

Registering for an Account in Citizen Access

1. Click “Register for an Account” at the top-right hand corner of the window.



- a.
2. Read an Accept the license agreement by checking the “I have read and accepted the above terms” and then click “Continue Registration”. If you do not agree to the terms you will not be allowed to continue.

I have read and accepted the above terms.

[Continue Registration >](#)

- a.
3. Fill out the required fields that are high-lighted with a red asterisk.

Login Information

*User Name: ?

*E-mail Address:

*Password: ?

*Type Password Again:

*Enter Security Question: ?

*Answer: ?

- a.
4. Next, click “Add New” from the contact menu.

Contact Information

Choose how to fill in your contact information.

[Add New](#)

- a.
5. From the pop-up menu, select “Individual” if you are signing up for a Site Permit Account. Click “Continue” once you have selected the contact type.

Select Contact Type ×

DOT Utility Applicants: Select "Utility Company Individual" from the Type-Drop Down.

Sign Permits: Select "Individual" from the Type-Drop Down.

Commercial Permits: Select "Individual" or "Organization" from the Type-Drop Down.

Business License: Select "Individual" or "Organization" from the Type Drop Down.

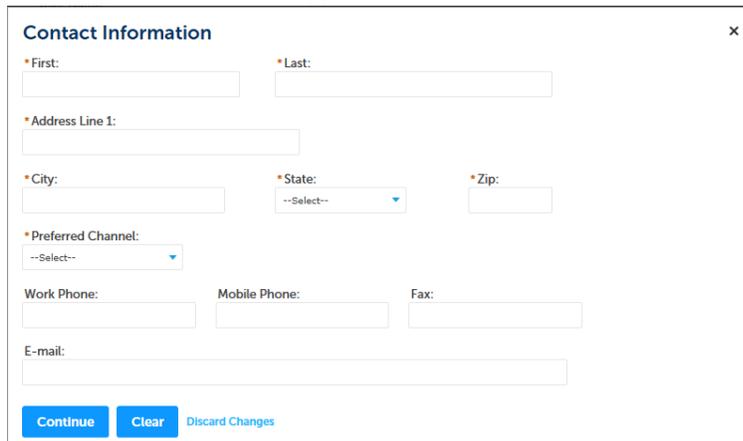
*Type: ?

- Select—
- Individual
- Organization
- Utility Company Individual

[Continue](#) [Discard Changes](#)

a.

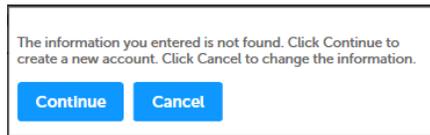
6. Fill out the contact information menu. Click “Continue” when finished.



The image shows a 'Contact Information' form with the following fields: First (required), Last (required), Address Line 1, City, State (dropdown menu with '--Select--'), Zip (required), Preferred Channel (dropdown menu with '--Select--'), Work Phone, Mobile Phone, Fax, and E-mail. At the bottom, there are three buttons: 'Continue' (blue), 'Clear' (blue), and 'Discard Changes' (text link).

a.

7. A pop-up will display stating that the information has not been found. Click “Continue” to create the new account. Once added, a green “Contact added successfully” message will appear on the screen.



The image shows a pop-up message box with the text: "The information you entered is not found. Click Continue to create a new account. Click Cancel to change the information." Below the text are two buttons: 'Continue' (blue) and 'Cancel' (blue).

a.

8. Click “Continue Registration” to complete the registration process.



The image shows a blue button with the text "Continue Registration »".

a.

9. Once the account has been created, the user will see an “Account has been created successfully” screen message. The user will also receive an email stating that the account has been added an activated. From here, the user will be able to login to Citizen Access and submit Site Plan Review applications to the system.



The image shows a green message box with a checkmark icon and the text: "Your account has been created successfully. You will receive additional instructions by e-mail."

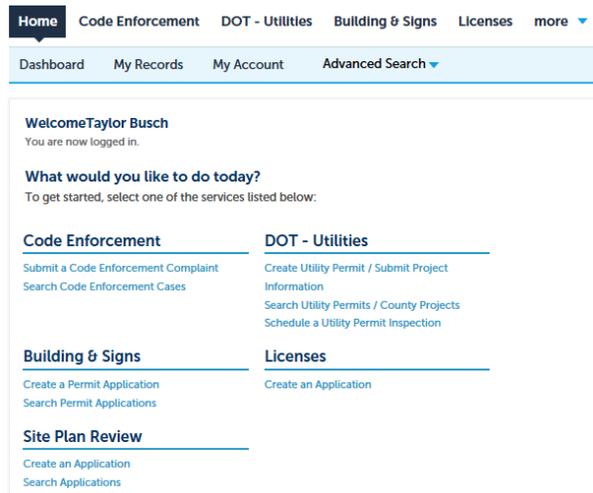
Your account has been successfully created.

Congratulations. You have successfully created an account with the Agency. An e-mail has been sent to show your information has been successfully submitted to the system. If activation is necessary, another e-mail will be sent notifying you when your account activation has been completed.

a.

Entering a Site Plan Review Application in Citizen Access

1. Login to Citizen Access using the account you have created
 - a. <https://cobbca.cobbcounty.org/citizenAccess/>
2. Once logged in, select “Create an Application” under “Site Plan Review”. If you cannot find this link, click the “Home” tab at the top left of the window.



- a.
3. Click the box next to “I have read and accepted the above terms.” to agree, and then click “Continue Application”.

I have read and accepted the above terms.

[Continue Application »](#)

- a.
4. Select the Site Plan Review Application that you are applying for, and click “Continue Application”. There are descriptions of the applications list above the application types to be selected if you have questions on which one to choose.

- Commercial
- Infrastructure
- Institutional
- Mixed Use
- Recreational – Private
- Recreational – Public
- Residential

[Continue Application »](#)

- a.
5. Entering Contact Information.
 - a. For “Applicant” click “select from Account. This will enter you associated login information to the application
 - b. For Developer, select “Add New” and enter the developer information. Fields marked with a red asterisks are required fields must be entered. Click “continue” when done.
 - c. For Engineer, select “Add New” and enter the developer information. Fields marked with a red asterisks are required fields must be entered. Click “continue” when done.
 - d. For Surveyor, select “Add New” and enter the developer information. Fields marked with a red asterisks are required fields must be entered. Click “continue” when done.

e. Once all contact information has been entered, click “Continue Application”

6. Entering the work location

a. If you know the parcel number, enter it into the “Parcel Number” field, and click “Search”. If a parcel is found, it will populate the address and owner fields as well.

