Plan Submittal Guide

Contents

Plan Submittal

The Plan Submission web site allows you to submit your plans electronically. Steps for submitting plans, site, and file requirements are detailed in this document. _Please read the entire document before beginning your submittal process._

Requirements

- You must create an account on this web site in order to upload plans
- All plans must be submitted in the form of PDF's, DWF's, or TIF Images
- You are responsible for obtaining all permits, and payment of fees for your project
- You are responsible for scheduling inspections after the work has been started.

Account Creation

To register for an account, navigate in your web browser to:

https://eplanreview.huntsvilleal.gov/PlanReview/

1. Click the "Register" link in the upper right-hand corner of the web page.
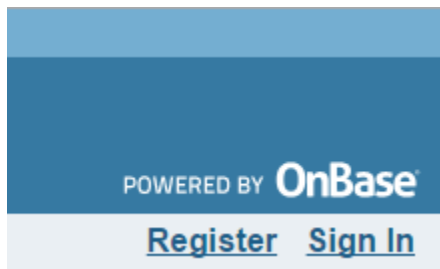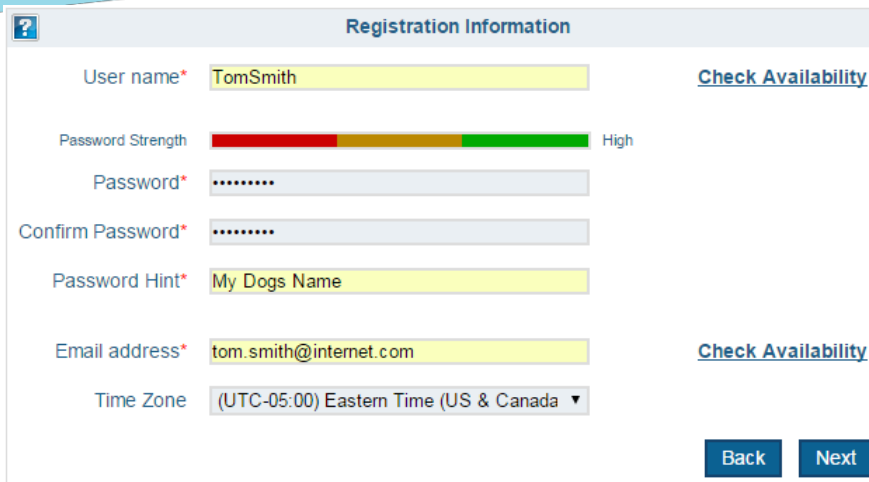
2. You will be presented with "Disclaimer" language that you must accept to proceed.

3. The "Registration Information" screen is now loaded. This is where you create a User Name, Password, and an email address that you can be contacted at to receive updates on the status of your project. Additionally, you can check for the Availability of your chosen User Name and email address. When creating your password, it should be at least 5 characters long. For passwords with 'High' strength, you should include a number and an upper-case character. Be sure to enter a "Password Hint" that will be used to retrieve your password in the event that it is forgotten.
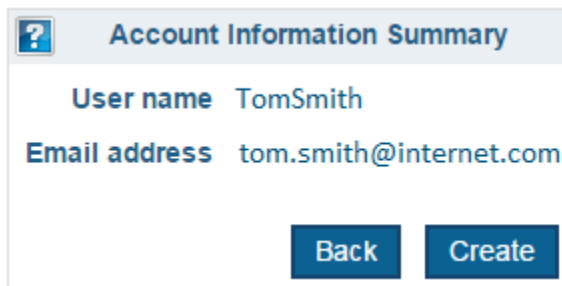
4. Click "Next" to register the account and go on to the next step.

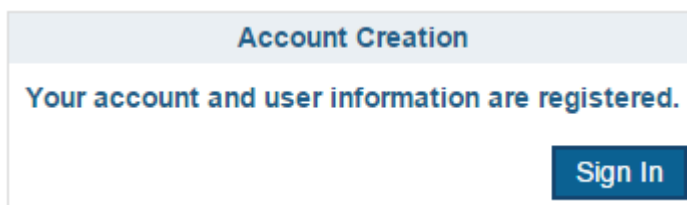5. A confirmation screen with your username and email address will appear, click "Create".

