



San Bernardino County

Land Use Services Department

Building and Safety Division

A screenshot of the ProjectDox login page. The page has a header with the County of San Bernardino logo and name. On the left, there is a banner for "Land Use Services Department ePlans" with a laptop icon. The main content area contains a login form with a scrollable "TERMS AND CONDITIONS OF USE" section, "E-mail:" and "Password:" input fields, and "Login" and "Forgot your password?" buttons. The footer includes the ProjectDox logo, copyright information for Avolve Software (© 2011), and the Avolve Software logo. Below the footer are three boxes: "Install ProjectDox Components" with a link, instructions on how to create a desktop shortcut with a yellow 'X' icon, and a link to add ProjectDox San Bernardino County to favorites.

ePlans Applicant User's Guide



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Electronic Plan Submission

Electronic Plan Review is a web-based solution that will allow building plans to be submitted electronically, improve the plan review cycle, reduce costs associated with obtaining residential and commercial construction permits, as well as support green initiatives.

Please complete the following prior to getting started:

1. Apply at the County of San Bernardino Land Use Services Department located at the following official locations:

County Government Center

385 N. Arrowhead Avenue
San Bernardino, CA 92415

Mon – Fri 8 am – 4:30 pm

Jerry Lewis High Desert Government Center

15900 Smoke Tree St.
Suite 131
Hesperia, CA 92345

Mon – Fri 8 am – 12 pm
1 pm – 4:30 pm

Yucca Valley B&S Office

57407 Twentynine Palms
Outer Highway South
Yucca Valley, CA 92284

Wed, 8 am – 4:30 pm
(closed 30 minutes for lunch)

Barstow B&S Office

301 East Mt. View Ave.
Barstow, CA 92311

Mon – Fri 8 am – 8:30 am

Big Bear B&S Office

477 Summit Boulevard
P.O. Box 2835
Big Bear Lake, CA 92315

Tues, 8 am – 4:30 pm
(closed 30 minutes for lunch)

Twin Peaks B&S Office

26010 State Highway 189
P.O. Box 709
Twin Peaks, CA 92391

Mon, Weds, Thurs, 8 am – 4:30pm
(closed 30 minutes for lunch)

If you have any questions involving the application process please contact us by phone at (909) 387-8311. Once completed and submitted, you will be given a permit/project number and fees can be paid.

2. Review the standards section immediately following for how to name your drawing and document files, border spacing, acceptable file formats, etc.

Glossary of Terms

- Applicant
 - Member of the public that provides material for electronic review.
- Change Mark
 - Digital icons (such as Post-It-Notes, revision clouds, callouts, etc.) used by Reviewers to enter comments/corrections during the process of making “Markups.”
- Markup
 - Digital overlay file used to consolidate the “Change Marks” entered by the Reviewers into a single file.
- eForm
 - Digital forms created within the e-Plan application to request application reviews or re-submittal information.
- DWF
 - Drawing web format. A format developed by Autodesk for the plan review process.
- Standard PDF
 - Digital file format used for documents, reports and other supporting non-plan files that were traditionally submitted in paper format.
- Vector PDF
 - Digital file format that maintains AutoCAD information. This format also a PDF to function similarly to an AutoCAD file.
- Customer Service Unit Technician
 - Line staff person in Building & Safety responsible for initial project screening. Their function is to review the application (pre-screening) for completeness, collect necessary fees, and initiate the application in e-Plans.
- Plan Review Project Manager (Plan Review PM)
 - Lead staff person in Building & Safety assigned primary project management responsibility over the application. This lead person may also be referred to as “Plan Review PM,” “Plans Examiner,” or “Building Plan Reviewer.”
- Plan Reviewer
 - Individual assigned the task of reviewing and commenting on a specific project.

➤ Project Status

- Intake – Workflow has started, Customer Service Unit Technician is awaiting fees, and/or uploads.
- Plan Review – Plans are in review by County plan review teams.
- Out for Corrections – Waiting on Applicant to upload corrections or additional plans/documents.
- Approved – Plans are approved and ready for download.
- Conditional Approval – Plans are approved once certain conditions are satisfied.
- Expired – Applicant did not respond within set time limits.
- Withdrawn – Applicant withdrew plan review application.

Standards

Standards allow for easy identification of drawing by naming convention, vector file types in order to facilitate the most efficient review, color coding of comments for visual identification of departments and so on.

Required Files

1. Drawing Files are always uploaded to the “Plans” folder. – Each page of the drawing shall be uploaded as a separate file.
2. Supporting Document Files are always uploaded to the “Documents” folder. – Supporting documents are all other files that are required as part of the application submission but are not drawing files (i.e. Drainage Calculations, Easement letter, certifications, etc.). Each document shall be uploaded as a separate file.

Border Standards

All Plan Files

The entire top margin of all plans must be reserved for the County of San Bernardino electronic approval stamps. Reserve a 3“(inch) margin on all plans uploaded to the “Plans” folder.

File Naming Standards – Building Plans (Residential & Commercial)

Documents

File names for documents submitted through ePlans should be identified by indicating the discipline first followed by the function or object (e.g. Engineering Calculations, Fire Letter, Structural Calculations, etc.).

Plans

File names for plans submitted through ePlans should include the first character(s) of the discipline name, followed by a three (3) digit sheet number and drawing type (ref. to “[File Naming Standards Table](#)” that follows for details).

Documents and Plans

Please Note: Corrected files (Documents and Plans) should always be re-submitted with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so reviewers can easily differentiate between revisions and review the most recent document.

- **Discipline** – First character(s) in the file name represents the discipline area followed by the page number and type of drawing, i.e. A002 – Elevations. Ensure that all plans, including the associated details, are submitted with the correct discipline characters as indicated below the Character column shown in the [“File Naming Standards Table”](#).
- **Sheet Number** – Must be a 3 digit number including any leading zeros. Note: if decimals are needed, place decimal after the 3rd digit, ex. P001.99.
- **File Name Length** – All file names are limited to 50 characters in length including the **Discipline** and **Sheet Number**.

File Naming Standards Table

Plan Type	Discipline	Character	Sheet Number	Example File Names
Architectural	ARCHITECTURAL	A	001-999	
Cover Sheet	ARCHITECTURAL			A000 – COVER
Floor Plan	ARCHITECTURAL			A001 – FLOOR PLAN
Foundation	ARCHITECTURAL			AO05 – FND
Elevations	ARCHITECTURAL			A009 – ELEV
Details	ARCHITECTURAL			A015 – DETAILS
Interior Design	ARCHITECTURAL	ID	001-999	ID009 – INTDS
Site Plan	SITE PLAN	SP	001-999	SP002 – SITE PLAN
Grading Plan	GRADING	G	001-999	G005 – GRADING PLAN
Erosion Control/Pre-Construction Inspection	EROSION CONTROL/PRE CONSTRUCTION INSPECTION	EC-PCI	001-999	EC-PCI004 – EROSION CONTROL/PRE-CONSTRUCTION INSPECTION
Structural – All Structural and related plans including details	STRUCTURAL	STR	001-999	STR002 – STEEL BLDG
Plumbing	PLUMBING	P	001-999	PL099 – PLUMB
Electrical	ELECTRIC	E	001-999	E001 – ELEC
Mechanical	MECHANICAL	M	001-999	M101 – MECH
Landscape	LANDSCAPE	L	001-999	L011 – IRRIG
Survey	SURVEY	S	001-999	S008 – SURVEY
Shoring	SHORING	SHR	001-999	SHR022 – SHORING
Fire Protection	FIRE	F	001-999	F799 – FIRE
Energy	ENERGY	EN	001-999	EN012 – ENERGY

Markup Name and Color Standards

Below is the Standard markup Department Listing and associated colors that will be used for each reviewing discipline for easy identification. A *'Markup'* (complete review) can have one or more *'Change Marks'* (individual comments). Change marks are created to quickly identify a markup and associated comments.

Typically, all *'Markups'* (reviews) that contain any *'Change Marks'* will require a subsequent re-submittal of new drawings or documents prior to approval of your project.

Corrected files should always be re-submitted with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so the reviewers can easily differentiate between revisions and review the most recent document.

Reviewing Departments Color Standards Table

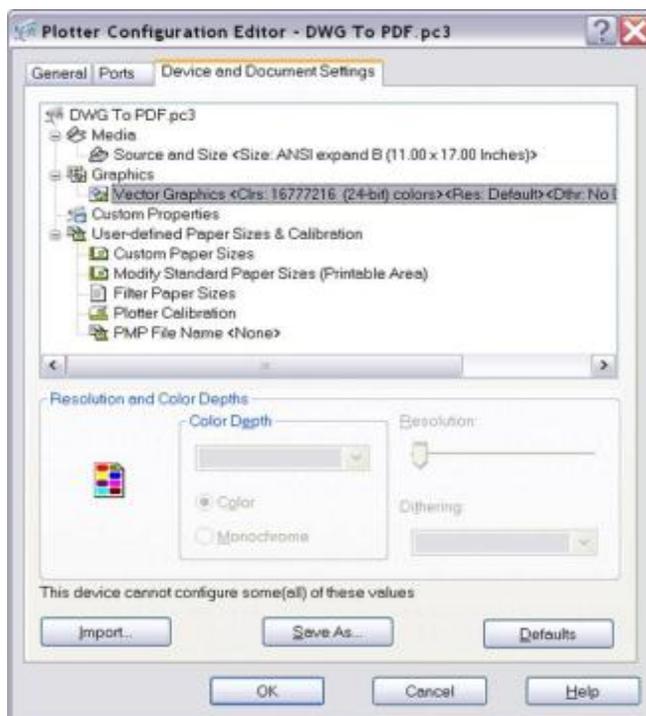
Department	Department Sub-Group	Markup Color
Public Works	Land Development - Roads	Sandy Brown
Public Works	Land Development- Drainage	Saddle Brown
Public Works	Surveyors	Brown
Flood Control	Design	Dark Brown
Public Works	Solid Waste	Green
Public Works	Traffic	Orange
LUSD	Building & Safety	Navy Blue
LUSD	Planning	Blue
Public Health	Environmental Health Services	Purple
LUSD	Code Enforcement	Aqua
County Fire	Community Safety	Red
County Fire	HAZMAT	Red
OTHER AGENCIES	N/A	Dark Red

File Type Standards

Only DWG, DWF, DGN, DXF or vector PDF files will be accepted for plans. AutoCAD software is commonly used to create plan files. If PDF is the preferred file type, it is recommended that plans created in AutoCAD are converted to Vector PDF by using the Autodesk Vector Graphic Converter “DWG to PDF.pc3 plotter driver.”

Document files may be in the following formats: PDF, DOC, DOCX, XLS, XLSX, PPT, PPS, PPTX, TIF, TIFF, JPG, PNG, IMG, or BMP. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-plan files).

If plans are electrical, mechanical, plumbing/gas, etc., confirm that only the trade lines are dark by changing the background to grayscale prior to saving as a vector PDF file.



File Layering Guidelines

There are no strict guidelines for the number of layers to include in your AutoCAD, MicroStation or Adobe files but the general rule of thumb is for the submitting party to restrict layering to the smallest number of usable layers. Relative to general guidelines for electronic submittal we suggest the following:

1. “Burn in” all visible layers that will be static and viewable.
2. Limit file layering to no more than 50 layers per drawing.
3. Minimize the amount of cross hatching to improve file performance when opening, manipulating, and publishing files.

Electronic Signatures

- All drawings to be uploaded must contain an electronic seal and signature.

Folder Structure

- All documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the "Documents" folder for each project.
- All drawings should be uploaded to the "Plans" folder for each project.

Login to County of San Bernardino ePLANS

ePlans Invitation

When your online plan review application is processed, an ePlans invitation will be sent to your e-mail address (see below). The e-mail will contain your login information and information about your project, including a link to the project. The site address for the County of San Bernardino ePlans system is: <https://projectdox.lu.sbcounty.gov/projectdox>.

Invitation to Submit Electronically

Land Use Services Department

COUNTY OF SAN BERNARDINO



Hello Rick Napier:

Welcome to the County of San Bernardino's ePlan review system. Your application has been received and a project number has been created. You may now upload your plans and documents electronically using the following instructions.

ACCEPTABLE FILE FORMATS

1. **DRAWING FILES:** The only Plan Drawing file formats acceptable are DWF, vector PDF, and print ready DWG files. Single page drawings are required, no multi-page drawings are allowed. Please provide a three (3) inch margin on the top of the plan for the County's electronic stamps.
2. **SUPPORTING DOCUMENTS:** The preferred supporting document file format is PDF. You may upload Word, Excel and other formats. Both single and multi-page documents are allowed.
3. **NAMING STANDARDS:** File names for drawings submitted through e-Plans should include the first character(s) of the discipline follow by a 3-digit sheet number and drawing type (ie. STR-001 for the first structural document). Click [here](#) to learn more about our naming requirements.

PROJECT INFORMATION		RESOURCE LINKS
Your User Login:	randcnapier@hotmail.com	Applicant User Manual
Project Number:	B201100189	
CSU Representative Phone #:	(909) 387-8311	
Project Access:	Project Login	

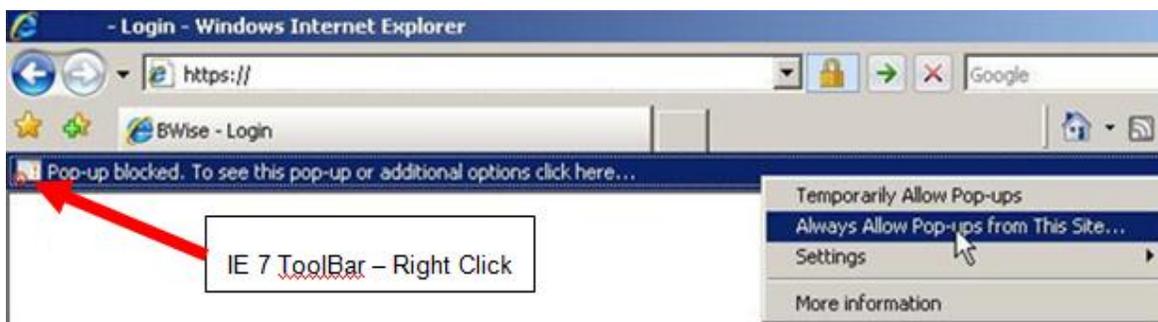
INSTRUCTIONS

1. Click the Project Login link to access your Project.
2. Enter your User Login and then your **Permanent Password** (Passwords are Case Sensitive).
3. At the "My Projects" page click on the applicable sub-folder: "Plans", "Documents", or "Photos".
4. Click on the "Upload Files" button and follow the instructions to upload your plans and documents.

