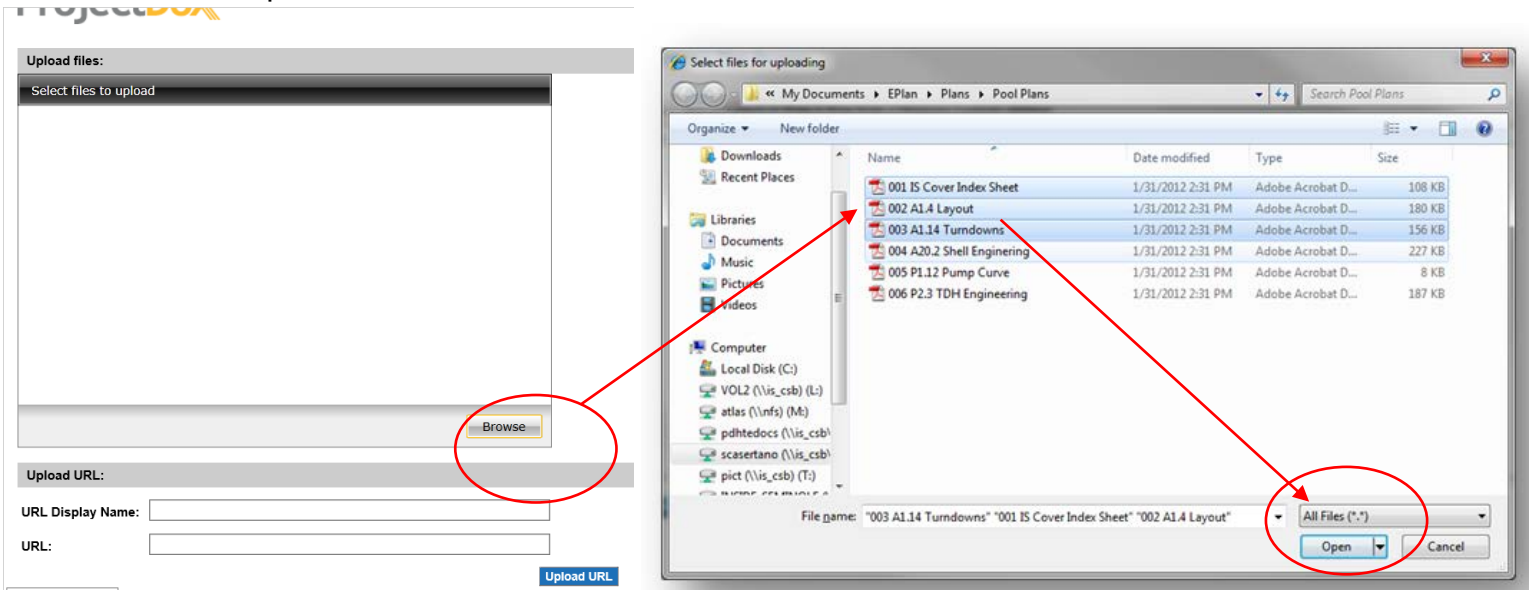
- Project Name:** BP15-00003812
- Description:** CHURCHES AND OTHER RELIGIOUS BUILDINGS - NEW CHURC
- Project Image:** No image exists
- Map Config Name:**
- Location:** 72 W COLLEGE AVE
- Contact:**
- Contact's Email:**
- Phone:**
- Cell Phone:**
- Pager:**
- Project Owner:** Planning and Development Services
- Owner's Email:** eplan@cosatx.us
- Project Admins:** Planning and Development Services
- Status:**  Approved
- Status Info:**
- Project Start/End:** Start: 8/31/2015 2:03:30 PM | End: 2/29/2016 2:03:28 PM
- Pass-Through:** mov, wmv, avi, htm, html, install, config, mp4
- Incoming Files:** Fax: | Email: 16@projectdox.cosatx.us
- Versioning:** Enabled for this project



D. Click the “Drawings” folder to upload your plans or the “Documents” folder to upload your Application and supporting plan documents for all forms related to the project application. Follow the prompts for uploading your plans and documents. Click the “Upload Files” button.