6. Your registration is complete.
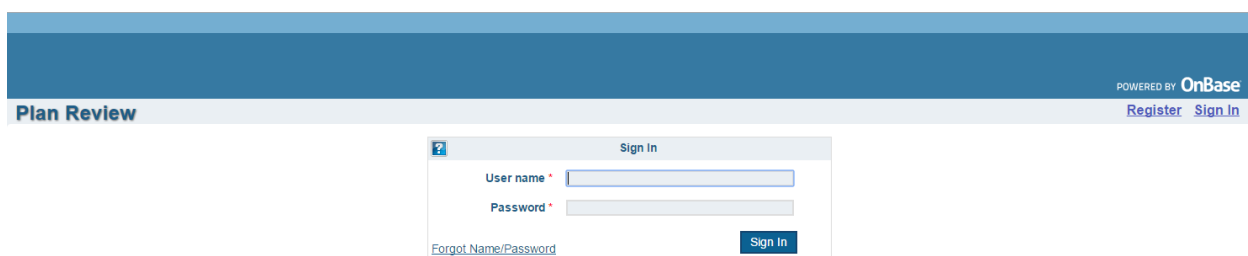
Signing In

Sign into the account using the username and password you created in the previous steps.
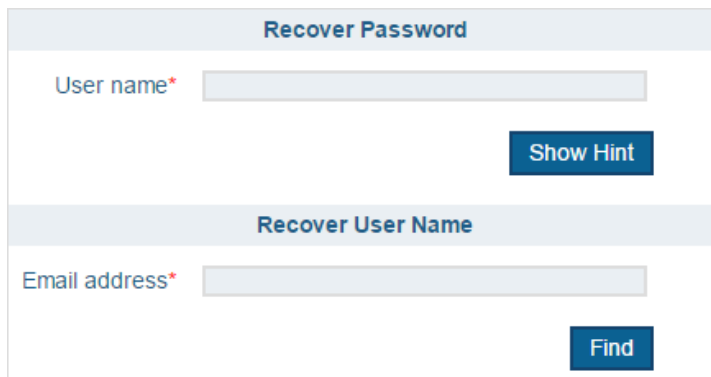
To retrieve a lost username or password, click on "Forgot Name/Password" on the sign in page
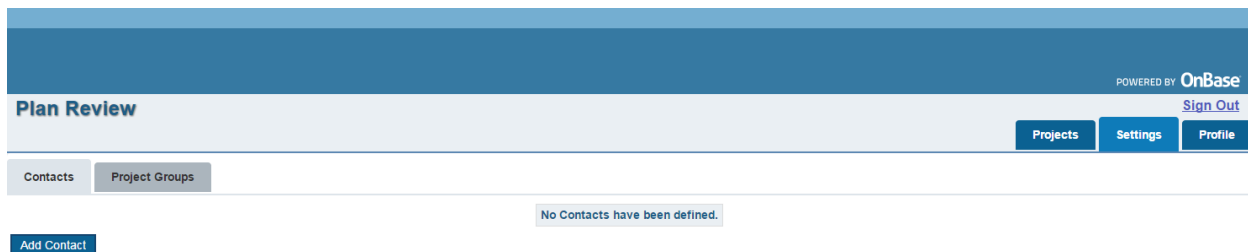
To recover a password or username click "Show Hint"

To recover the username email click "Find". The username will be sent to the email registered for the username.

Adding Contacts

After the account has been set up and the user has logged in they have the ability to create a list of contacts. This list can be added to at any time. This is done by clicking on the "Settings" tab and selecting the "Add Contact" button.

Add Company

OnBase®
by Hyland

To add a company, click "Add" next to the company drop down list. This will add the company name to the drop-down list, which can be used to select the company name for the contact.

Enter the company name, address and business phone number in their respective areas. Click "Add" to add the company to the list.

