

# DRC Workflow Tutorial

When you're assigned a City of Santa Clarita project for review, you'll receive an email from ePlans@santa-clarita titled: Formal Review Action Request for: *project number*.

The email contains information about the project and a link to the ePlans project.

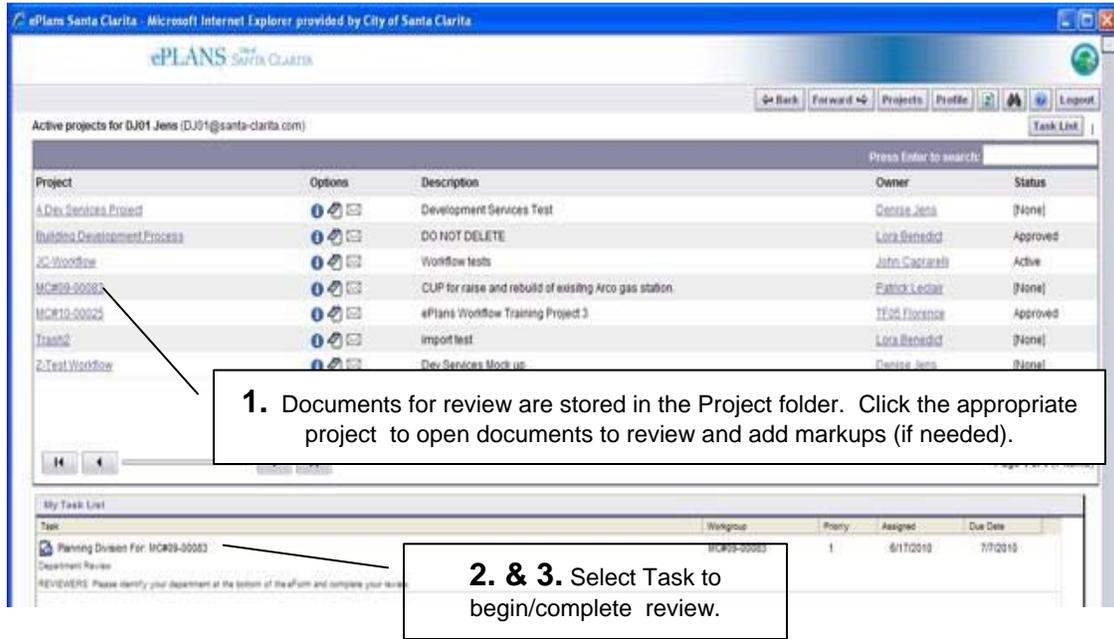
	
Hello DJ01 Jens,	
You have been notified to please perform the action requested below for Master Case Number: MC#09-00083	
REVIEWERS: Please identify your department at the bottom of the eForm and complete your review.	
<b>Plan Review Number:</b>	MC#09-00083
<b>Project Description:</b>	CUP for raise and rebuild of existng Arco gas station.
<b>Project Planner:</b>	Patrick Leclair
<b>Project Planner Email:</b>	<a href="mailto:pleclair@santa-clarita.com">pleclair@santa-clarita.com</a>
<a href="#">Login to ePlans</a>	
For all technical or Plan Submission questions, please send an e-mail to <a href="mailto:helpdesk@santa-clarita.com">helpdesk@santa-clarita.com</a> or call (661) 286-4095.	



Log into ePlans using the link at bottom of the email.

# Project Review – Overview

After logging into ePlans, the following screen appears listing projects and assigned tasks:



The top section is the **Project** list, showing all projects of which you're a member. The bottom portion is your **Task** list, with assigned tasks for your completion.

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## The initial review takes place in three steps:

1. Review project documents in the **Project** list. When adding markups, **please** use Changemarks.  For markup instructions, please refer to the Brava Viewer Contents when viewing the project documents . You may also download the Brava Viewer manual from <http://www.santa-clarita.com/eplans>.
2. From "**My Task List**", select the Planning Division task and accept the project.
3. Complete your review in the eForm by adding status, comments, markups, etc.

# Project Review – Accepting the Review Task

Clicking the Planning Division review task from your Task List triggers the ePlans eForm. **Please note** if you are the **current user** of the form.

