

# PROJECT SUBMITTAL PROCESS

## Step 1: Complete the 'INFORMATION' page.

Enter the **Project Name**

1. Choose the appropriate **Project Type** from the drop-down.
2. Fill out all required fields (marked with an asterisk \*). Reference number can be the permit number, if needed
3. For **Property Location**, selection one of the following:
  - a. Specific address fill in Street #, Street Name, Unit/Suite, City, State
  - b. If needed, use the Address Notes field at the bottom for more details
4. Select the **SAVE** button.

The screenshot shows a web application interface for creating a new project. The title is "New Project" and the breadcrumb is "220 Technology Dr. (#: JKSN-)". The "INFORMATION" tab is selected and highlighted with a red box. The form is divided into two main sections: "Details" and "Property Location".

**Details Section:**

- Project Number: JKSN-
- Project Name: 220 Technology Dr.
- Project Type: For Permitting - Addition and Remodel
- Reference Number: (empty)
- Occupancy Type: (empty)
- Construction Type: (empty)
- Square Footage: (empty)
- Height: (empty)
- Project Cost: (empty)
- Project Fees: (empty)
- Scope of Work: Business addition.
- Notes: (empty)

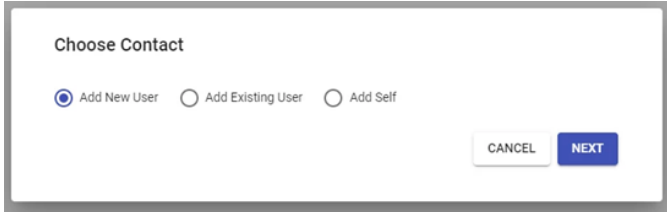
**Property Location Section:**

- This property does not have a street address.
- Site Name: (empty)
- Parcel #: (empty)
- Lot #: (empty)
- Tract #: (empty)
- Street #: 220
- Direction: (empty)
- Street Name: Technology
- Street Type: Drive
- Unit/Suite: 215
- City: Irvine
- State/Province: California
- Zip/Postal Code: 92618
- Country: United States
- Address Notes: (empty)

**At this point, your project is CREATED and you can leave and return to continue or complete the application at any time.**

## Step 2: Complete the 'CONTACTS' page

Each project must have at least one Project Contact. The Project Contact person must be a user with an account to log into goPost since they are expected to access the project to upload submitted files, receive email notifications, download deliverable packages, etc. Additional contacts may be added for informational purposes. If these other contacts also have applicant accounts to log in to goPost, they will also have project access; if not, they will only be used as reference information.

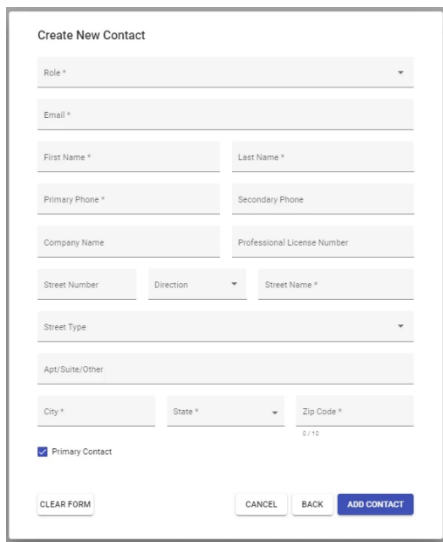


### Adding a Contact:

Select the + button at the bottom right of the Contacts page. A form will pop up asking you to either:

- Add New User
- Add Existing User
- Add Self

Select the appropriate option and click **NEXT**.

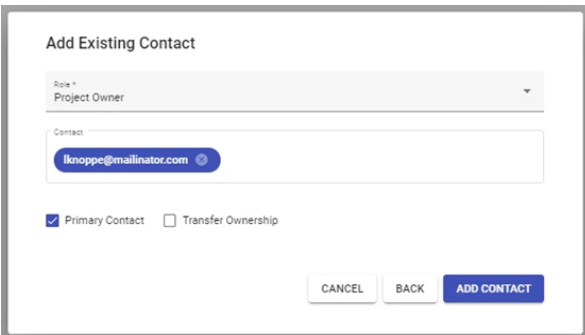


### If you are adding a New User that is not in goPost:

Choose a Role from the drop-down that reflects the contact's relationship to the project.

Fill in all required information (fields with an asterisk \*).

Click **ADD CONTACT**.

