



HCAI eServices Portal

Public User Guide

Version Number: 1.2

Section 15 – Document Attachment Control



eServices Portal – Document Attachment Control

1 Introduction

Welcome to HCAI Electronic Services Portal (eSP) User Guides

This user guide details the step-by-step instructions for using the Document Attachment Control feature in the HCAI eServices Portal.

The Document Attachment Control provides improved document management and grouping of documents. This guide provides instructions on navigating the Document Attachment Control feature the steps necessary to upload, download and resubmit construction documents and other forms, letters, applications and documents.

2 Using Document Attachments Control

2.1 Locating Document Attachments Control on your Project

When you navigate to the Record Detail section of your project, you can access the Document Attachments Control as shown below in Figure 1:

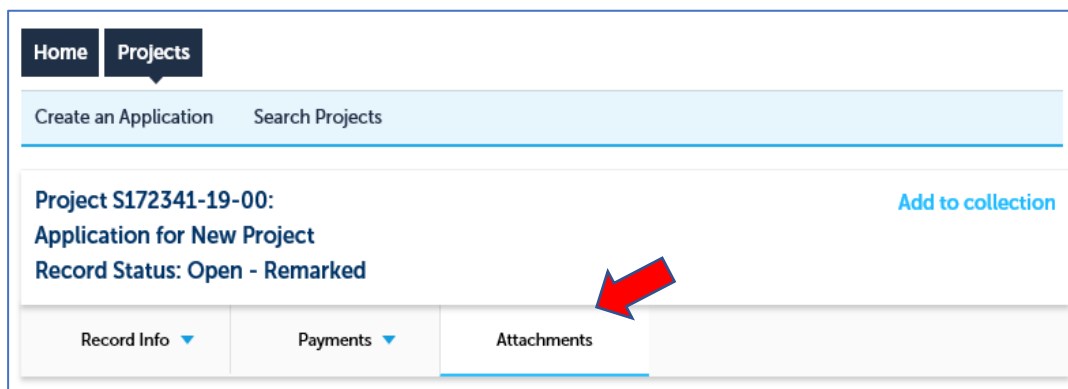


Figure 1 – Accessing Attachments Control

Document Attachments Control will automatically sort and separate uploaded documents into four groups: Plan Review, Construction, Closure, and Other Attachments (Figure 2):

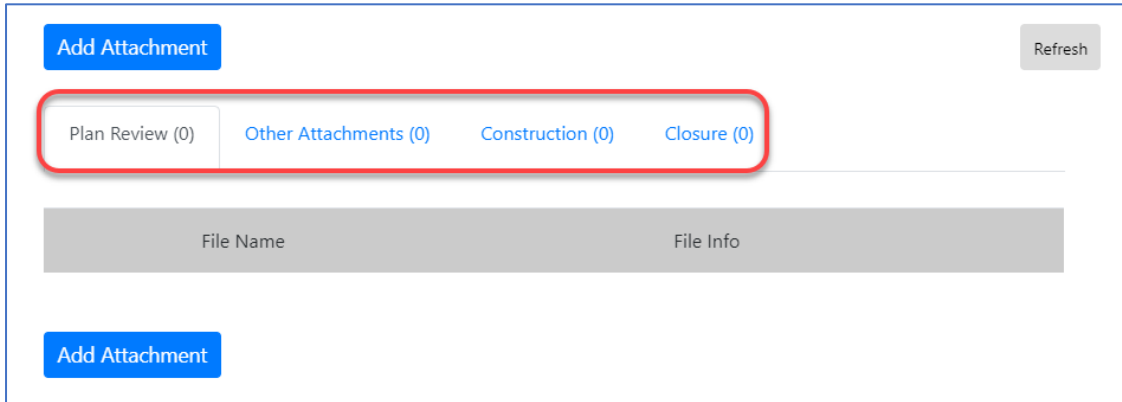


Figure 2 – Attachment Tabs

2.2 Uploading Documents

To upload a NEW document to your project record, click the **Add Attachment** button shown in Figure 3 below. When the New Attachment dialog form appears (Figure 4), click the **Browse** button locate and select the desired file. Complete the form by selecting the proper Document Type from the dropdown menu and providing a brief description of the file. Lastly, select the appropriate virtual folder (when applicable) then click the **Submit** button.