Parcel

*Parcel Number:

i.

b. If you do not know the parcel number, but you have an address, enter only the street number and street name into the two fields. Do not include the road suffix when entering the road name such as “Rd”, “St”, “XING”, etc. Doing so will prevent the address from being determined when the search button is clicked”

*Street No.: *Street Name:

i.

c. Once the parcel and address have been determined, click “Continue Application”

7. Entering Application Information

- a. Required fields are marked with a red asterisk and must be completed in order to continue with the application.
- b. Enter the project name and a detailed description of the project.
- c. Enter the number of “Disturbed Acres”. When entering less than an acre, enter them as a decimal such as 0.75, 0.85, etc. If you do not enter a leading 0 when acreage is less than 1, it will not be accepted by the webpage. When the acreage is 1 or greater, you will be required to enter GSWCC certified Designer, Erosion Certification Number, and Erosion Cert Expiration Date fields.
- d. Enter the Various Zoning and Variance, Number of Lots, and Review Requested fields.
- e. Enter GSWCC certified Designer, Erosion Certification Number, and Erosion Cert Expiration Date fields if needed.
- f. Once done, click “Continue Application”

8. Review Screen

- a. Review the application for completeness and that all data is correct. If there is something to correct, click the “Edit” button to go back.
- b. If the application is complete, click “Continue Application” to submit.

9. Application Submitted Screen.

- a. The system will provide you with your application number which will be listed as “SPR-<YEAR>-<APP NUMBER>”
- b. From here you will be able to access the ePlan website and upload your plans.

Step 5: Record Issuance



Your application has been successfully submitted.
Please print your record and retain a copy for your records.

Thank you for using our online services.

Your Record Number is SPR-2017-00022.

You will need this number to check the status of your application or to schedule/check results of inspections. Please print a copy of your record and post it in the work area.

1. Log into ePlan before uploading documents

[ePlan Sign-in](#)

2. Click the button below to upload documents

[Plan and Supporting Document Upload](#)

A licensed professional is now authorized to proceed with work at the designated location.

Your record type requires a follow-up inspection once work is completed. You may schedule the inspection now or return to schedule the inspection upon completion of the work. Choose "View Record Details" to Schedule Inspections, check status, or make other updates.

[View Record Details »](#) (You must post the record in the work area.)

i.

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1 Overview of Plan Review

The Electronic Plan Review solution provides a public portal website that external users, such as builders, architects, developers, engineers and others use to interface with Cobb County for submitting plans and other documents related to community development and construction projects. This portal provides a collaborative environment for Cobb County government and the community to work together in an electronic manner in submitting and reviewing plans.

Users who visit the Cobb County Accela Citizen Access (ACA) Portal will be presented with a button to launch the OnBase Plan Review Portal within a new window. The Submitter registers for an account in Plan Review and then applies for a permit in Accela, opening Plan Review from the Accela document upload page. If the project does not exist in Plan Review, the project will automatically be created from the project information stored in Accela.

The Submitter signs in to the system through the Plan Review portal to get permitting information, submit plan sheets, and monitor the status of submitted projects. Once the project information is complete, the Submitter submits the project for review. Meanwhile, the Submitter also has the ability to request others to assist in this review process, manage a list of contacts, submit updated plan sheets as requested, download marked plans and review comments, and retrieve approved plan sets.

The Plan Review system routes newly submitted projects or re-submitted projects to the review coordinator. The Coordinator determines whether the project plans are complete and ready for acceptance and begins a review cycle. The Coordinator assigns departmental reviewers and the system tracks review decisions.

Reviewers can review the plans using tools such as window magnification, measurement of lines, areas, arcs and angles and more. The Reviewer marks up supporting documents and creates review comments as appropriate during the review. The markup comparison tool makes it easy to compare revised plans. Multiple reviewers review and mark plans at the same time. After all initial reviews are complete, the Coordinator consolidates marked plan sheets into a marked plan set and returns to the Submitter for review or further action. The Submitter then submits revised plan sheets directly to each reviewer via email. Once all comments have been addressed to the County's satisfaction, the Submitter uploads their revised plan sheets through the OnBase Plan Review Portal for approval stamping. The Coordinator creates, stamps, and publishes the Approved Plan Set, creates the approval letter and notifies the Submitter/Applicant of approval.

The Submitter is notified of eligibility and downloads the approved/stamped plan set to apply his/her own stamp. The Submitter scans the newly stamped set and uploads through the Plan Review Portal. The signed affidavit is uploaded as well. The Submitter then delivers paper copies of the stamped plans and payment to Cobb to receive the permit.

1.1 Submitter Quick Reference

Projects can be submitted at any time through the ACA website and the Plan Review Portal.

The Coordinator will monitor submitted projects throughout the week for completeness so feedback can be given prior to deadline of 4:30pm on Wednesdays.

The Coordinator will confirm plan sheets follow proper naming procedures (see section further in this guide) and all necessary documents are included. If not, the project will be returned to the submitter with a Review Comment letter detailing the required changes.

After the project makes it to Department Review status, the Submitter will get an email from ePlan stating they will have comments back by the close of business the following Tuesday and they will have the option to Opt Out of the SPR meeting the following Thursday. They must Opt Out by noon on the following Wednesday, via email, otherwise they will be assigned a meeting time.

By the close of business Tuesday before the Thursday SPR meeting, the submitter will be notified the status of their project. If the review cycle has a decision of Ineligible, the Submitter will be notified they will need to resubmit and can review the Marked Plan Set (if there are sheet markups) and Comment Letter on the Plan Review Portal.

The submitter will have until noon on Wednesday (the next day) to opt out via email of the SPR meeting.

If the Submitter opts out by noon on Wednesday, they won't be added to the schedule for next day's SPR meeting. All ePlan submitters that have not opted out will be assigned time slots after the paper walkup appointments. The new combined schedule will be updated. The schedule will be emailed to County staff and any ePlan submitter on the schedule by close of business Wednesday for the meeting the next day.

If an individual reviewer marks the project ineligible the submitter will work with the reviewer to resolve comments and markups. This will be done via email, calls or in person.

The Submitter is responsible for knowing if all reviewers have agreed with their changes. Once the submitter receives confirmation from all reviewers they will upload revised sheets only and submit for review via the portal.

Inquiries from submitters about status for resubmission should be directed to the reviewers, not the coordinator.

When the Submitter resubmits the project and does it properly, the revised plan sheets will show as revision 2 (or whatever revision number is applicable).

Once the Project is resubmitted, a review cycle will be started and should be resolved within 7 business days.

Because this is after the initial review cycle and one-on-one communication with the review departments, the project is anticipated to receive approval stamps.

It will not receive stamps if plans are not revised as agreed or another issue is found or a conflict has arisen from the addressing of comments. All fees to departments (with the exception of SPR) must be paid prior to final approval stamps.

If project is made ineligible, the same steps with the previous Review Cycle will be followed until the project is made eligible.

The Submitter will receive an email notification that the Approved Plan Set with electronic stamps for all applicable departments along with the Approved for Construction (corner stamp) is available for download from the Plan Review Portal. There will also be an Affidavit to be downloaded and completed.

