

## DOCUMENT PREPARATION TIP SHEET

### General Information about Documents with EDR

Electronic Document Review (EDR) has been developed in conjunction with specific software to facilitate an electronic plan review and approval process. The sophisticated tools within this software are designed to recognize documents that are named in accordance with a designated naming convention and file type. Deviation from that designated naming convention will delay the review process. Please take a moment to carefully review and understand the following helpful tips.

There are specific criteria that must be followed in preparing documents for EDR application submittal. If this criteria is not followed, the files will not be recognized and will not be able to integrate with the software reviewing tool. Likewise, the documents must be in PDF format with certain criteria to integrate with the software. In order to prevent any problem during review, the documents are examined during the Digital Intake process to ensure they meet all criteria. If documents are not prepared properly, the customer will be contacted to correct deficiencies within a short time frame. If deficiencies are not corrected, the submittal may be rejected.

### Submittal Requirements and Recommendations

Please use the following instructions to prepare your documents for electronic plan check. Note that *Plans* have different submittal recommendations than supporting documents/attachments.

- ✓ All PDF files must be under 50 MB in size.
- ✓ Paper sizes should not exceed 36x48 inches.
- ✓ Resolution should not exceed 200 DPI.
- ✓ Files must be saved in PDF 1.4 OR GREATER.

#### ★ Applicant – quick tip

Retain a copy of the submitted file to later verify the filename and sheet order (during resubmittal). **Revision/resubmittals may be rejected if not submitted with a filename that exactly matches the original submittal filename.**

#### Preparing plans for submittal

1. **Creating pdf's:** each 'plan' (or 'plan set') must be saved as a **flattened/optimized pdf**. Flatten the drawing layers in your cad program prior to creating the pdf, or use the 'save as/flattened' and/or **optimized** pdf option available in your pdf tool or use the Adobe PDF print option. Plans that have 'layers' are not acceptable.

#### Naming plan sets:

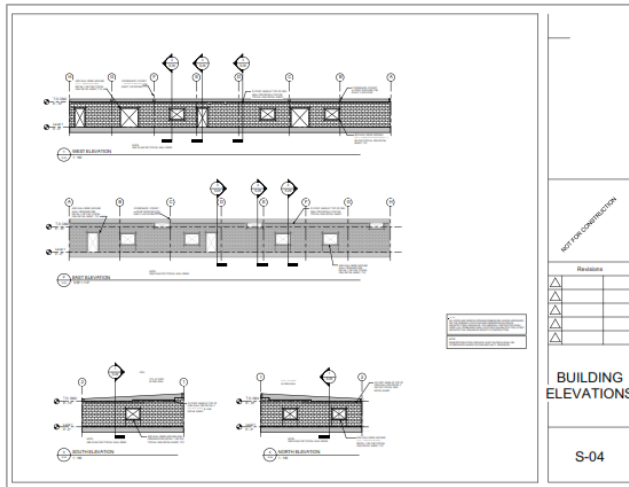
We recommend grouping and submitting plans in smaller, logical sets to facilitate the electronic plan review. For example, the Grading and Drainage plans should include all pages in one pdf; photovoltaic details should all be grouped in one pdf; building plans should be in one pdf, etc.

#### ★ Applicant – quick tip

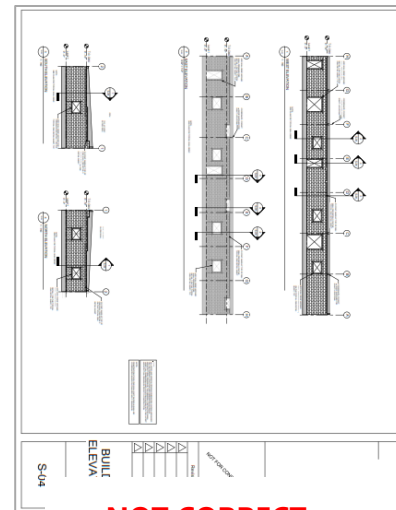
To verify that pages are properly oriented, open the document in your pdf application and do a '**print preview**'. Scroll through each page in the preview window to make sure the pages are properly oriented. Make sure the correct paper size is selected.

#### Page orientation and alignment:

1. Pages must all be properly oriented, meaning upright, **not** sideways or upside down, so that the document can be viewed without rotation. Failure to submit correctly oriented plans will result in the rejection of the plans and closure of the permit number during digital intake, see the digital customer checklist.



