

Electronic Plan Review

Setting up File Formatting for a Successful Submittal



CONTACT

For the electronic plan review permit application process, contact:

**Development Services
Permit Center
408-535-3555**

Electronic plan (eplan) review can save time and resources. This bulletin outlines the formatting requirements for a successful eplan submittal. Only submittals following these formatting requirements will proceed through eplan review. This bulletin addresses formatting only; for instructions on plan content, based on the project scope of work, please see the “Plan Requirements and Checklists” section at www.sanjoseca.gov/buildingbulletins.

SUBMITTAL REQUIREMENTS

Bring the following non-returnable item to the Development Services Permit Center:

- USB drive or CD/DVD with files of the project drawings and support documents:
 - Place all files on the root folder; do not use sub-folders. See page 2 for file naming conventions.
 - Only files for the current submittal are to be provided. If your project is a resubmittal, do not include files from the original submission.

Format. Formatting requirements are outlined below:

1. **PDF or PDF/A** - Digital documents must be PDF (portable document format) or PDF/A, compatible with Adobe Acrobat Version 9.0 or higher.
 - **Exported PDFs required for most projects** - A PDF exported from the native file, not a scan saved as a PDF, is required for most projects. PDFs of scanned documents are accepted only for supporting/reference documents and single-family additions or alterations, in which case, scan the hard copy at 150dpi minimum and 300dpi maximum for acceptable legibility and file size.
 - **Text-searchable PDFs** - For scanned or non-searchable PDF exports, apply Optical Character Recognition to your documents
 - **Separate sub-trade PDFs** - Create a separate PDF for each sub-trade or plan review item; see page 2.
 - **Supporting documents** - Calculations, cut sheets, forms, etc. must be separated from the plan sheets in a separate file(s). See page 2.
 - **Drawings** - All layer information must be removed and flattened into a single layer.
2. **Unsecured setting** - Choose “unsecured” on your security settings so that plan reviewers may mark up the documents or create notes.
3. **Landscape orientation** - All drawings must uniformly use landscape orientation. Maintain a uniform page position and insertion point for all files in all submittals.
4. **6x6-inch stamp space on Cover Sheet** - Provide a 6 x 6-inch clear space on the cover sheet for jurisdiction approval stamps.
5. **3x3-inch stamp space on each drawing sheet** - Provide a 3” x 3” clear space for jurisdiction approval stamp on the lower right quadrant in the same location of the title block.
6. **Scale, legibility and legends** - Plans shall be to scale, fully dimensioned, and legible:
 - **Text prints at minimum 10pt font size** - Use a legible font, equivalent or better than Arial, Gill Sans or Tahoma, set at minimum 10pt when printed.
 - **Use symbols and grayscale, not color** - Do not use color to differentiate items on the plans; instead use symbols, hatches, line-type, and line-weights to relay information. Include a legend that defines all symbols. Plans shall be legible when set to print in grayscale.
7. **Indexed Pages** - Index/bookmark and label the pages within the PDF. The index and page labels should note the sheet number as well as the title/description of each sheet. See the example on page 2.