The approved Hydrology study, if applicable, will also be available on the Plan Review Portal.

The last submission by the Submitter will be an engineer stamped approved plan set, the signed affidavit and the Hydrology Study if required.

When picking up their permit, the submitter will pay their fees and bring hard copies as listed below.

- SPR gets 2 if Commercial, 3 if Residential (single family detached only)
- CCWS/Fire gets 1 copy each for inspector
- SWM 1 hydro study.
- DOT as needed

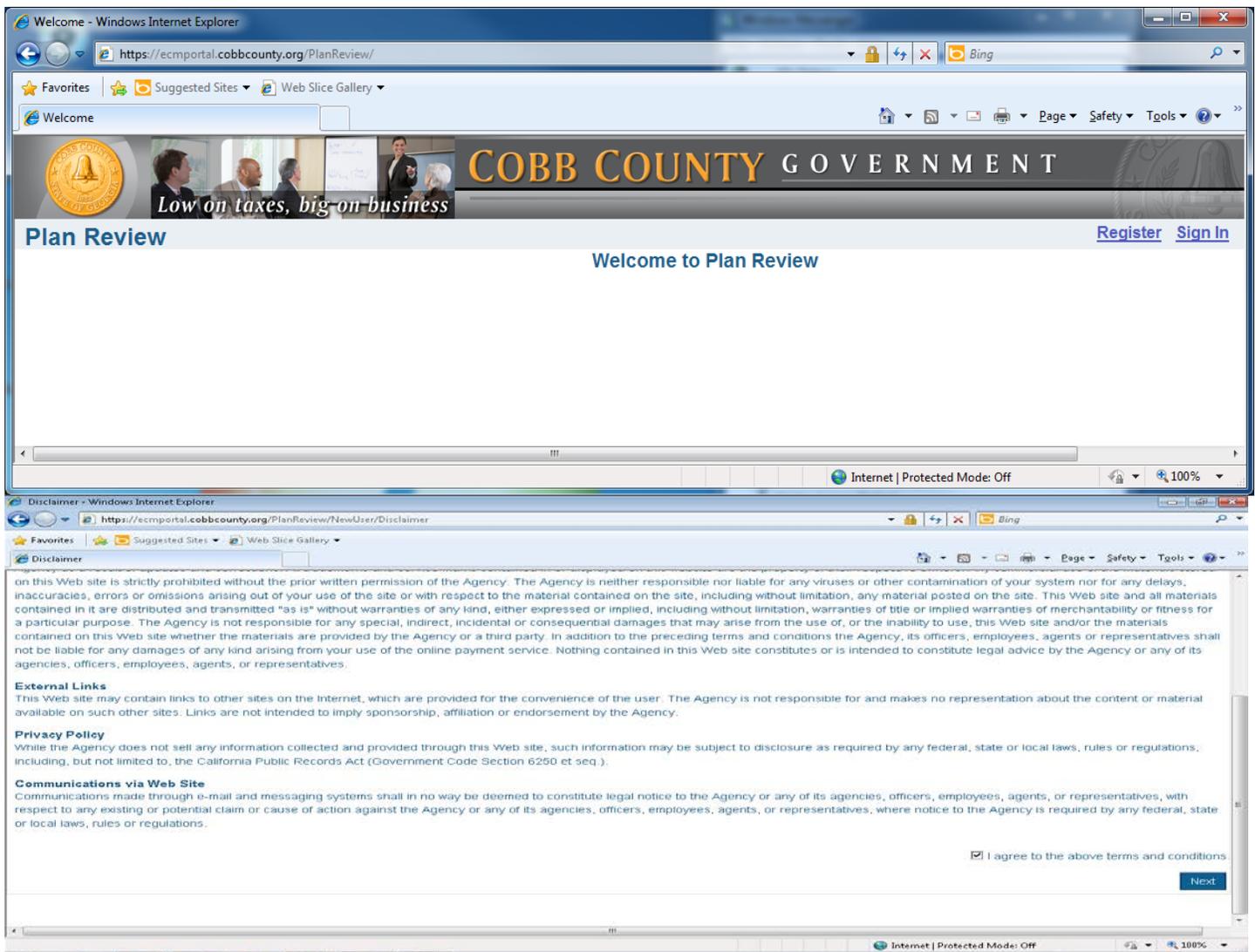
2 Plan Review Portal

Applicants upload project documents and view markups and comments by way of the Plan Review Portal, an external-facing webpage. The Applicant must register and log into the portal with the same credentials as are used with the Citizen Access site in order to view projects and upload documents.

We recommend, as a standard, that one username be created per organization. Once a username is created for an organization, then individuals within your organization or outside the organization can be invited to specific projects. More information on this can be found further in this document.

2.1 Access and Registration

Open the Plan Review Portal in a web browser by navigating to <https://ecmportal.cobbcounty.org/planreview/>. Select the Register link in the top right of the page and create a username and password.





Note: The email account must be unique in the system. In order to create projects with the Accela Citizen Access (ACA) integration, the username in Plan Review portal must match the username in ACA.

2.2 View Projects

Once an account has been registered, select the Sign In link at the top right of the page to log in and view projects (projects are created from the application process in ACA). Open a project by clicking the folder icon in the furthest right column of the projects table.



2.3 Upload Documents

In an open project, select the Plan Documents tab to upload plan documents. The upload buttons will be available as long as the project is not in an open review cycle. Use the Browse button to select files from the local machine and click Upload to add the documents to the project.



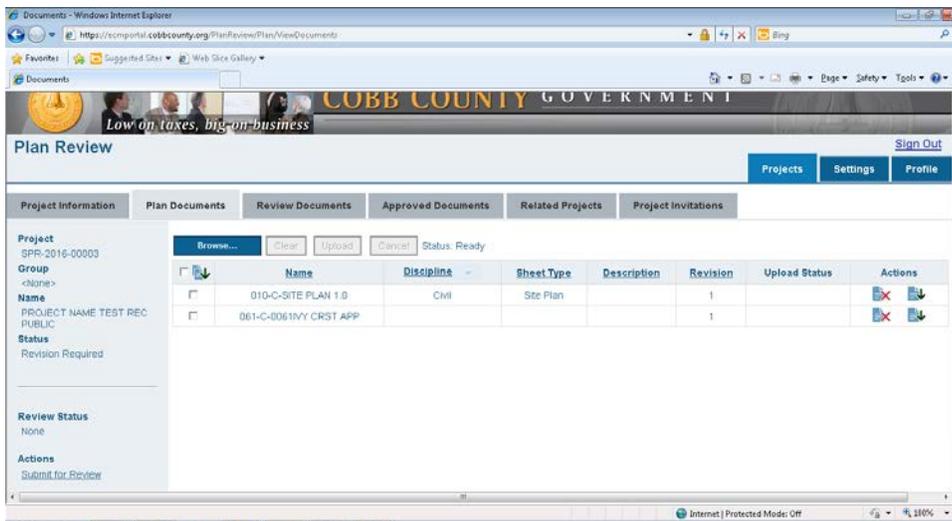
Files that have yet to be uploaded are indicated with a status of 'Pending Upload' and once uploaded display a status of 'Success'.