If not, you must wait for the DRC member to complete their review. If form is locked, please contact the Assigned Planner.

Planning Division Request Form - Microsoft Internet Explorer provided by City of Santa Clarita

**ePLANS** City of SANTA CLARITA

You are the current user of this eForm. It is locked to all other users until you either complete the form, click the 'Cancel' button or click the 'Save and Close' button.

**Planning Division**  
23920 Valencia Blvd. Santa Clarita, CA Suite 302  
(661) 255-4530

Contact the Planning Division | City of Santa Clarita

**Project Information**

Master Case Number	SPC409-00005
Permit Type	
Project Name	A23406
Project Description	CUIP for raise and rebuild of existing Arco gas station.
Entitlement	
Site Address	28406 SAND CANYON ROAD 91387 ADR02
Assessor ID Number (AIN)	2840007901
Status	
Progress	
Assigned Planner	Patrick Lecter
Planner Phone	
Review Cycle	1
Current Step	Department Review

**Step Instructions** → REVIEWERS: Please identify your department at the bottom of the eform and complete your review.

Current User: You are logged in as D301 Jens (D301@santa-clarita.com).

Development Review (DRC) Scheduled Meeting Date/Time: / 00:00

Development Review (DRC) Actual Meeting Date:

**Applicant Information**

Applicant First Name		Company	
Applicant Last Name	ATLANTIC RICHFIELD CO	Applicant Address	
Applicant Email		Applicant Phone	

**Project Dates**

Application Received Date	5/15/2009 11:00:38 AM	Application Expiration Date	
Application Last Updated	6/18/2009 9:18:23 AM	Application Injured Date	
Application Finalized Date			

**Project Documents**

Consolidated Master Case Comments		Consolidated Applicant Response	
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**Select Review Task**

Select	Review Department	Reviewer	Status
<input type="checkbox"/>	Development Services	D301 Jens (D301@santa-clarita.com)	Assigned

Select Review Task | Save and Close

Scroll to bottom of eForm. Check the **“Select”** box to accept the Review Task.



# Project Review – Update Review Status

**Update Review Status** - Locate your division, highlighted in yellow. Choose appropriate status from the “Update Status” dropdown list:

Review Cycle	Review Department	Reviewer	Status	Reviewer Comments	Attachment(s)
1	Building & Safety	DJ02 Jens (DJ02@santaclarita.com)	Current Status: Assigned Update Status: <Select Status>	<input type="checkbox"/>	
1	Development Services	DJ01 Jens (DJ01@santaclarita.com)	Current Status: In Review Update Status: <Select Status>	<input type="checkbox"/>	Attach Support File
1	Environmental Services	DJ03 Jens (DJ03@santaclarita.com)	Current Status: In Review Update Status: <Select Status>	<input type="checkbox"/>	
1	Planner	Patrick Leclair (pleclair@santaclarita.com)	Current Status: Assigned Update Status: <Select Status>	<input type="checkbox"/>	

Select Drawing Markups

Complete Review Task Save and Close Cancel

## Update Status:

**In Review** – Project review in process.

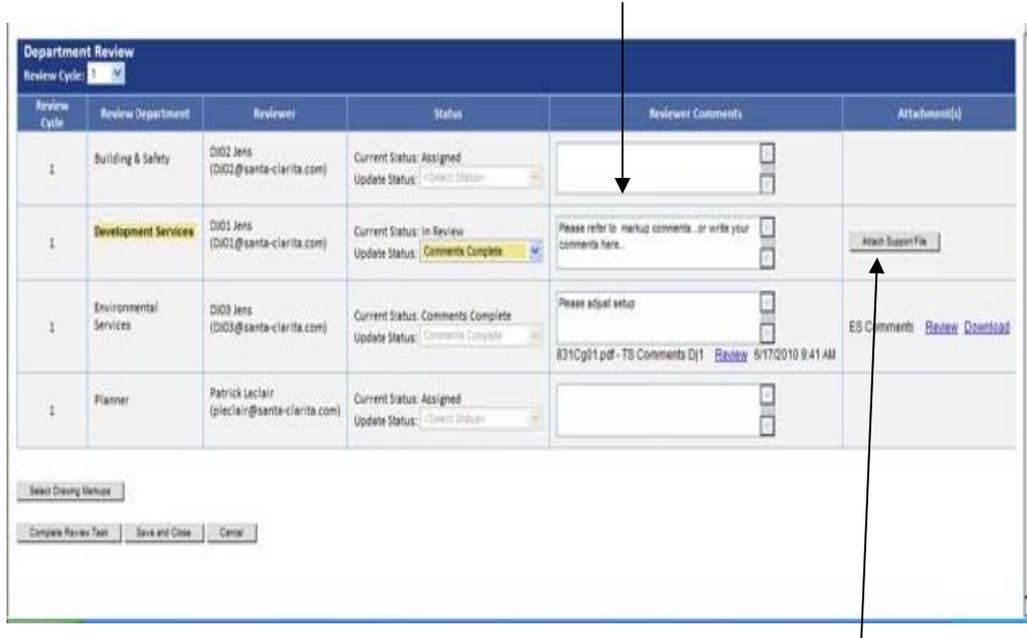
**Approved with Conditions** – This project is ready for approval with the Conditions of Approval attached.