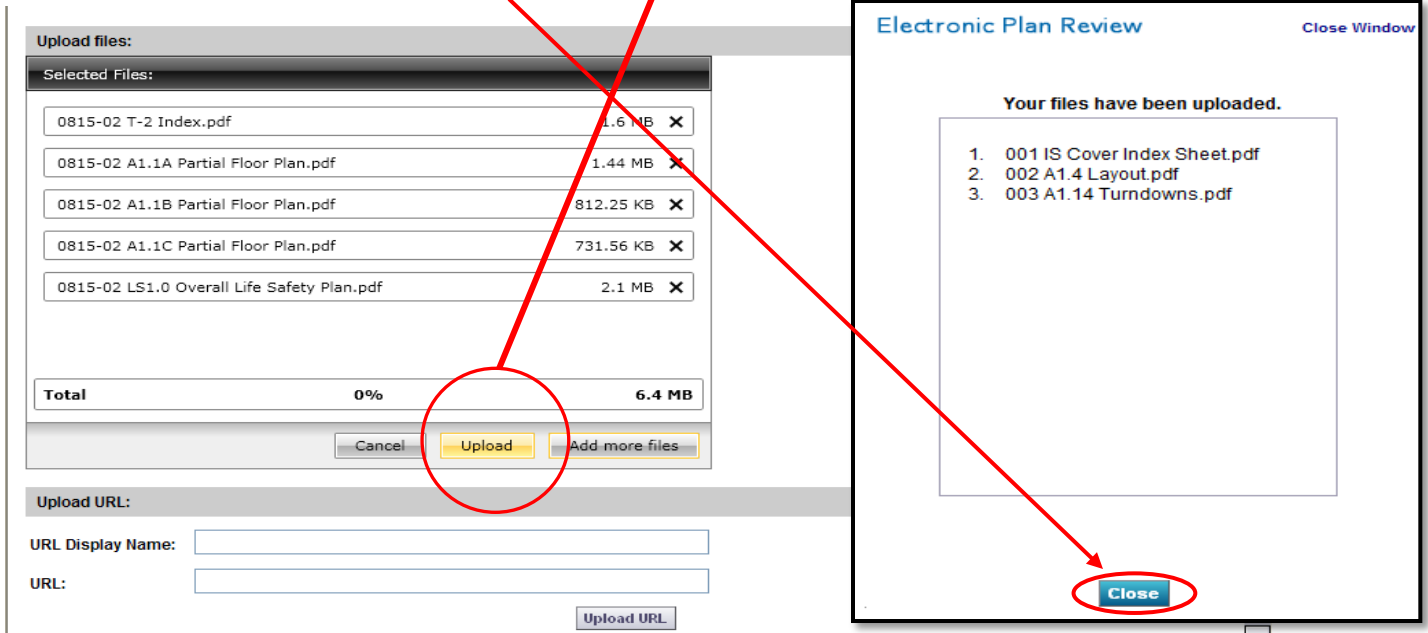


E. Select or browse to the file location on your computer. Select or highlight the files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the “Open” button.



Note: City of San Angelo requires that all drawings be uploaded as individual files and saved in landscape format (horizontal orientation). See page 8, Plan File Type Standards, for how to name the drawings.

F. After reviewing the files, click the “Upload” button. The files will be copied to the upload window. Click on the “Close” button to close out of the dialog box



Upload files:

Selected Files:

0815-02 T-2 Index.pdf	1.6 MB	X
0815-02 A1.1A Partial Floor Plan.pdf	1.44 MB	X
0815-02 A1.1B Partial Floor Plan.pdf	812.25 KB	X
0815-02 A1.1C Partial Floor Plan.pdf	731.56 KB	X
0815-02 LS1.0 Overall Life Safety Plan.pdf	2.1 MB	X

Total 0% 6.4 MB

Buttons: Cancel, Upload, Add more files

Upload URL:

URL Display Name:

URL:

Upload URL

Electronic Plan Review Close Window

Your files have been uploaded.

- 001 IS Cover Index Sheet.pdf
- 002 A1.4 Layout.pdf
- 003 A1.14 Turndowns.pdf

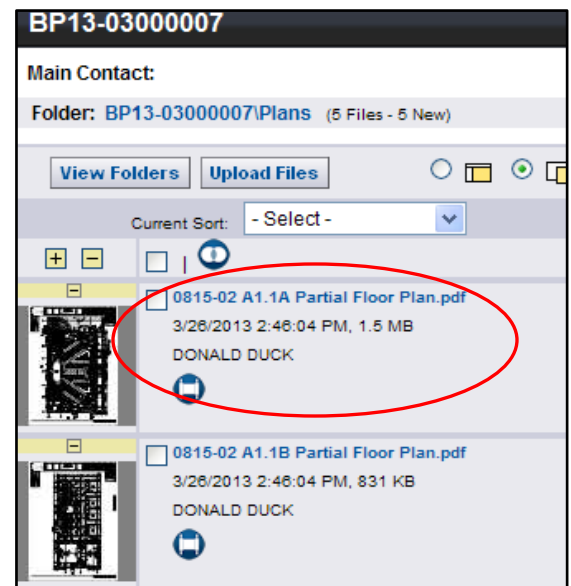
Close

G. Once files are uploaded to the folder(s), the folder list is populated with thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons are displayed.

H. Once all documents and drawings have been uploaded, and you click on the “Complete” button, ProjectDox will automatically notify the prescreen reviewers.

I. You have successfully finished part one of submitting your plans electronically.

J. Please logout after your session is complete.




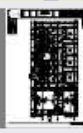
BP13-03000007

Main Contact:

Folder: BP13-03000007\Plans (5 Files - 5 New)

Buttons: View Folders, Upload Files

Current Sort: - Select -

	<input type="checkbox"/>	0815-02 A1.1A Partial Floor Plan.pdf	3/26/2013 2:46:04 PM, 1.5 MB	DONALD DUCK
	<input type="checkbox"/>	0815-02 A1.1B Partial Floor Plan.pdf	3/26/2013 2:46:04 PM, 831 KB	DONALD DUCK

NOTE: For all Planning projects, fees must be paid either by phone or in person at the time of application submittal. For Building Permits & Inspections, all applicable fees must be paid by phone or in person before plans are stamped and permits can be issued; but, only after the plan or permit has been approved.



VI. Prescreening/Completeness Check

A. Prescreening Has Been Approved

1. If your submittal is approved, you will receive an e-mail and your project will continue through the ePlan system for review, as shown below.

ProjectDox
Notification
PreScreening Approved
City of San Angelo, TX

Please do not reply to this email, it is system generated.

Hello Applicant:

Your project application EN15-50000006 has met the review requirements and will now move forward through the formal review process .

Project Name: EN15-50000006

Project Description: COSA COFFEE SHOP

[Login to ProjectDox](#)

City of San Angelo
Engineering Services Division,
Public Works Department
 72 W College Ave
 San Angelo, TX 76903
 Phone: (325) 657-4203
eplan@cosabx.us

B. Prescreening Has Been Returned (Revisions Needed)

1. If your submittal did not meet all of the requirements, you will receive an e-mail notification that prescreening has been denied and corrections are needed.