2.4 Submit for Review

Once all desired files have been uploaded, select the link to 'Submit for Review' on the bottom left side panel. This will notify the Coordinator that the project and plans are ready for review and begin the review process.



2.5 View and Download Documents

Throughout the review process, documents may be published to the portal containing markups, comments or instructions. To view these documents, choose the Review Documents (for markups and comments) or Approved Documents (for approved plan sets) tabs. Check the box to the left of any document you wish to download and download by clicking the icon in the furthest right column.



2.6 Logging On

To logon to your Plan Review account, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Login**.
3. Enter your user name and password in the **User** and **Password** fields, then click **Sign In**.

Note: If you have forgotten your password, you can select the **Forgot Name/Password** option to reset your password. See [Resetting or Retrieving Your User Name and Password](#) for more information.

2.7 Resetting or Retrieving Your User Name and Password

If you have forgotten your user name or password, you can use the **Forgot Name/ Password** feature to reset or retrieve your user name or password.

2.7.1 Resetting or Retrieving Your Password

To retrieve or reset your password, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Sign In**.
3. Select the **Forgot Name/Password** option. The **Account Recovery** window is displayed.

The screenshot shows a web form with two sections. The top section is titled "Recover Password" and contains a text input field labeled "User name*" with the value "kathybrown" and a blue button labeled "Show Hint". The bottom section is titled "Recover User Name" and contains a text input field labeled "Email address*" with the value "kathy.brown@gmail.com" and a blue button labeled "Find".

4. Type your user name in the **User name** field and click **Show Hint**. Your security hint is displayed.
 - If the security hint was sufficient to remind you of your password, you can click the **Return to Login** button and log in to Plan Review.
 - If you still do not remember your password, click the **Reset Password** button. An e-mail message that contains a hyperlink to reset your password will be sent to your e-mail account. After you reset your password, you can log in to Plan Review with your user name and new password.

2.7.2 Retrieving Your User Name

To retrieve your user name, follow these steps:

1. Navigate to the address of your Plan Review site.
2. Click **Login**.
3. Select the **Forgot Name/Password** option. The **Account Recovery** window is displayed.

This screenshot is identical to the one above, showing the "Recover Password" and "Recover User Name" sections of the account recovery window.

4. Type your e-mail address in the **Email address** field and click **Find**. An e-mail message that contains your user name will be sent to your e-mail account.

3 Using the Plan Review Web Site

The following list contains a brief overview of the steps you will need to perform in order to create and submit a project for review using the Plan Review site.

1. Enter contact information for people that are associated with your project (including information for the company at which they are employed). For more information, see [Adding People to Your Contacts](#).
2. Create a Project within Plan Review that will be used to store all documents and information related to your project. For more information, see [Creating a New Project](#).
3. Assign the contacts you added in step 1 to the roles they perform for your project (i.e., Architect, Subcontractor, etc.) For more information, see [Assigning Someone to a Project Role](#).
4. Enter the Location(s) at which the project is taking place. For more information, see [Adding a New Location Parcel](#).
5. Upload plan documents associated with the project. For more information, see [Adding Documents to a Project](#).

- Submit your project for review. For more information, see [Submitting a Project](#). Once your project has been reviewed, the reviewed documents will be displayed in your Review Documents or Approved Documents window.
- Review any documents that have been added to your Review Documents window, and modify the documents per the reviewer's comments. Once all required modifications have been made, re-upload your revised plan documents. For more information, see [Viewing Reviewed Documents](#).
- Resubmit your project for review. For more information, see [Submitting a Project](#).

4 Adding People to Your Contacts List

Your Plan Review contact list is used to store contact information for every person that has a significant level of involvement with any of your projects - this could include a project's architect, an engineer, a subcontractor, etc. Any contact in your Contact list can then be assigned to one or more projects before it is submitted for review.

To add a new contact to your Plan Review account, follow these steps:

- Select the **Settings** tab. The **Settings** window is displayed.

Contacts		Project Groups		
Company	Name	Addresses	Contact Information	Actions
Phone Shack	Abe Lincoln	1234 Main Street, Cleveland, OH, 44012	Business: 123-456-7890 Cell: 890-123-4567 Email: Abraham.Lincoln@ps.com	 

Add Contact

- Select the **Contacts** tab.
- Click **Add Contact**. The **New Contact** window is displayed.

Company

Company Add

Name

First Name*
 Middle Name
 Last Name*

Address

Use Company Address Copy
 Address
 Address 2
 City
 State / Province / Region
 Postal Code

Contacts

Business Phone
 Cell Phone
 Email

Close
Add

- Enter the information for your new contact.

Option	Description
--------	-------------

Company	Select the company the selected contact is affiliated with from this drop-down select list. If the contact's company does not yet exist, see Adding Company Information .
FirstName	The contact's first name. This is a required field.
Middle Name	The contact's middle name.
LastName	The contact's last name. This is a required field.
UseCompanyAddress	Select the Copy button to copy the selected company's address to the contact address fields.
Address	The contact's address.
Address2	The contact's address.
City	The contact's city.
State / Province / Region	The contact's state, province, or region.
Postal Code	The contact's ZIP or Postal Code.
Business Phone	The contact's business phone number.
CellPhone	The contact's cell phone number.
Email	The contact's e-mail address.

5. Click **Add**. The contact's information is added to your **Contact list**.

Note: Contacts in your **Contact** list must be manually assigned to the project(s) they are associated with. For more information on assigning a contact to a project, see [Assigning Someone to a Project Role](#).

4.1 Modifying an Existing Contact

You can remove or modify an existing contact's information at any time by selecting the **Contacts** tab (located in the **Settings** tab).

Company	Name	Addresses	Contact Information	Actions
Hyland Construction, Inc.	Abraham Lincoln	1234 Main Street, Westlake, OH, 44145	Business: 456-987-6548 Cell: 456-789-9999	 

Add Contact

Option	Description
	Select this button to modify an existing contact's information. Once you have finished modifying your contact's information, select Save Contact to save your changes.

	Select this button to remove a contact from your Contacts list.
Add Contact	Select this button to add a new contact to your Contacts list. For more information, see Adding People to Your Contacts List .

4.2 Adding Company Information

Each contact you create must be assigned to a **Company**. To add a new company to your **Company** list, follow these steps:

1. Select the **Settings** tab. The **Settings** window is displayed.

Contacts		Project Groups		
Company	Name	Addresses	Contact Information	Actions
Phone Shack	Abe Lincoln	1234 Main Street, Cleveland, OH, 44012	Business: 123-456-7890 Cell: 890-123-4567 Email: Abraham.Lincoln@ps.com	 

Add Contact

2. Select the **Contacts** tab.
3. Click **Add Contact**. The **New Contact** window is displayed.
4. Click the **Add** button next to the **Company** field. The **New Company** window is displayed.

