CITY OF MILPITAS

ePlan Review User Guide

OFFICE OF BUILDING SAFETY

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INTRODUCTION

Electronic plan submittal (ePlan) is a web-based solution which allows drawings and documents to be submitted electronically and have each city department perform their review, add a status, write a list of comments and place markups on the drawings. The City of Milpitas has selected *ProjectDox* by Avolve Software to provide its ePlan services. *ProjectDox* works with the city's permitting software allowing applicants to submit, have plan reviews completed, receive and respond to plan check comments, have projects approved and permits issued with the applicant never having to come into city hall.

This Manual provides basic information on the steps involved in using *ProjectDox* software for the Milpitas Office of Building Safety's ePlan Review Submittal process. The ePlan Review Submittal process replaces submitting paper plans at the Permit Center.
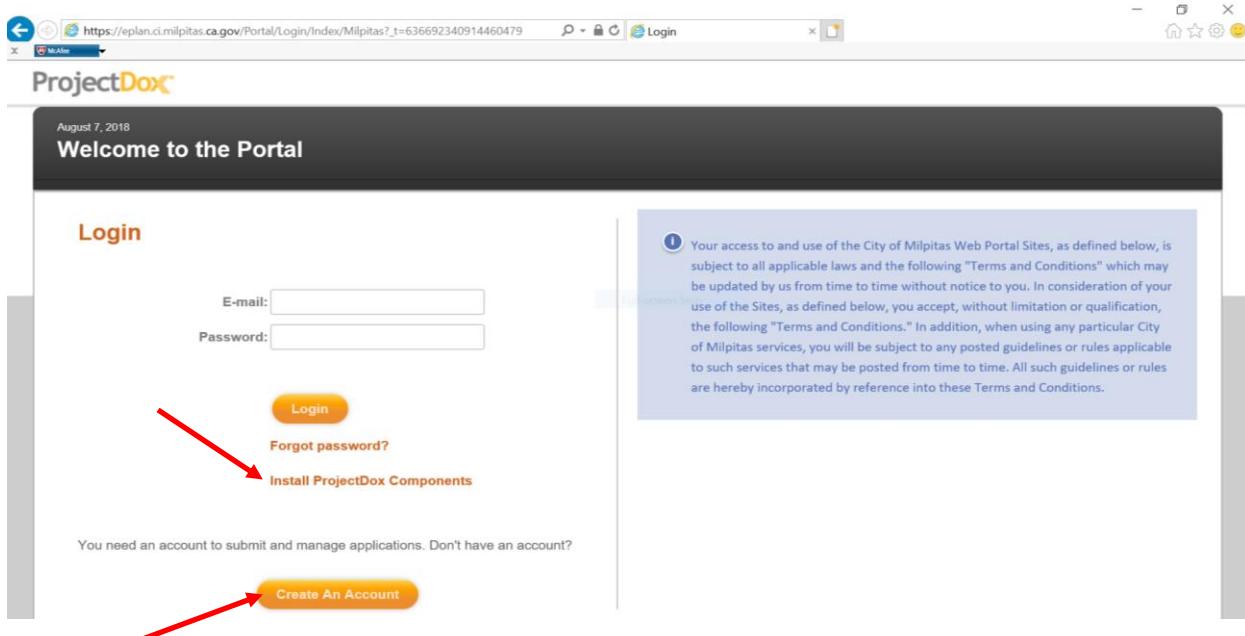
Additional information may be found by selecting the question (?) mark on each screen.

While most any browser will work, only Microsoft Internet Explorer (not Edge) will give you access to all of the software's features. Be sure your pop-up blockers are turned off.
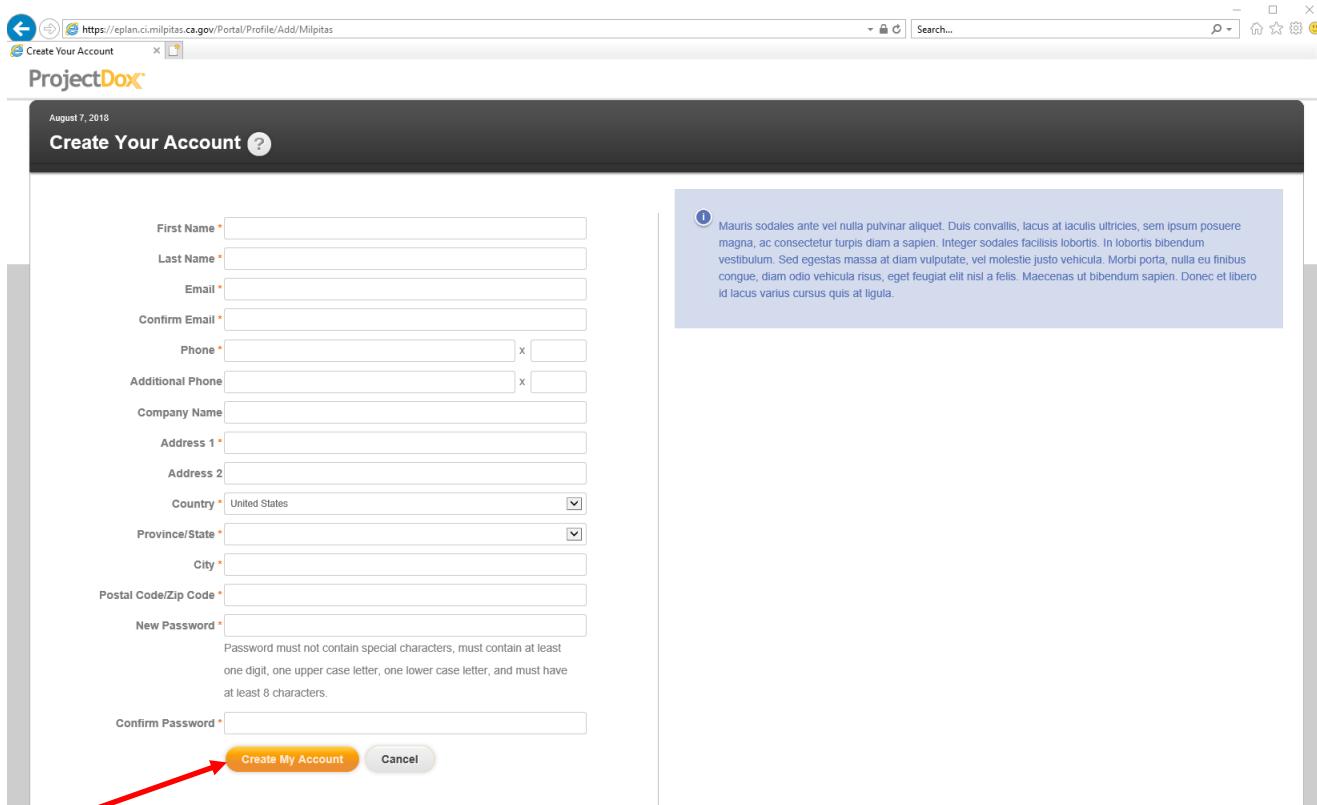
To log into ProjectDox, go to https://eplan.milpitas.gov/ and it will take you to the Portal (login) screen. Frequent users should create a shortcut to the Portal. **The system works best with any browser (Chrome, Firefox and Edge)**
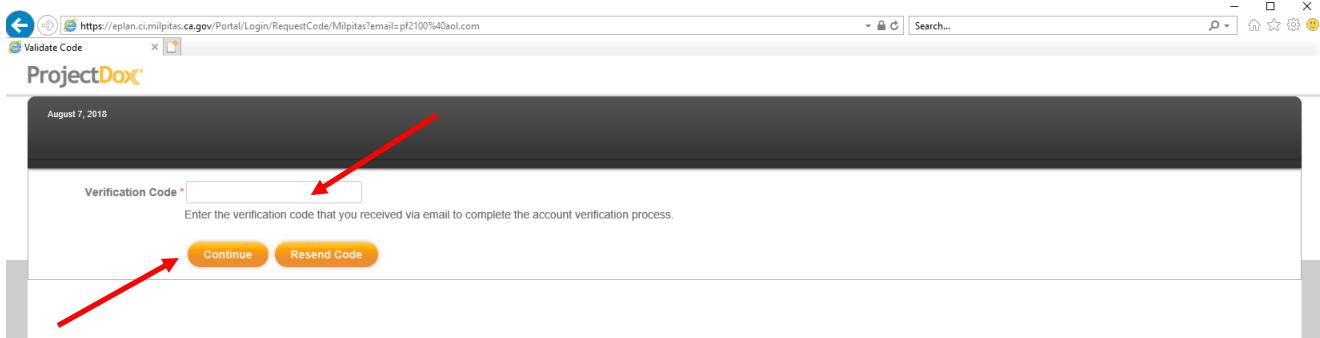
First time users will need to download the *ProjectDox* Components to have access to all of the features and then create an account.