ProjectDox
Task Assignment
PreScreening Review Corrections Required
City of San Angelo, TX

Please do not reply to this email, it is system generated.

Hello:

A Prescreening Review of your uploaded plans and documents was performed, and the submittal was found to be incomplete. Please login to the ProjectDox System, click on the task for this project and review the comments. When you have addressed them, please mark this task as complete in the eForm. Please contact the Planning and Development Services at the number listed below if you have any questions regarding this email.

Project Name: EN15-50000006

Project Description: COSA COFFEE SHOP

Task: CorrectionComplete

Instructions: Please review the Prescreening notes and checklist items and submit the required drawings and documents. Once requested items have been uploaded, click the Corrections Complete button below to send this task back to the Submissions Group for sufficiency verification.

[Login to ProjectDox](#)

City of San Angelo
Engineering Services Division,
Public Works Department
 72 W College Ave
 San Angelo, TX 76903
 Phone: (325) 657-4203
eplan@cosabx.us

2. Login to Electronic Plan Review. Find the project and associated task in the Active Task List, click the "Correction Complete" task, and accept it and it will launch the eForm.

Active Task List

Project Name	Task	Attached To
EN15-50000006	CorrectionComplete	Applicant

Message from webpage ✕

Do you want to accept this task?

EN_StartWorkflow / CorrectionComplete

Review Information | Project Information | Location | Data | Resources | Checklist Report (3) | Routing Slip | Folder List

Review Coordinator Review Cycle Activity Instructions Current User Logon	Engineering Services Division (engineering@cosatx.us) 1 Please review the Prescreening notes and checklist items and submit the required drawings and documents. Once requested items have been uploaded, click the Corrections Complete button below to send this task back to the Submissions Group for sufficiency verification. Jason Pelofske (jason.pelofske@cosatx.us)
---	--

Task Instructions

PRESCREEN COMMENTS

RESPONSE

[VIEW CHECKLIST \(3\)](#)

I HAVE ADDRESSED ALL OF THE PRESCREENING CHECKLIST ITEMS AND COMMENTS.

REVIEWER ATTACHMENTS

Uploaded file attachments may not be immediately available while being processed by Electronic Plan Review.

3. (1) Please review the “Prescreening Comments” under the “Task Instructions.” You may type a response, if necessary, in the “Response” box. (2) Review the Checklist Items under the Checklist Report Tab or (3) View Checklist Hyperlink, if any. (4) Once you understand the corrections needed, upload the revised/corrected drawings and/or documents by going to the “Folder List” tab. (5) Once you are ready to submit and finish this step, check the box stating “I have addressed all if the prescreening checklist items and comments” and then (6) select the “Corrections Complete” button. **Note:** The “Save and Close” button enables you to save your work without submitting.

EN StartWorkflow / CorrectionComplete

Review Information | Project Information | Location | Data | Resources | **Checklist Report (3)** | Routing Slip | Folder List **4**

Review Coordinator: Engineering Services Division (engineering@cosatx.us)

Review Cycle: **1**

Activity Instructions: Please review the Prescreening notes and checklist items and submit the required drawings and documents. Once required below to send this task back to the Submissions Group for sufficiency verification.

Current User Logon: Jason Pelofske (jason.pelofske@cosatx.us)

Task Instructions **1**

Prescreen Comments box →

PRESCREEN COMMENTS

Please review the items listed on the checklist and provide revisions to the project drawings.

Applicant Response box →

RESPONSE

3 [VIEW CHECKLIST \(3\)](#)

5 I HAVE ADDRESSED ALL OF THE PRESCREENING CHECKLIST ITEMS AND COMMENTS.

REVIEWER ATTACHMENTS

Browse... **6**

Attach Files

Uploaded file attachments may not be immediately available while being processed by Electronic Plan Review.

Corrections Complete **Save And Close**



- 4. Once your project has met all the requirements for Prescreening/Completeness Check you will be e-mailed letting you know that your project has moved on to the formal review process.

ProjectDox
Notification
 PreScreening Approved

Please do not reply to this email, it is system generated.

Hello Tony Stark: |
 Your project application EN15-5000007 has met the review requirements and will now move forward through the formal review process .

Project Name: EN15-5000007
 Project Description: COSA COFFEE

[Login to ProjectDox](#)

City of San Angelo
 Engineering Services Division,
 Public Works Department
 72 W College Ave
 San Angelo, TX 76903
 Phone: (325) 657-4203
eplan@cosabx.us

VII. Correction Items and Plan Resubmit

- A. Before the formal review process for your project is completed, correction items and/or review comments may require plan corrections or changes.
- B. You will receive an e-mail notification from the City requesting corrected plans and/or documents. Click the link "Login to ProjectDox" in the email to access your projects.

ProjectDox
Task Assignment
 Applicant Resubmittal

Please do not reply to this email, it is system generated.

Hello Tony Stark: |
 Your submittal has been reviewed by the required agencies, however, change requests and/or comments have been made requiring your correction. Please login to ProjectDox for your Project and click on your task to launch the eForm to see the requests. Complete the form when you have made all of the requested changes. Please contact Planning and Development Services at the number or email listed below if you have any questions regarding this notification.

Project Name: EN15-5000007
 Project Description: COSA COFFEE
 Task: ApplicantResubmit

Instructions: Please review all sections of the eForm, including comments, checklists, and drawing markups. Once all items have been addressed, upload the revised sheets and documents according to the Applicant User Guide.