Development Services Permit Center

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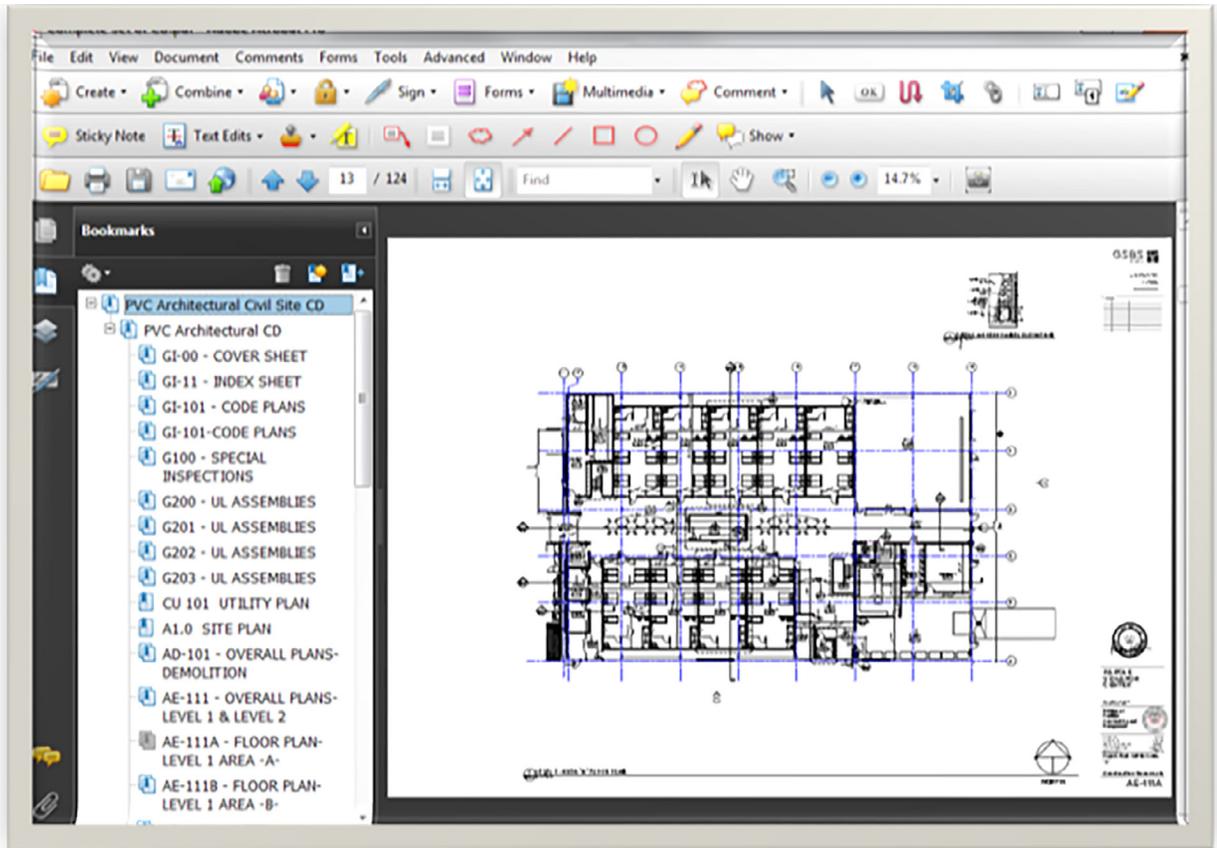
www.sanjoseca.gov/permitcenter

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SHEET INDEX/BOOKMARKS

Bookmarks

The Navigation column of this screen is an example of how to index or bookmark files within the PDF.



FILE NAMING CONVENTIONS

Use these conventions for naming all files. Use UPPERCASE and hyphens (up to three hyphens allowed), not spaces, in the name.

S#-DISCIPLINE-FOLDER#-DESCRIPTOR.PDF

S# - This is the submission number where S1 = first submittal; S2 = second submittal for a resubmittal or revision; each subsequent resubmittal becomes S3, S4, S5 etc.

DISCIPLINE - This is the abbreviation for trade plans or area of review as applicable to your project:

- | | |
|-------------------------|--|
| AC = Architectural Plan | PB = Plumbing Plan |
| ST = Structural Plan | PL = Planning Division review |
| EC = Electrical Plan | FE = Fire review (Bureau of Fire Prevention) |
| ME = Mechanical Plan | PW = Public Works Department review |

FOLDER# - Permit center staff will assign you a Folder Number during your application intake. For the first submittal use "TBD" in place of the Folder Number and the technician will rename it for you.

DESCRIPTOR - At the end of the name, you may include a word or combination word to describe the file further. For example, "FOUNDATIONCALCS" might be added to a file that shows the foundation engineering calculations. Do not use spaces in the descriptor.

Here are more examples of file names followed by how they are decoded:

- S1-ME-TBD.PDF** - First Submittal, Mechanical Plan, Folder Number, no descriptor added
- S1-AC-TBD-GRADING.PDF** - First Submittal, Structural Plan, Folder Number, descriptor for Grading Plan is added
- S2-FE-12345678-HAZMAT.PDF** - Second Submittal, Fire Review, Folder number, descriptor for HAZMAT locations is added
- S3-EC-12345678-EVC.PDF** - Third Submittal, Electrical Plan, Folder Number, descriptor for an Electrical Vehicle Charger plan is added

REMEMBER: Do NOT use more than three hyphens and do NOT use a space between words the Descriptor.