After you have downloaded the Components, select "Create an Account" and answer all of the questions on the Create Your Account screen. All questions with an * are mandatory. When done, select "Create My Account". You can return to update this information by selecting the "Profile" button on the Main Tool Bar.
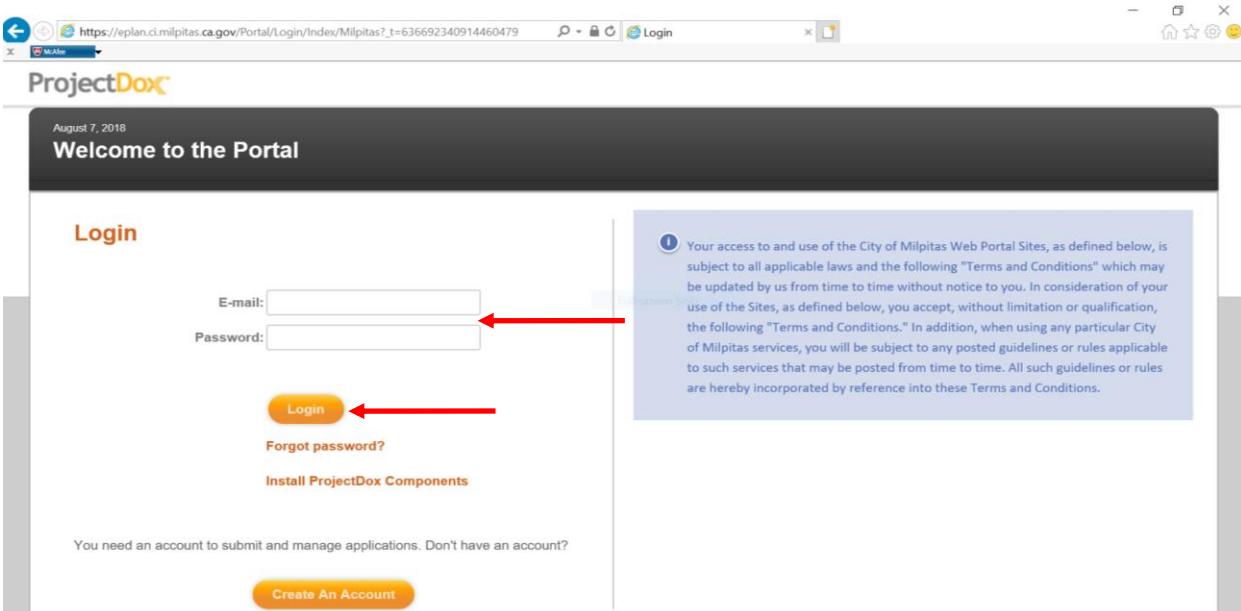
After you select "Create My Account", you will receive a verification code sent to the email address in your profile. Enter the code and select "Continue".


Now you can login and go to your home page. Here you will be able to start a new application and manage existing projects.

RETURNING USERS

Go to https://eplan.milpitas.gov/ and login on the Portal screen.

This will take you to the home screen.