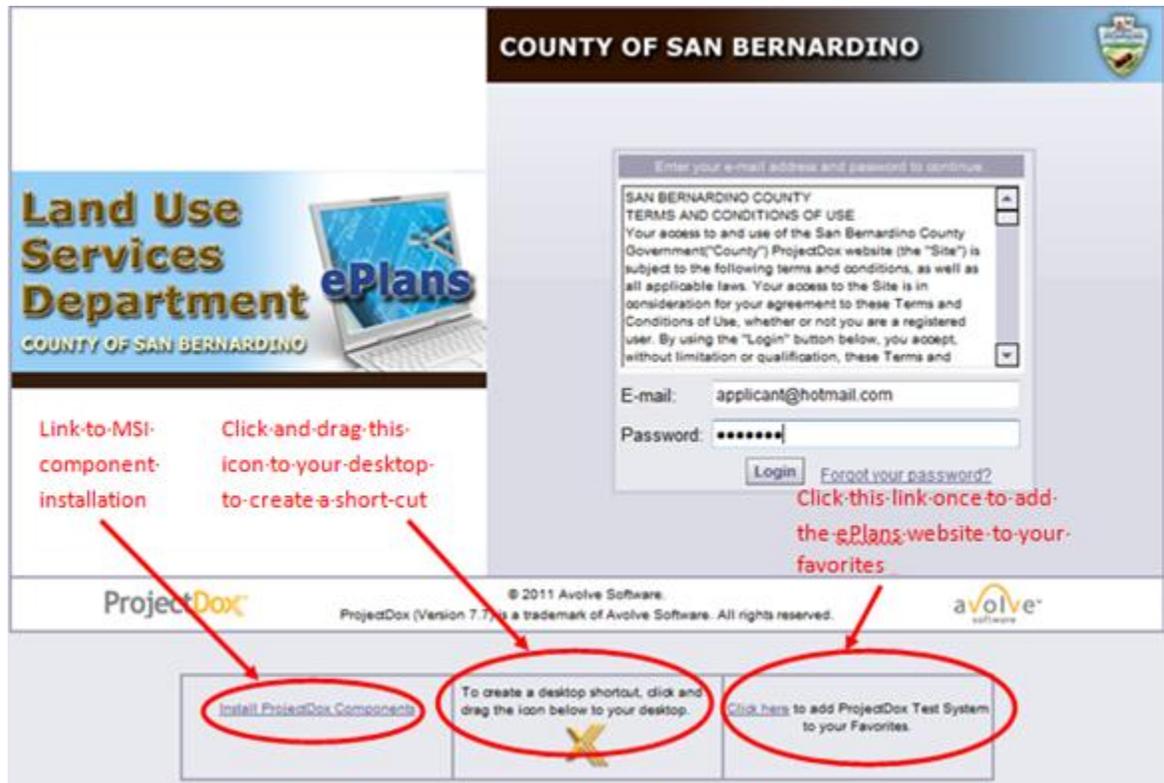
Your submission will be prescreened for completeness prior to the start of formal review.
PLEASE DO NOT REPLY TO THIS EMAIL

New Users

4. You must use Internet Explorer v6.0 or higher to access ePlans.
5. Prior to logging into the ePlans application, the following actions must be completed:
 - If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the ePlans web address (<https://projectdox.lu.sbcounty.gov/projectDox>). The indicator that this has not been done will occur when you type in your login and password, then hit the Login button and the page immediately disappears. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc.). Once the ePlans site is allowed, you will be able to utilize the application. To always allow a site to display pop-ups, click the Information Bar when it notifies you that a pop-up has been blocked. Then click Temporarily Allow or Always Allow Pop-ups from This Site (as shown in the second of two screen images that follow).



- The login page has a MSI (Microsoft Silent Install) component required to install all the necessary ePlans ActiveX controls. This installation will only need to be done once; if you utilize a different computer it will require another installation for each unique computer. The link to the component install is shown below. (If you are running Vista or Windows 7 please refer to [Vista and Windows 7 Install Instructions](#) of this manual for further details).
- The login page also provides a shortcut that you can drag and drop onto your desktop as well as a link to save the ePlans web address to your favorites (as shown in the following image).



- To sign in, enter your e-mail address and temporary e-Plans password (first time use) and click the Login button.

COUNTY OF SAN BERNARDINO

Land Use Services Department ePlans
COUNTY OF SAN BERNARDINO

Enter your e-mail address and password to continue.

SAN BERNARDINO COUNTY
TERMS AND CONDITIONS OF USE
Your access to and use of the San Bernardino County Government ("County") ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the

E-mail:

Password:

[Forgot your password?](#)

ProjectDox © 2011 Avolve Software.
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[Applicant Guide](#)

Install ProjectDox Components	To create a desktop shortcut, click and drag the icon below to your desktop. 	Click here to add ProjectDox San Bernardino County to your Favorites.
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7. Enter your new password and reconfirm the new password, and personal account information. Yellow highlighted fields are required but a full Profile record is ideal, then click the Save button in the middle of the screen. Remember passwords are case sensitive and must be 8 to 10 characters in length with at least one number and no special characters. This Profile Information can be accessed at any time by selecting the "Profile" button at the top of the Home page.

Settings for LU10 SBCounty (lute10@usd.sbcounty.gov)

Welcome to ProjectDox San Bernardino County.
 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 * Confirm new password *

Password Reset Question & Answer:
 Security question: no trainer passwod
 Security answer: <Answer has been encrypted>

Profile Information

Contact Information | User Metadata | Project Membership | Group Membership

* Required field

First Name *	LU10	Last Name *	SBCounty
Email *	lute10@usd.sbcounty.gov <input checked="" type="checkbox"/> HTML format ⓘ		
Title	Test User		
Company	County of San Bernardino		
Address 1:			
Address 2:			
City	San Bernardino		
State/Province:	CA	Postal Code:	92415
Country:	USA		
Phone:		Fax:	
Mobile:		Action date:	
Stamps:			<input type="button" value="Browse..."/> ⓘ
Language *	en		

Existing Users

If you are a returning user, login to ePlans Review with your full e-mail address and password. If you have forgotten your password, click on the "Forgot your password" link in the initial login screen and your password will be e-mailed to you. This will work only if you have logged in once and added a security question and answer.

COUNTY OF SAN BERNARDINO

Land Use Services Department
ePlans
COUNTY OF SAN BERNARDINO

Enter your e-mail address and password to continue

SAN BERNARDINO COUNTY
TERMS AND CONDITIONS OF USE
Your access to and use of the San Bernardino County Government("County") ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and

E-mail: applicant@hotmail.com

Password:

Login [Forgot your password?](#)

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[Applicant Guide](#)

Install ProjectDox Components	To create a desktop shortcut, click and drag the icon below to your desktop. 	Click here to add ProjectDox San Bernardino County to your Favorites.
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Uploading Files

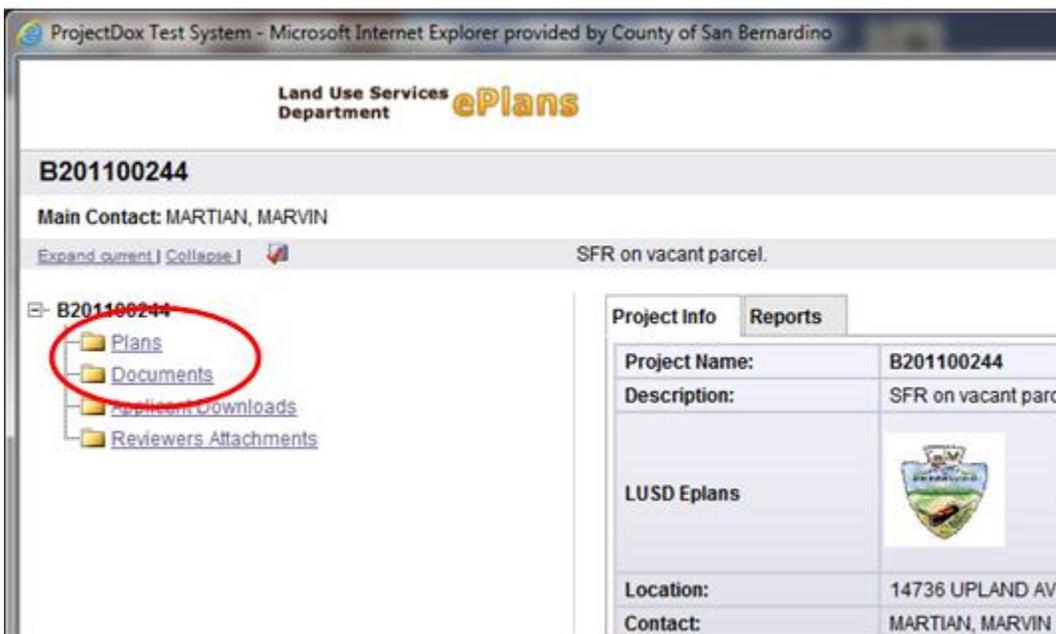
1. When you have successfully logged into ePlans, the projects screen will display. Your 15 most recent projects for which you have access will display in the list. To see the full list of your projects, click the "All Projects" button. Any outstanding tasks that require your action are displayed in the Task List area below the project list. You may also view the Task List in a separate window by clicking the "Task List" [Task List](#) button in the upper-right corner. Select (click the link) of the specific project that corresponds to the plans you will be uploading (in this instance project B201100244). The projects are listed in order by project number, but can be sorted by clicking on any header field name.

The screenshot shows the ePlans web interface. At the top, it says "Land Use Services Department ePlans" and "COUNTY OF SAN BERNARDINO". There are navigation buttons for Back, Forward, Projects, Profile, and Logout. A "Task List" button is also visible. The main content area shows a list of 42 projects (out of 42 for user Joe Johnston). The list has columns for Project, Options, Description, Owner, and Status. Project B201100244 is highlighted with a red box and a red arrow pointing to it. Below the list is a "Task List" table with the following data:

Project Name	Task	Attached To	Status	Created On	Updated On	Updated By
B201100229	ApplicantResubmit	Applicant	Accepted	8/17/2011 2:55:56 PM	8/19/2011 8:33:24 AM	
B201100200	ApplicantResubmit	Applicant	Accepted	8/17/2011 7:11:55 AM	8/17/2011 7:13:17 AM	

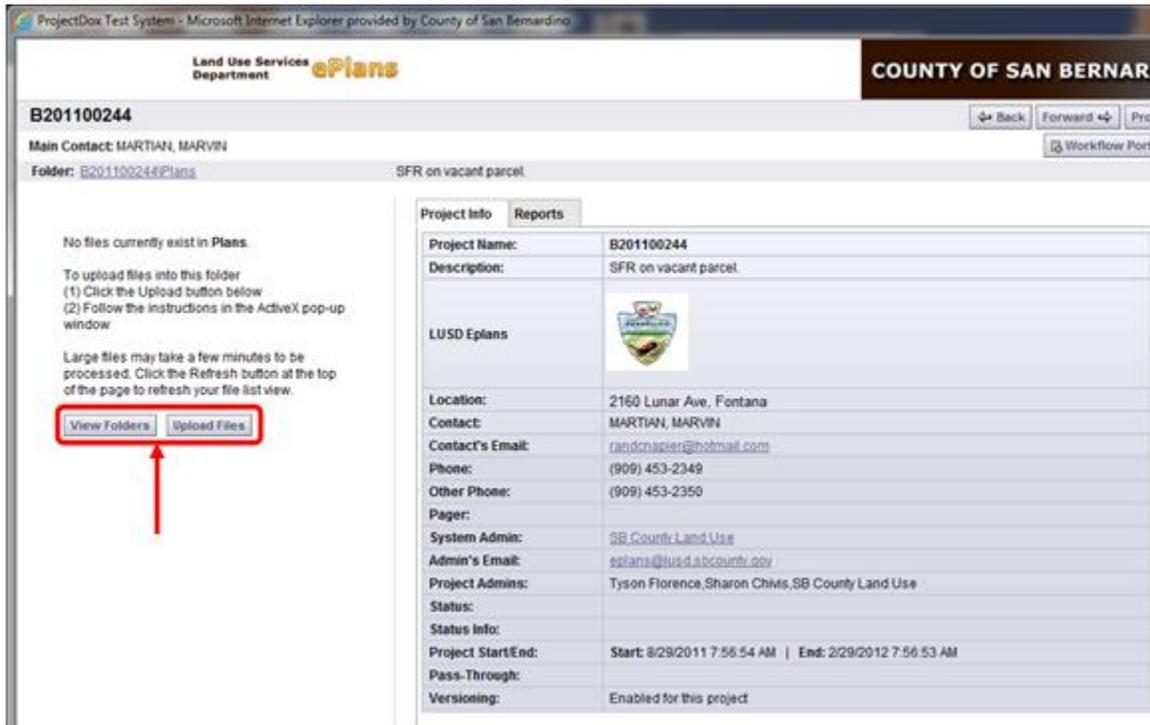
42 project(s) out of 42 for Joe Johnston (jjohnston@hotmail.com)		
Project	Options	Description
B201100235		SFR on vacant parcel.
B201100236		SFR on vacant parcel.
B201100237		SFR on vacant parcel.
B201100238		SFR on vacant parcel.
B201100239		SFR on vacant parcel.
B201100240		SFR on vacant parcel.
B201100241		SFR on vacant parcel.
B201100242		SFR on vacant parcel.
B201100243		SFR on vacant parcel.
B201100244		SFR on vacant parcel.