[Login to ProjectDox](#)

City of San Angelo
 Engineering Services Division,
 Public Works Department
 72 W College Ave
 San Angelo, TX 76903
 Phone: (325) 657-4203
eplan@cosabx.us

- C. Once logged in, scroll down to the Active Task List and select “Applicant Upload” or “Applicant Resubmit.” The question “Do you want to accept this task?” will launch. Select “OK” to accept it, and open the eForm.

Active Task List

Project Name	Task	Attached To	Status	Priority	Due date	Cre
PL15-10500001	ApplicantUpload	Applicant	Accepted	1		12/

- D. The eForm has four sections that provide correction information. Make sure to review:
 1) Checklist Items, 2) Folder List, 3) Changemarks/Markups, & 4) Department Review.

ADMINISTRATIVE PLAT **PL15-10100002** VALERIE'S COMPUTER ASSISTED DESIGNS
 PZ_StartWorkflow / ApplicantResubmit

Review Information | Project Information | Location | Data | Resources | **Checklist Report (0)** | Routing Slip | **Folder List**

CHANGEMARKS

1) Checklist Items: Items that are required but have not been provided.

2) Folder List: Click this tab to view/upload plans, drawings, & documents.

3) Changemarks: Allows you to load & review the details of changemarks; if warranted, type a response & click “Save Changemarks Updates.”

Resolved	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
<input type="checkbox"/>		1	PLANNING	Site Plan 3 pages.pdf				
<input type="checkbox"/>		1	PLANNING	Site Plan 3 pages.pdf	Planning Comments	Planning	Comments, please show us the parking easement	<input type="text"/>

Save Changemark Updates

4) Department Review: Tells you which Division is reviewing the project, who is reviewing it, and the project status & any notes associated.

DEPARTMENT REVIEW - Review Cycle: 3

CYCLE	DEPARTMENT	REVIEWED BY	NOTES
<input checked="" type="checkbox"/>	3	PLANNING JASON PELOFSKE JASON.PELOFSKE@COSATX.US	RETURNED FOR RESUBMITTAL Applicant has fixed the Parking Issue with a parking easement but needs to show the easement on the Plat.

PLAN REVIEW AND/OR ASSIGNMENT COMPLETE

E. How to Open Files with Markups:

1. The first way to open Markups is to go to the Active Task List, click “Applicant Resubmit,” then click the link under the “Markup” heading to open the file that contains the changemarks.

CHANGEMARKS

Filter by Department:

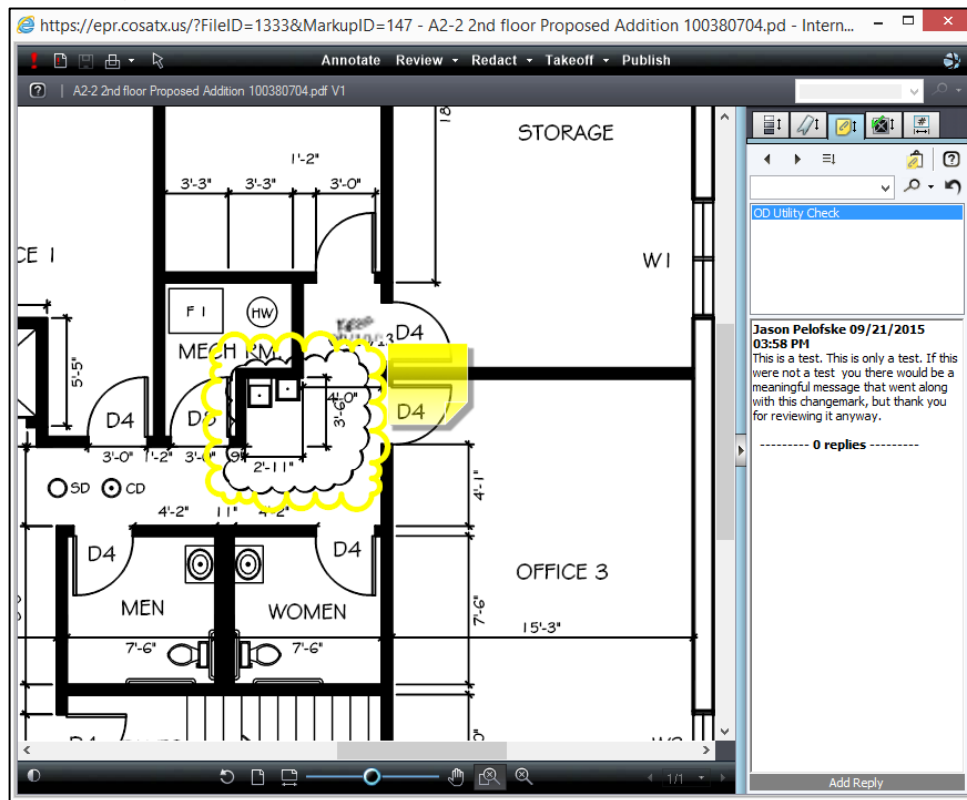
[Click Here to Load Changemarks...](#)
[Click Here to Publish Changemarks to PDF...](#)

Resolved	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
<input type="checkbox"/>		1	PLANNING	Site Plan 3 pages.pdf	Pelofske			
<input type="checkbox"/>		1	PLANNING	Site Plan 3 pages.pdf	Planning Comments	Planning	Comments, please show us the parking easement	<input type="text"/>

Show All Changemarks for All Cycles

The “Markup” heading will provide an overview of each division’s changemarks associated with the project.