To begin a new project, enter a Request Type (use the drop down menu to select a Building Permit, Alternate Materials & Methods, Deferred Submittal, Revision or Unreasonable Hardship application) and then enter the Request Name. The Request Name should be in the following format:
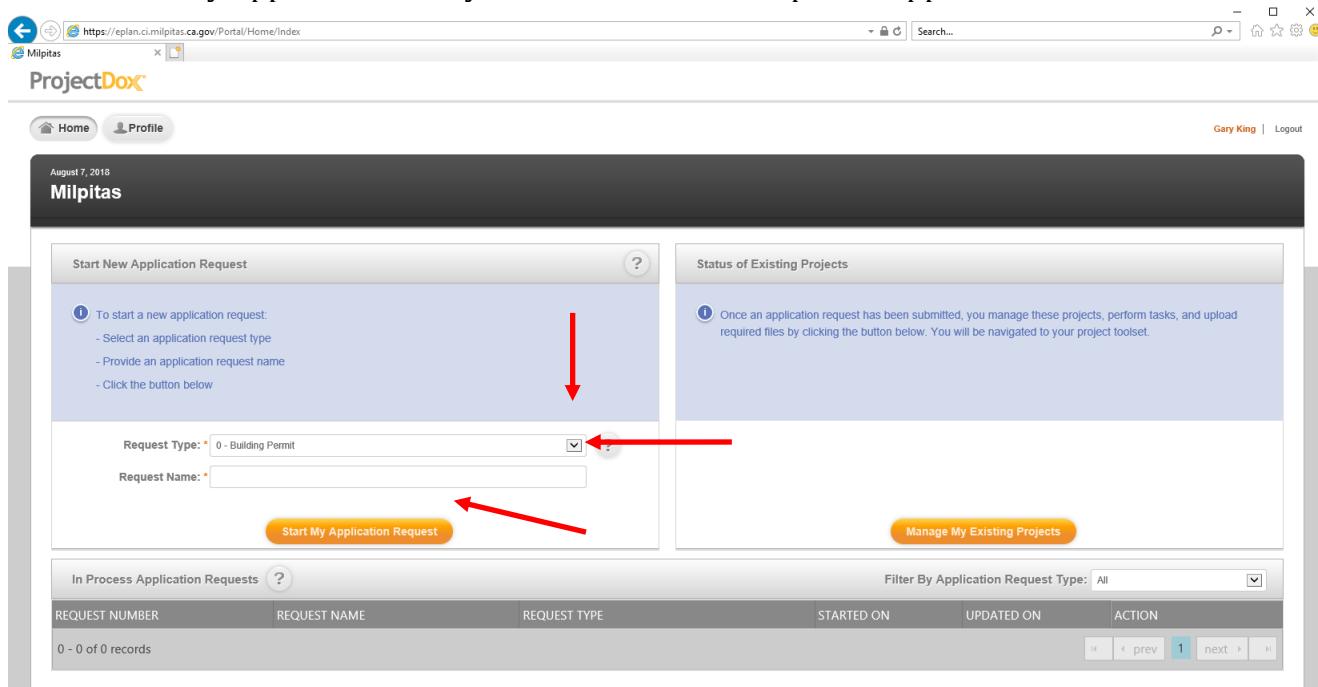
Commercial and Development Project:
"[BUSINESS NAME]: Project Description" (For Example: "BURGER KING: Tenant Improvement")
"[DEVELOPMENT PROJECT NAME: Project Description" (For Example: "CERANO APARTMENTS: New Apartment Building)

Residential Project:
"[PROPERTY OWNER LAST NAME] RESIDENCE: Project Description" (For Example: "PANG RESIDENCE: Addition and Remodel")

Select "Start My Application" and you will be taken to the permit application form.

Fill out all of the information on the form noting those questions with an * are mandatory.

General information – include the entire street address including suite number where applicable. City and state should not be entered (all projects will be in Milpitas or you are applying for a permit from the incorrect city).

Applicant info – enter all of the information requested. You can check the box "use profile information" to duplicate the information that is in your profile.

You can select the minus (-) sign next to the description to collapse the information box and the plus (+) will expand it.

In the other boxes you can use the "Same as Applicant" to duplicate the information in the Applicant box.

Property Owner, Tenant Info, Designer Info and Contractor Info – please fill out each section as complete as possible. If the contractor has not been selected, leave blank.

Project Description – If the contractor's license is not known enter N/A. In the project description box, write a brief description of the scope of work. Any answer not known can be left blank unless it has an * after the questions.

Signature – Click on the plus (+) to expand this section and select "Click to Acknowledge" and select "Submit Request".


You will then see a confirmation of your application request. You can select Print to print this information including the temporary application number.

Next, select "Home" to take you back to the home screen.

Before proceeding, you should now prepare your documents for uploading.

Our file standards for receiving documents are as follows:

Drawings:

- All drawings must be uploaded in PDF format.
- **Each drawing sheet saved in one file.** (For example, if your project has total 23 sheets, there shall be 23 pdf files of drawings.)
- Each file (drawing sheet) shall be named with the sheet number and sheet name (For example, "A1 - First Floor Plan")
- A file with the sheet index named as "**0-Index**" shall be uploaded. Note that filename must start with "0".
- A file with the Title Sheet of the entire drawing package named as "**0-Cover Sheet**" shall be uploaded. Note that filename must start with "0".
- A separate file with all combined drawing sheets shall also be uploaded and named as "**0-[Project Name] – Combined Set**". The sheets in the file shall be ordered in the same order as the sheet index. Note that filename must start with "0".

Documents (structural calculations, soils report, hydrology calculations, etc.):
- All documents must be uploaded in PDF format.
- Each document shall be saved in a separate file.
- Name of the document file shall start with the submittal cycle no. and followed by the document name. (For example, structural calculations submitted in the 1st cycle shall be named as "**1-Structural calculations**"; structural calculations submitted in the 2nd cycle shall be named as "**2-Structural calculations**", etc.)

Note: Any submittal which does not follow the standard of this guideline will be required to be corrected and will delay the submittal process.

Now that you have prepared your documents, from the home screen select "Manage My Existing Projects".

Select the "Task" tab. You should see your project on the list below. If not, select refresh and it should now appear. All of the tasks you are asked to do will appear under the 'Task" window.

Select the "Applicant Upload Task" in the second column.

After you accept the task, the Applicant Upload window will open.

From this window, you will upload the project drawings, documents and other attachments.

First, select the destination folder ("Drawings" or "Documents").

Then select "Select Files to Upload".

You can select "Browse For Files" or drag files into the window.

After you have selected some or all of the files, select "Upload Files", then select "close" on the pop-up window. This will add them to the upload window but does not upload them to the city server.

You will now see the plans you have selected for upload to the city. If you need to add additional drawings, select "Select Files to Upload" and repeat the process above.

To select another folder (like "Documents"), select "View Folders" and select the folder you want to upload to and repeat the process above.

Under "Add Group Members", you can add or remove additional members of this project, such as other members of your team. This will allow them to access and view the project.

If you need to leave the screen before you have finished the upload, select "Save for Later" at the bottom of the screen. You can return later and finish the upload.

Once all files and documents have been uploaded, check the box next to "I have uploaded all required drawings and/or documents" and select "Upload Complete – Notify Jurisdiction" at the bottom.

Select the "Projects" tab and you will see all of your projects. Under the "Status" tab, you will see the status of your projects. In the sample below, project #REV-176 shows the status as "Prescreen". This indicates your application and uploaded documents are being reviewed by a Permit Technician.

If they discover anything missing, they will return the project back to you assigning you a task to upload additional information.

This will show the status as "Prescreen corrections". Select the project number, in this case "BLD-180".

