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.*

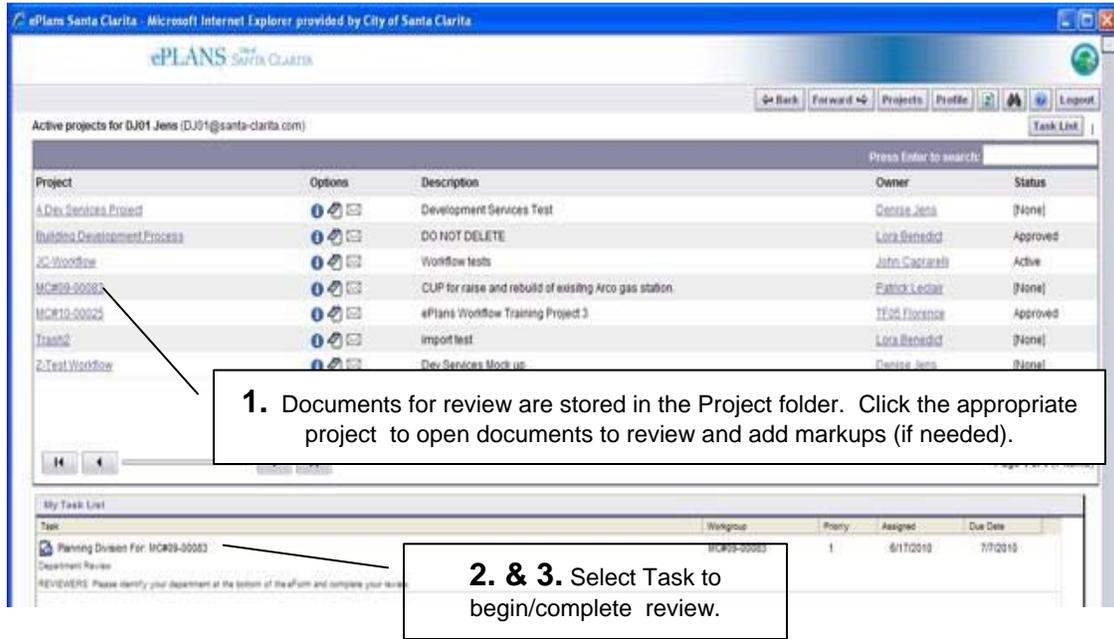The email contains information about the project and a link to the ePlans project.

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:

1. Documents for review are stored in the Project folder. Click the appropriate project to open documents to review and add markups (if needed).

2. & 3. Select Task to begin/complete review.

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.

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.

Notice the instructions

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

Project Review – Accepting the Review Task (cont.)

Choosing the "**Select Review Task**", triggers additional information:

Select Review Task assigns the review to you and allows you to complete your review task.

Save and Close allows you to return later to complete your review. Use "Save and Close" to exit the eForm to add comments/markups to the project documents.

<div align="center">

Prevent locking the form for other's use
PLEASE select either **Select Review Task**   OR   **Save and Close**

Please click the appropriate button to close the form.
DO NOT close the form using the red **X**.

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Project Review – Delegate Review

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Delegating to others - If you delegate to others, the screen below appears. Select the appropriate group, if needed to review the DRC project.

Choose "Assign Selected Reviewers" to invite delegate to the project review. Clicking "Cancel" returns you to your starting point on the main project screen.
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Project Review – Update Review Status