**Comments Complete** – This round of review is complete, but this project is not approved until the attached comments have been addressed.

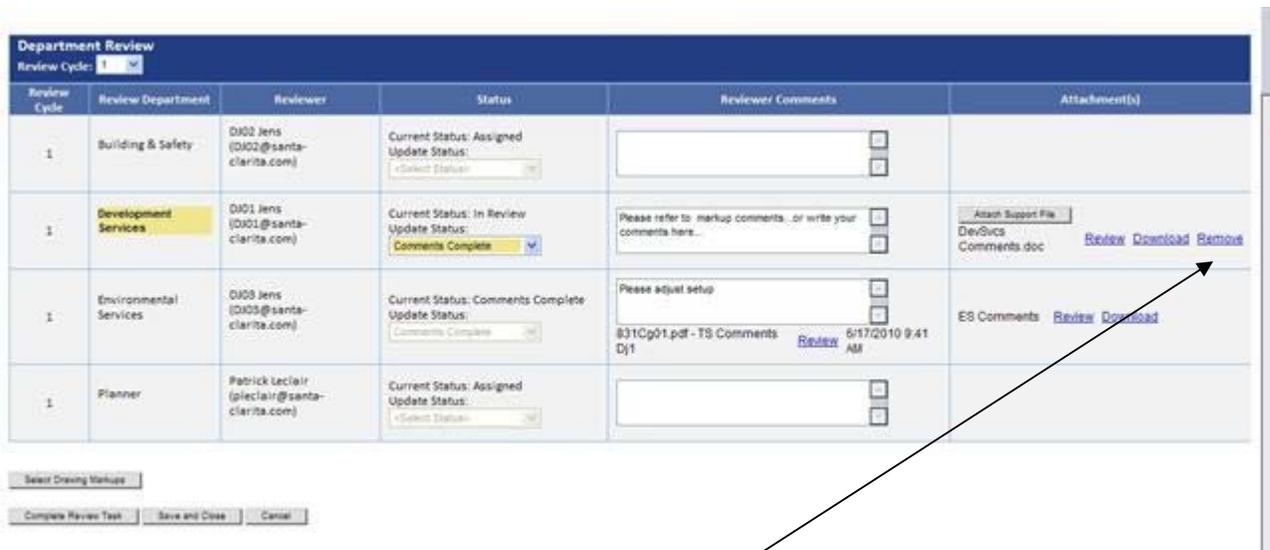
One Stop applications: In the case of One Stop applications, completion of the round signifies the completion of the project until a formal application is submitted.

# Project Review – Review Task

You may add additional comments in the “Reviewer Comments” field:



To upload an additional sheet of comments/conditions, click “Attach Support File” button.



Notice you can remove your work, but not other's.

If you've added markups to the plans/documents, please add them to your review for the Applicant to view. Click the “**Select Drawing Markups**” button.

# Project Review – Adding Markups to Review

Clicking “Select Drawing Markups” will open a window listing the project folders.

Expand/collapse the appropriate folder ( clicking +/-) to view the documents and their corresponding markups in that folder. Click the markup icon  on the specific document to locate your markup.

Check the “Attach to Workflow” box next to your markup. Click “**Attach Markup(s)**”.