2. The Brava! viewer will launch only the selected Division’s markups and display the changemarks that require revisions.



Annotations in the Brava! viewer include:

- MECH RM. (highlighted with a yellow cloud)
- Two yellow callouts labeled "D4" pointing to specific areas within the mechanical room.
- Other room labels: STORAGE, OFFICE 3, MEN, WOMEN.
- Dimensions: 1'-2", 3'-3", 3'-3", 3'-0", 5'-5", 3'-0", 1'-2", 3'-4", 2'-11", 4'-2", 11", 4'-2", 7'-6", 7'-6", 15'-3", 4'-1", 7'-6".
- Right-hand comment box:

Jason Pelofske 09/21/2015 03:58 PM
 This is a test. This is only a test. If this were not a test you there would be a meaningful message that went along with this changemark, but thank you for reviewing it anyway.
 ----- 0 replies -----



3. Markup and Changemark Color Standards

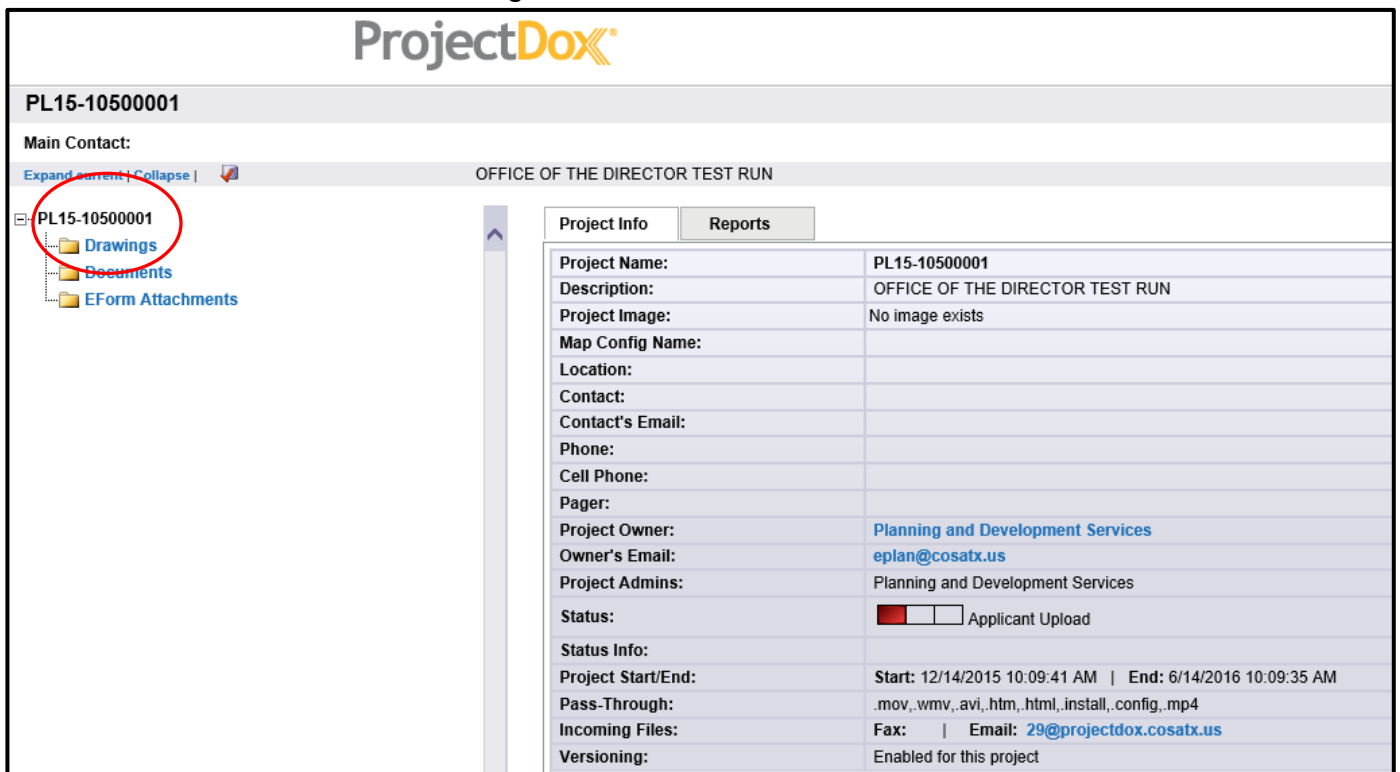
Project Group	Project Group Members	MarkupColor	Markup Name	Changemark Title/Issue
Building Inspector	Building Inspector, Principal	Brown	BLDG-Initials	Title: Name of Issue Comment: Explanation of action needed with citation Example: Emergency Lights and Fire Extinguisher Fire Lane Width
	Combination Inspector	Brown		
Electrical Inspector	Electrical Inspector	Orange	ELEC-Initials	
	Building Inspector, Principal	Orange		
	Combination Inspector	Orange		
Mechanical Inspector	Mechanical Inspector	Black	MECH-Initials	
	Building Inspector, Principal	Black		
	Combination Inspector	Black		
Plumbing Inspector	Building Inspector, Sr	Teal	PLMB-Initials	
	Mechanical Inspector	Teal		
	Building Inspector	Teal		
Plans Examiner	Senior Plans Examiner	Yellow	EXAM-Initials	Jason Pelofske 11/18/2015 02:34 PM Applicant needs to show Emergency Exit Lighting and either submit revisions showing Fire Extinguishers Placement or submit plans for a sprinkler suppression system. IFC 213.223 sec 2; IFC 211.223 sec 1
	Plans Examiner	Yellow		
	Building Official	Yellow		
	Deputy Building Official	Yellow		
Permit Technician	Permit Technician	Pink	PERM-Initials	
	Building Official	Pink		
	Deputy Building Official	Pink		
	Senior Plans Examiner	Pink		
Engineer Stormwater	Stormwater Engineer	Blue	STORM-Initials	
	Project Engineer	Blue		
	City Engineer	Blue		
	Assistant City Engineer	Blue		
Engineer Streets	Project Engineer	Grey	STREET-Initials	
	City Engineer	Grey		
	Assistant City Engineer	Grey		
	Stormwater Engineer	Grey		
Engineer Utilities	Project Engineer	Green	UTIL-Initials	
	City Engineer	Green		
	Assistant City Engineer	Green		
	Stormwater Engineer	Green		
Fire Marshal	Fire Inspector	Red	FIRE-Initials	
	Fire Investigator	Red	FIRE-Initials	
	Fire Marshal	Red	FIRE-Initials	
Planning	Planner	Purple	PLAN-Initials	
	Planning Manager	Purple	PLAN-Initials	
Health Department	Health Inspector	Gold	HLTH- Initials	