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

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:
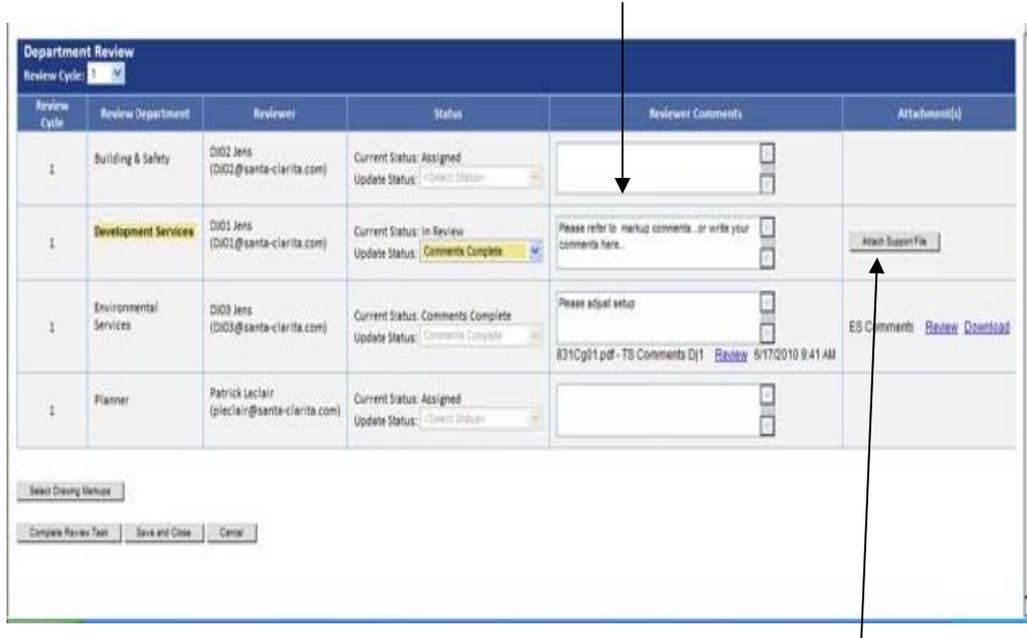
To upload an additional sheet of comments/conditions, click "Attach Support File" button.
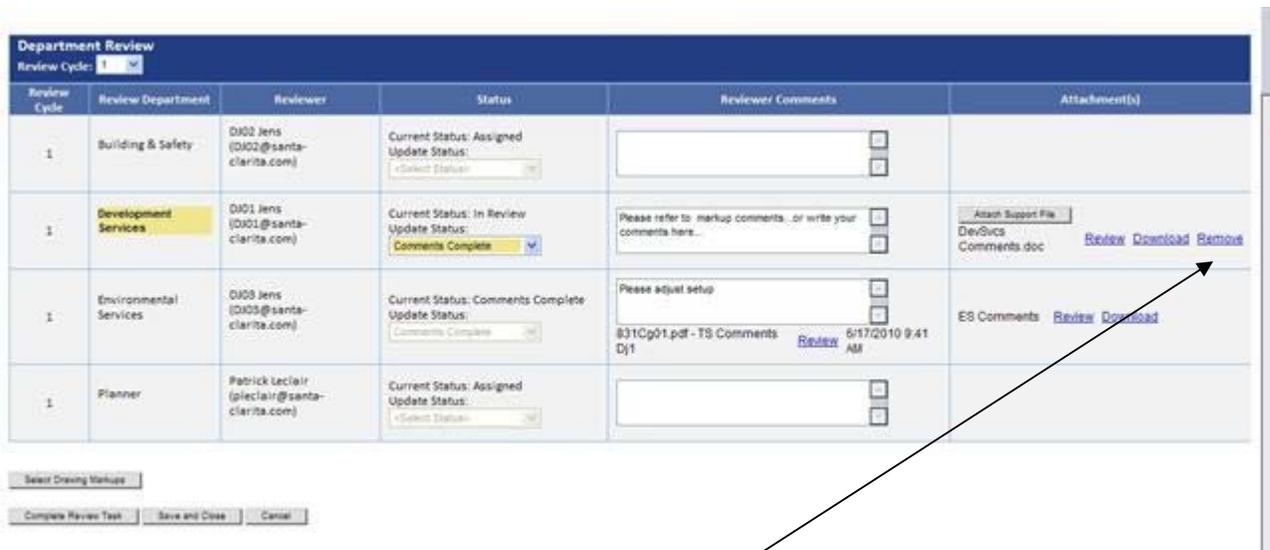
Notice you can remove your work, but not other's.