2. Click on your project, then click the "Plans" folder to upload your plan drawings or the "Documents" folder to upload supporting project documents.¹

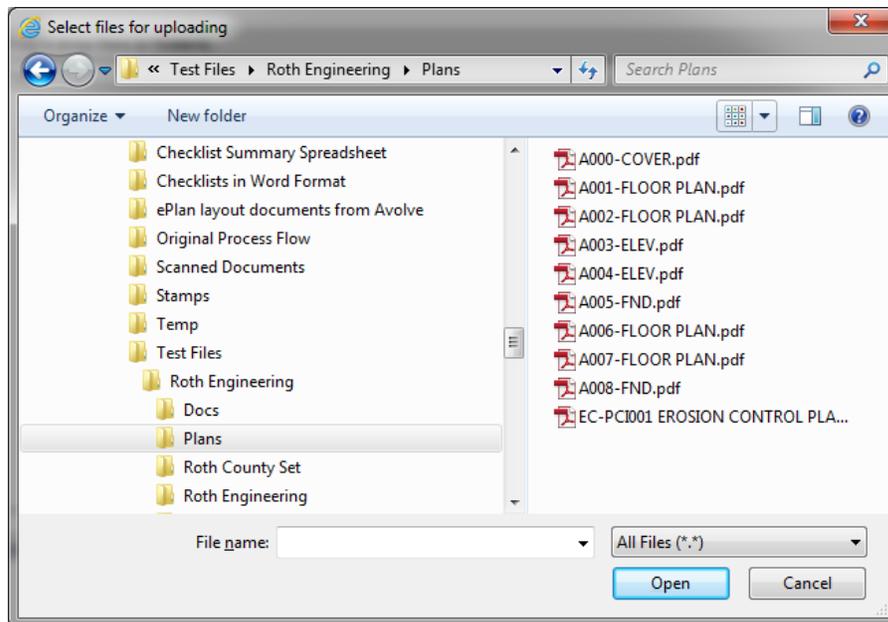


¹ **Please Note:** If you are re-submitting corrected files (Documents and Plans) you should always re-submit them with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so reviewers can easily differentiate between revisions and review the most recent document.

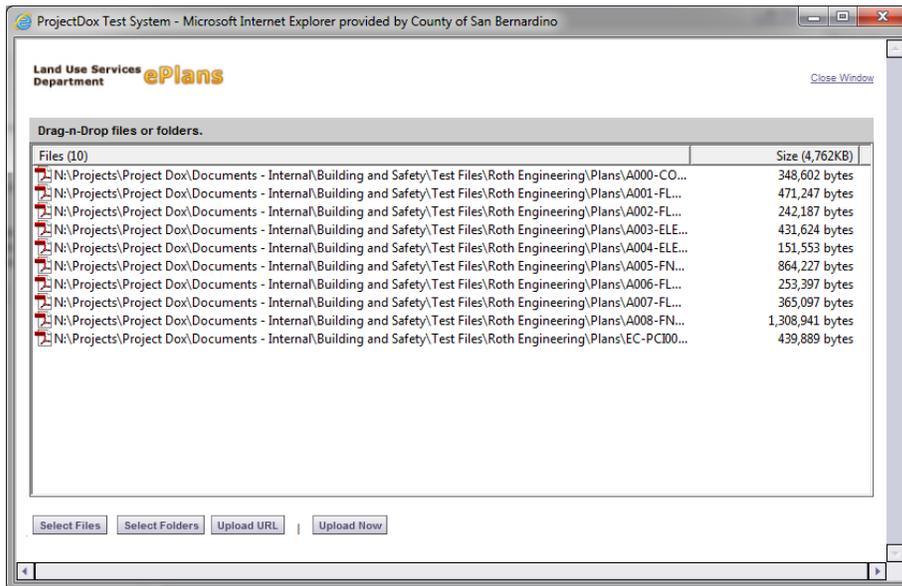
- Upon selecting either folder, you will be presented with two buttons, View Folders and Upload Files.



- Click the "Upload Files" button. "Select Files for Uploading" box will automatically display. Go to the file location on your computer and select or highlight files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. You can also drag and drop files into the upload window list. Click the "Open" button and the files selected will then be copied to the upload window.

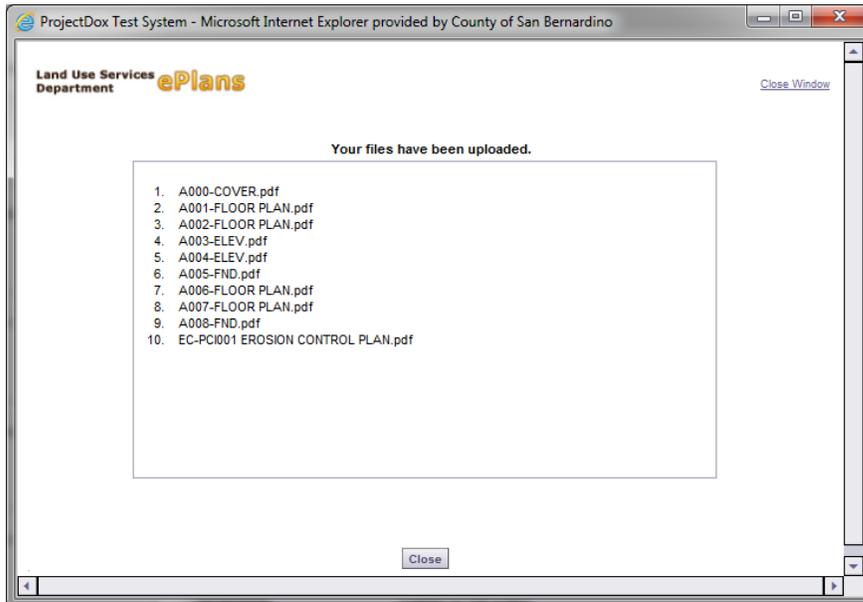


5. Click the "Upload Now" button and a pop-up will appear stating the number of files that are to be uploaded and ask if you want to continue.

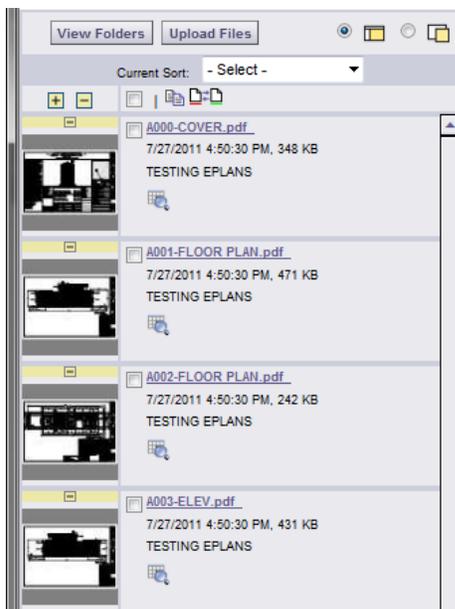


Select "OK" to the message box "You are about to upload X files (where X is the number of files submitted in this batch) from your computer. Do you want to continue?" and the files will be copied to the upload window.

A new window will open stating “Your files have been uploaded” with a list of those files. Select the “Complete Upload Process” button underneath the upload window and this will complete the file upload for this cycle.



2. Select the “Close” button. Once the files are uploaded to the folder, the folder list is replaced by thumbnail images of each file contained in the folder. Next to each thumbnail, the file name, author, date uploaded, file size, and History icon displays.



3. Congratulations! You have successfully finished part one of submitting your plans electronically. Please logout after your session is complete. A notification has been sent to the San Bernardino County Land Use Services Customer Service Unit to start the prescreening process to determine if the submittal requirements have been met.

Security Timeout

Due to security and resource concerns, the system will automatically sign you out after sixty (60) minutes of inactivity. When you are ready to resume working with the system, click any button on the screen. The system automatically loads the login page for you. You can also close the web browser window and reload the login page manually in a new browser window.

Correction Complete Task

Prescreening

Prescreening is a cursory review of your uploaded documents in preparation for formal review. This will be performed by the Customer Service Unit Technician for most types of permits/projects. Allow a minimum of three (3) working days after you have uploaded your documents for the Prescreening process to take place. The status of your project in e-Plans will be "Intake". If there are questions or missing items from your submittal, you will receive a "Prescreening Correction Request" e-mail with instructions on the changes requested and how to resubmit.



Prescreen Correction Request Task Assignment

Attention :

Project:	B201100244
Instructions:	<p>Your plan review submission for Permit # B201100244 has not met the minimum requirements for acceptance. 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.</p> <p>Please remember when re-submitting drawings and/or documents:</p> <ul style="list-style-type: none"> • 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 • To ensure timely plan review, please make corrections and resubmit as soon as possible.
Assigned by:	Harold Lloyd
Project Access Login to ProjectDox	

If you do not have access to the specified folder, please contact the [Project Administrator](#).
 If you have any questions, please contact Building and Safety at (909) 387-8311.

Please do not reply to this email.

1. Click on the 'Login to ProjectDox' link in the e-mail to access the ePlans site and login. The CorrectionComplete task will appear at the bottom of the Projects screen (Home Page).

15 recently entered project(s) out of 42 for Joe Johnston (johnston@hotmail.com)				Recent Projects	All Projects	Press Enter To Search:
Project	Options	Description	Owner	Status		
B201100244		SFR on vacant parcel.	SB County Land Use	Out For Corrections		
B201100241		SFR on vacant parcel.	SB County Land Use	Intake		
B201100243		SFR on vacant parcel.	SB County Land Use	Plan Review		
B201100236		SFR on vacant parcel	SB County Land Use	Plan Review		

Project Name	Task	Attached To	Status	Created On	Updated On	Updated By
B201100244	CorrectionComplete	Applicant	Pending	8/29/2011 9:42:17 AM	8/29/2011 9:42:17 AM	
B201100229	Submission	Applicant	Accepted	8/17/2011 2:55:56 PM	8/18/2011 8:33:24 AM	
B201100200	ApplicantResubmit	Applicant	Accepted	8/17/2011 7:11:55 AM	8/17/2011 7:13:17 AM	

Page 1 of 1 (3 items)

2. Click on the CorrectionComplete task then click 'OK' to the system prompt "Do you want to accept this task?' This will launch the ePlan Internet Explorer screen (shown in the next image).
3. When the ePlan screen appears click the 'Corrections Items' tab at the top to reveal any Not Met deficiencies in the plans submitted. The bottom half of the screen reveals the Task Instructions section.
4. Review the 'Land Use Customer Service Unit Comments' in the Task Instructions section to identify other requirements noted as deficient and/or missing by the Customer Service Unit technician.

Land Use Services Department **ePlans**

Review Information | Permit Information | Contact Information | **Corrections Items** | Routing Slip

ID	Group	Comment Text	Status	Updated By	Update Date
BCSU3.01	CSU	Clear and legible plan.	NotMet	LU01 Test	8/17/2011 8:12:38 AM
BCSU3.03	CSU	Files located in correct folder(s)	NotMet	LU01 Test	8/17/2011 8:12:43 AM
BCSU3.05	CSU	Grading plans for more than 5,000 cubic yards signed by a registered person.	NotMet	LU01 Test	8/17/2011 8:12:46 AM
BCSU3.09	CSU	Geology report.	NotMet	LU01 Test	8/17/2011 8:12:49 AM

[Export to Excel](#)

Task Instructions

[View Intake Checklist](#)

I have uploaded the corrected documents and/or drawings as indicated below.

Land Use Customer Service Unit Comments

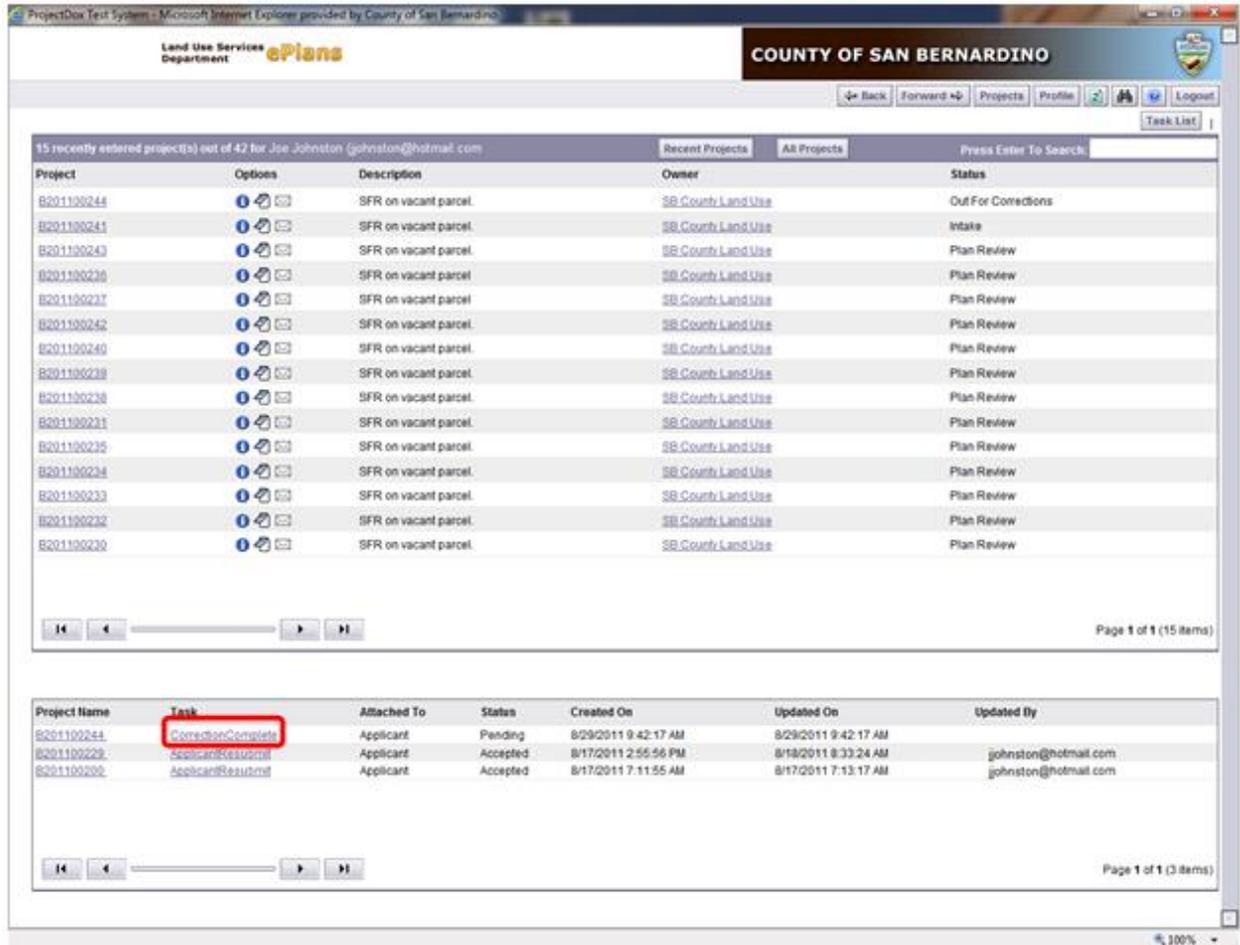
Applicant Response

Corrections Complete | Save | Save And Close | Close

5. Save and Close the ePlan screen, then click the 'Logout' button if you are finished with your current session.
6. After you have identified the missing or corrected drawings, and/or documents to upload, log back in to ePlans (if not already logged in) and again select the project.
7. Upload the missing and/or corrected drawings and documents (see the "Uploading Files" section for instructions). If you are uploading revised plans or documents, ensure the file name matches the document or plan that has been revised.²

² **Please Note: If you are re-submitting corrected files (Documents and Plans) you should always re-submit them with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so reviewers can easily differentiate between revisions and review the most recent document.**

- Click back to the eForm by selecting your Task assignment (CorrectionComplete) as shown in the following image.