This will open the task window. Select "Prescreen Corrections Task" and accept the task.
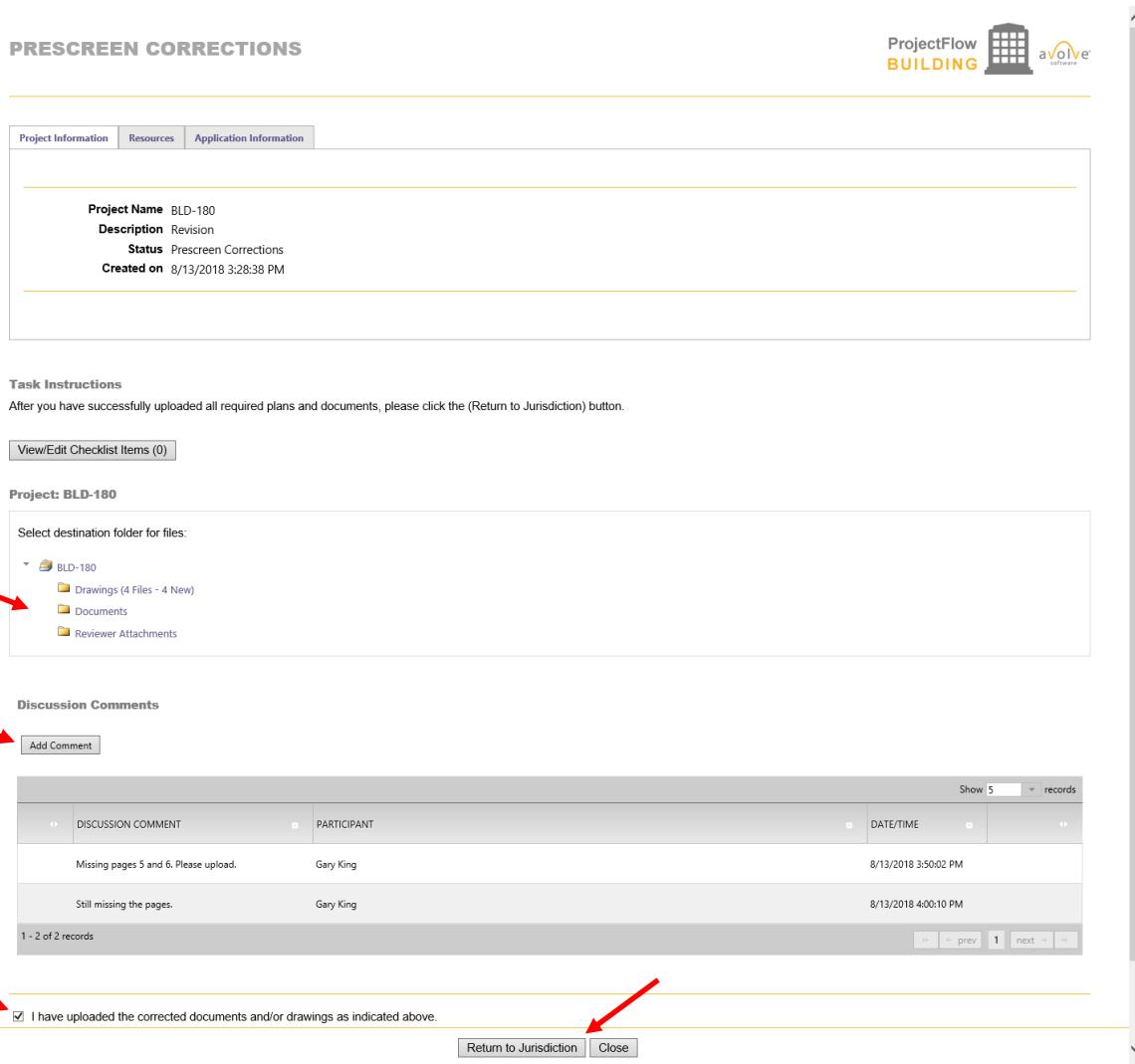
This will open the "Prescreen Corrections" window. You will see the comments from the Permit Technician under "Discussion Comments". Please respond to the comments by selecting "Add Comment" and provide your written response and by uploading the missing documents. Select which folder you want to upload to and the "Select Files to Upload" button will become available. Proceed with uploading

documents as described above. When complete, check the "I Have Uploaded" box and select "Return to Jurisdiction".

This will return the status back to Prescreen.

When the submittal is determined by the Permit Technician to be complete, they will create the permit in our permitting software (TrakIt) and calculate the fees within two business days.
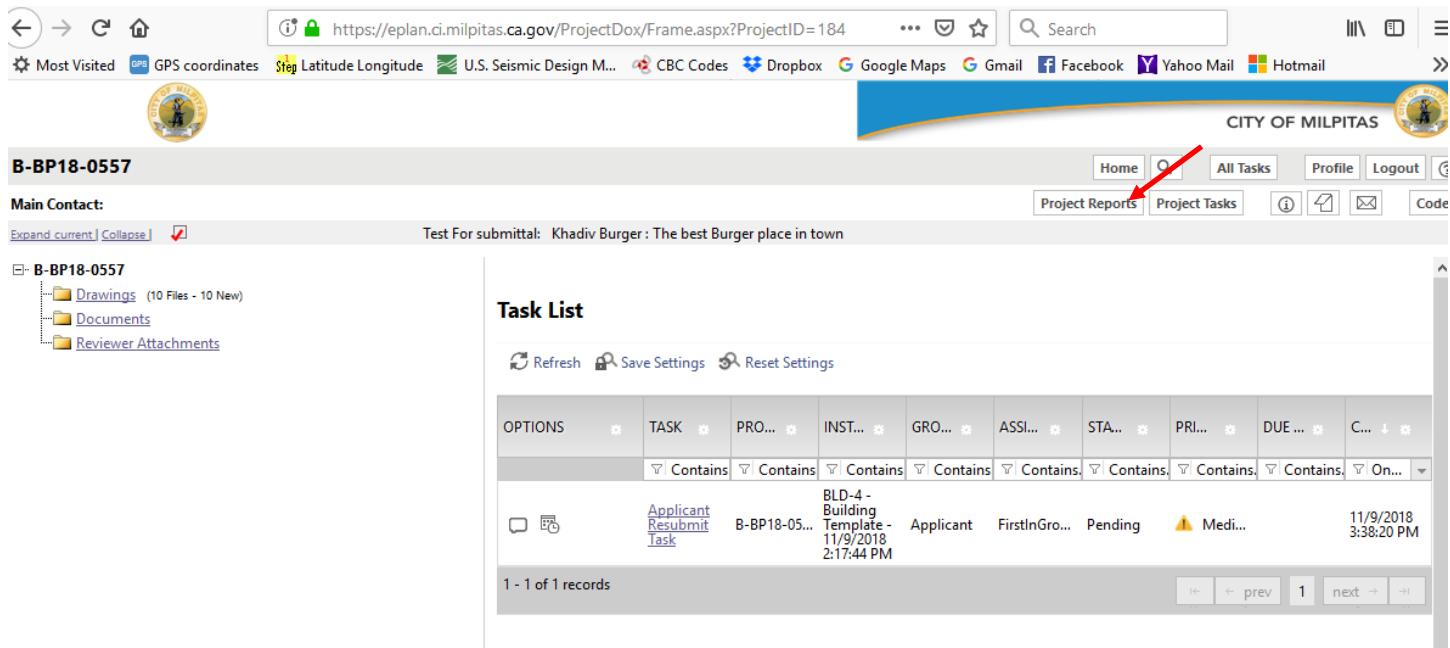
Once the fees have been calculated, you will be emailed the invoice along with instructions on how payment can be made.