You are returned to the “Choose Files” menu. Repeat for markups on other documents.

Click the **Add Markup(s) to Workflow** button to attach all markups to your review and return to the Department Review screen.

# Project Review – Complete Review Task

Now that you've added any comments, documents and/or markups to your review, please be sure to update the Update Status.

The screenshot displays the 'Department Review' interface. At the top, there is a 'Review Cycle' dropdown menu set to '1'. Below this is a table with the following columns: Review Cycle, Review Department, Reviewer, Status, Reviewer Comments, and Attachment(s). The table contains four rows of review tasks. The second row, for 'Development Services', is highlighted in yellow. Below the table, there are three buttons: 'Select Drawing Markups', 'Complete Review Task', and 'Save and Close'. An arrow points from the text above to the 'Update Status' dropdown in the second row of the table. Another arrow points from the text below to the 'Complete Review Task' button.

Review Cycle	Review Department	Reviewer	Status	Reviewer Comments	Attachment(s)
1	Building & Safety	DJ02 Jens (DJ02@santaclarita.com)	Current Status: Assigned Update Status: <Select Status>		
1	Development Services	DJ01 Jens (DJ01@santaclarita.com)	Current Status: In Review Update Status: Approved with Conditions	831Cg01.pdf - DS Comment DJ 6/18/2010 9:56 AM DJ01 Jens	Attach Support File DevSVCS Comments.doc Review Download Remove
1	Environmental Services	DJ03 Jens (DJ03@santaclarita.com)	Current Status: Comments Complete Update Status: Comments Complete	Please adjust setup 831Cg01.pdf - TS Comments Dj1 6/17/2010 9:41 AM	ES Comments Review Download
1	Planner	Patrick Leclair (pleclair@santaclarita.com)	Current Status: Assigned Update Status: <Select Status>		

Select Drawing Markups

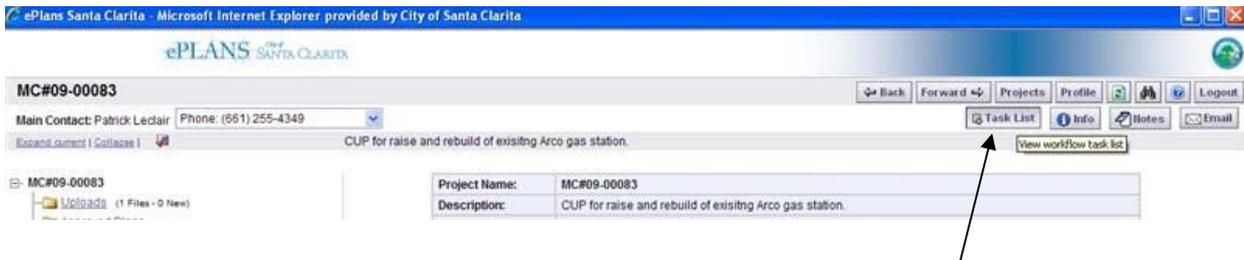
Complete Review Task Save and Close Cancel

**You must select “Complete Review Task” to complete your project review.**

Your project review is now complete. The review task will be removed from your Task list.

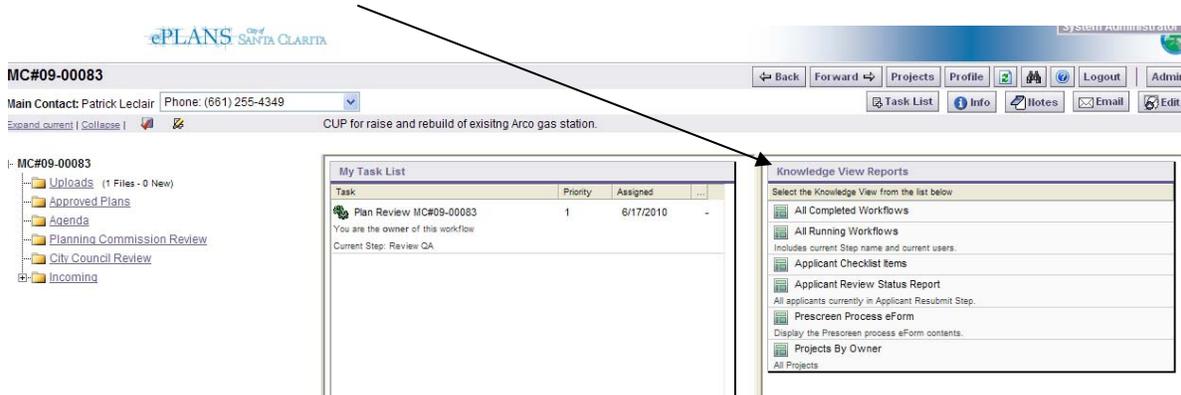
# Project Review – View Other’s Comments Knowledge View Report