OnBase®
by Hyland

The company name is added to the list and will be available in the drop-down list for adding a contact. The company information can also be edited. Select the company name from the drop- d o w n list. Enter contact name, address, business phone number, cell phone number and email.   If the contact address is the same as the company address, click "Copy" for 'Use Company Address'. Click 'Add' to add the contact to the list of contacts for the account.

Edit/Delete Contact

The contact is added to the list of contacts. Contact information can be edited if necessary by clicking on the "Edit" icon under Actions. The contact can be deleted by clicking on the "Delete" icon under "Actions".

Edit the Account Profile

In the "Profile" tab is the user profile information. Password, password hint, and email address can be changed by the user in "Profile" tab.

Access Projects

To access your projects, select the "Projects" tab. The list of projects can be filtered for a given time period. Click on the drop-down box to select the time period. The blue arrow icon will open the list of "Additional Search Fields". These fields can be used to search for projects. Click on the blue arrow icon and it will close the list of fields.

NOTE: You can navigate back to your projects at any time by clicking on the "Projects" tab.

View Within Last 6 Months ▼ ⌃

Advanced Search Fields	
Project Name	
Project ID	
Alternate ID	
Group Name	
Parcel ID	
Site Address	
Street Number	
Street Name	
City	
State / Province / Region	▼
Postal Code	
Contact Company Name	
Contact First Name	
Contact Last Name	

[Find]

Group	Identifier	Name	Create Date	Status	Open
<None>	RES-135	Garage	2/9/2015	Plan Submission	

Add a New Project

To add a new project, select a review type from the drop down under "Start New Project" and click "Add Project"

Plan Review

Start New Project

Review Type
Residential ▼

[Add Project]

Enter in your project information, Location Parcels, and any Associated Review Type Information (Commercial, Residential and Fire Protection)

OnBase®
by Hyland

Project Information

Name*	Out Building
Alternate ID	
Review Type	Residential

Site Address

Street Number	21966
Street Name *	Bradley Rd
City *	Westlake
State / Province / Region *	OH ▼
Postal Code *	44012

Roles +

Location Parcels +

Associated Review Type Information

Permit #

456789

Addition Project Description

30x40 Outbuilding, with heat and plumbing.

OnBase®
by Hyland

Editing a Project

If at any time you need to change any of the information defined in a project you can simply click the "Edit" link in the top right corner of the Project Information"
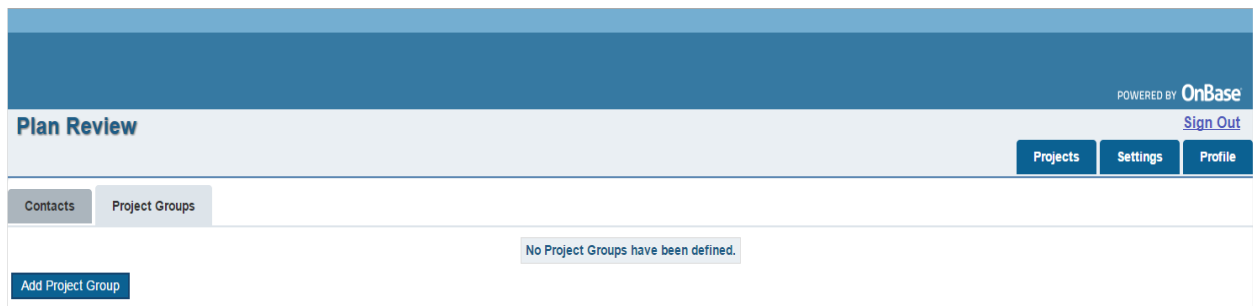
Edit

Project Information

Name	Out Building
Identifier	RES-136
Alternate ID	
Review Type	Residential

Project Groups

Optionally individual related projects can be grouped together under one master project. Project groups are created from the "Settings" tab on the main screen and then by clicking on the "Project Groups" tab next to "Contacts".