After fees have been paid, you shall reply to the email with a copy of the receipt. Once the receipt is received, the permit will be processed and various staff members will be assigned to review the project.

After all reviews have been completed, you will be assigned a new task to respond to comments or will be notified the project has been approved and final fees are being calculated.
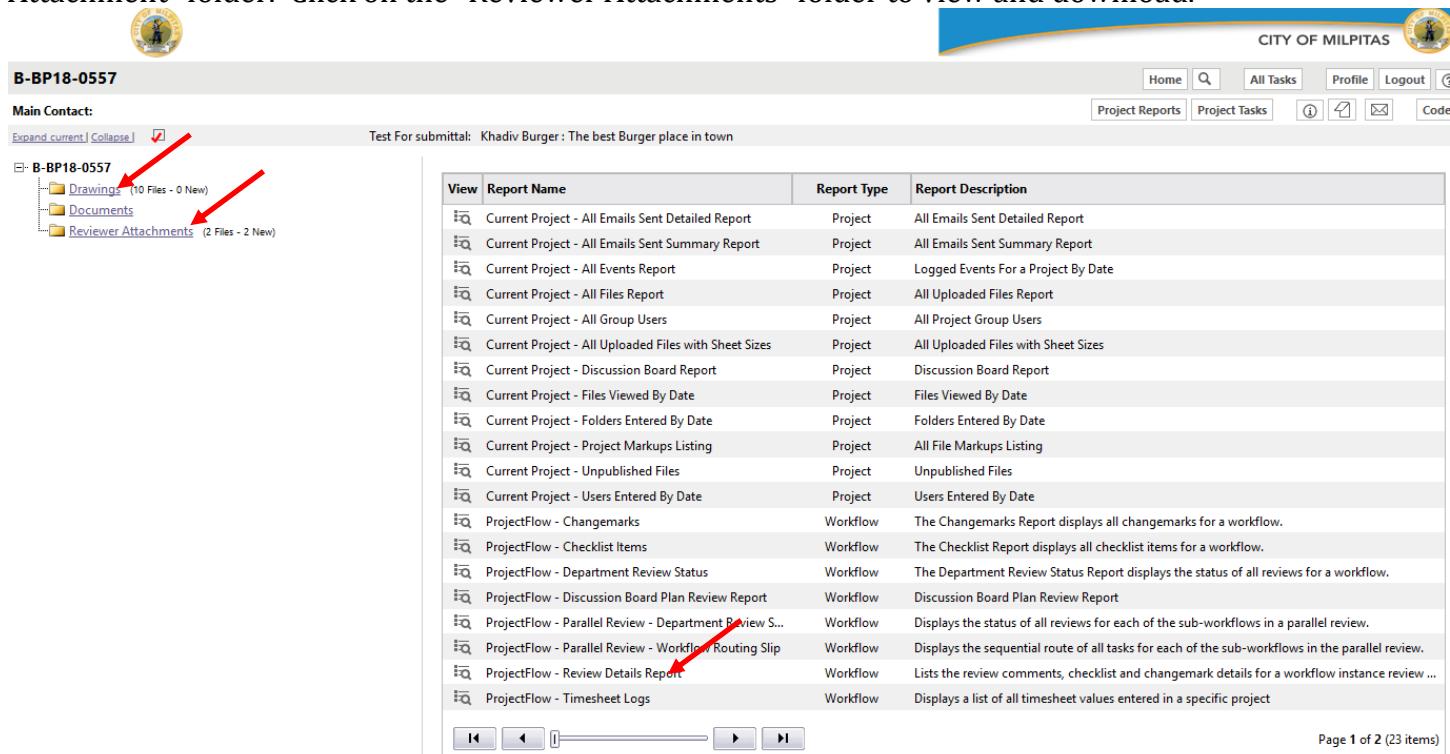
When the project has been reviewed with comments, you will be notified by email. Log in and select the project number to open the project screen. View project status and comments by selecting "Project Reports" tab to open the list of available project reports.
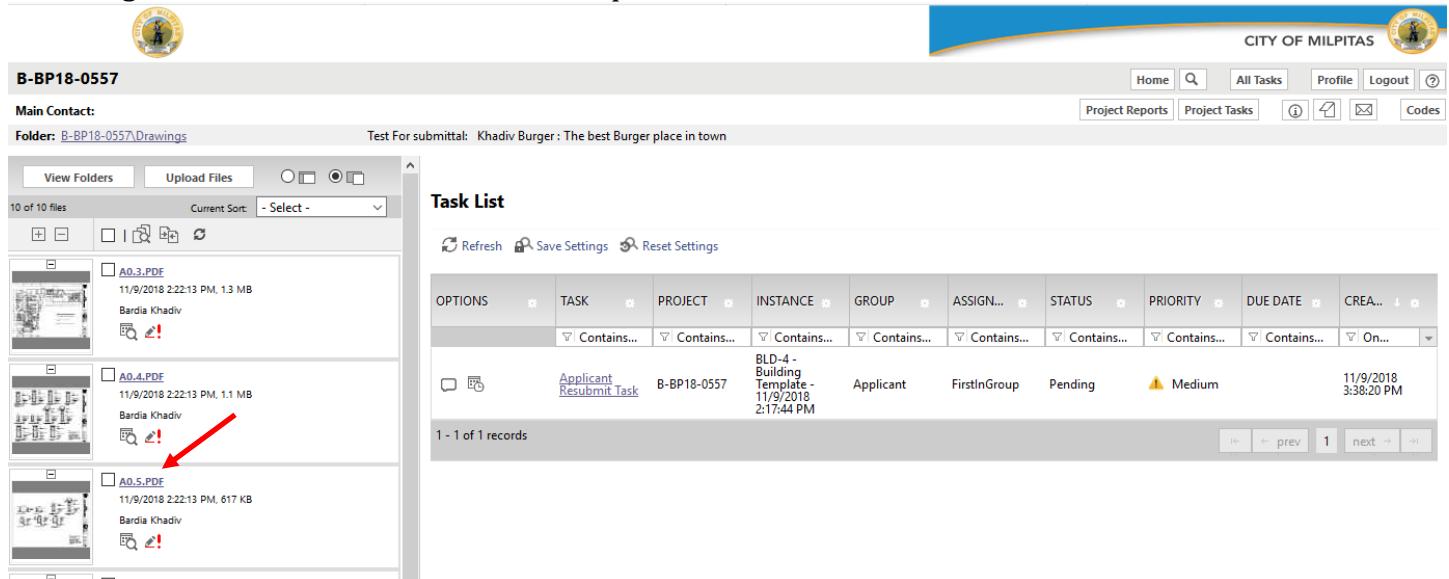
Select "ProjectFlow – Review Details Report" to view the list of "Checklist" comments, "Changemark" comments and "Reviewer comments". Click on the "+" sign on the applicable columns "Cycle", "Department", "Reviewer" in the report to expand the list to view each type of comments. If there are attachments from the reviewers, the no. of attachment files will be indicated in the "Reviewer Attachment" folder. Click on the "Reviewer Attachments" folder to view and download.