Project Name	Task	Attached To
B201100244	CorrectionComplete	Applicant
B201100229	ApplicantResubmit	Applicant
B201100200	ApplicantResubmit	Applicant

- When the eForm opens, place a checkmark in the "I have uploaded the corrected..." and the Corrections Complete button will display for you to click to complete your task. Upon completion, the County will be notified that the files have been completed or corrected and will continue with the Prescreening process.

The screenshot displays a web form interface. At the top, there is a blue header bar labeled "Task Instructions". Below this, there is a link "View Initial Checklist" and a checkbox that is checked, with the text "I have uploaded the corrected documents and/or drawings as indicated below." next to it. Below the checkbox is a section titled "Land Use Customer Service Unit Comments" containing two lines of text: "Looks like the plans are incomplete. Send back to user to update." and "There are also some deficient items indicated in the checklists." Below the comments is a section titled "Applicant Response" with a large empty text area. At the bottom right of the form, there is a button labeled "Corrections Complete" which is highlighted with a red circle.

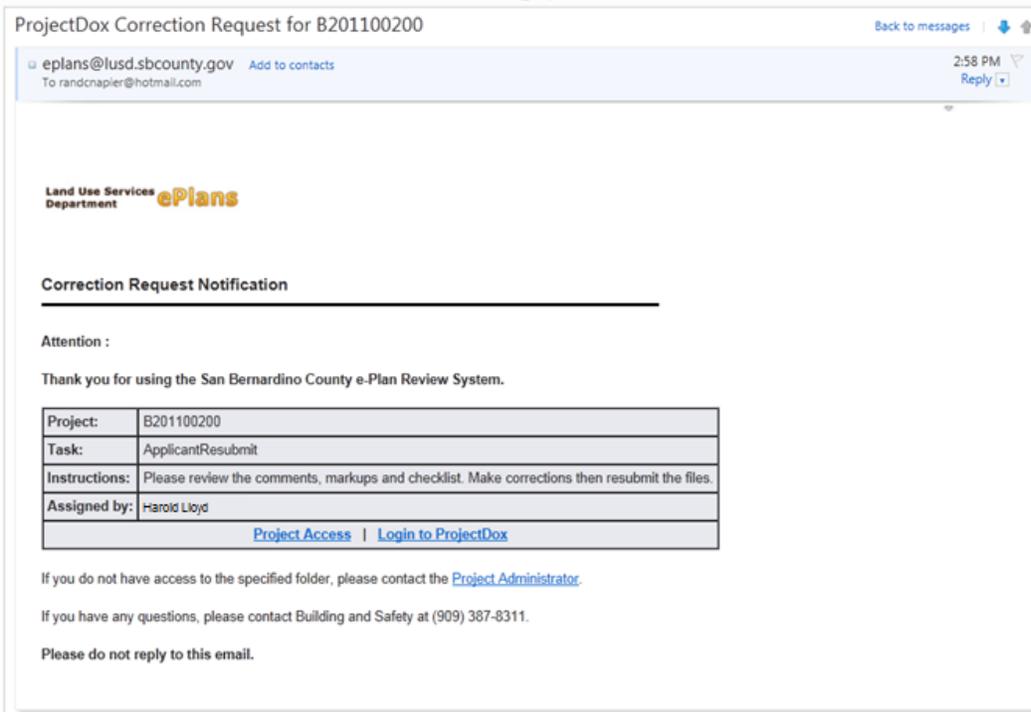
Approved

If your submittal is approved, it will immediately move to plan review.

ApplicantResubmit Task

Correcting Project Plans and Documents

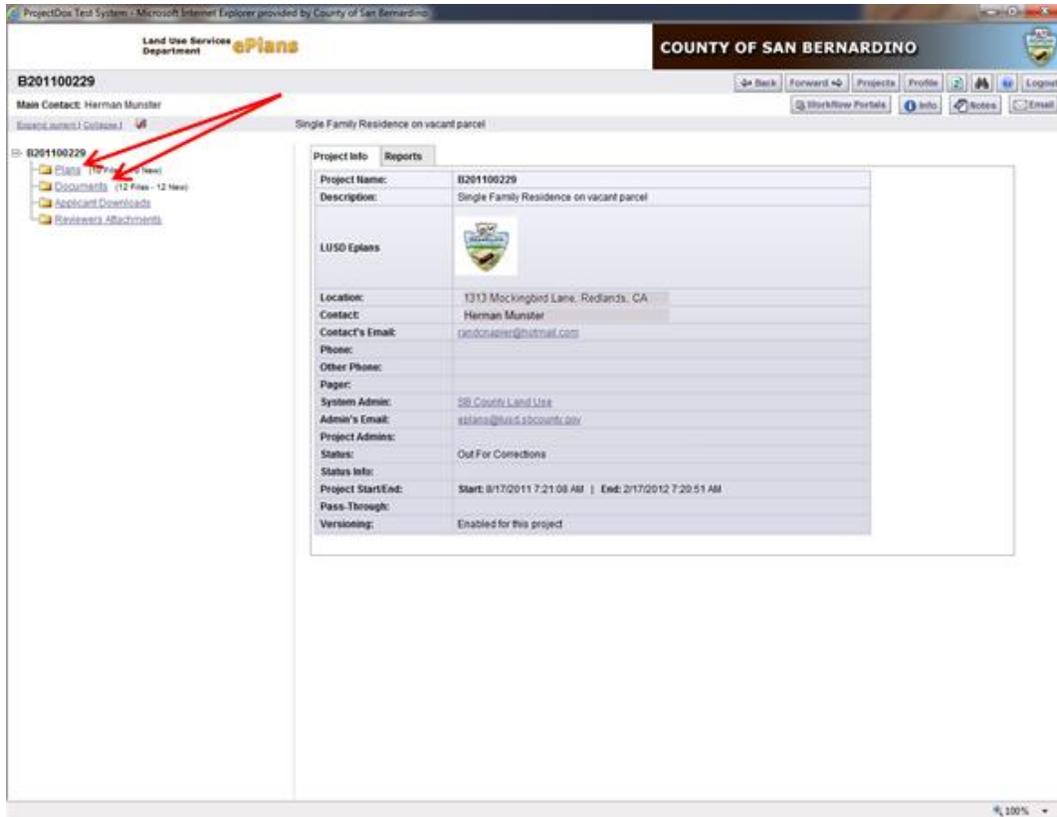
If corrections are requested following the formal review cycle(s) of your drawings, you will receive the following email notification from the Building & Safety Plan reviewer requesting revised documents.



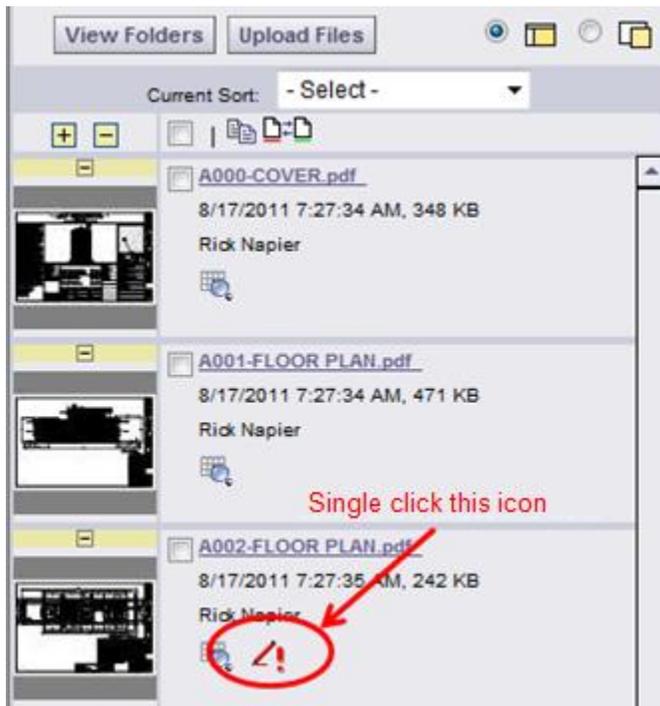
1. Click the link in your e-mail to access the ePlans site.
2. Login to ePlans. The ApplicantResubmit task will display at the bottom of the main page with your permit/project number under the heading "Project Name" (i.e. *B201100229 in the instance that follows*). Click on your project number listed below the Project Name column to access the main project screen (containing the Plans and Documents folders).

Project Name	Task	Attached To	Status
B201100229	ApplicantResubmit	Applicant	Pending
B201100200	ApplicantResubmit	Applicant	Accepted

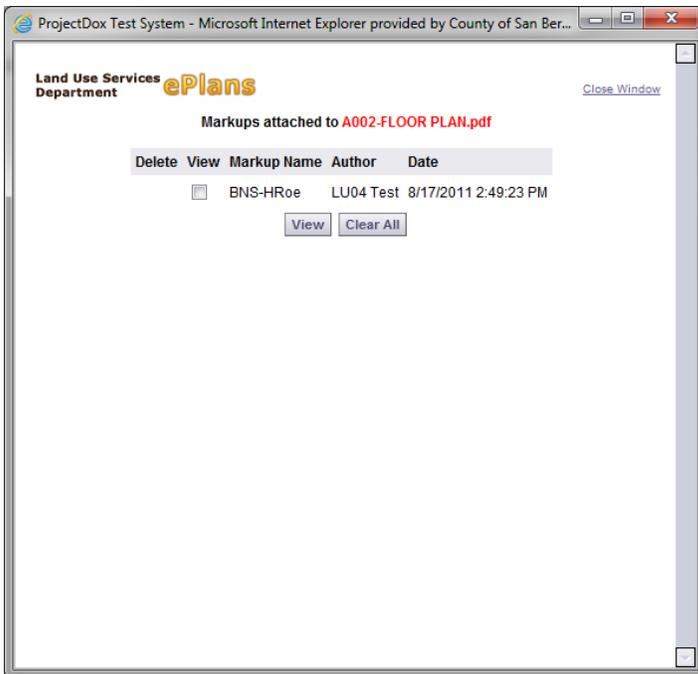
3. The Plans and Documents folders will appear. Each can be opened by selecting the link under each heading as shown in the next image.



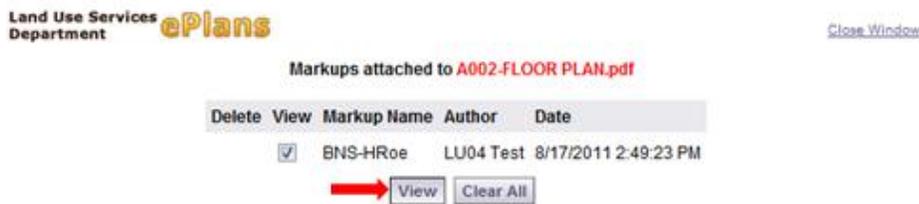
4. Selecting the Plans link changes the folder list into thumbnail images of each file contained in the Plans folder. Next to each thumbnail, the file name, author, date uploaded, file size, and History icon displays.