Knowledge View reports allow you to view Project information, including comments from other project members.

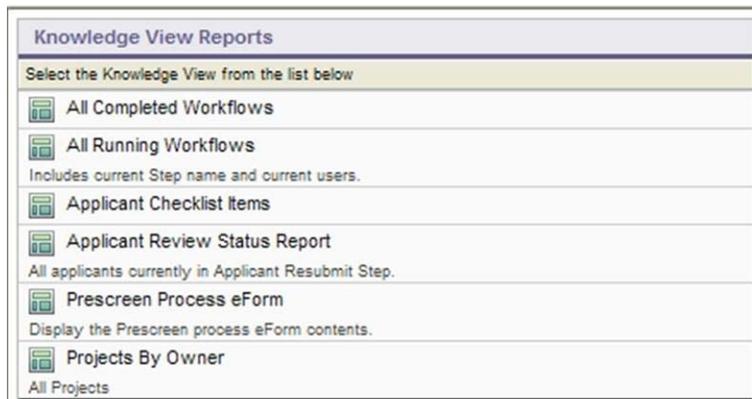


To access the Knowledge Views, open your Project. Click the Task List button.

Knowledge View Reports become available on the right-side of your screen:

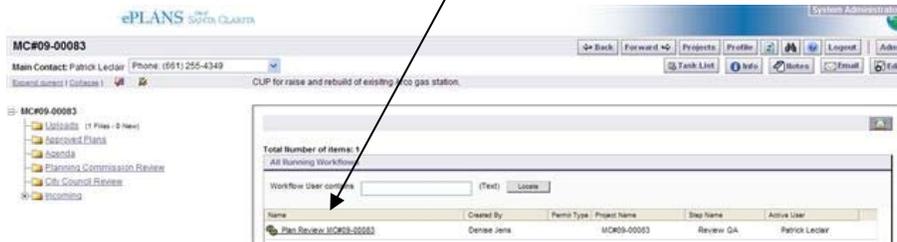


Depending on the stage of the project, choose either “All Completed Workflows” or “All Running Workflows”.