- a. Standard markup names and colors will be used for each reviewing agency for easy identification as shown on the previous page.
 - b. A markup can have one or more changemarks.
 - c. A changemark is a plan call-out created by review staff to quickly identify a markup and associated comments.
 - d. Each agency changemark will be titled with an issue name for each sheet/file.
4. Another way to open markups is to select the project number from the “Active Task List.”

Active Task List						
Project Name	Task	Attached To	Status	Priority	Due date	Cre
PL15-1050001	ApplicantUpload	Applicant	Accepted	1	12/	

Navigation buttons: [Previous] [Next] [Home] [End]

5. Select the “Drawings” folder once this screen loads:



ProjectDox

PL15-1050001


Main Contact: OFFICE OF THE DIRECTOR TEST RUN

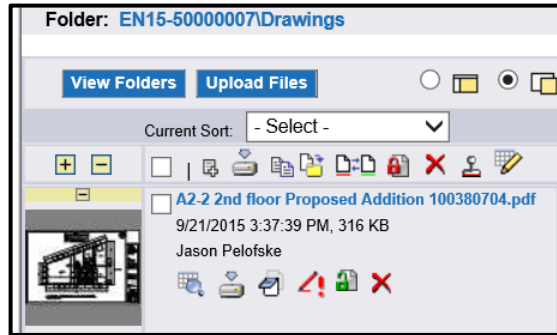
Expand current | Collapse | [Icon]


PL15-1050001

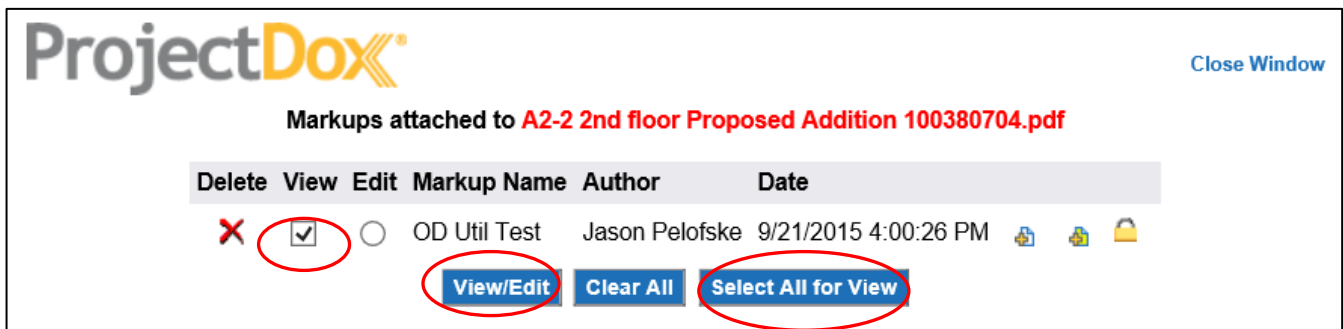
- Drawings
- Documents
- EForm Attachments

Project Info	Reports
Project Name:	PL15-1050001
Description:	OFFICE OF THE DIRECTOR TEST RUN
Project Image:	No image exists
Map Config Name:	
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Planning and Development Services
Owner's Email:	eplan@cosatx.us
Project Admins:	Planning and Development Services
Status:	<input checked="" type="checkbox"/> <input type="checkbox"/> Applicant Upload
Status Info:	
Project Start/End:	Start: 12/14/2015 10:09:41 AM End: 6/14/2016 10:09:35 AM
Pass-Through:	.mov, .wmv, .avi, .htm, .html, .install, .config, .mp4
Incoming Files:	Fax: Email: 29@projectdox.cosatx.us
Versioning:	Enabled for this project