**CORRECT**



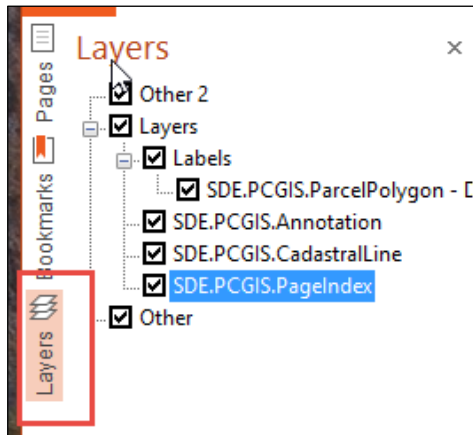
**NOT CORRECT**

2. Alignment: plan drawings must be created in your cad program so that drawing perimeters 'line up' exactly when overlaid electronically.
  - Revised/corrected plans must 'line up' with the original submittal to facilitate comparing versions electronically.
3. Plans must be 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. Plans should be plotted/drawn using a black and white plot style. Grayscale, monochrome and colored pens are not encouraged.
5. **Do not submit password protected or locked pdf documents.** Plan reviews are conducted on copies of the original files provided. The original pdf's are not changed in any manner.
6. After saving the cad files to pdf format, **ensure that no 'comments' or 'editable content' exists** in the file. (Embedded hyperlinks are acceptable.)
7. **Paper plans scanned from a photocopy to pdf format are acceptable, but should be clearly legible and follow the same rules noted above.**
8. Open each pdf using *adobe reader/adobe pro* and select 'file/save as'. Adobe is the best tool for resolving corrupted or malformed files. Do not submit pdf's that adobe indicates are corrupted.
  - Ensure the file name meets the naming recommendations noted above.
  - **Be sure your PDF tool has editing capabilities.**

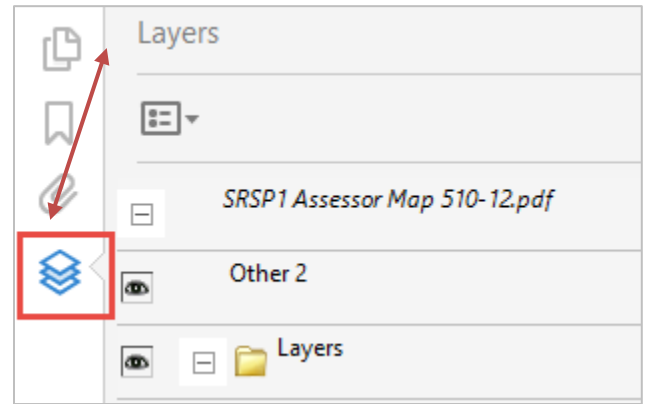
Electronic plan review software relies on correct (pdf/a compliant) information that is embedded in every pdf document (the *metadata*). For intellectual property and security reasons, plan review software does not and should not change incoming files. Here are some guidelines for *resolving potential issues* before you submit your plans.

## How can I tell if my pdf has 'layers' or other 'editable content'?

Most pdf compliant software (like adobe reader, adobe pro, nitro pro, etc.) Display a layers icon when a document contains layers, (see below). The layers icon is not displayed if the file contains no layers recognized by the pdf tool.



Nitro Pro PDF – with 'Layers'



Adobe Reader PDF – with 'Layers'

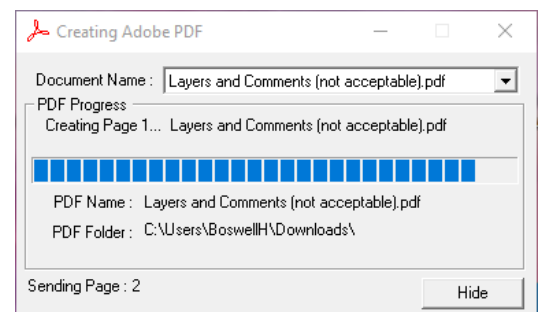
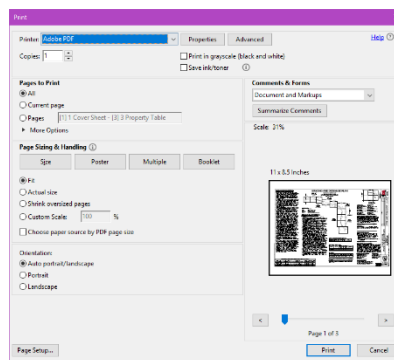
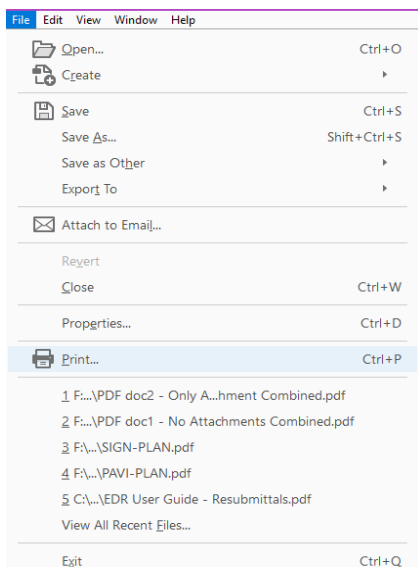
Other 'editable content' includes: active **form fields, stamps, comment or text boxes, signatures, or markups** that can be deleted from the pdf by any user. Editable fields will have a blue background within the pdf. Open the comment window in your pdf tool to see these types of objects. If any of these are found, please flatten the pdf or remove them. These include plans that use *autocad shx text* objects – this font type that has compatibility issues in many pdf viewers.