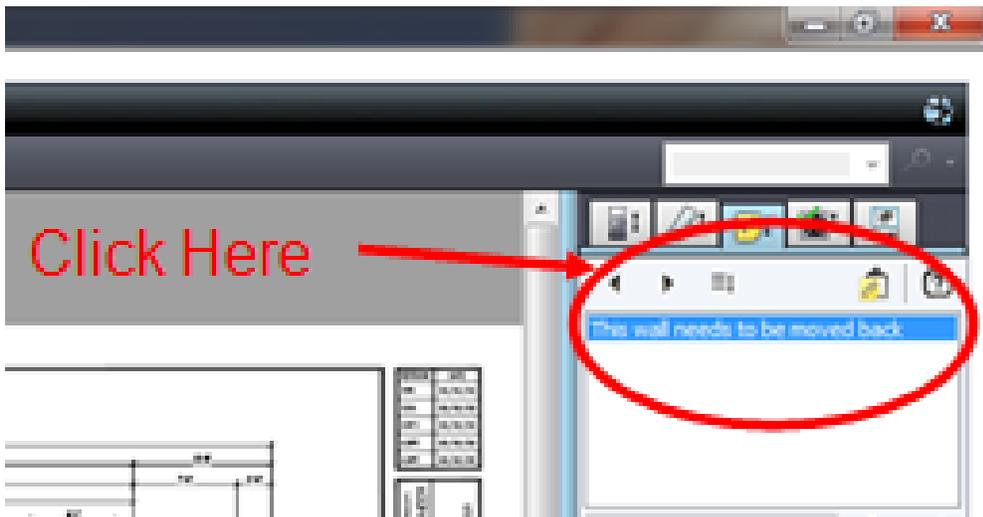
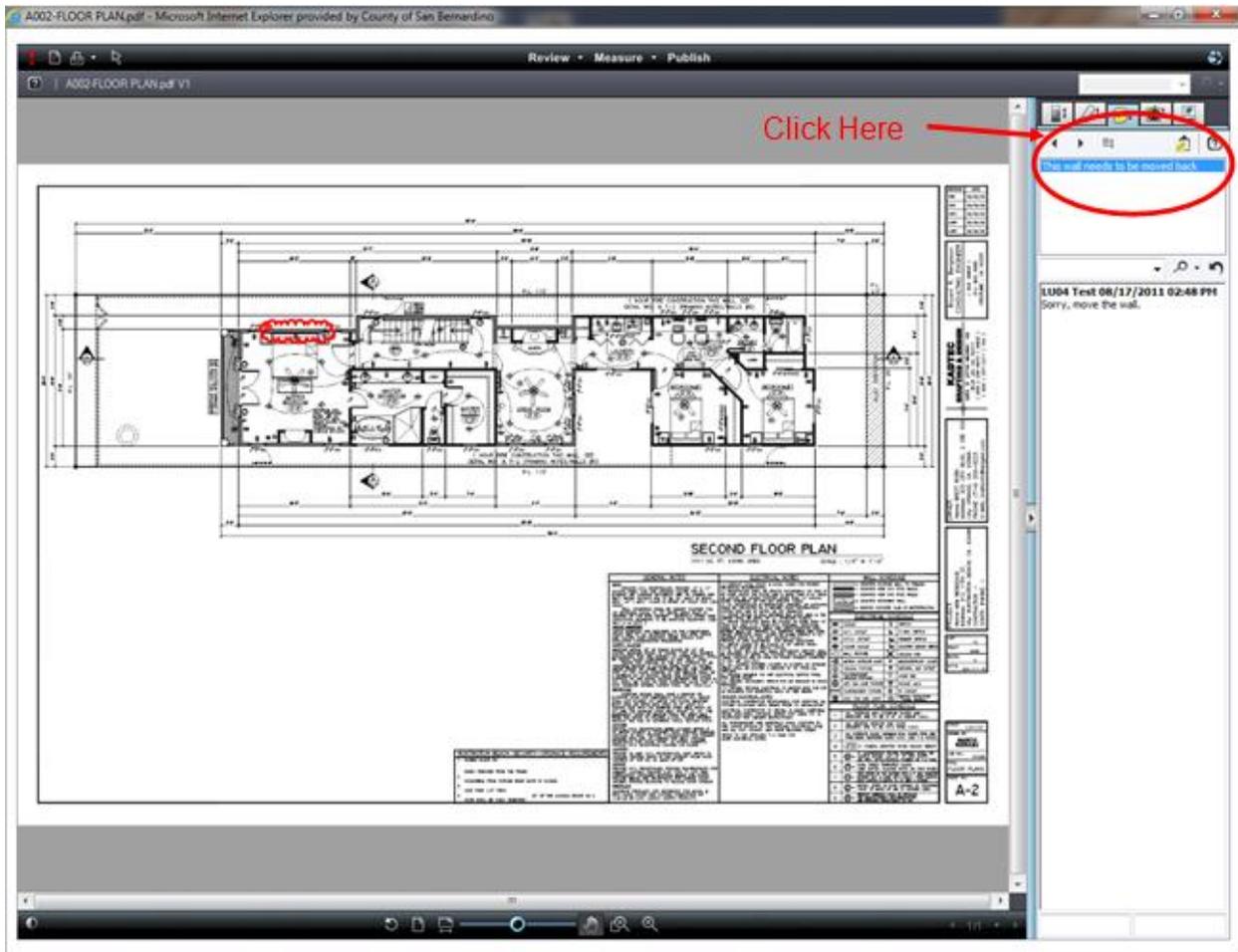
- To view the actual change mark click the red icons (pencil/exclamation mark) and the following window will open.



- Click the View checkbox, then click the View button as shown



The markups selection pop-up window will appear as shown in the following image with the change mark(s) already present.



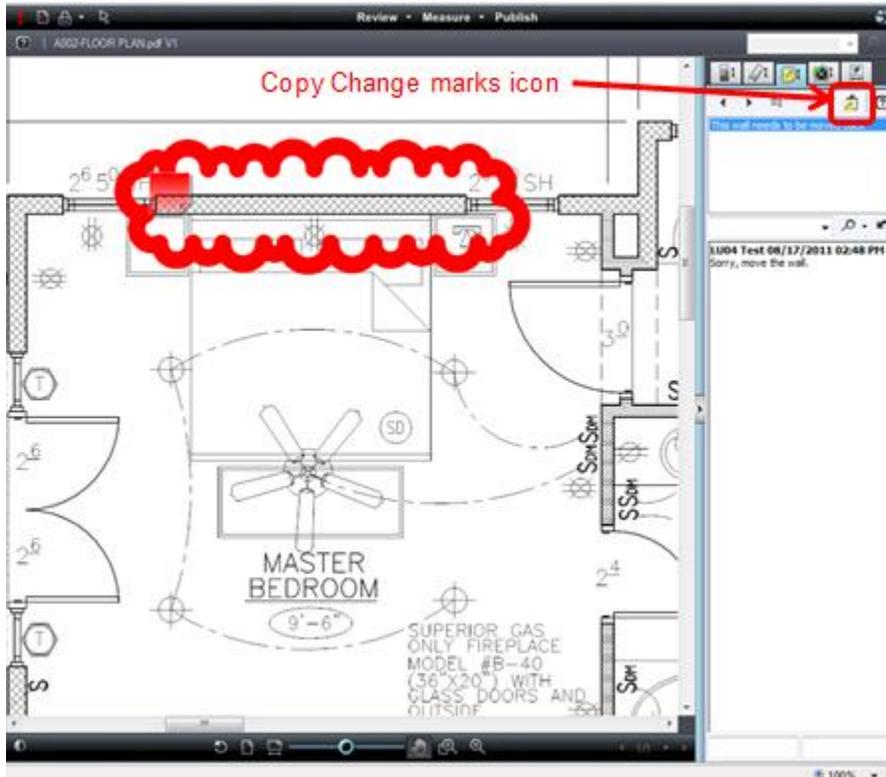
All changemarks will display in the right hand pane and as you review, click on each changemark text entry . . .

. . . and you will zoom directly into the colored (in this case red) changemark created by the reviewer (shown in the next image).

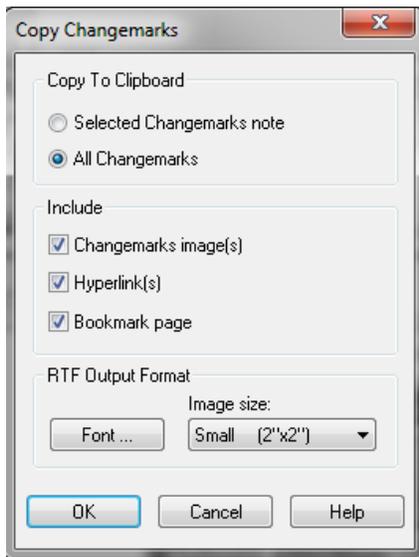
Printing Markups using Word

There are a number of ways to print out the markups.

Select the Copy Change marks icon as shown.



Check all boxes and change image size for larger thumbnails of markups.



Open a new Word document and right click to paste.

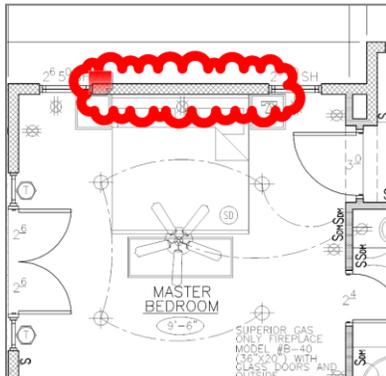
List of Comments

Each page will show details of one markup

[This wall needs to be moved back](#) (Harold Lloyd 08/17/2011 02:48 PM)

This wall needs to be moved back

[\(Back to List\)](#)



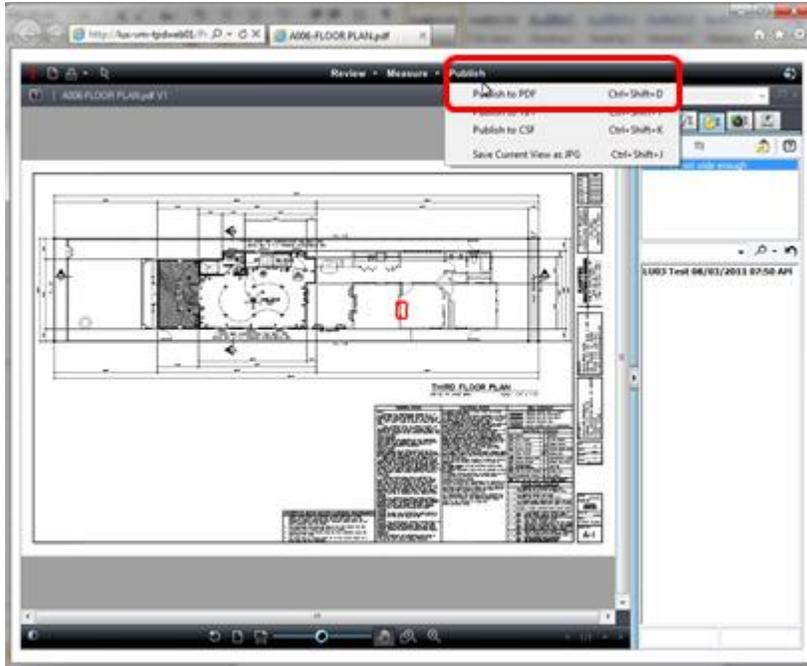
Created by: Harold Lloyd

On: 08/17/2011 02:48 PM

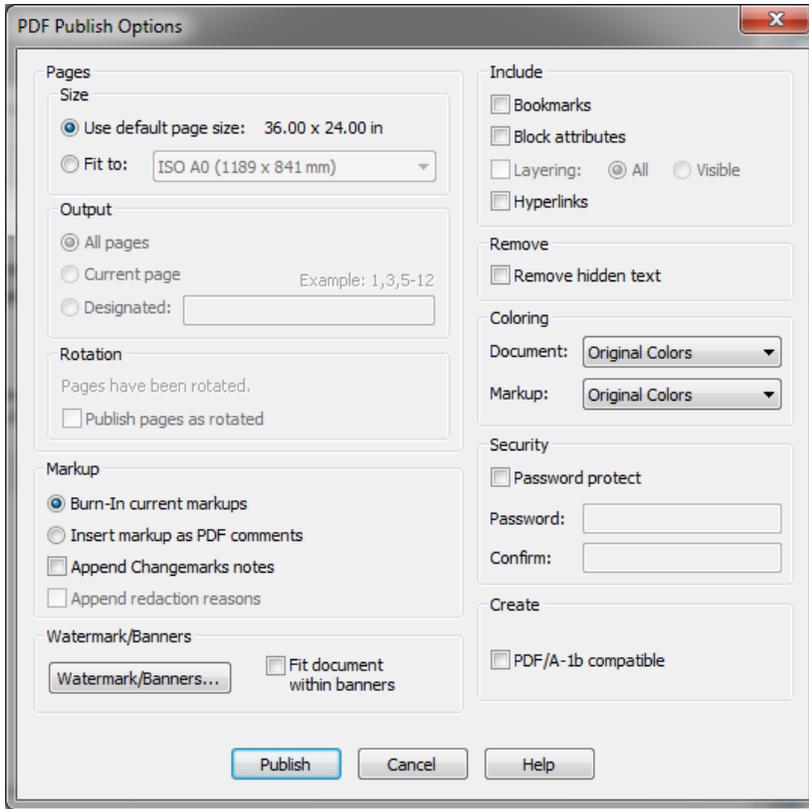
Sorry, move the wall.

Printing Markups as PDFs

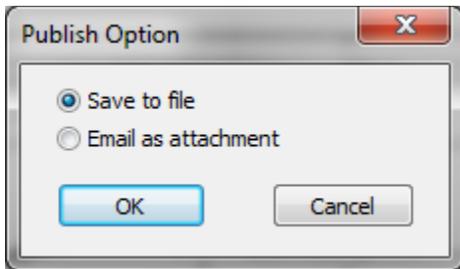
To print the markups in the original drawing format (24x 36) click the Publish link to open the drop-down, then high-light and click the 'Publish to PDF' option as shown



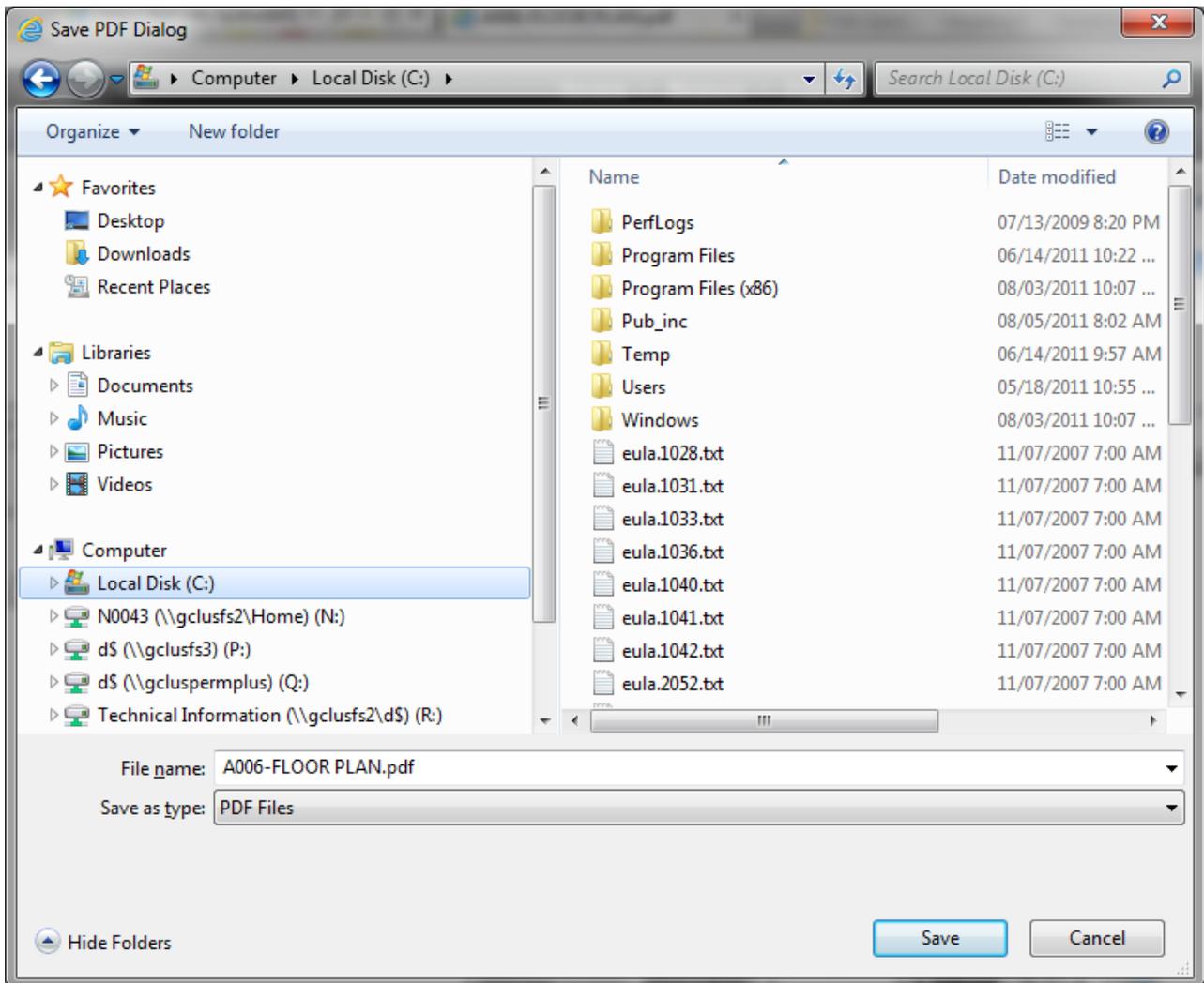
In the Publish option screen check 'Burn-in current markups' (if not already selected) and select 'Publish'.