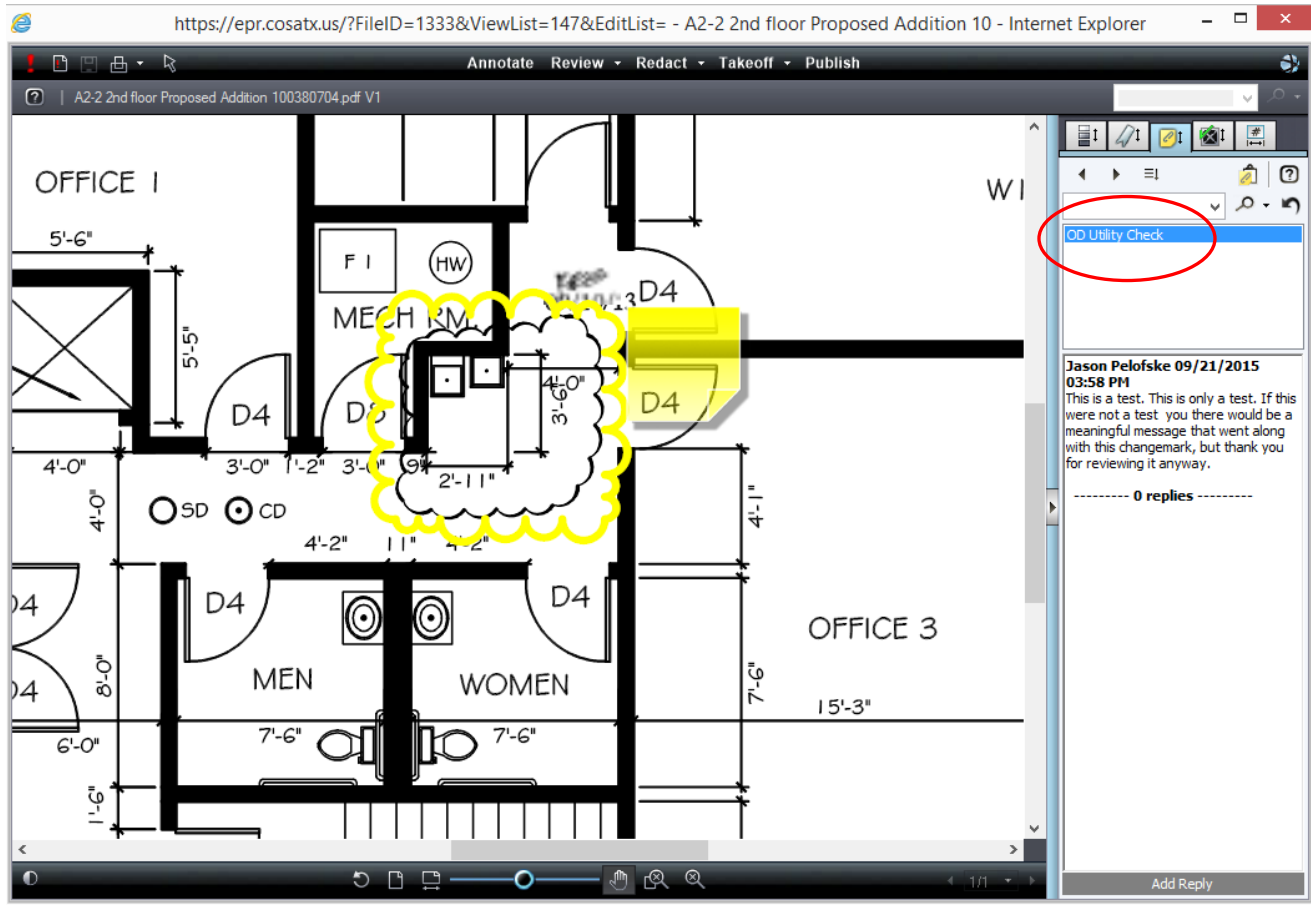
6. It will show all the drawings/plans associated with the project.
7. If markups exist on the file a markup icon  will be displayed.



8. Click the markups icon  to open the list of markups attached to the file. To view the markups on the file, check the “View” box beside the markup name(s) and then click the “View/Edit” button. If there are multiple markups check all of the “View” boxes and click the “Select All for View”.