POWERED BY **OnBase**

Sign Out

| Projects | Settings | Profile |

OnBase®
by Hyland
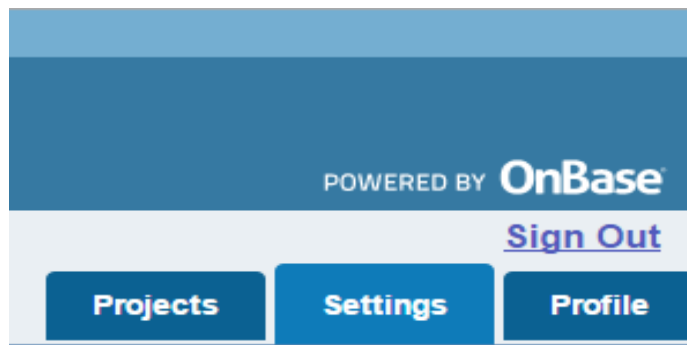
Click the "Add Project Group" button and enter the desired "Name" then click "Save".

The new Project Group will be added to the list of Project Groups that can be selected from the main project screen. These can also be changed or deleted at any time by using the icons for Edit and Delete under the "Actions" tag.
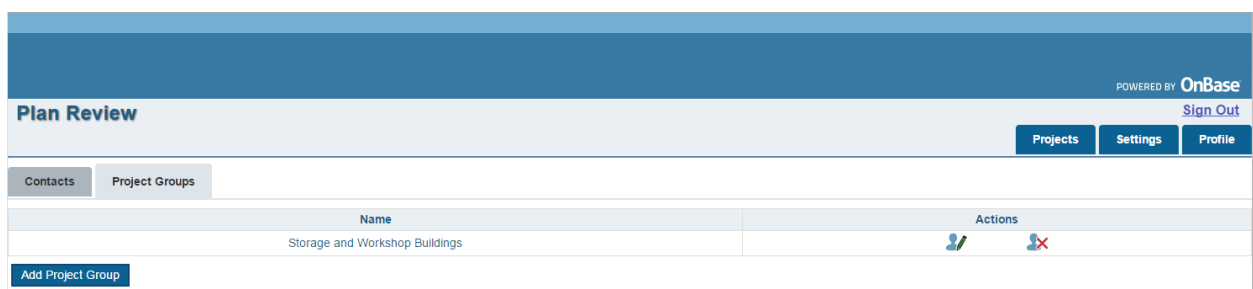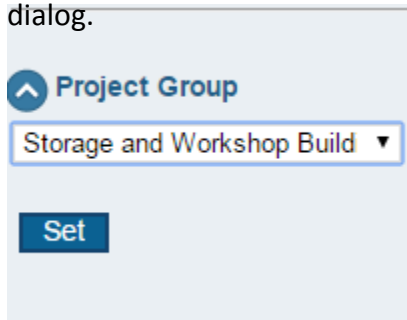

Group a Project

To group projects, start by clicking the "Group Project" link on the left side of the screen.
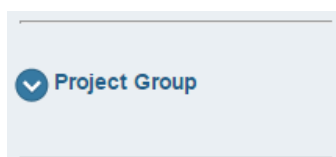
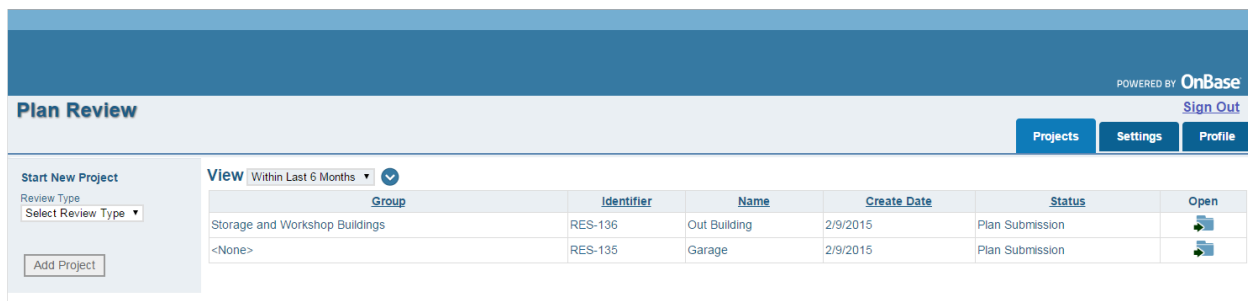Click the blue arrow icon to open the selection and click the "Set" button to open the Grouping dialog.