Company

Name*

Address

Address

Address 2

City

State / Province / Region

Postal Code

Contact

Business Phone

5. Enter the information for your new company.

Option	Description
Name	The name of the company. This is a required field.
Address	The company's address.
Address2	The company's address.
City	The company's city.
State / Province / Region	The company's state, province, or region.
Postal Code	The company's ZIP or Postal Code.
Business Phone	The company's phone number.

6. Click **Add**. Your new company will be added to your **Company** list.

5 Adding Project Groups

Your Plan Review Project Group list is used to store Project Group names that can then be assigned to any new or existing projects in order to help organize the submitted project.

To create a new project group, follow these steps:

1. Select the **Settings** tab. The **Settings** window is displayed.

Contacts		Project Groups		
Company	Name	Addresses	Contact Information	Actions
Phone Shack	Abe Lincoln	1234 Main Street, Cleveland, OH, 44012	Business: 123-456-7890 Cell: 890-123-4567 Email: Abraham.Lincoln@ps.com	 

Add Contact

2. Select the **Project Groups** tab.
3. Click **Add Project Group**. The **Edit Project Group** window is displayed.

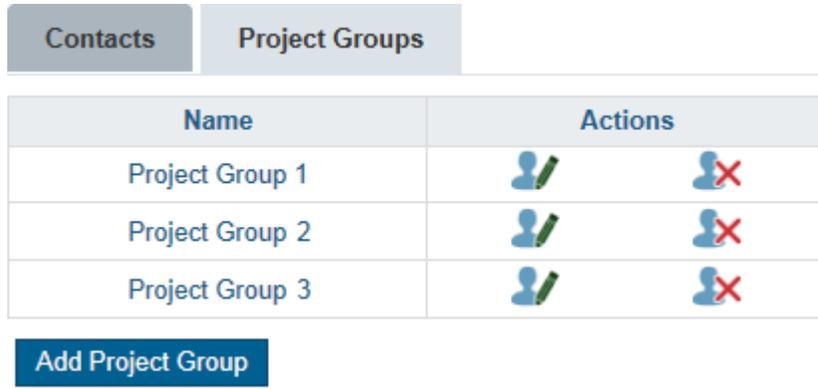
Edit Project Group

Name*

4. Enter the name of the new project group in the available text field.
5. Click **Save**. The new project group is added to the Project Group list.

5.1 Modifying an Existing Project Group

You can remove or modify an existing project group at any time by selecting the **Project Groups** tab (located in the **Settings** tab).

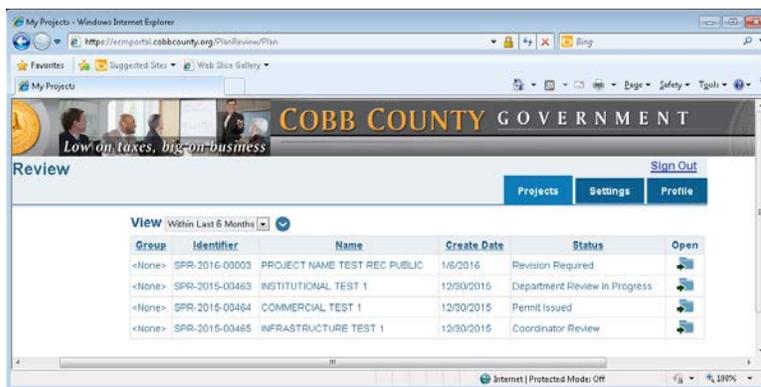


Option	Description
	Select this button to modify the name of an existing Project Group. Once you have finished modifying the Project Group's name, select Save to save your changes.
	Select this button to remove a group from your Project Groups list. Note: You can't delete a group from your Project Groups list if it's assigned to any existing projects.
Add Project Group	Select this button to add a new group to your Project Groups list. For more information, see Adding Project Groups .

6 Adding Documents to a Project

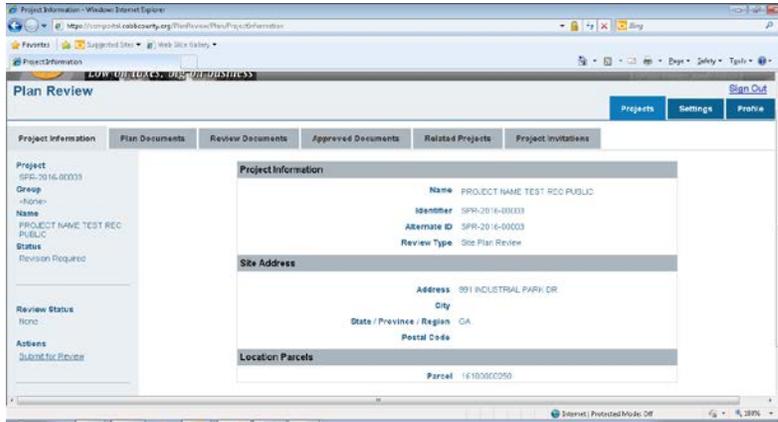
To add documents to a project, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.

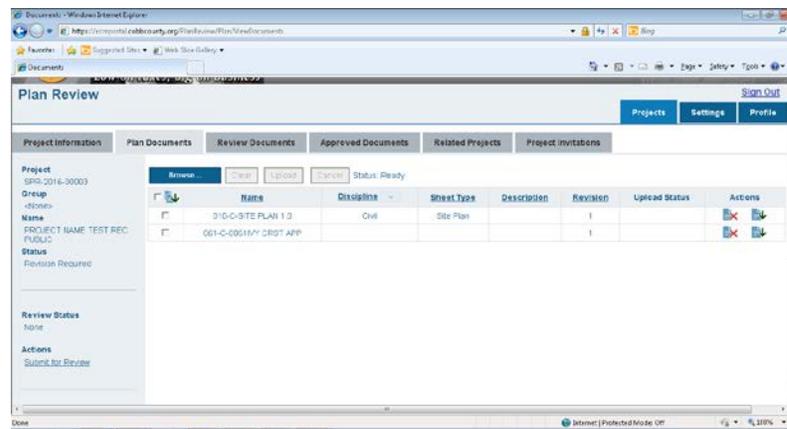


2. Select the folder button for the project you want to add documents to.

 The **Project Information** window is displayed.



3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



Select **Browse** and navigate to the document(s) you want to upload. All selected documents will be displayed in the **Plan Documents** list.

4. You can select **Clear** to remove all documents that have not yet been uploaded from the **Plan Documents** list, or select a single document's remove icon to remove it from the list.



5. Select the **Discipline** and **Sheet Type** for all selected documents.

Tip: You can apply a single **Discipline** to all documents available for upload by selecting the button next to the **Discipline** header and selecting a discipline from the drop-down select list.