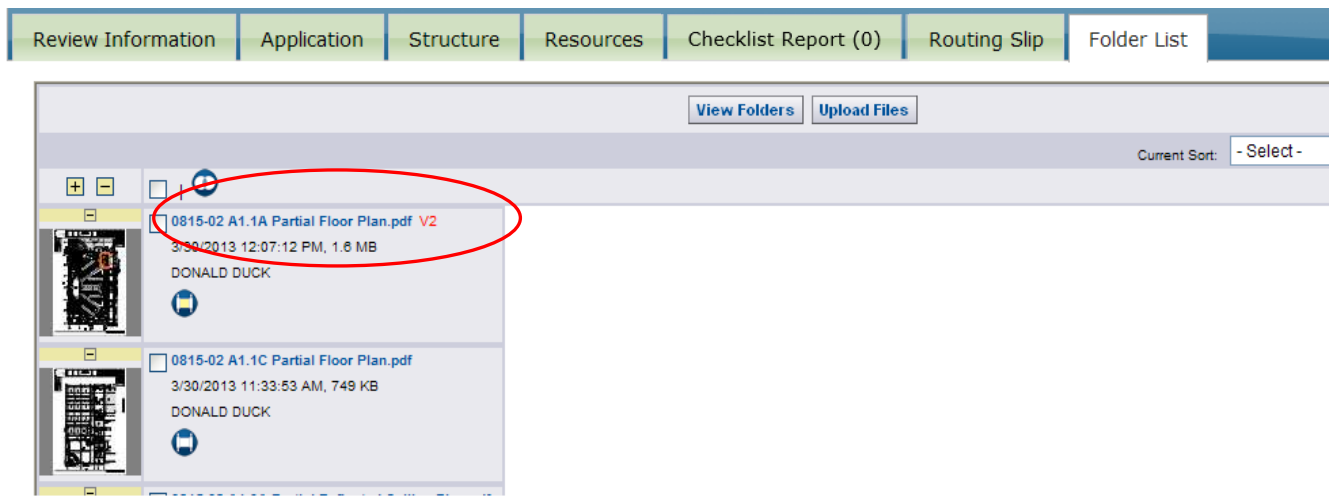


9. The Brava! viewer will launch and load the changemarks associated with the markups that have been selected to view.

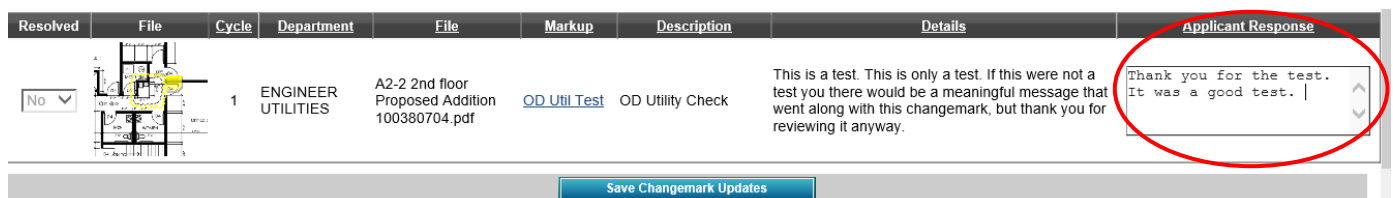


VIII. Uploading Corrections

- A. When corrections have been made to the plans and/or documents you are ready to upload revisions.
- B. Revised plans and/or documents MUST be uploaded with the EXACT file name as the original submitted file. The system will automatically add a version number to the resubmitted plans and/or documents. If no changes were made to the file a new version will not be created.



- C. Verify all corrected plans and documents that have markups or comments have been corrected. Failure to submit corrected plans will result in the project being returned for corrections again.
- D. Applicant comments may be added in the “Applicant Response” box located in the “changemark” section of the eform. *Note: If you are submitting a narrative explaining the plan corrections, it should be submitted to the document folder and labeled as Plan Corrections Narrative.*





- E. Once you have successfully uploaded plans and documents into the correct folders, scroll down to the "Task Instructions" section and check the boxes to confirm you have completed all tasks. Then Click the "Complete" button so the project can be forwarded back to the City.

DEPARTMENT REVIEW - Review Cycle: 1

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	ENGINEER UTILITIES	JASON PELOFSKE JASON.PELOFSKE@COSATX.US
			RETURNED FOR RESUBMITAL
<input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE			

Task Instructions

- I have addressed all of the items above that were identified during the Plan Review.
- I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the same file name as the original files. You can upload files by clicking the Folder List tab above and selecting a folder.

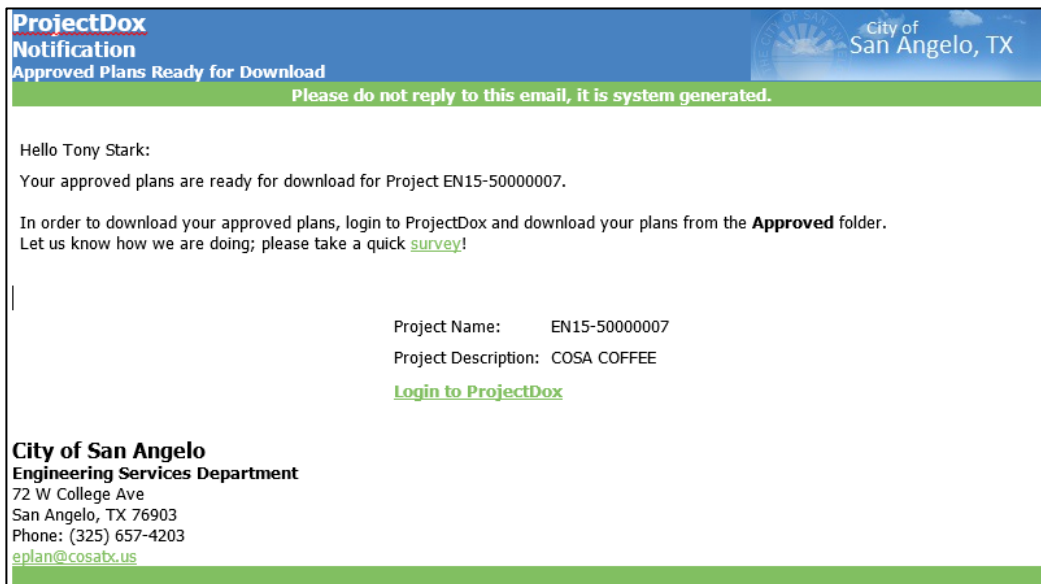
REVIEWER ATTACHMENTS

Browse...

Uploaded file attachments may not be immediately available while being processed by Electronic Plan Review.

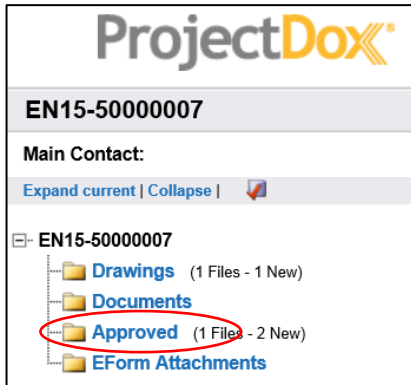
IX. Approved Plans


- A. When all agencies have approved the plans you will receive an e-mail notifying you that the review is complete.



X. Downloading Approved Plans/Files

A. Click on Approved folder to view/download/print the files.



B. Check the “Select All” box and click the download button  to download the files.