Any "Changemark" comments on the drawings made by the reviewers may be viewed by clicking on the "Drawings" folder and select the icon with a pen and red exclamation mark.
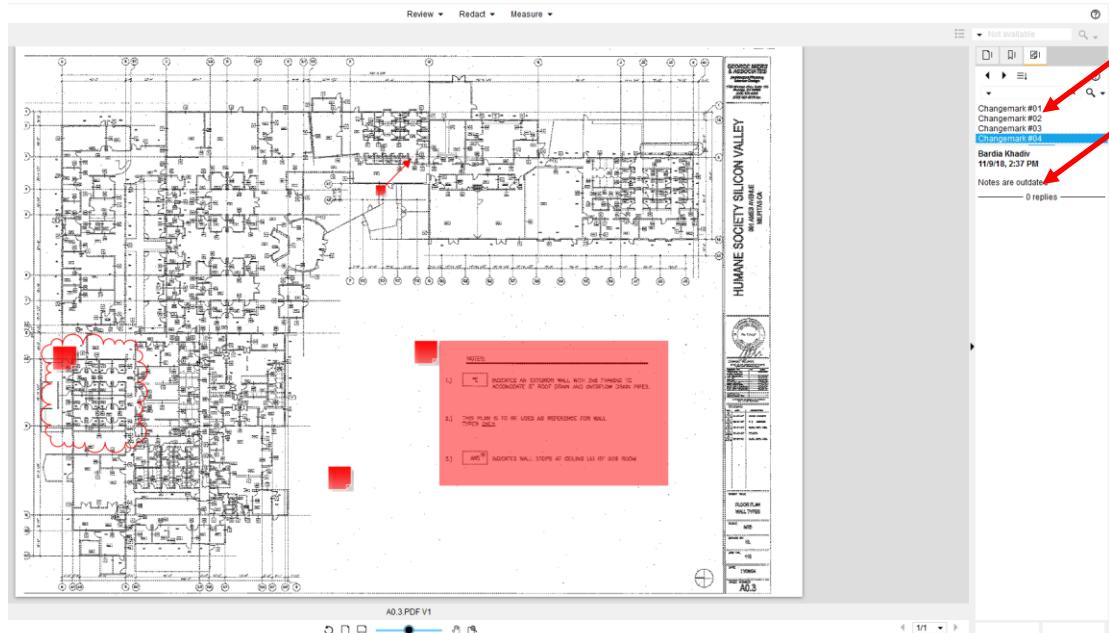
The "Markups attached to filename.pdf" window will open. Select the box of the "Markup Name" and select "View" to open the marked up drawings to view the "Changemark" comments.
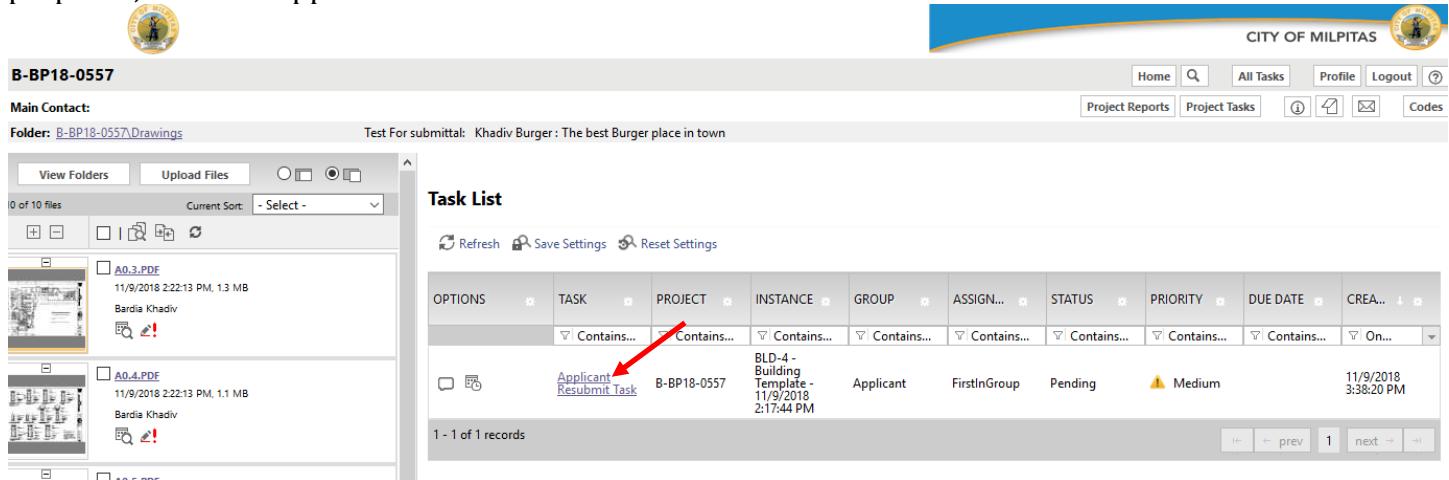
A new window showing the "Changemark" comments on the selected "Markup Name" layer will open. The list of "Changemark" is shown on the right side and the comments for each "Changemark" can be viewed in the box below. View each "Changemark" comment by clicking on each "Changemark" item on the list above.
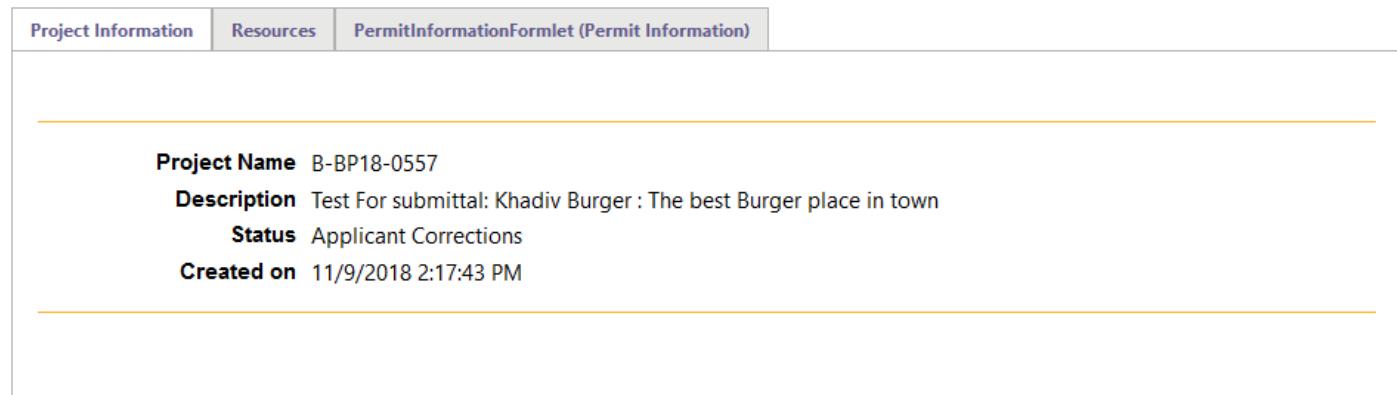
After reviewing all the comments under "Changemark" and "Checklist" and resubmittal package is prepared, click on "Applicant Resubmit Task".