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.

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.
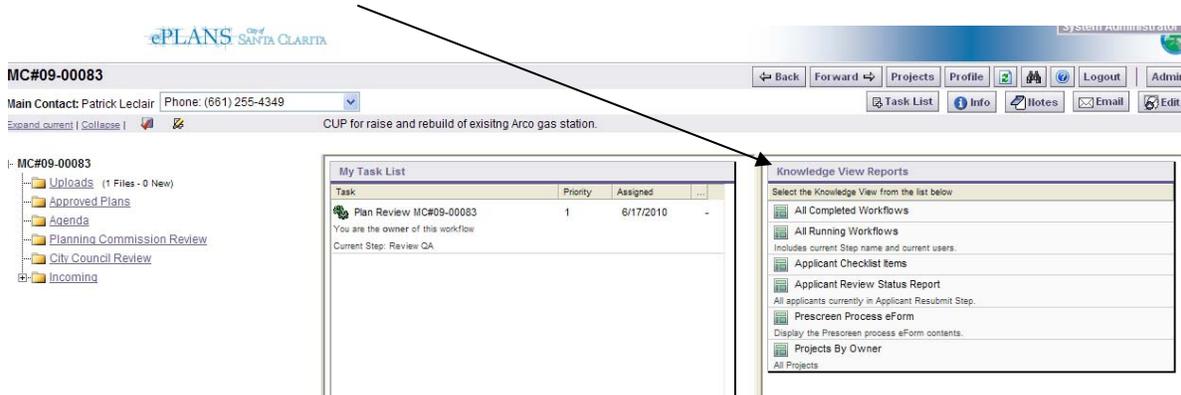
Project Review – View Other's Comments
Knowledge View Report

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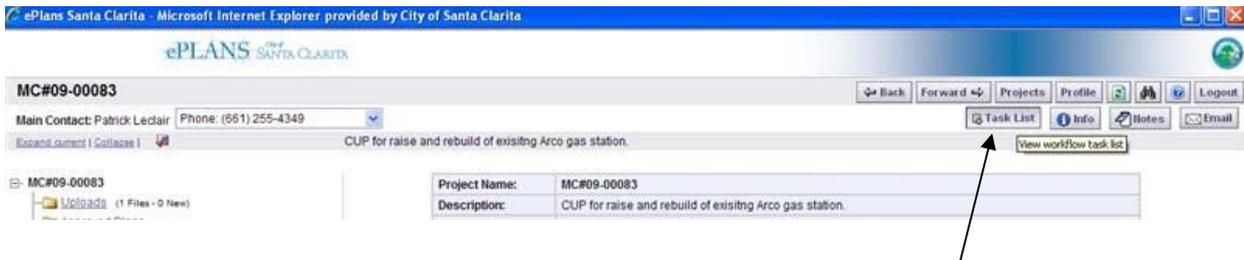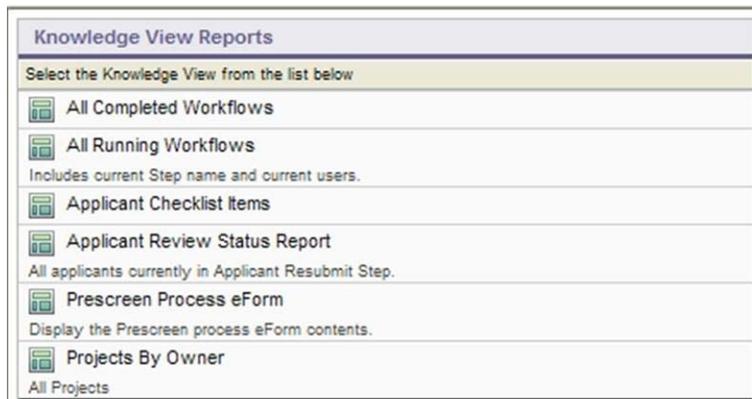

To access the Knowledge Views, open your Project. Click the Task List button.