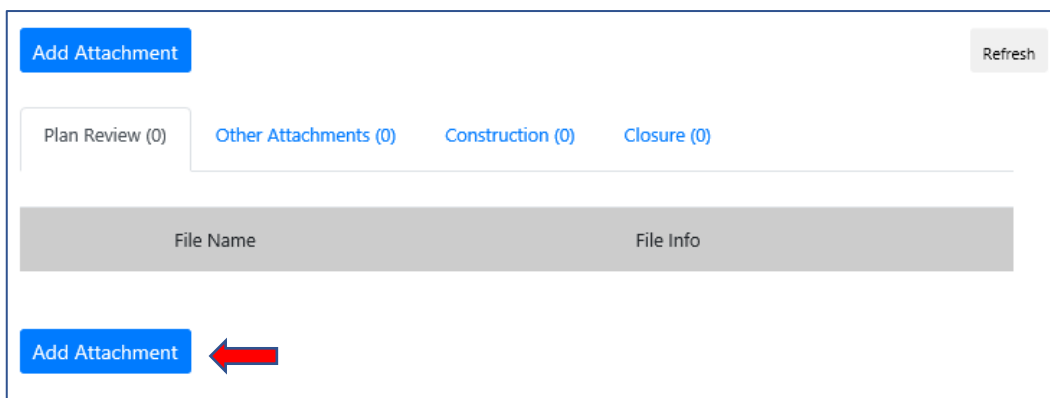


Figure 3 – Attachment Tabs



Note: You may only upload or resubmit one file at a time. The Description and Virtual Folder fields are optional. You can click **Add Attachment** again while the first document is uploading to repeat the process for each file that needs to be uploaded or resubmitted.

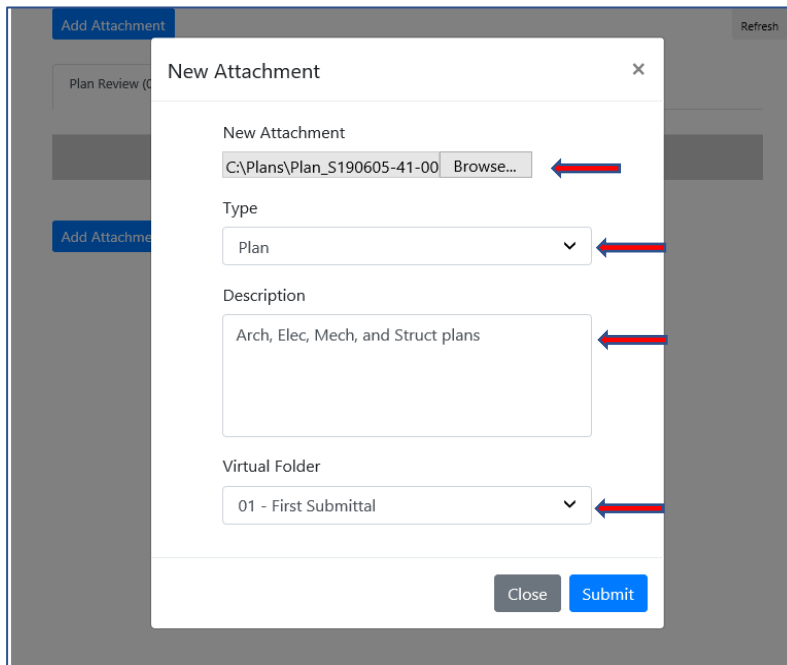


Figure 4 – New Attachment

2.3 File Validation Using PDF Scout Inspector

Each time a file is uploaded or resubmitted with a Document Type setting “Plan”, “Calc” or “TIO”, the Document Attachment Control feature will analyze the PDF file to confirm that it does not contain known issues in the PDF files; the issues the PDF Scout Inspector identifies are:

- Password Protected or File Encryption
- PDF version (Version 1.4 or higher)
- File Optimized
- File Size (under 300 Megabytes)
- Page Size (8.5” x 11” minimum)
- Page Orientation (warning only)
- Annotations/Comments (any ‘object’ that appears in the ‘Comment’ panel, SHX Fonts, etc.)
- Page Access (file has good resolution and all pages are readable)
- Filename Special Characters (warning only)

Uploading documents other than “Plan”, “Calc” or “TIO” will not be validated; however, these documents will be uploaded and attached to the project record and will receive the same confirmation messages shown below (Figure 5).

When a file is uploaded, status messages will appear indicating the progress of the file upload, file analysis and upload confirmation. If the file is successfully validated and attached to the project record, you will see the following confirmation messages:

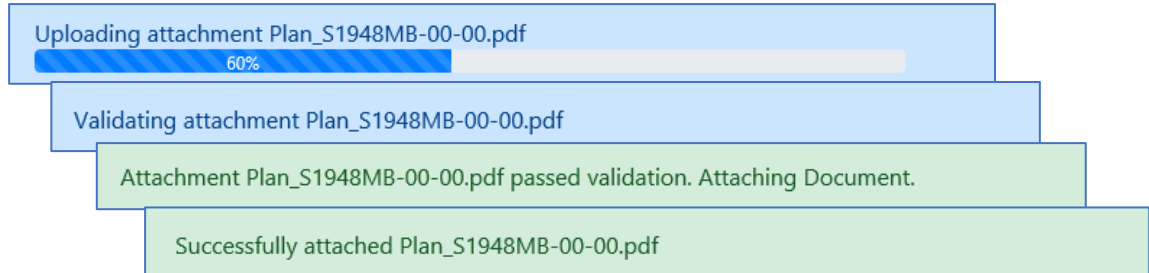


Figure 5 – Successful Document Attachment

If a “Plan”, “Calc” or “TIO” document fails the Scout Inspector validation, a **RED** message will appear indicating which document attribute failed (Figure 6) and the file upload will be rejected. **You must correct this document before attempting to upload again.** To clear this document from the upload process, click the X.

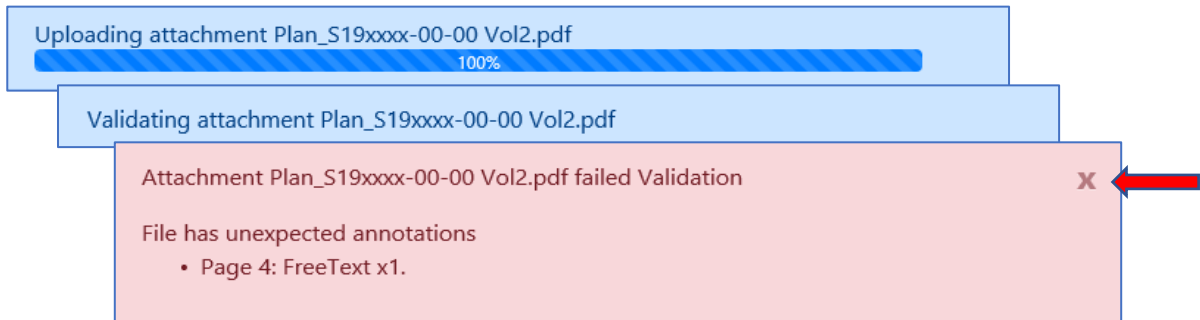


Figure 6 – Document Failed Validation

To repair your file(s), see the [Correcting PDF Validation Issues](#) web page.

When all documents display a successful attachment confirmation, click the **Refresh** button (Figure 7) to view your uploaded documents in the document list (Figure 8).