Once a group has been applied to a project(s) those projects will be grouped together on the main screen.

Uploading Plan Documents

To begin uploading plan documents select the "Plan Documents" tab, then select the "Browse" button.

Plan Review

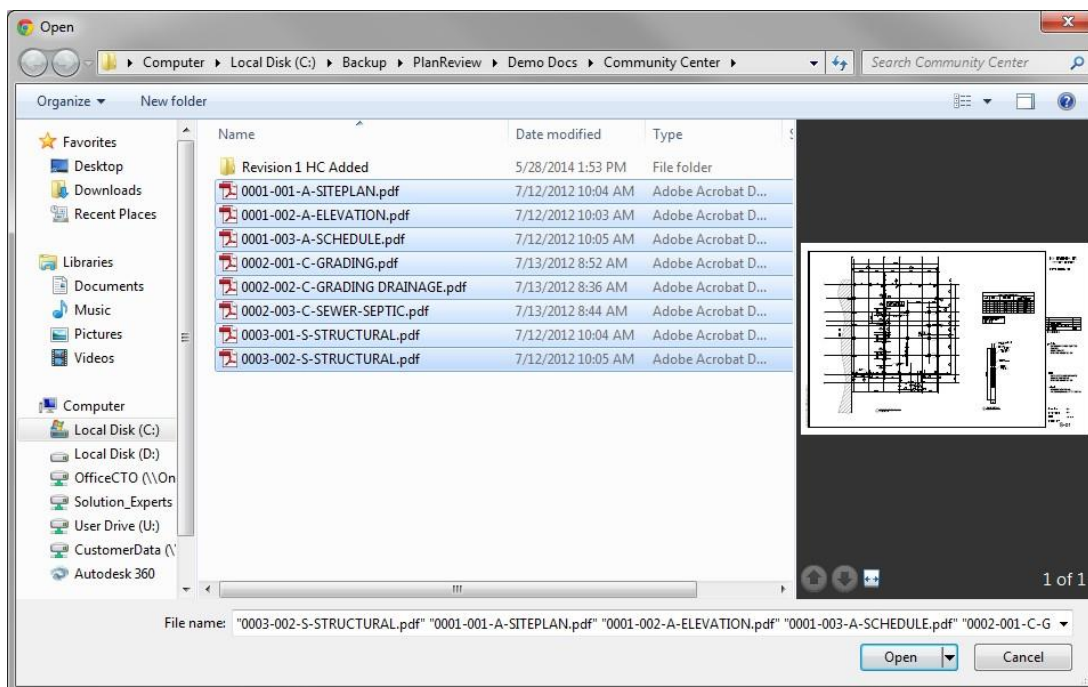| Project Information | Plan Documents | Review Documents | Approved Documents |

[Browse...] [Clear] [Upload] [Cancel] Status: Ready

Project
RES-136
Group
Storage and Workshop Buildings
Name
Out Building
Status
Plan Submission

Review Status
None

Actions
Submit for Review

Then select the file(s) you wish to upload. The browse dialog that appears allows you to select multiple items using Shift-Click or Control-Click. After you have selected the appropriate items, click the "Open" button.

The selected items will be loaded into the "Plan Documents" screen for your review and a ready to be uploaded. It is at this point that a user can review the items in they selected and verify

OnBase®
by Hyland

that they are correct.

If it is determined that any of those items are incorrect they can be deleted from the list before being upload by clicking the remove item icon under "Actions".

If they items selected are correct click on the "Upload" button. As the documents are being upload the "Upload Status" will change from "Pending Upload" to "Uploaded"

NOTE: Due to the naming convention specified on the files being uploaded, these selections were automatically categorized by Discipline and Sheet Type. Discipline and Sheet Type can also be selected manually. See the Naming Convention section of this document for more detail.