1. Type a description of the document to the **Description** field.

2. Click **Upload**. You will be prompted to confirm your decision.
3. Click **Yes**. The documents are added to your project file.

Note: You can select **Cancel** while documents are being uploaded to halt the upload process. Halting the upload process will not affect any documents that have already been uploaded from your current **Plan Documents** list, but any documents that have not yet been uploaded will be removed from the **Plan Documents** list and will not be uploaded.

4. Repeat this process as many times as needed to upload all documents for your project. Once you are ready to upload your project for review, continue on to Submitting A Project.

Note: If your document's file name is longer than 100 characters, it will be truncated to 100 characters upon upload.

7 Removing Documents from a Project

To remove documents from a project, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



2. Select the folder button for the project you want to add documents to.



The **Project Information** window is displayed.

3. Select the **Plan Documents** tab. The **Plan Documents** window is displayed.



4. Click the **Delete** action for the document(s) you want to remove from your Plan Review project.



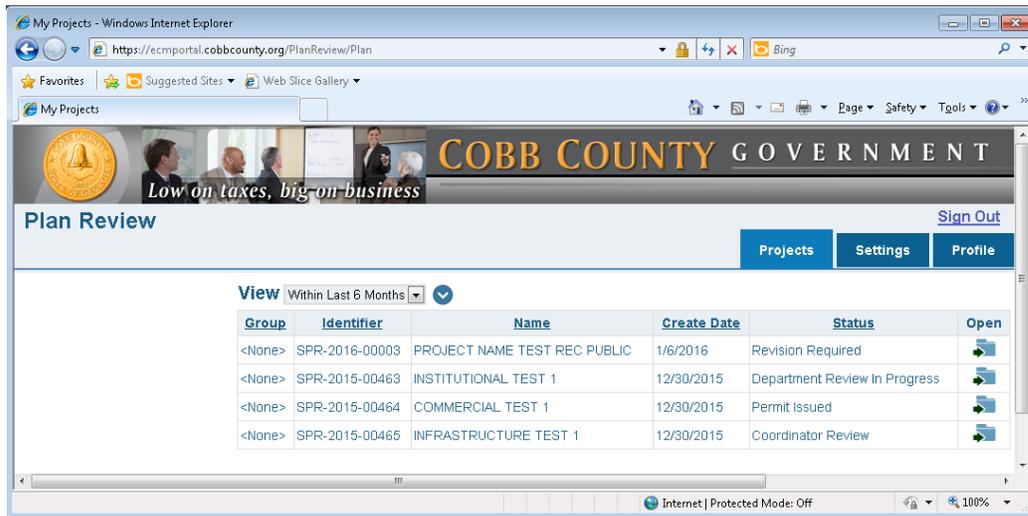
You will be prompted to confirm your decision.

5. Click **Yes**. The selected document is removed from your **Plan Documents** list.

8 Submitting a Project

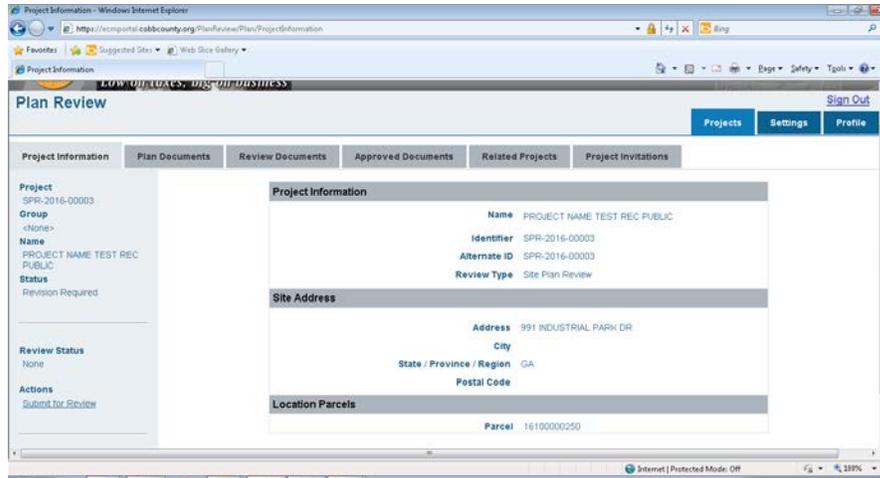
To submit a project for review, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



2. Click the folder button for the project you want to add documents to.

 The **Project Information** window is displayed.



3. Select the appropriate **Action** hyperlink. Your project is uploaded for review.

Note: Depending on your system's configuration, you may have multiple actions to choose from. Contact your system administrator if you are unsure which action you should select to upload your project.

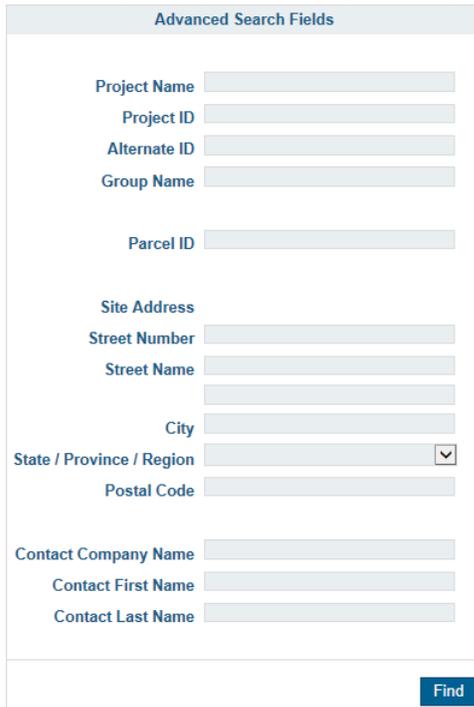
9 Searching for Projects

You can filter your project list using a variety of date criteria, as well as several advanced search options. The Plan Review site will only display projects that meet the criteria you have selected. To specify criteria to filter your project list, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



2. Use the **View** drop-down select list to specify a date or range of dates.
3. Select the blue arrow icon to display the **Advanced Search Fields** window. 
4. Enter values in the available fields as desired.



The Advanced Search Fields form contains the following input fields:

- Project Name
- Project ID
- Alternate ID
- Group Name
- Parcel ID
- Site Address
- Street Number
- Street Name
- City
- State / Province / Region (dropdown menu)
- Postal Code
- Contact Company Name
- Contact First Name
- Contact Last Name

A "Find" button is located at the bottom right of the form.