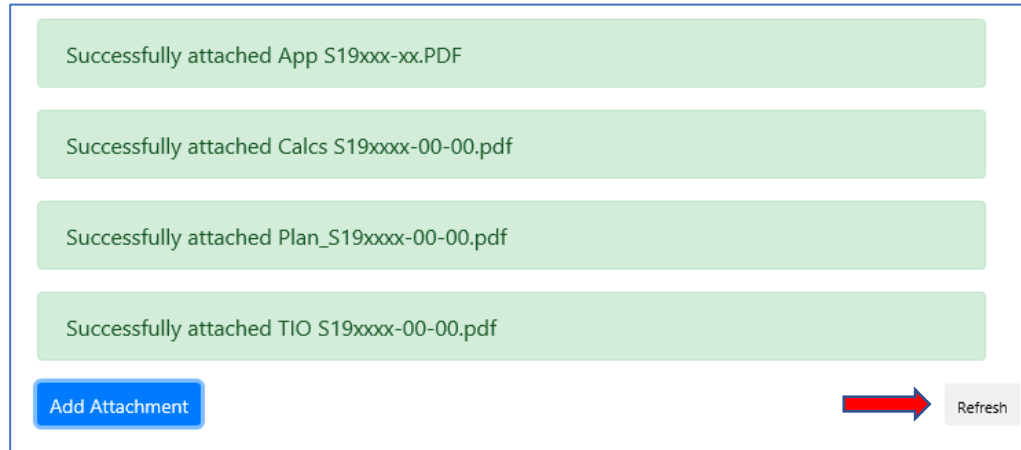


Figure 7 – Document Refresh

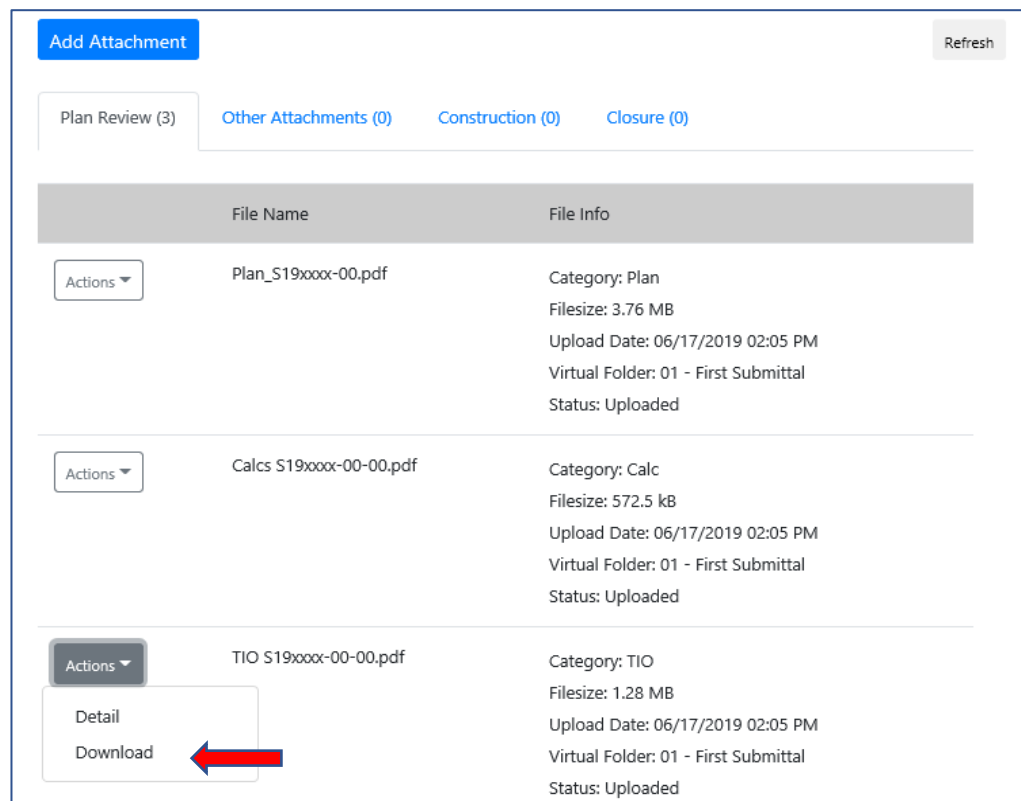


Figure 8 – Document List

To download a document, click the **Download** Action link as shown above in Figure 8.