	Name	Discipline	Sheet Type	Description	Revision
☐	0001-001-A-SITEPLAN	Architectural ▼	Siteplan ▼		New
☐	0001-002-A-ELEVATION	Architectural ▼	Elevation ▼		New
☐	0001-003-A-SCHEDULE	Architectural ▼	Schedule ▼		New
☐	0002-001-C-GRADING	Civil ▼	Grading ▼		New
☐	0002-002-C-GRADING DRAINAGE	Civil ▼	Grading ▼		New
☐	0002-003-C-SEWER-SEPTIC	Civil ▼	Sewer-Septic ▼		New
☐	0003-001-S-STRUCTURAL	Structural ▼	Structural ▼		New
☐	0003-002-S-STRUCTURAL	Structural ▼	Structural ▼		New

When you are ready to upload your plan documents, click the "Upload" button.

Browse...   Clear   Upload   Cancel   Status: Ready

When this confirmation box appears click "Yes".

? Are you sure you want to upload the document changes?   Yes   No
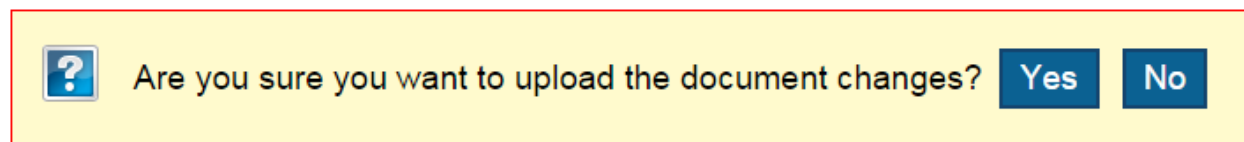
Submit for Review

Once you have successfully uploaded your plan documents the last step is to click the "Submit for Review" link in the bottom left of the screen.

Review Status
None

Actions
Submit for Review
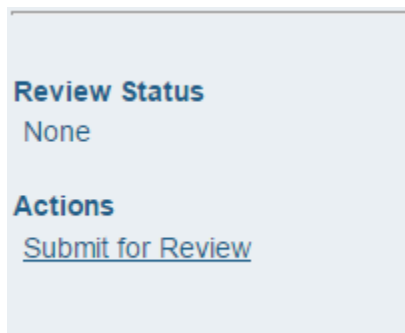
Your plans documents have been submitted for review.

NOTE: You can change plan documents, remove/add as long as the review cycle has not been started by the reviewer.

Review Documents

The "Review Documents" tab is where plan documents that have been reviewed appear. Plan

OnBase®
by Hyland

documents in this state may require review and correction by the submitter.

Plan Review

| Project Information | Plan Documents | Review Documents | Approved Documents |

Project
RES-136
Group
Storage and Workshop Buildings
Name
Out Building
Status
Coordinator Review

Review Status
None

Review Cycle All ▾

Approved Documents

Approved Documents is where the approved plans will be uploaded by the reviewer. These will be available in either an Approved Plan Set, a combined PDF of all of your pages or Approved Plan Sheet, single pages of your plans.

Plan Review

| Project Information | Plan Documents | Review Documents | Approved Documents |

Project
RES-136
Group
Storage and Workshop Buildings
Name
Out Building
Status
Coordinator Review

Review Status
None

Approved Plan Sets ▾
Approved Plan Sets
Approved Plan Sheets

OnBase®
by Hyland

Related Projects

This displays all projects related to the project you are currently viewing, essentially it is the grouping that you assigned.

Plan Review

| Project Information | Plan Documents | Review Documents | Approved Documents | Related Projects | Project Invitations |

Project
RES-136
Group
Storage and Workshop Buildings
Name
Out Building
Status
Coordinator Review

Review Status
None

Group	Identifier	Name	Create Date
Storage and Workshop Buildings	RES-135	Garage	2/9/2015

Project Invitations

Project Invitations allow you to invite others to view or modify your project, such as your contractor, architect, plumber, etc.