The "Applicant Resubmit" window will open. If there are attachments from the reviewer, it will be Click on "View/Edit Changemark Items"

The "Workflow Review Changemark Viewer" window will open.

Workflow Review Changemark Viewer

🔃 Refresh 🔐 Save Settings Review Cycle: [All ▾] Group: [All ▾]

REF #	STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME
▽ Equals...	▽ Contains...		▽ Contains...	▽ Equals...	▽ Contains...	▽ Contains...
8	Unresolved		B-Architectural	1	Bardia Khadiv	A0.5.PDF
5	Unresolved		B-Architectural	1	Bardia Khadiv	A0.4.PDF

Scroll down and scroll to the right to view all the columns in the list. Type the response to each comment under the column "Applicant Response" on the right end of the screen. The total number of "Changemark" comments is indicated at the bottom left corner. To turn to the next page, click "Next" at the bottom right corner. Click "Save" at the bottom left corner after typing the applicant response. Alternatively, a response letter with response to each comment may be submitted as part of the resubmittal document.

Workflow Review Changemark Viewer

🔃 Refresh 🔐 Save Settings Review Cycle: [All ▾] Group: [All ▾]

Show 5

ANGEMARK SUBJECT	CHANGEMARK DETAILS	CHANGEMARK DATE UPDATED	REVIEWER COMMENTS	COORDINATOR COMMENTS	APPLICANT RESPONSE	ROW UPI
Contains...	▽ Contains...	▽ On...	▽ Contains...	▽ Contains...	▽ Contains...	▽
ngemark #01	Add this detail in drawings	11/9/2018 2:42:14 pm				11/
ngemark #01	Remove this detail	11/9/2018 2:39:49 pm				11/
angemark #03	Revise to 5/8" Type "X" Sht Rck.	11/9/2018 2:39:49 pm				11/9/2018 2:42:45 pn
angemark #01	18" Is required at strike edge	11/9/2018 2:37:45 pm				11/9/2018 2:42:45 pn

1 - 5 of 8 records |◄ ◄ prev 1 2 next → ►|

[Save] [Close] [View Full Report]

After all comments have been provided with response and saved, click "Close" at the bottom left corner to close the window.
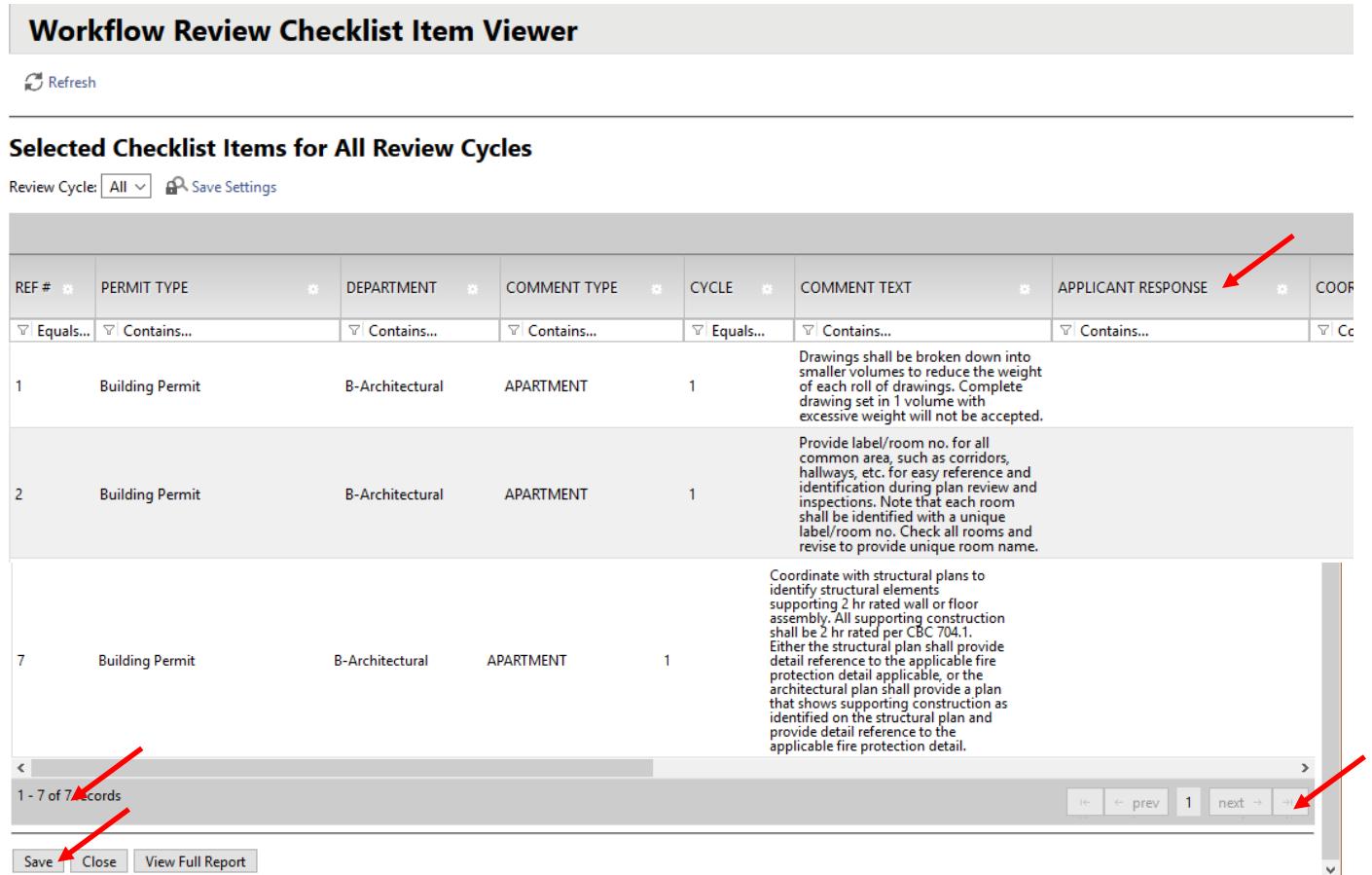
Open the "Applicant Resubmit" window and click on "View/Edit Checklist Items"

APPLICANT RESUBMIT

ProjectFlow BUILDING — avolve software

| Project Information | Resources | PermitInformationFormlet (Permit Information) |

Project Name B-BP18-0557
Description Test For submittal: Khadiv Burger : The best Burger place in town
Status Applicant Corrections
Created on 11/9/2018 2:17:43 PM

Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

View/Edit Changemark Items (8)   View/Edit Checklist Items (7)

The "Workflow Review Checklist Item Viewer" window will open.