2.4 Resubmitting Corrected Plan Review Documents

When HCAI completes the review of your project, plan review files that require correction will have remarks on the Plans, Calculations and TIO Program documents that describe the deficiency and provide a code reference. Documents that include a date/time stamp in the filename (see Figure 9) are these documents that have been reviewed by HCAI and include the remarks.



Note: If the Virtual Folder is **40 – Approved Documents**, these are the documents that have been reviewed and stamped approved by HCAI.

To resubmit a corrected Plan, Calc and/or TIO it is imperative that you use the Resubmit Action to insure your corrected plans are properly connected to the previous review planset. Failure to use the Resubmit Action may result in delays for plan review and approval.

To resubmit your corrected files, click the Actions dropdown menu and select **Resubmit**. The New Attachment window will appear as shown in Figure 4 above. Locate and select the desired file then complete the form by providing a brief description of the file. The Document Type will be read-only.

The screenshot shows a web interface for managing attachments. At the top left is a blue 'Add Attachment' button, and at the top right is a 'Refresh' button. Below these are tabs for 'Plan Review (1)', 'Other Attachments (9)', 'Construction (0)', and 'Closure (1)'. A table lists attachments with columns for 'File Name' and 'File Info'. The first row shows a file named 'Plans_S172341-19-0020190124104612[1].pdf'. To the left of the table is an 'Actions' dropdown menu with options: 'Detail', 'Download', and 'Resubmit'. A red arrow points from the 'Resubmit' option to the file name, and another red arrow points from the file name to the 'Resubmit' option. The 'File Info' for the selected file includes: Category: Plan, Filesize: 12.7 MB, Upload Date: 01/24/2019 10:46 AM, Virtual Folder: 02 - BackCheck 1, and Status: Uploaded.

Figure 9 – Resubmit or Details

Lastly, select the appropriate virtual folder (when applicable) then click the **Submit** button.

2.5 Viewing Previous Versions of Documents

In an effort to reduce the number of documents listed in the Attachments section of the project, files with matching Document Categories (Plans, Calcs, TIO, etc.) will be grouped together and displayed as a single attachment in the Document Attachments Control tab. To view each of the previous versions of a document, select the **Details** link shown above in figure 9.

All previously submitted files will be visible as shown below in Figure 10.

File Name	File Info
<input type="button" value="Actions"/> Plan_S190294-19-00-20190625-[4].pdf	Category: Plan Filesize: 35.3MB Upload Date: 06/25/2019 02:10 PM Virtual Folder: 03 - BackCheck 2 Status: Remarks
<input type="button" value="Actions"/> Plan_S190294-19-00.pdf	Category: Plan Filesize: 35.2MB Upload Date: 06/24/2019 01:54 PM Virtual Folder: 03 - BackCheck 2 Status: Review Complete
<input type="button" value="Actions"/> Plan_S190294-19-00-20190624-[7].pdf	Category: Plan Filesize: 35.3MB Upload Date: 06/24/2019 01:40 PM Virtual Folder: 02 - BackCheck 1 Status: Resubmitted
<input type="button" value="Actions"/> Plan_S190294-19-00.pdf	Category: Plan Filesize: 35.2MB Upload Date: 06/17/2019 02:30 PM Virtual Folder: 02 - BackCheck 1 Status: Review Complete
<input type="button" value="Actions"/> Plan_S190293-19-00-20190617-[8].pdf	Category: Plan Filesize: 27.8MB Upload Date: 06/17/2019 01:17 PM Virtual Folder: 01 - First Submittal Status: Resubmitted
<input type="button" value="Actions"/> Plan_S190293-19-00.pdf	Category: Plan Filesize: 27.8MB Upload Date: 06/15/2019 07:46 PM Virtual Folder: 01 - First Submittal Status: Review Complete

Figure 10 – Details for Plan