Plan Review

| Project Information | Plan Documents | Review Documents | Approved Documents | Related Projects | Project Invitations |

Manage Invitations   Invite User

Project
RES-136
Group
Storage and Workshop Buildings
Name
Out Building
Status
Coordinator Review

Review Status
None

There are no project invitations.

OnBase®
by Hyland

To invite someone to view your project, click on "Invite User". When the Invite User dialog appears you will be able to specify whether you want the user to view just the Project or the Project Group. What kind of access they should have, "View Only" or "Upload", and their email address, then click the "Invite" button.

Manage Invitations   Invite User

Invite User	
Invite user to	Project ⦿ Project Group ○
Grant Access	\<None\> ▼
Email address*	[ ] Invite

NOTE: The invited user will have to create an account on the Plan Review site to use this feature.

Naming Conventions

Naming conventions are used to categorize documents when they are uploaded to the Plan Reviewers. A default naming convention has been set up to automate this process for you. To take advantage of this feature single page PDF's should be named according to the standards described below.

Example:
0001-002-A-ELEVATION.pdf – This states that this file will be in the *first* grouping of files (0001), and is *page 2* of that grouping (002), it is *Architectural* discipline (A), and is an *Elevation* sheet type (ELEVATION).

NOTE: This convention relies on the files being named exactly as they are in the "Disciplines" and "Sheet Types" charts below.

Explanation of naming convention parts:

File Name Part	Type and Format	Purpose/Definition
Global Sequence Number	4 Digits, 0 Padded from left	This number sets the overall position of every sheet in the plan set and will be used to sort the plan sheets when listed together
Separator	Dash	Character to separate file name section
Drawing Number	3 Digits, 0 Padded from left	Number defined by submitter, this can be used to identify the drawing to the architect/owner/engineer team or can be left as '000'
Separator	Dash	

OnBase®
by Hyland

	1 or 2 Alpha Char Must match predefined list	Used to define the Discipline type of the plan sheet, must match one of the predefined values in the Discipline list for [Name of county or city]
Discipline Identifier		
Separator	Dash	
Sheet Type Identifier	1-30 Alpha Char Must match predefined list	Used to define the sheet type of the plan sheet, must match one of the predefined values in the Discipline list for [Name of county or city]
Extension	File type	Identifies standard data file types. Plan Sheets should be PDF whenever possible, other reports and documents should be in their native format (Word, Excel, etc.) or converted to PDF whenever possible.

Disciplines

Possible Disciplines are:

Discipline Identifiers:	Full Name
G	General
H	Hazardous Materials
V	Survey/Mapping
B	Geotechnical
W	Civil Works
C	Civil
L	Landscape
S	Structural
A	Architectural
I	Interiors
Q	Equipment
F	Fire Protection
P	Plumbing
D	Process
M	Mechanical
E	Electrical
T	Telecommunications
R	Resource
X	Other
Z	Contractor/Shop Drawings
O	Operations

Sheet Types

Possible Sheet Types are:

Sheet Type Identifiers:
ALTA/ACSM Land Title Survey
Cover Sheet
Cross Section And Detail Sheet
Detail Sheet
Drainage
Electrical
Elevation
Environmental - 404
Environmental - Archeological
Environmental - Biological
Environmental - Geotechnical
Equipment Layout
Final Plat
Fixture Cut Sheet
Flood Plain Analysis
Flood Plan LOMAR
Floodplain CLOMAR
Floor Plan
Framing
Gis
Gis-Cad
Grading
Grading Drainage
Irrigation
Irrigation Drainage Paving
Irrigation Grading
Irrigation Grading Drainage
Landscape Overall
Landscape Partial
Lighting
Masonry
Minor Land Division
Off-Site Improvement
Off-Site Sewer
Off-Site Water
On-Site Improvement
On-Site Sewer
On-Site Water

Other
Paving
Photometric
Plumbing
Property Line Lighting
Schedule
Security Lighting
Sewer-Septic
Signing And Striping
Site Lighting Cut Sheets
Siteplan
Siteplan Partial
Stormwater
Structural
Survey
Traffic Report
Utility
Water

OnBase®
by Hyland