Workflow Review Checklist Item Viewer

🔄 Refresh

Selected Checklist Items for All Review Cycles

Review Cycle: All ▾   🔒 Save Settings

REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COOR
▽ Equals...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Equals...	▽ Contains...	▽ Contains...	▽ Co
1	Building Permit	B-Architectural	APARTMENT	1	Drawings shall be broken down into smaller volumes to reduce the weight of each roll of drawings. Complete drawing set in 1 volume with excessive weight will not be accepted.		
2	Building Permit	B-Architectural	APARTMENT	1	Provide label/room no. for all common area, such as corridors, hallways, etc. for easy reference and identification during plan review and inspections. Note that each room shall be identified with a unique label/room no. Check all rooms and revise to provide unique room name.		
7	Building Permit	B-Architectural	APARTMENT	1	Coordinate with structural plans to identify structural elements supporting 2 hr rated wall or floor assembly. All supporting construction shall be 2 hr rated per CBC 704.1. Either the structural plan shall provide detail reference to the applicable fire protection detail applicable, or the architectural plan shall provide a plan that shows supporting construction as identified on the structural plan and provide detail reference to the applicable fire protection detail.		

1 - 7 of 7 records |← ← prev 1 next → →|

Save   Close   View Full Report

Scroll down and scroll to the right to view all the columns in the list. Type the response to each comment under the column "Applicant Response" on the right end of the screen. The total number of "Checklist Items" comments is indicated at the bottom left corner. To turn to the next page, click "Next" at the bottom right corner. Click "Save" at the bottom left corner after typing the applicant response. Alternatively, a response letter with response to each comment may be submitted as part of the resubmittal document.

After inputting response to all "Changemark" and "Checklist Item" comments, open the "Applicant Resubmit" window. Upload the resubmittal drawings and documents by clicking on "Drawings" and "Documents" folders respectively.   Note that only drawings shall be uploaded to the "Drawings" folder. All other documents shall be uploaded to the "Documents" folder.

The drawings and documents must be properly named (see page 7). **Revised files must be named exactly the same as the first submittal**. Do not rename your drawings or documents. Revised files of the same file name will be assigned a version number ("V2") by the system. Resubmittal with incorrect file names will be required to be corrected and will delay the resubmittal process.
Respond to "Reviewer Comments" by typing in response in "Applicant Comments" as necessary.
Click "Save for Later" to continue at a later time.

Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

[View/Edit Changemark Items (8)]   [View/Edit Checklist Items (7)]

Project: B-BP18-0557

Select destination folder for files:

- 📁 B-BP18-0557
  - 📁 Drawings (10 Files - 10 New)
  - 📁 Documents
  - 📁 Reviewer Attachments

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
B-Architectural	Bardia Khadiv bkhadiv@ci.milpitas.ca.gov	Not Approved	Please call to set up a meeting to go over the comments	

Task Instructions

Discussion Comments

[Add Comment]

Show 5 ▼ records

	DISCUSSION COMMENT	⚙	PARTICIPANT	⚙	DATE/TIME	⚙	

0 - 0 of 0 records |← ← prev 1 next → →|

[Save for Later]

When ready to resubmit, review and checkmark all acknowledgement items at the bottom of the "Applicant Resubmit" window. Then, click on "Resubmit Complete".
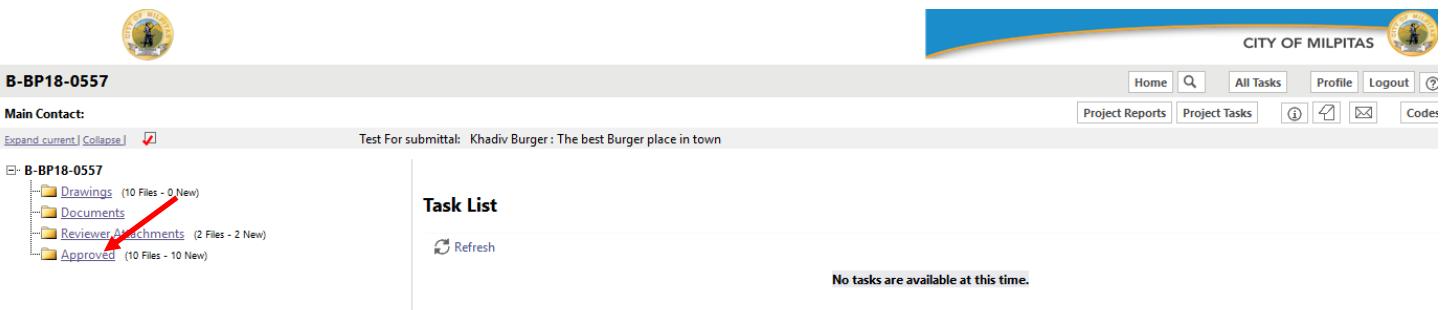

PRINTING APPROVED DRAWINGS

Once the plans are approved, the applicant will be emailed if any additional documents are pending prior to permit issuance and the invoice for the inspection fees and balance of any other fees due will also be included in the email.

You shall reply to the email with all outstanding documents requested. After fees are paid, you shall reply to the email with a copy of the receipt.

A California Licensed Contractor or the property owner shall obtain the permit card at the Milpitas City Hall.

The permit holder will receive an email notification that the approved plans are ready to be downloaded. A user account shall be created if not already existing. The approved plans can be accessed in the "Approved" folder.

It is up to the permit holder to print and distribute copies of the approved plans to contractors and others involved with the project. One paper set of approved plans needs to be kept on the project site for inspection.

REVISIONS

To submit a revision or deferred submittal, follow the same instructions for a new submittal above. On the home page, select Revision or Deferred Submittal under the "Request Type" drop-down menu.

Only submit those sheets that have changes in the revision application. All changes should be clouded and identified with a cloud and a delta with the revision number. The drawings in the revision application must be properly named (see page 7). **REVISED DRAWING FILES MUST BE NAMED EXACTLY THE SAME AS THE ORIGINAL SUBMITTAL**. Do not rename your drawings or documents. Revision submittal with incorrect file names will be required to be corrected and will delay the submittal process.