Click the 'Save to file' option and click OK.

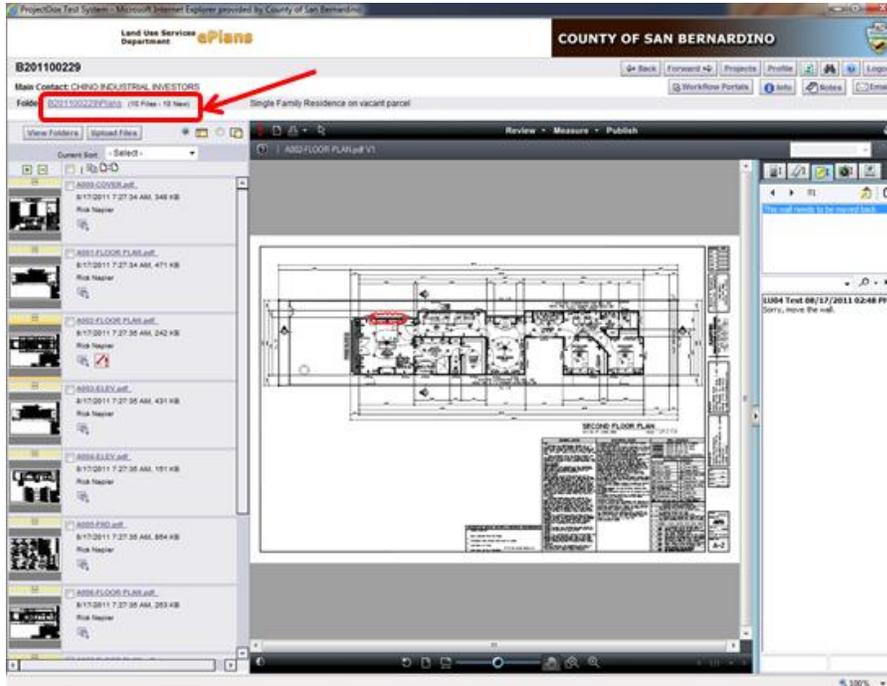


Determine the location of the file and click 'Save'.



Correcting Other Project Deficiencies

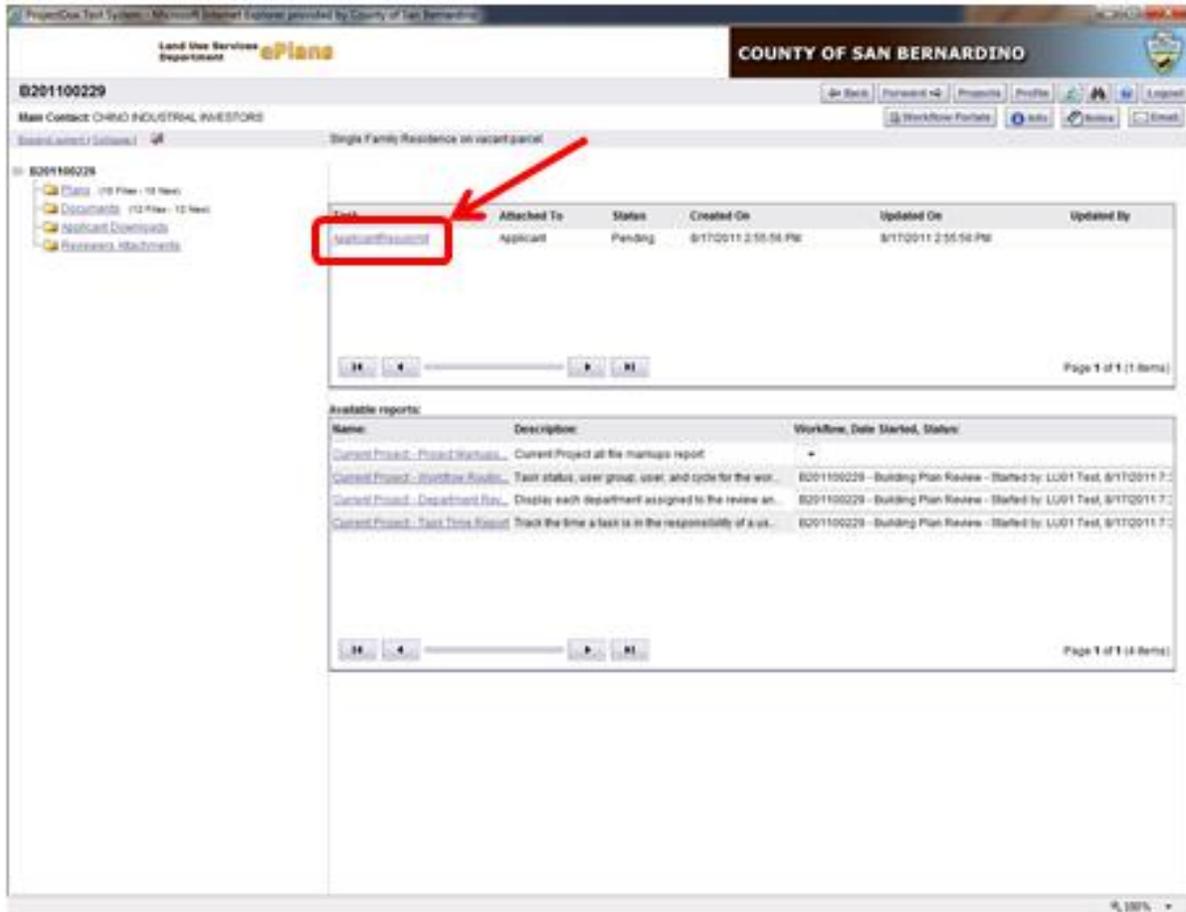
- To view the remaining deficient issues related to your project return to the main project screen by clicking on the Folder link shown in the following image.



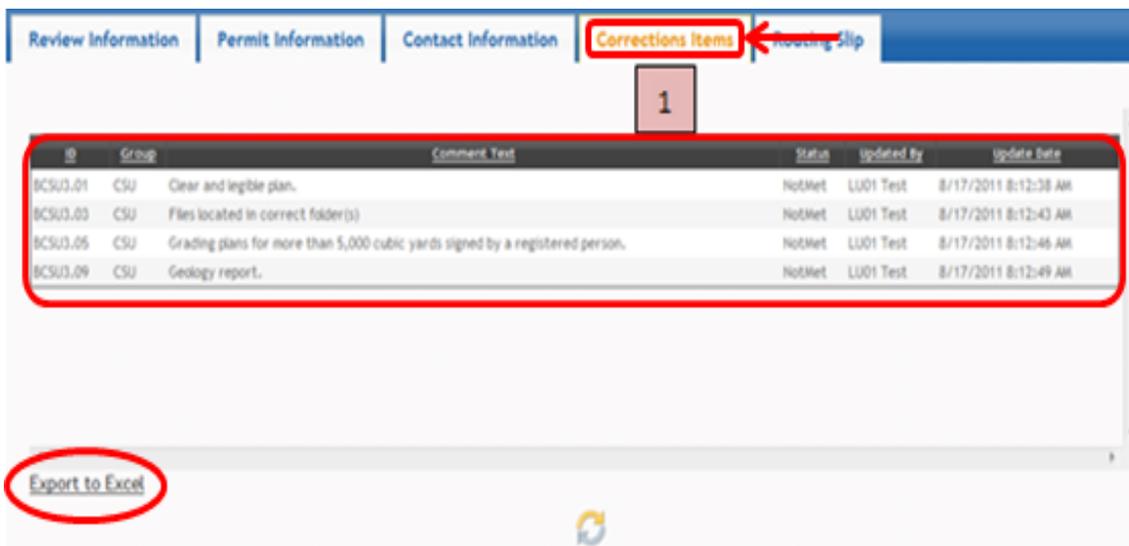
- Next click on the Workflow Portals button shown below to open the project task list.



Then click on the 'ApplicantResubmit' task link. Click OK when asked 'Do you want to accept task?'



9. When the eForm opens click on the 'Corrections Items' tab to view only the required corrections.



10. Select Export to Excel (ref. to link circled in red in the previous image) to create a spreadsheet of all checklist review comments to be used as the applicants response. Insert rows below not met comments to indicate how they are being addressed in the revised file.

11. Move the vertical slider bar downward to see the complete eForm as shown in the following image.

The screenshot displays the 'DEPARTMENT REVIEW' interface. At the top, there is a header bar with a logo, the text 'DEPARTMENT REVIEW - Review Cycle: 2', and a red box labeled '2' next to the cycle number. Below this is a navigation bar with 'GROUP', 'MARKUP', 'FILE', and 'ACTION' tabs. The main content area features a table with the following columns: 'CYCLE', 'DEPARTMENT', 'REVIEWER', and 'STATUS & NOTES'. The table contains one row with a checked checkbox in the first column, '2' in the second, 'BUILDING AND SAFETY' in the third, and 'LU04 TEST' and 'LUTEST04@LUSO.SBCOUNTY.GOV' in the fourth. To the right of the table, there is a dropdown menu set to 'Corrections Needed', a text area, a 'VIEW CHECKLIST' link, and a checkbox labeled 'PLAN REVIEW AND/OR ASSIGNMENT COMPLETE'. Below the table is a 'Task Instructions' section with three checkboxes, each with a red box labeled '3', '4', and '5' respectively. The instructions are: 'I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the lower left hand corner of the tab.', 'I have addressed all of the items in the File Markups above that were identified during the Plan Review.', and 'I have uploaded the revised drawings into the "Plans" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files.'. At the bottom right, there are 'Complete' and 'Save And Close' buttons. At the bottom center, there is an 'Email:' field with a 'Go' button. The footer indicates 'eForm Version: DEV VERSION 2.0'.

1. Consolidated department checklist (ref. to previous 'Corrections Items' image)
2. Review cycle & department review information
3. Checkboxes one (1) and two (2) are confirmation that you have read and corrected the issues
4. Checkbox three (3) is confirmation you have uploaded all new and/or corrected files

5. Resubmit Complete button.

(1) Consolidated department checklist

One or more departments may use the Checklist feature in the eForm. All checklist items will be reviewed again in the subsequent cycle(s). Only items with a Status of 'Not Met' will be displayed in the checklist below.

ID	Group	Comment Text	Status	Updated By	Update Date
BCSU3.01	CSU	Clear and legible plan.	NotMet	LU01 Test	8/17/2011 8:12:38 AM
BCSU3.03	CSU	Files located in correct folder(s)	NotMet	LU01 Test	8/17/2011 8:12:43 AM
BCSU3.05	CSU	Grading plans for more than 5,000 cubic yards signed by a registered person.	NotMet	LU01 Test	8/17/2011 8:12:46 AM
BCSU3.09	CSU	Geology report.	NotMet	LU01 Test	8/17/2011 8:12:49 AM

Export to Excel

(2) Review Cycle

The Review Cycle dropdown allows the user to review any review cycle information. The Review cycle also displays near the top in the Review Information tab of this eForm.



(3) Checkbox 1, 2, & 3

Checkbox one (1) asks for confirmation that the checklist and the comments in the eForm have been reviewed. Checkbox two (2) asks for confirmation that you have reviewed all the markup comments (red lines) attached to the drawings. Checkbox three (3) confirms that you have uploaded revised drawings and/or documents using the SAME FILE NAMES.³

³ **Please Note: If you are re-submitting corrected files (Documents and Plans) you should always re-submit them with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so reviewers can easily differentiate between revisions and review the most recent document.**

Task Instructions

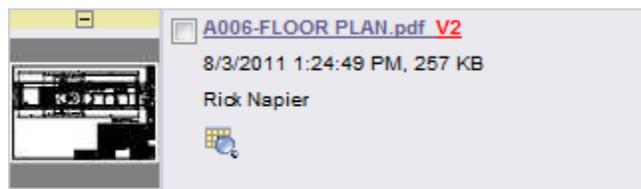
I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the lower left hand corner of the tab.

I have addressed all of the items in the File Markups above that were identified during the Plan Review.

I have uploaded the revised drawings into the "Plans" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files.

Checkbox three (3) asks for confirmation that you have corrected the plans and/or documents per the reviewer's request and that you have uploaded them into the appropriate folder. The Upload dialog is identical to your initial upload. It is important that corrected plans and documents have the same file name as the existing file name in ePlans. Keeping the exact same file name allows ePlans to associate the revised file with the previous submittal.

When uploading revised files, they will show in blue screen as candidates for versioning. If you are uploading a corrected file and it does not show in blue, the file names likely do not match. Once the file has been uploaded it will display the version number, V2 for example, to indicate which version of the file you are viewing.