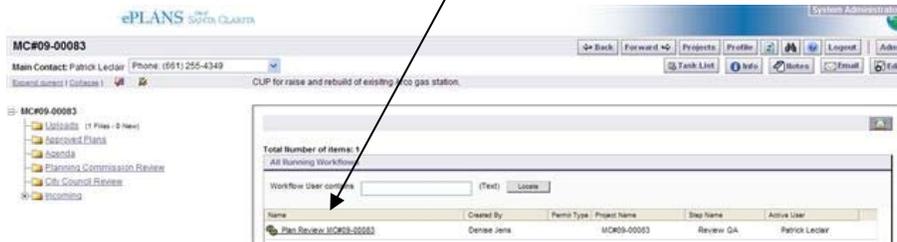Knowledge View Reports become available on the right-side of your screen:

Depending on the stage of the project, choose either "All Completed Workflows" or "All Running Workflows".
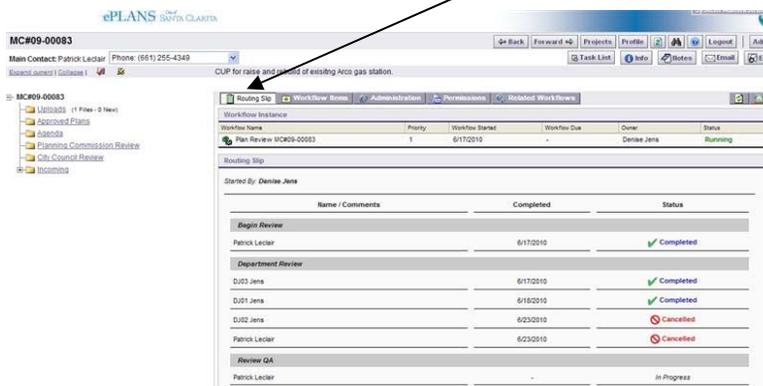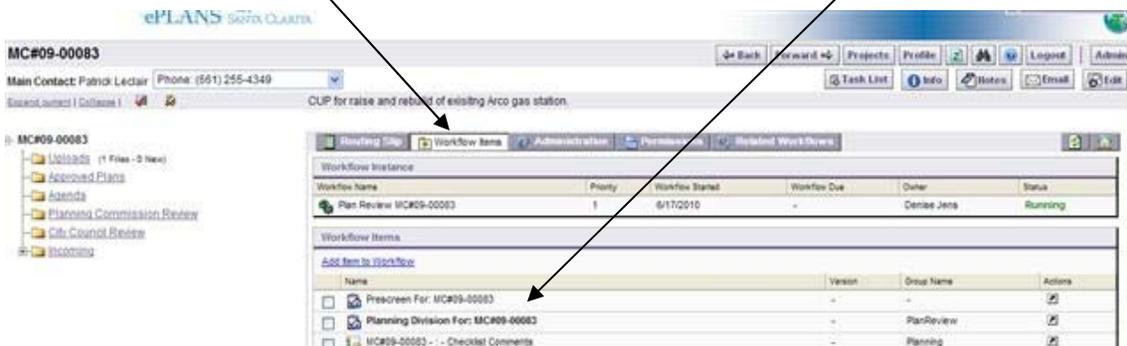
Project Review – Knowledge View Report (con't)

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.

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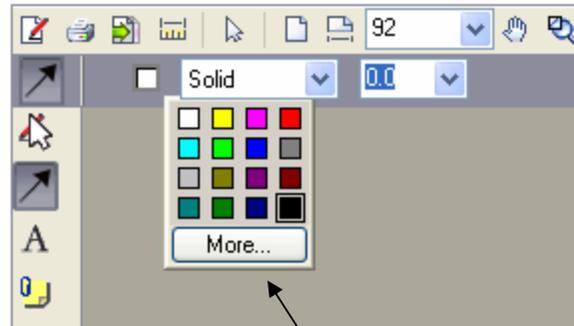
Please feel free to make variations to your division color by selecting More... on the color palette.