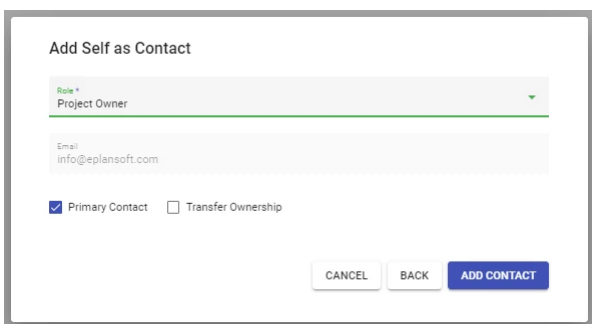


### If you are adding an Existing User that is already in goPost:

Choose a Role from the drop-down list.

Type in the user's email address in the search field. goPost will return a match if it already exists. Click on the match so the user is selected (email turns blue).

Click **ADD CONTACT**.



### If you are adding yourself (Self):

Choose a Role from the drop-down list.

Click **ADD CONTACT**.

Repeat as needed.

Fields denoted with an asterisk are required.

### Step 3: Upload your first set of plan review documents and supporting attachments

Prerequisites: See Preparing your Documents - **SUBMITTAL RECOMMENDATIONS** for a comprehensive list of recommendations.

From the **DOCUMENTS** tab, select the **add button** on the bottom right corner of the page.

1. Upload your plans in PDF format and supporting attachments (any file format). Drawings need to be a submitted as a single pdf document. The datasheets/calcs/cutsheets need to be in a separate pdf.
2. After the page refreshes:
  - a. Verify that the plan review files in PDF format are placed on the left side of the page.
    - i. Click the arrows underneath the '**Actions**' header to move supporting documents in PDF format to the right side of the page under ATTACHMENTS (see below).
3. Select the **PROCESS** button to inspect the Plan Review files for compliance.
  - a. Plans that do not pass inspection should be deleted from the documents page.
  - b. See Preparing your Documents - **SUBMITTAL RECOMMENDATIONS** for instructions on resolving file issues.

The screenshot shows the 'DOCUMENTS' tab in a software interface. At the top, there are navigation tabs: INFORMATION, CONTACTS, DOCUMENTS (selected), COMMENTS, INTERNAL NOTES, and REVISIONS. Below the tabs is a large dashed box for file upload, containing an upward arrow icon, the text 'Drag file(s) here to upload or', and a 'Browse Files' button. To the right of the upload area are 'Cancel' and 'Process' buttons, with a yellow arrow pointing to the 'Process' button. Below the upload area are two tables: 'Plans' and 'Attachments'.

Plans			
Name	Size	Status	Actions
B_BUILDING PLANS.pdf	1.412 MB	✓	🔍 🗑️

Attachments			
Name	Size	Status	Actions
Word Doc.docx	0.018 MB	✓	🔍 🗑️

Documents that do not pass the inspection process will be flagged with a red warning symbol.

Click on the symbol to open the STATUS window as shown in the example below.

Delete the rejected documents, resolve the issues and reupload the document again for another inspection.

#### STATUS

▲ filename: Filename can not contain special characters: #, +, &, (, )

✓ accessible:

✓ version: 1.4

✓ metadata:

✓ size: 2.94MB

✓ rotation:

▲ annotation: Page 9: Stamp x1. Popup x1.

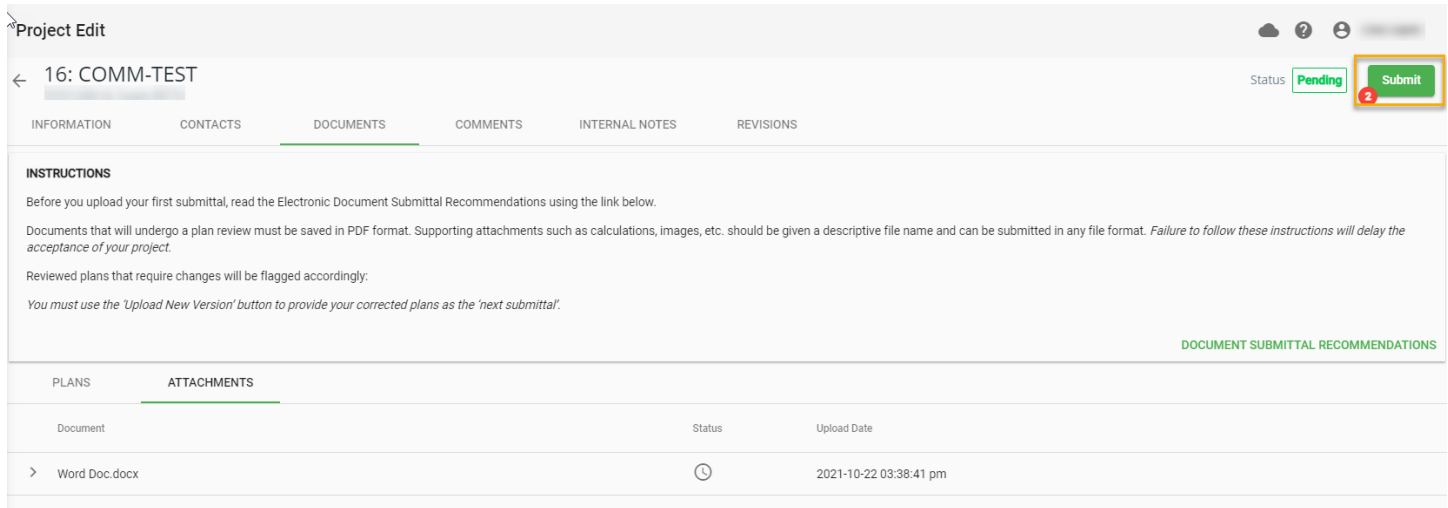
✓ pageAccess:

✓ resolution:

## Step 4: Submitting your project

Once all plan review documents have been inspected and flagged with a green checkmark status, select the **PROCESS** button to complete the upload process.

Then, select the **SUBMIT** button at the top of the page to trigger a notification the Intake staff.



The screenshot shows the 'Project Edit' interface for project '16: COMM-TEST'. The status is 'Pending' and there is a 'Submit' button. The 'DOCUMENTS' tab is active, showing a table of attachments.

Document	Status	Upload Date
> Word Doc.docx	🕒	2021-10-22 03:38:41 pm

Once the Intake staff begin their completeness check on your project you will not be able to make changes to the information/documents submitted.

## About the Intake Completeness Check Process

After submitting your project, you will receive an *email* when:

1. Your project has been accepted. In this case, await an email notification that a *deliverable* package is available for download from goPost.
  - a. If the reviewed plans require corrections:
    - i. Make those corrections to your drawings and **upload** new PDF's as the '*next version*'.
    - ii. **Submit** those plans to Intake staff again.
  - b. If no changes are required to your most recent document submittal, no further action is required.
    - i. Depending on the Agency/plan review Firm rules, your approved plans will be made available for download via goPost or you may be given other instructions.
2. Your project has been placed on hold for 'file issues':
  - a. Make the requested changes to your submitted plans per the instructions in the email.
  - b. Upload the corrected documents to the project and Submit to intake again.
3. Your project has been placed on hold for other issues:
  - a. Provide the information requested in the email and 'Submit' the project to Intake staff again.
4. Your project has been denied. In this case, the Intake staff have refused your project application outright. The email you receive will provide more details.

## ELECTRONIC SUBMITTAL RECOMMENDATIONS FOR DESIGN REVIEW

Please use the following instructions to prepare your documents for electronic plan submittal. Note that *plan review files* (“plans”) have different submittal recommendations than supporting documents.

### A. PREPARING PLAN REVIEW FILES (“PLANS”) FOR SUBMITTAL

1. **Materials List and Quantities:** Plans should have an accurate materials list with accurate quantities printed on the plans.
2. **File Drawing Style:** Plans should be plotted/drawn using a *black and white plot style with minimal grayscaling* to ensure documents are read properly. Colored pens are not encouraged because plan review markups will be drawn using colored sketches (and reduces the file size), though they are not prohibited.
3. **File Scale:** Plans must be drawn and saved “To Scale” to ensure proper measuring of lines and areas electronically. *Include a scale on each sheet or include the measurements for each object.*
4. **Architectural Scale Guide:** Plans should have an architectural scale on the plans to accurately measure distances and/or spacing.
5. **File Type:** Files intended for plan review must be saved in **PDF 1.3** format or greater.
6. **File Sizes:** The maximum upload size is **400 MB** at a time.
7. **File Orientation:** Pages must be **LANDSCAPE** orientation.
8. **File Content:** Files should be *flattened and/or optimized* PDFs.
  - Do not submit files that Adobe reports as damaged or that Adobe cannot open.
  - Either flatten drawing layers when creating PDFs from CAD, or flatten them after-the-fact by using the “Save As/Flattened” or “Optimize PDF” option within a PDF editor. (Adobe Pro is recommended.)
9. **File Encryption:** Do not submit password protected or encrypted (locked) documents, they will be rejected.
10. **File Scanning:** Scanned files are acceptable, but must meet all other submittal requirements listed above. When scanning, be sure to properly align page edges on scanning bed so the pages are not skewed.
11. **Preparing File Sets:** Grouping and submitting plans in logical sub-sets, such as separating plans by discipline, is encouraged because plans are typically distributed to reviewers by discipline.
12. **File Name Characters:** Filenames should *not exceed 140 characters* in length.
  - Do not include any of these characters in the filename: pound (#), plus (+), ampersand (&), backslash (\), forwardslash (/), colon (:), asterisk (\*), question mark (?), double quote ("), less than (<), greater than (>), or the pipe symbol (|).
13. **File Name Format:** If required, name each PDF using the appropriate filename prefix from the table below, followed by an underscore character ( \_ ) and a description. *For example:* ELEC\_Wiring Diagrams.pdf

## PROJECT DELIVERABLES

### Step 1: Open the Project record by selecting the ellipsis and choosing the Edit icon

1. Open the project record and navigate to the **DOCUMENTS** page.
2. Find the document flagged with the red warning icon and click on the **down arrow** to expand the panel.