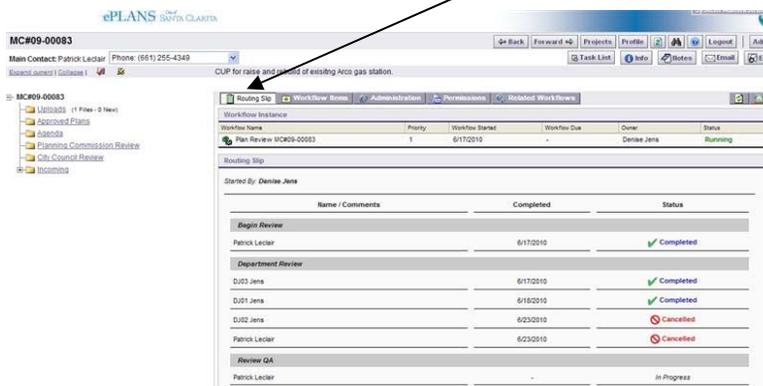


# Project Review – Knowledge View Report (con't)

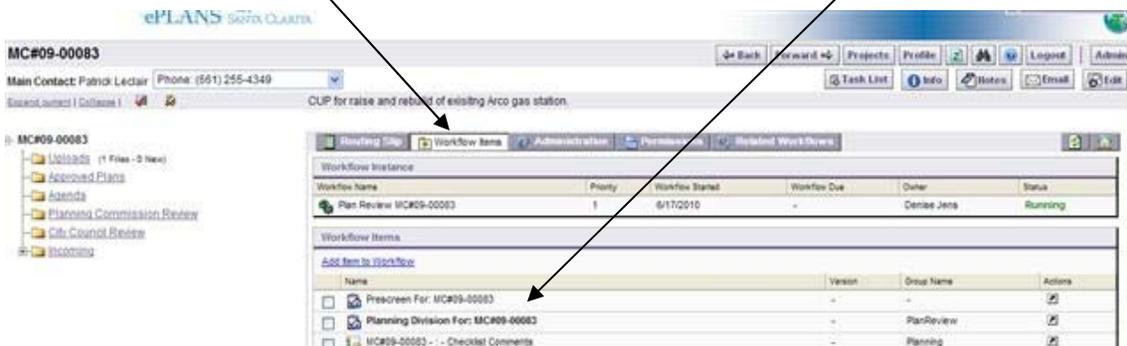
Click on the project link to open the workflow:



Notice the gray tabs at top of window; default is "Routing Slip".



Click on the "Workflow Items" tab. Click on the eForm for "Planning Division..."



## Project Review – Knowledge View Report (con't)

The Planning Division Review eForm opens. **Scroll to the bottom of the form** to view comments and see markups from other review participants.

Development Review (DRC) Scheduled Meeting Date/Time		/ :00:00 AM		Development Review (DRC) Actual Meeting Date	
<b>Applicant Information</b>					
Applicant First Name		Company			
Applicant Last Name	ATLANTIC RICHFIELD CO	Applicant Address			
Applicant Email		Applicant Phone			
<b>Project Dates</b>					
Application Received Date	6/15/2009 11:00:39 AM	Application Expiration Date			
Application Last Updated	6/19/2009 9:19:23 AM	Application Issued Date			
Application Finalized Date					
<b>Project Documents</b>					
Consolidated Master Case Comments			Consolidated Applicant Response		
<b>Department Review</b>					
Review Cycle: 1					
Review Cycle	Review Department	Reviewer	Status	Reviewer Comments	Attachment(s)
1	Building & Safety	DJ02 Jens (DJ02@santa-clarita.com)	Current Status: Assigned		
1	Development Services	DJ01 Jens (DJ01@santa-clarita.com)	Current Status: Approved with Conditions	831Cg01.pdf - DS Comment DJ <a href="#">Review</a> 6/18/2010 9:56 AM	DevSvcs Comments.doc <a href="#">Review</a> <a href="#">Download</a>
1	Environmental Services	DJ03 Jens (DJ03@santa-clarita.com)	Current Status: Comments Complete	Please adjust setup 831Cg01.pdf - TS Comments DJ1 <a href="#">Review</a> 6/17/2010 9:41 AM	ES Comments <a href="#">Review</a> <a href="#">Download</a>
1	Planner	Patrick Leclair (pleclair@santa-clarita.com)	Current Status: Assigned		

The Knowledge View version of this eForm has no buttons at the bottom for closing the form.

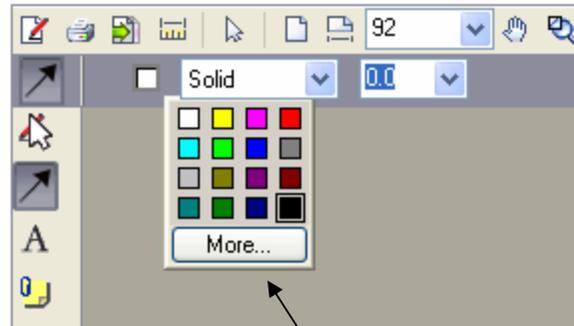
It's okay to close this form using the red **X**.

## Project Review – Assigned Review Colors

When performing markups, please refer to the list below to choose your division :

Colors are selected from the default selections of the tools color palette in the Brava Viewer:

Development Services: Dark Brown  
Econ Dev: Orange  
Environmental Services: Blue-Green  
Fire Department: Red  
Special Districts: Bright Green  
Parks: Olive Green  
Planning: Bright Blue  
Redevelopment: Dark Blue  
Traffic: Purple  
Transit: Fuschia  
Urban Forestry: Kelly Green  
Building & Safety: Orange-Red



Please feel free to make variations to your division color by selecting More... on the color palette.