(4) Resubmit Complete

When you are ready to complete the task and exit the form, click the "Complete" button.

Approval

When the plan review is approved by all reviewers, you will be notified by email.

Print Approved Plans

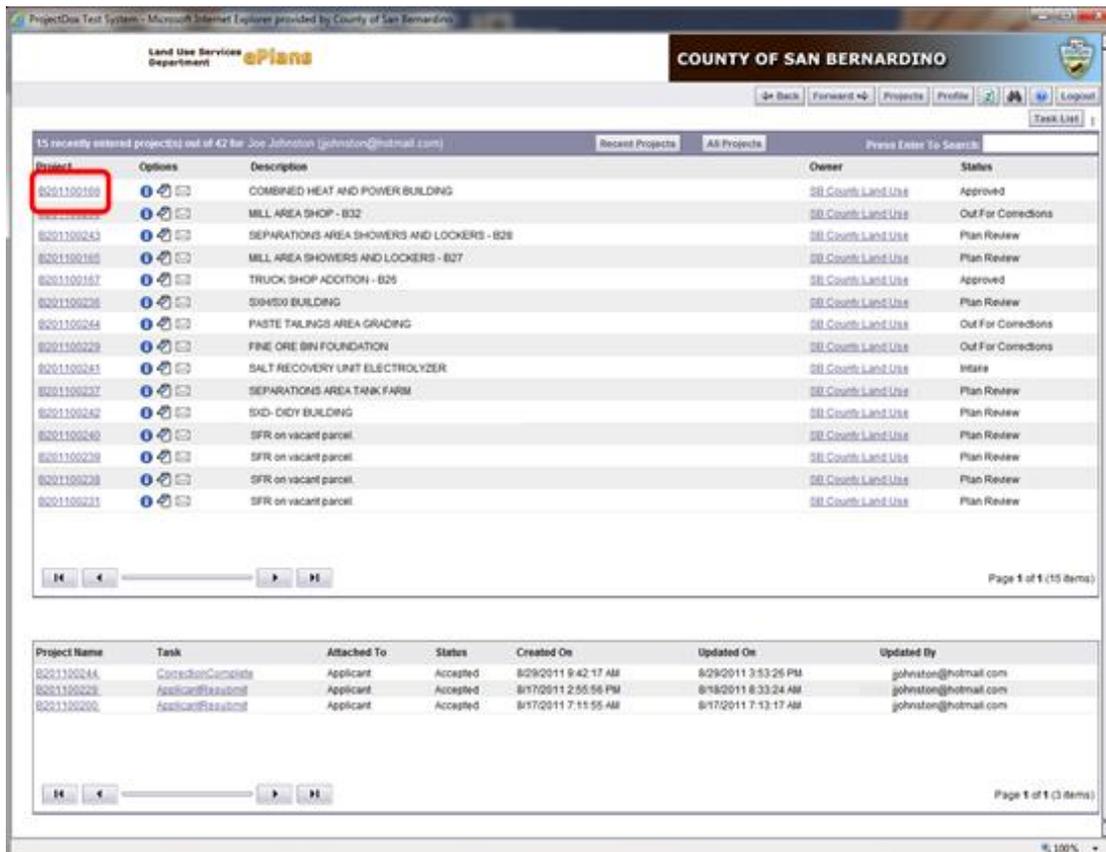
After an approval has been issued the plans will be electronically stamped by the County. You will then receive an e-mail indicating that your application is ready and instructions on how to download and print your files. Approved drawing and/or document files will be in the "Approved" folder and available for download. One set of approved plans must be printed and available at the job site during all inspections.

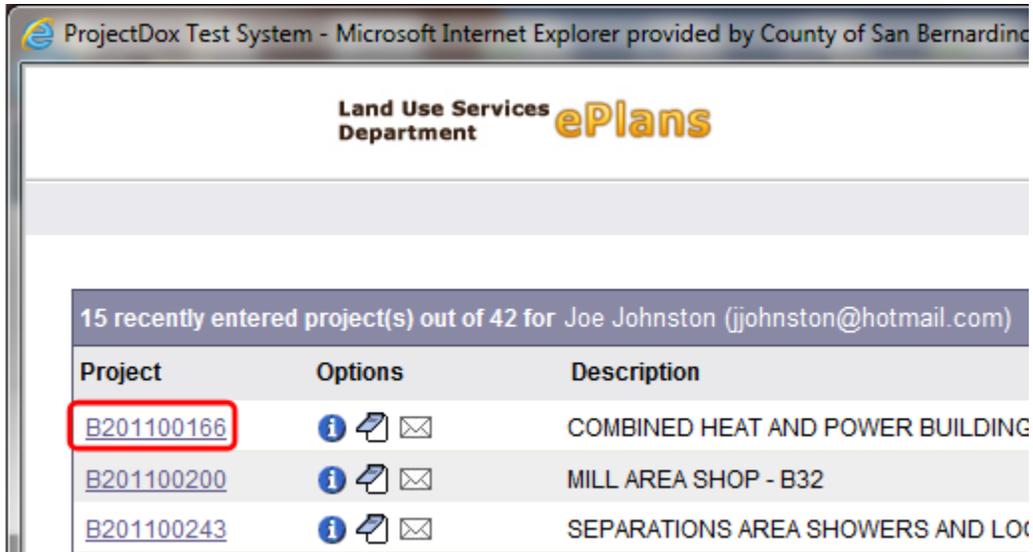
ePlan Reports

Electronic Plan Review reports are available from the main project screen. These reports allow the applicant to retrieve vital summary information about their project including: each department assigned to the review and the status, all file markups, the time a task is the responsibility of a user or user group, and a task routing report of status, user group, user, and cycle in the workflow.

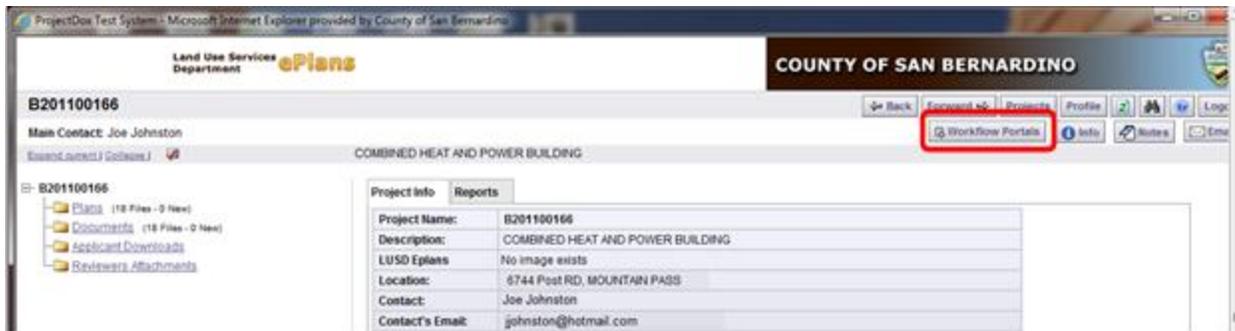
Retrieving Available Reports

1. To retrieve available reports login to the ePlans website with your user ID (email address) and current password using the following link <https://projectdox.lu.sbcounty.gov/projectdox>. If you are having issues with the login and you have already logged in at least once review the [Existing User](#) section of this manual for assistance. Otherwise follow the directions to setup your initial [New Users](#) account.
2. When you have successfully logged into ePlans, the projects screen will display. Your 15 most recent projects for which you have access will display in the list. To see the full list of your projects, click the "All Projects" button. Select (click the link) of the specific project that you wish to review the reports for (in this instance project B201100166).

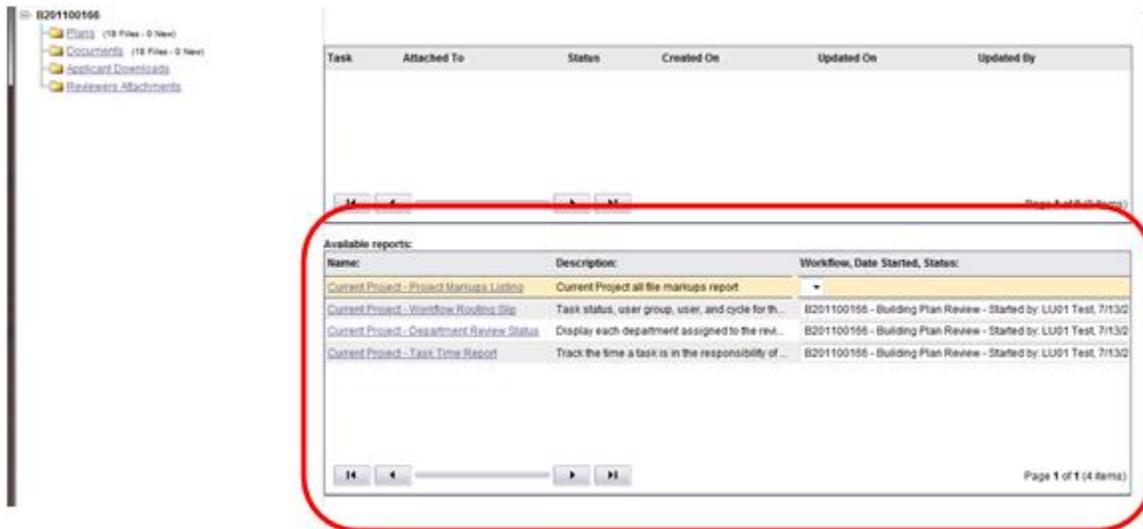




- When the main project screen appears click on the Workflow Portals button to open Available reports.



4. The Available reports sub-section appears with a link to several reports:
 - a. Project Markup Listing – all project markups.
 - b. Workflow Routing Slip – task status, user group, user, and cycle for the workflow.
 - c. Department Review Status – each department assigned to the review and the status.
 - d. Task Time Report – the time a task is in the responsibility of a user or user group.

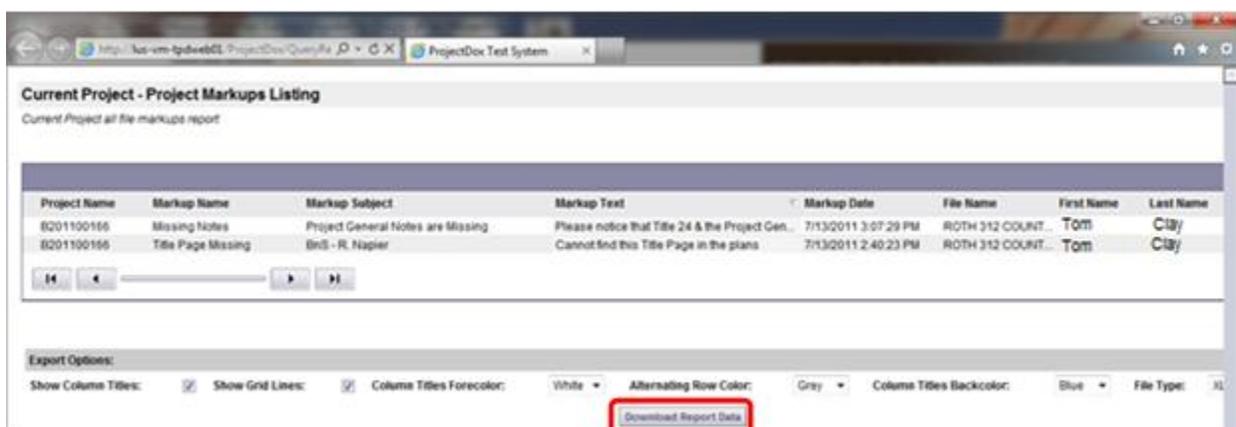


Project Markup Listing

This report contains information on each markup in the project plans: Name, Subject, Text, the File Name, and the First and Last Name of the reviewer applying the markup.

Note that you can download this report by clicking on the Download Report Data

[Download Report Data](#) button located in the Export Options section at the bottom of window.



Workflow Routing Slip

The workflow routing report contains information on the status of each task either completed or still in-progress: Task Name, Status, Date Created, Date Updated, Name (group or individual completing the task), Review Cycle, and date Completed. Incomplete tasks will be indicated by an open entry under the 'Completed' date column.

Note that you can download this report by clicking on the Download Report Data

Download Report Data button located in the Export Options section at the bottom of window.

Current Project - Workflow Routing Slip
Task status, user group, user, and cycle for the workflow

TaskName	Task Status	DateCreated	DateUpdated	Name	TaskUser	ReviewCycle	Completed
GroupPreScreen	Complete	7/13/2011 2:11:34 PM	7/13/2011 2:13:30 PM	CSU	LU01 Test	0	7/13/2011 2:1
PreScreenReview	Complete	7/13/2011 2:13:31 PM	7/13/2011 2:18:37 PM	CSU	LU01 Test	0	7/13/2011 2:1
BeginReview	Complete	7/13/2011 2:18:38 PM	7/13/2011 2:26:52 PM	Plan Review PM	Rick Napier	1	7/13/2011 2:2
DepartmentReview	Complete	7/13/2011 2:26:53 PM	7/13/2011 3:42:27 PM	lules04@lusd.sbcounty.gov	LU04 Test	1	7/13/2011 3:4
ReviewQA	Complete	7/13/2011 3:42:27 PM	7/14/2011 9:46:12 AM	Plan Review PM	LU02 Test	1	7/14/2011 9:4
ReviewComplete	Complete	7/14/2011 9:46:12 AM	7/14/2011 9:56:42 AM	Plan Review PM	LU02 Test	1	7/14/2011 9:5
ApplicantResubmit	Complete	7/14/2011 9:56:42 AM	7/14/2011 11:05:32 AM	Applicant	Rick Napier	1	7/14/2011 11:
ResubmitReceived	Complete	7/14/2011 11:06:33 AM	7/14/2011 12:17:30 PM	Plan Review PM	LU02 Test	2	7/14/2011 12:
DepartmentReview	Complete	7/14/2011 12:17:31 PM	7/14/2011 12:57:17 PM	lules04@lusd.sbcounty.gov	LU04 Test	2	7/14/2011 12:
ReviewQA	Complete	7/14/2011 12:57:17 PM	7/14/2011 1:20:23 PM	Plan Review PM	LU02 Test	2	7/14/2011 1:2
ReviewComplete	Complete	7/14/2011 1:20:23 PM	7/14/2011 1:27:20 PM	Plan Review PM	LU02 Test	2	7/14/2011 1:2
PlanApproved	Complete	7/14/2011 1:27:20 PM	7/14/2011 1:42:57 PM	Plan Review PM	LU02 Test	2	7/14/2011 1:4
ZeroBalance	Pending	7/14/2011 1:43:03 PM	7/14/2011 1:43:03 PM	CSU		2	

Export Options:
 Show Column Titles: Show Grid Lines: Column Titles Forecolor: White Alternating Row Color: Grey Column Titles Backcolor: Blue File Type: XL
[Download Report Data](#)

Department Review Status

This report contains information on all departments involved in the review process as indicated under the 'GroupName' column shown below. In addition the report provides information on the Review Cycle, Reviewer Name, Reviewer Status, and any Reviewer Comments.