Project Manager

Search Project Status None

ID	Number	Name	Address	City	Status	Contact	Created At	Portal	Submittal Comment
81					Created				
80					Accepted				
78					Accepted				
77	IRV-0822-1	0822-1	111 Main	irvine	RESB	Tiger Woods	2018-08-22 03:48:54 pm	IRVINE	
76					Accepted				

### Step 2: Select the DELIVERABLES tab

The red chip indicates the number of deliverable (.ZIP) packages available for download.

Project Edit

← [Project Name] Status RESB

INFORMATION CONTACTS DOCUMENTS DELIVERABLES 1

Details Property Location

Project Number Square Footage Height Site Name

### Step 3: Find the most recent zip file package in the list and select the download icon.

The package name includes the project number and date stamp.

INFORMATION CONTACTS DOCUMENTS DELIVERABLES 1 COMMENTS

File Name	Date Received
IRV-0822-1-20180822.zip	2018-08-22 04:34:28 pm

1 total

Download

#### Step 4: Open the zip file package and extract the documents to your device.

Correction reports and supporting documents will be found in the Attachments folder.

Name	Type	Compressed size
attachments	File folder	
20180822A-SITE_BUILDINGSET7.pdf	PDF Document	827 KB
info.txt	TXT File	1 KB

### PROJECT RESUBMITTAL

#### Step 1: Locate the document flagged for Corrections required.

1. Open the project record and navigate to the **DOCUMENTS** page.
2. Find the document flagged with the red warning icon and click on the **down arrow** to expand the panel.

The screenshot shows a document list with the following columns: Name, Type, Compressed size, Version, and Upload Date. The document 'SITE\_BUILDINGSET7.pdf' is highlighted with a red box and a red arrow pointing to it. A red warning icon is visible next to the document name, and a tooltip labeled 'Corrections Required' is shown. Below the document list, there is a table with columns: Document, Size, Version, # Pages, Upload Date, and Action. The document 'SITE\_BUILDINGSET7.pdf' is listed with a size of 0.87 MB, version '1st Submittal', 7 pages, and an upload date of 2018-08-22 03:50:49 pm. A green checkmark is visible in the Action column. Below the table, there is a green button labeled 'UPLOAD VERSION' with a red arrow pointing to it. At the bottom, it says '1 selected / 1 total'.

#### Step 2: Select the **UPLOAD VERSION** button.

1. Browse/select to the newer document version.
2. The PDF Scout Inspection Tool will process the incoming file.
  - . The **UPLOAD NEW VERSION** window will display a green checkmark if the document is acceptable. Select **FINISH**.
  - a. If the document fails inspection, make the requested changes and try again. See [Preparing your Documents - SUBMITTAL RECOMMENDATIONS](#)

The screenshot shows the 'UPLOAD NEW VERSION' dialog box. The dialog has a title bar 'UPLOAD NEW VERSION' and a document name 'B\_BUILDINGSET7\_b.pdf'. The size is 1.263 MB, and a green checkmark is visible next to the size. There are two buttons: 'CANCEL' and 'FINISH'. The 'FINISH' button is highlighted with a red box. In the background, the document list from the previous screenshot is visible, with the 'UPLOAD VERSION' button highlighted.

#### Best Practices

Be sure to associate the new document version to the prior version properly. The page order and number of pages in each version should match exactly.



### Step 3: Verify and submit the document version

1. **Verify** that the new submittal is properly associated to the prior submittal.
2. **Repeat** this process for each document flagged for correction/resubmittal.
3. **Select** the **SUBMIT** button at the top of the page.

SITE\_BUILDINGSET7.pdf 🕒 2nd Submittal 2018-08-27 10:09:20 am

Version Reference

Document	Size	Version	# Pages	Upload Date	Action
SITE_BUILDINGSET7.pdf	0.87 MB	1st Submittal	7	2018-08-22 03:50:49 pm	👁
B_BUILDINGSET7_b.pdf	1.26 MB	2nd Submittal	7	2018-08-27 10:09:20 am	👁 🗑

2 total

**UPLOAD VERSION**