Note: By default, searches will only locate values at the beginning of a field. For example, if you search for Main in the **Street Name** field, the search will not return any projects with a **Street Name** of North Main Street. In order to locate values in the middle of a field, you must begin your search with a wildcard character: *

5. Select **Find**. The project list will be updated to only display projects that match your specified criteria.

10 Inviting Other Users

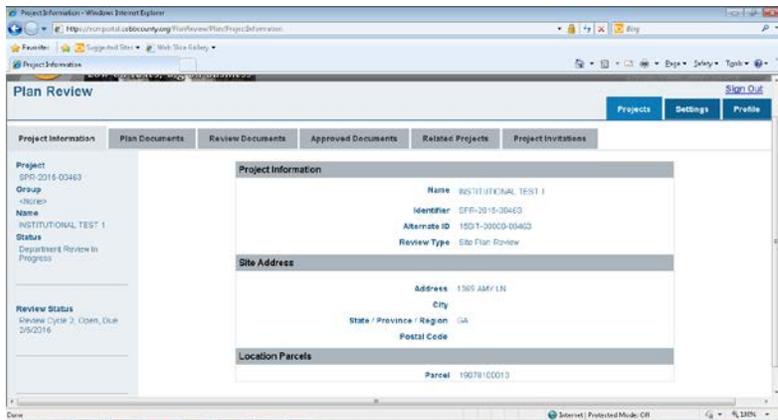
You can grant access to a project that you have created to another person by sending them an invitation to your project. To send someone an invitation, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.



2. Click the folder button for the desired project.

 The **Project Information** window is displayed.



3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.

Manage Invitations [Invite User](#)

There are no project invitations.

4. Click **Invite User**. The **Invite User** window is displayed.



5. Select one of the following options:

- **Project** - select this option to invite the specified person to the selected project.
- **Project Group** - select this option to invite the specified person to the project group assigned to the selected project. The invited user will be able to access all projects assigned to the project group of the selected project.

Note: These options are only displayed if the selected project has been assigned to a project group.

6. Enter the e-mail address of the person you want to invite to view your project or project group into the **Email address** field.
7. Click **Invite**. The invitation will be sent to the specified address.

11 Managing Invitations

Once another user has accepted your invitation, you can manage the level of access that you are allowing them to have for this project. To manage the level of access your invitees have, follow these steps:

1. Select the **Projects** tab. The **Projects** window is displayed.
2. Click the folder button for the desired project.



The **Project Information** window is displayed.

3. Click the **Project Invitations** tab. The **Project Invitations** window is displayed.
4. Click **Manage Invitations**. The **Manage Invitations** window is displayed.

Manage Invitations [Invite User](#)

Email address	User name	Invitation Type	Status	Grant Access	Revoke Access
submitter@email.com	SUBMITTER	Group	Upload Access	View Only <input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/>

5. To change a user's access level, select the desired access level from the user's **Grant Access** drop-down select list. The following selections are available:

Option	Description
ViewOnly	When this option is selected, the user will only be able to view project information.
Upload Access	When this option is selected, the user will be able to upload and delete documents from the project.

Click the **Check** icon to save your changes. 

You can also select the **X** icon to revoke a user's access to the project entirely. 

12 Viewing Reviewed Documents

Project reviewers will review your submitted plans and add comments or markups to any sheets that require modification. These updated documents will then be posted onto your Plan Review site, under the **Review Documents** tab. When you see a document in this tab, you should review the document to determine the issue, modify your document so that the issue is resolved, and then re-submit your document for another review cycle.

12.1 Downloading Documents

To download a document that has been reviewed, follow these steps:

1. Select the **Review Documents** tab. All available documents will be listed in the **Review Documents** window.

Review Cycle

<input type="checkbox"/>	<u>Name</u>	<u>Document Date</u>	<u>Download</u>
<input type="checkbox"/>	Project Name: 133493 - Doc Handle: 1143 - Comment Letter	4/27/2012 10:46:06 AM	

2. Select a review cycle from the **Review Cycle** drop-down select list to filter the list of available documents.
3. Click on the document download button to download the document.



Tip: You can also download multiple documents as a compiled ZIP file. To do so, select the check box next to every document you want to include in the ZIP file, and then click the zip download button.



4. Review all comments and markups that have been made by your plan reviewer(s).
5. Revise your plan document(s) as noted by the reviewers and save the revised documents using the same file name as the original document.

Note: When re-uploading a document, the document must use the exact file name that the original document initially used so that the modified document is correctly uploaded as a revision of the original document.

1. Re-upload the document. For more information on uploading documents, see [Adding Documents to a Project](#).

13 Downloading Approved Documents

Submitted documents that have been approved and require no modifications are displayed in the **Approved Documents** tab. The **Approved Plan Sets** option allows you to download a set of approved documents and any comment letters, while the **Approved Plan Sheets** option allows you to download one or more approved plan sheets by themselves.

13.1 Approved Plan Sets

To download a set of documents that have been approved, follow these steps:

1. Select the **Approved Documents** tab.
2. Select the **Approved Plan Sets** option from the drop-down select list.
3. All available plan sets and comment letters will be listed in the **Approved Documents** window.

Approved Plan Sets

<input type="checkbox"/>	Name	Document Date	Download
<input type="checkbox"/>	Project Name: 133493 - Doc Handle: 1144 - Comment Letter	04/27/2012	
<input type="checkbox"/>	Project Name: 133493 - Project ID: DPRV256 - Doc Handle: 1133 - Plan Set	04/24/2012	

4. Click on the document download button to download the document or plan set. 

Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.



13.2 Approved Plan Sheets

Documents or plans that have been approved and require no modifications will appear in your **Approved Documents** tab.

To download a document that has been approved, follow these steps:

1. Select the **Approved Documents** tab. All available documents will be listed in the **Approved Documents** window.
2. Select the **Approved Plan Sheets** option from the drop-down select list.

3. All available documents will be listed in the **Approved Documents** window.

Approved Plan Sheets ▾

<input type="checkbox"/>		<u>Name</u>	<u>Discipline</u>	<u>Sheet Type</u>	<u>Download</u>
<input type="checkbox"/>		A-02	Addressing	Final Plat	
<input type="checkbox"/>		A-01	Addressing	Final Plat	

1. Click on the document download button to download the document or plan set.



Tip: You can also download multiple documents and/or plan sets as a compiled ZIP file. To do so, select the check box next to every document or plan set you want to include in the ZIP file, then click the zip download button.



14 Modifying Your Account Information

You can modify your user information at any time by selecting the **Profile** tab.

 **User Profile**

User name matt

Password Strength

Password

Confirm new password

Password Hint*

Email address*

Time Zone (UTC-05:00) Eastern Time (US & Canada) ▾

Make sure you select **Save** after making your changes.

15 Glossary

Discipline - this is a broad category under which several types of similar plan documents are grouped together. A single Discipline often contains multiple Sheet Types. For example: you could configure a Discipline for Building Safety. The Building Safety Discipline would contain plan sheets that are related to the safety and stability of the building - for example, architectural sheets, drainage sheets, or utility sheets.

Department – A group of individuals that is assigned to review a project as determined by the discipline and the group’s area of expertise. These may or may not map directly to the departments of the organization (ex. Environmental, Building, Planning) or any existing OnBase groups.