Note that you can download this report by clicking on the Download Report Data

[Download Report Data](#) button located in the Export Options section at the bottom of window.

Current Project - Department Review Status
 Display each department assigned to the review and the status

ReviewCycle	ReviewerName	ReviewStatus	ReviewComments	GroupName
1	LU04 Test	Corrections Needed	Applicant is missing the drawing title page.	Building and Safety
2	LU04 Test	Approved		Building and Safety

Export Options:
 Show Column Titles: Show Grid Lines: Column Titles Forecolor: White Alternating Row Color: Grey Column Titles Backcolor: Blue File Type: XL

[Download Report Data](#)

Task Time Report

The Task Time Report provides information on status of the tasks (Upper Grid); and/or the total time spent (column labeled 'Duration') by the assigned party (column labeled Name) for that Review Cycle (Lower Grid).

Note that the user needs to decide which grid to download by selecting the corresponding option button , then clicking the Download Report Data [Download Report Data](#) button located in the Export Options section at the bottom of window.

Current Project - Task Time Report
Track the time a task is in the responsibility of a user or user group

TaskName	Name	TaskUser	ReviewCycle	Completed
GroupPreScreen	CSU	LU01 Test	0	7/13/2011 2:13:30 PM
PreScreenReview	CSU	LU01 Test	0	7/13/2011 2:18:37 PM
BeginReview	Plan Review PM	Rick Napier	1	7/13/2011 2:26:52 PM
DepartmentReview	lules04@luisd.sbcounty.gov	LU04 Test	1	7/13/2011 3:42:27 PM
ReviewQA	Plan Review PM	LU02 Test	1	7/14/2011 9:46:12 AM
ReviewComplete	Plan Review PM	LU02 Test	1	7/14/2011 9:56:42 AM
ApplicantResubmit	Applicant	Rick Napier	1	7/14/2011 11:09:32 AM
ResubmitReceived	Plan Review PM	LU02 Test	2	7/14/2011 12:17:30 PM
DepartmentReview	lules04@luisd.sbcounty.gov	LU04 Test	2	7/14/2011 12:57:17 PM
ReviewQA	Plan Review PM	LU02 Test	2	7/14/2011 1:20:23 PM
ReviewComplete	Plan Review PM	LU02 Test	2	7/14/2011 1:27:20 PM
PlanApproved	Plan Review PM	LU02 Test	2	7/14/2011 1:42:57 PM
ZeroBalance	CSU		2	

Select grid for download **Select Upper Grid**

Name	ReviewCycle	Duration
Applicant	1	0 days: 2 hours: 10 mins
CSU	0	0 days: 0 hours: 7 mins
CSU	2	0 days: 0 hours: 0 mins
lules04@luisd.sbcounty.gov	1	0 days: 1 hours: 16 mins
lules04@luisd.sbcounty.gov	2	0 days: 0 hours: 40 mins
Plan Review PM	1	1 days: 18 hours: 22 mins
Plan Review PM	2	0 days: 2 hours: 56 mins

Select grid for download **Select Lower Grid**

Export Options:
 Show Column Titles: Show Grid Lines: Column Titles Forecolor: White Alternating Row Color: Grey Column Titles Backcolor: Blue File Type: XL
[Download Report Data](#)

Vista and Windows 7 Install Instructions

Sometimes users will encounter errors or issues as a result of incomplete installation of the client components. This is often caused by permissions issues. The instructions below have proved useful in resolving the security/permissions issues and getting a successful installation. (The account executing these steps will need administrative privileges on the computer).

Uninstall-reinstall ePlans components

If the operating system is Vista or Windows 7, the user will need to turn OFF UAC first.

Additionally, if using IE 8, will need to turn off protected mode. (apparently turning of UAC in Windows 7 also disables protected mode for IE8)

Turning Off UAC in Windows Vista and Windows 7

Disable UAC on Windows Vista

Open up Control Panel, and type in "UAC" into the search box. You'll see a link for "Turn User Account Control (UAC) on or off":



On the next screen you should uncheck the box for "Use User Account Control (UAC)", and then click on the OK button.



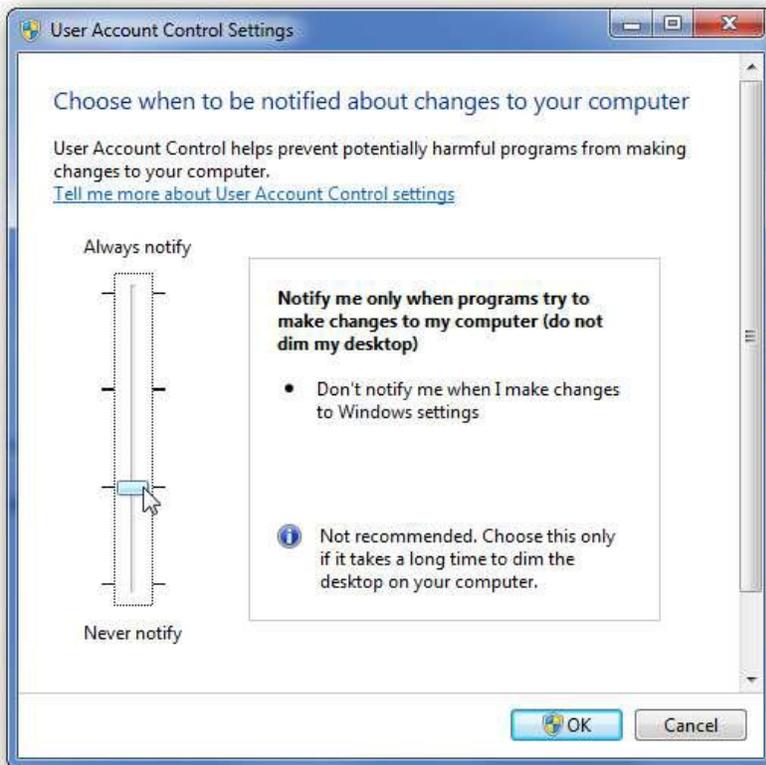
You'll need to reboot your computer before the changes take effect, but you should be all done with annoying prompts.

Disable UAC on Windows 7

Windows 7 makes it much easier to deal with UAC settings, and in fact you don't have to completely disable UAC if you don't want to. Just type UAC into the start menu or Control Panel search box.



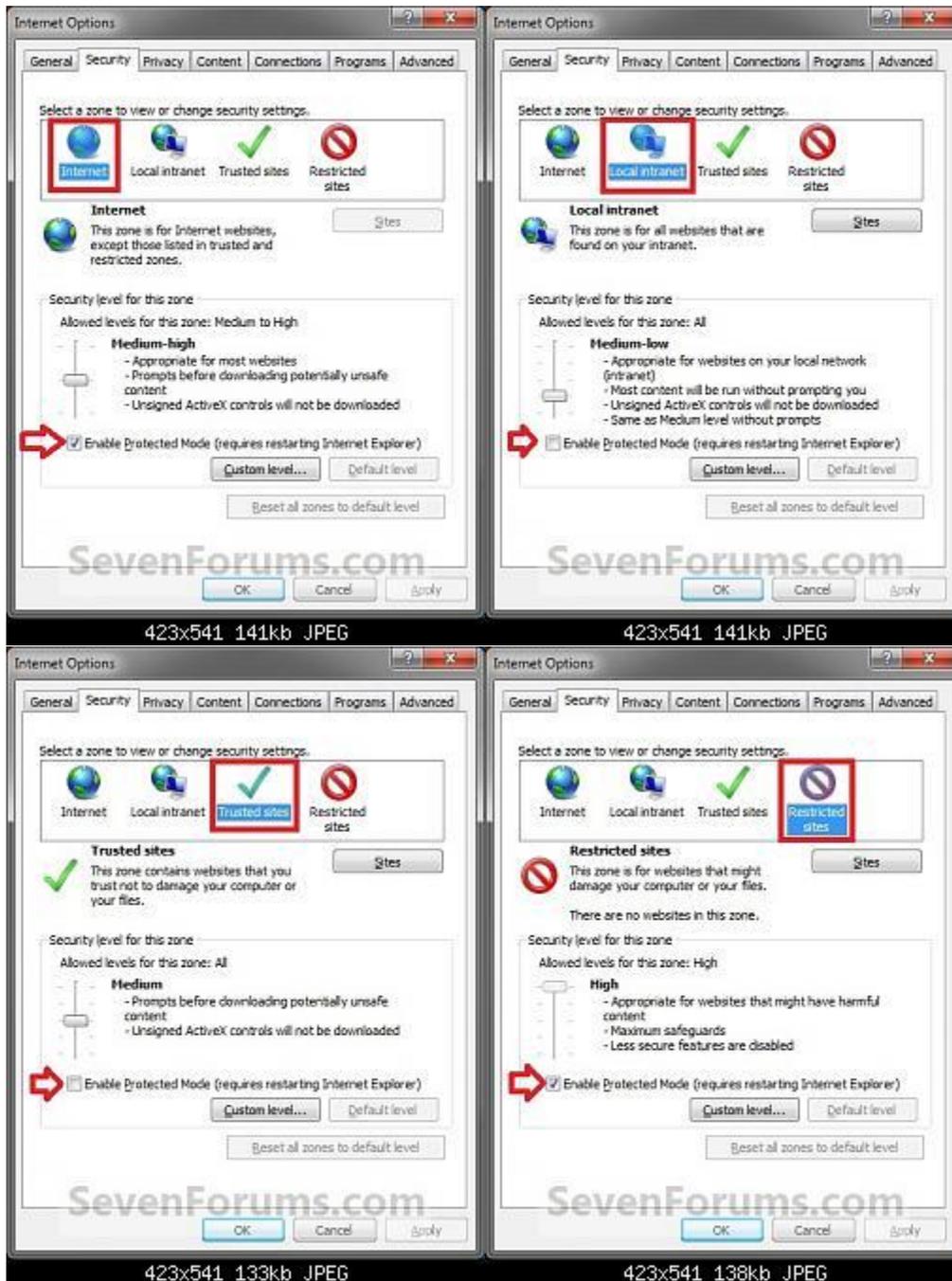
You can simply drag the slider up or down, depending on how often you want to be alerted.



If you drag it all the way down to the bottom, you'll have disabled it entirely.

Turning off Protected mode in IE8

1. Open Internet Explorer 8 (IE8) or Internet Explorer 9 (IE9).
2. Click on **Tools** on the menu bar, and **Internet Options**.
3. In the **Security** tab, select the zone that you want to turn protected mode on or off in. (see screenshots below)



4. To Turn On Protected Mode

- a. Check the **Enable Protected Mode** box, and click on **Apply**. (see screenshots above)
- b. Go to step 6.

5. To Turn Off Protected Mode

- a. Uncheck the **Enable Protected Mode** box, and click on **Apply**. (see screenshots above)
6. Repeats steps 3 to 5 if you want to turn protected mode on or off for any other zone.
7. When done, click on **OK**. (see screenshots above)
8. Close and reopen Internet Explorer to apply.

Then follow these steps:

Remove ALL ePlans components on the client:

1. Check for presence of program, and remove if found, using either a. or b. depending on version of operating system you are using:
 - a. VISTA, Windows 7 - Using Control Panel (in classic view) -> Program Features, if ePlans Components is listed then REMOVE
 - b. XP – Using Control Panel -> Add/Remove Programs, if ePlans Components is listed then REMOVE
2. In Internet Explorer (Internet Options->Browser History->Settings->View Objects - remove anything Brava, ePlans, or Xupload).
3. After the above is completed, delete these directories and their contents: **IGC** (in Windows Vista or 7, do a search for the filename IGC to locate, then delete)
 - a. In XP Documents and Settings->User Account->**IGC**
 - b. In XP Program Files->Avolve->**Components**).

(Again, if Vista or Windows 7, UAC must be OFF for the following to work):

You can reinstall the ePlans components by clicking on the link on the login page.

Once the components are installed, you can turn UAC back on.

Frequently Asked Questions

Q: What is ePlans?

A: ePlans is the name for our new computerized system providing for the digital submittal and review of plans. This system is expected to replace the paper based approach we have been using up until the implementation of our automated system.

Q: Do I still need to come to the Land Use Services Department offices?

A: Yes – at least for the time being. The long term plan would allow applications to be filed on-line, thus eliminating the need for an applicant to come into the office.

Q: How do I get started?

A: In order to use ePlans, you will need to start the process by visiting or calling one of the Land Use office locations noted at the beginning of this user manual. Once we process your request, you will get an invitation via email on how to proceed with your project.

Q: After I have submitted my payment at the Land Use Service Department, how long do I have to upload my digital files?

A: You will have 180 calendar days to upload your files onto the ePlan submittal website.

Q: Is the ePlans process 100% paperless?

A: During the submittal and review process ePlans is entirely paperless. When your plan is approved by all the reviewers, you will receive an e-mail indicating that your plans are approved and ready for download. There will be instructions for how to print and download your files. One set of approved plans will need to be printed and made available during all inspections.

Q: I am a Mac user can I run ePlans in a Mac environment?

A: ePlans requires Internet Explorer v6.0 or higher.

Q: If I have multiple projects do I need multiple log-ins?

A: No, you will need only one login for all the projects that you manage.

Q: Why am I receiving the message “The email address or password you entered is incorrect” even though I enter my password correctly?

A: Passwords are case sensitive. Be sure that your password is in the proper case.

Q: What are the business hours for ePlans?

A: ePlans is 24/7 and can be accessed at anytime and anywhere.