## Why do 'layers' and 'editable content' need to be removed from the pdf?

Many tools on the market convert cad drawings/plans to a pdf format. Unfortunately, some of these tools do not properly translate cad layers or content. Additionally, conversion irregularities introduced by the cad program or flatbed scanner may introduce errors into the pdf document. Do not submit files with *any editable content*. If an 'object' can be edited or deleted in the pdf, the document is not acceptable.

**Removing Layers and Comments:** To remove layers and comments, go to the **File** button at the top of the document and select the print option.

- Then select the **"Adobe PDF"** option for the printer. This is often referred to as "Print to PDF".
- When you hit Print, you will be prompted to save the file.
- You will then see the document being flattened.
- The PDF will open and there will be no comments or layers



Saving pdf's with consistently formatted, sequential bookmarks is helpful and encouraged. If multiple pdf's are merged, verify that bookmarks are consistent. Nested bookmarks are not officially supported. Ideally, a bookmark consists of the sheet number and a short description (*example: g1.0 general notes*)

### Why is page rotation so important?

Pdf tools that allow users to 'rotate' pages should properly record that 'rotation' within the pdf document. When this rotation is not properly set by the pdf software, those pages may end up printing upside down or sideways when they are sent to a printer.

### What does pdf optimization do?

Pdf optimization reduces file size by removing embedded fonts, compressing images and removing unused objects and improper metadata. Optimization is critical to reduce or eliminate pdf corruption.

### Naming supplemental documents

Supplemental documents or attachments are any files that are not plan sets. These may include permit applications, soils reports, calculations, images, etc. These must also be **submitted in pdf format with a unique, descriptive filename**.

## Attachments and Naming Convention Structure

There are specific naming conventions that must be followed when saving files for EDR application submittal. The table shown below specifies the required application submittal documents and required naming convention and document descriptions.

<u>Required Documents</u>	<u>Application Documents</u>	<u>Naming Convention</u>	<u>Document Description</u>
✓	Building Activity Application	BLDG-APPL	1 <sup>st</sup> Sub-Building Activity Application
✓	Digital Checklist	DIGT-CKLT	1 <sup>st</sup> Sub-Digital Checklist Form
✓	Unofficial/Official Recorded Deed	DEED-DETL	1 <sup>st</sup> Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 <sup>st</sup> Sub-Site Plan
✓	Grading and Drainage Plan	GRAD-PLAN	1 <sup>st</sup> Sub-G&D Plan
✓	Construction Plans	BLDG-PLAN	1 <sup>st</sup> Sub-Building Plans
If applicable	Structural Calculations	STRU-CALC	1 <sup>st</sup> Sub-Structural Calculations
If applicable	Truss Calculations	TRUS-CALC	1 <sup>st</sup> Sub-Truss Calculations
If applicable	Load Calculations	LOAD-CALC	1 <sup>st</sup> Sub-Load Calculations
If applicable	Specifications	SPEC-DETL	1 <sup>st</sup> Sub-Specifications
If applicable	Fence, Gate or Wall Details	FENC-DETL	1 <sup>st</sup> Sub-Fence, Gate or Wall Details
If applicable	Drainage Report/Plan	DRAI-RPTS	1 <sup>st</sup> Sub-Drainage Report
If applicable	Environmental Serv. Documentation	ENVS-DOCU	1 <sup>st</sup> Sub-Environmental Receipt
If applicable	Standard Plan Authorization Letter	SPAL-LTTR	1 <sup>st</sup> Sub-Standard Plan Authorization Letter
If applicable	Will Serve Letter	WLSR-LTTR	1 <sup>st</sup> Sub-Will Serve Letter
If applicable	Work Order for MH	WKOR-DOCU	1 <sup>st</sup> Sub-Work Order
If applicable	PUE Waiver	PUEW-DOCU	1 <sup>st</sup> Sub-PUE Waiver
If applicable	Finished Floor Letter	FFLT-LTTR	1 <sup>st</sup> Sub- Finished Floor Letter
If applicable	Temporary Benchmark Letter	TMBK-LTTR	1 <sup>st</sup> Sub- Temporary Benchmark Letter
If applicable	Special Inspection Certificate	SPLI-DOCU	1 <sup>st</sup> Sub- Special Inspection Certificate
If applicable	Contact Supplemental	CONT-DOCU	1 <sup>st</sup> Sub- Contact Supplemental
✓	Response letter	RESP-LTTR	2 <sup>nd</sup> Sub-Response Letter

If you have a document not listed here, please follow the basic naming convention structure: **CAPS-CAPS** If the item is a plan, use **XXXX-PLAN**, if it is a detail use **XXXX-DETL**, if it is a calculation use **XXXX-CALC**, etc. Please be as descriptive as you can. Example, for a fireplace detail use **FRPL-DETL**, the Document Description would be: **1<sup>st</sup> Sub-Fireplace Detail**.