Sheet Type - this is a more specific category under which documents are grouped and stored, which falls under a larger Discipline. For example: under the Discipline of Building Safety, you might configure a Drainage Sheet Type to store drainage documents. All submitted Drainage sheets will be grouped under this Sheet Type.

Review Type - this is a classification of a Review Cycle that allows administrators to determine the flow of review. In many cases, an organization will have a number of different employees tasked with reviewing plan documents. Some employees will only review certain types of documents - for example, you may have an employee who specializes in reviewing documents for overall Building Safety. You can configure a Review Type that is only associated with the Building Safety Discipline so that when the review cycle begins, the project will be sent to this specific reviewer.

Submitter – Usually the external user that creates the project and uploads supporting documents via the Electronic Plan Review Portal. Examples of a submitter are private and commercial contractors, architects, etc.

Coordinator – The Coordinator manages the project review cycle by assigning reviewers, and generating plan sets and other reference documents.

Reviewer – The qualified individual that belongs to a reviewing department. The department is selected by the Coordinator to review a submitted project. The reviewer may have specialized knowledge of building codes, CAD files and markup notation, legal requirements, etc.

“^.*\” = “###-C”

Name	Filename Matches
Affidavit	^.*\Affidavit.*
ALTA/ACSM Land Title Survey	^.*\ALTA/ACSM Land Title Survey.*
Architectural Elevation	^.*\Architectural Elevation.*
Bridge Plan	^.*\Bridge Plan.*
Cover Sheet	^.*\Cover Sheet.*
Cross Section And Detail Sheet	^.*\Cross Section And Detail Sheet.*
Demolition Plan	^.*\Demolition Plan.*
Detail Sheet	^.*\Detail Sheet.*
DOT/ISD/Entrance Plans	^.*\DOT/ISD/Entrance Plans.*
Drainage	^.*\Drainage.*
Electrical	^.*\Electrical.*
Electrical Site Plan	^.*\Electrical Site Plan.*
Elevation	^.*\Elevation.*
Environmental 404	^.*\Environmental - 404.*
Environmental Archeological	^.*\Environmental - Archeological.*
Environmental Biological	^.*\Environmental - Biological.*
Environmental Geotechnical	^.*\Environmental - Geotechnical.*
Environmental Plan/Reports	^.*\Environmental - Plan/Reports.*
Equipment Layout	^.*\Equipment Layout.*
Erosion Control Master Plan	^.*\Erosion Control Master Plan.*
Erosion Control Phase 1	^.*\Erosion Control Phase 1.*
Erosion Control Phase 2	^.*\Erosion Control Phase 2.*
Erosion Control Phase 3	^.*\Erosion Control Phase 3.*
Erosion Control Details	^.*\Erosion Control Details.*
Erosion Control Notes	^.*\Erosion Control Notes.*
Existing Conditions	^.*\Existing Conditions.*
Existing Tree Survey	^.*\Existing Tree Survey.*
Final Approved Plan Set	^.*\Final Approved Plan Set.*
Final Plat	^.*\Final Plat.*
Fixture Cut Sheet	^.*\Fixture Cut Sheet.*
Flood Plain	^.*\Flood Plain.*
Flood Plain Analysis	^.*\Flood Plain Analysis.*
Flood Plan LOMAR	^.*\Flood Plan LOMAR.*
Floodplain CLOMAR	^.*\Floodplain CLOMAR.*
Floor Plan	^.*\Floor Plan.*
Framing Plan	^.*\Framing Plan.*
General Notes	^.*\General Notes.*
GIS	^.*\GIS.*
GIS Cad	^.*\GIS Cad.*
Grading	^.*\Grading.*
Grading / Drainage	^.*\Grading / Drainage.*
Hydrology Study	^.*\Hydrology Study.*
Irrigation	^.*\Irrigation.*
Irrigation Drainage Paving	^.*\Irrigation Drainage Paving.*
Irrigation Grading	^.*\Irrigation Grading.*
Irrigation Grading Drainage	^.*\Irrigation Grading Drainage.*
Irrigation Plan	^.*\Irrigation Plan.*
Key Plan	^.*\Key Plan.*
Landscape Details	^.*\Landscape Details.*
Landscape Overall	^.*\Landscape Overall.*
Landscape Partial	^.*\Landscape Partial.*
Landscape Plan	^.*\Landscape Plan.*
Masonry	^.*\Masonry.*
Minor Land Division	^.*\Minor Land Division.*
NPDES Notes	^.*\NPDES Notes.*
Off-Site Improvement	^.*\Off-Site Improvement.*
Off-Site Sewer	^.*\Off-Site Sewer.*
Off-Site Water	^.*\Off-Site Water.*
On-Site Improvement	^.*\On-Site Improvement.*

On-Site Sewer	^.*\ On-Site Sewer.*
On-Site Water	^.*\ On-Site Water.*
Other	^.*\ Other.*
Paving	^.*\ Paving.*
Photometric	^.*\ Photometric.*
Photometric Plan	^.*\ Photometric Plan.*
Plumbing	^.*\ Plumbing.*
Preliminary Plat	^.*\ Preliminary Plat.*
Profiles	^.*\ Profiles.*
Property Line Lighting	^.*\ Property Line Lighting.*
Retaining Wall Plan	^.*\ Retaining Wall Plan.*
Retaining Wall Details	^.*\ Retaining Wall Details.*
Retaining Wall Elevation View	^.*\ Retaining Wall Elevation View.*
Sanitary Sewer Outfall	^.*\ Sanitary Sewer Outfall.*
Sanitary Sewer Profiles	^.*\ Sanitary Sewer Profiles.*
Schedule	^.*\ Schedule.*
Security Lighting	^.*\ Security Lighting.*
Signal Plan	^.*\ Signal Plan.*
Site Lighting Cut Sheets	^.*\ Site Lighting Cut Sheets.*
Signing And Striping	^.*\ Signing And Striping.*
Site Lighting Plan	^.*\ Site Lighting Plan.*
Site Master Plan	^.*\ Site Master Plan.*
Site Plan	^.*\ Site Plan.*
Siteplan Partial	^.*\ Siteplan Partial.*
Storm Drain Profiles	^.*\ Storm Drain Profiles.*
Stormwater	^.*\ Stormwater.*
Stormwater Pond	^.*\ Stormwater Pond.*
Street Profiles	^.*\ Street Profiles.*
Structural	^.*\ Structural.*
Survey	^.*\ Survey.*
Traffic Report	^.*\ Traffic Report.*
Tree & Landscape	^.*\ Tree & Landscape Details/Notes.*
Tree Plan	^.*\ Tree Plan.*
Utility	^.*\ Utility.*
Utility Plan	^.*\ Utility Plan.*
Water	^.*\ Water.*
Zoning Conditions	^.*\ Zoning Conditions.*