Application Contact Manual

ePlan Submittal for Project Dox

City of Lincoln & Lancaster County

Planning Department

Updated October 2018

Purpose Statement

This Manual provides basic documentation on the steps involved in using *ProjectDox* software for the City-County Planning Department's ***ePlan Submittal*** process. The ***ePlan Submittal*** process replaces the paper-based review of all Planning applications with a computer-based approach. This process relies upon digital documents using pdfs and GIS vector files. ***ePlan Submittal*** will allow everyone participating in the review process to enter their comments and exchange ideas within a secure digital environment.

This Manual has been prepared for use by the Application Contact as a general reference guide. There are text descriptions and screen images of the step-by-step tasks necessary to complete a project workflow using ProjectDox. It is not designed to present every detail on every element of the process. Rather it offers a basic foundation for learning the process and to serve as a subsequent point of reference as applications are being submitted and reviewed.

Overview

The ***ePlan Submittal*** process has been designed to both simplify and speed the review of Planning Department applications. To accomplish this goal, expeditious communications between the Planning Department, the Reviewing Agencies, and the Application Contact is required.

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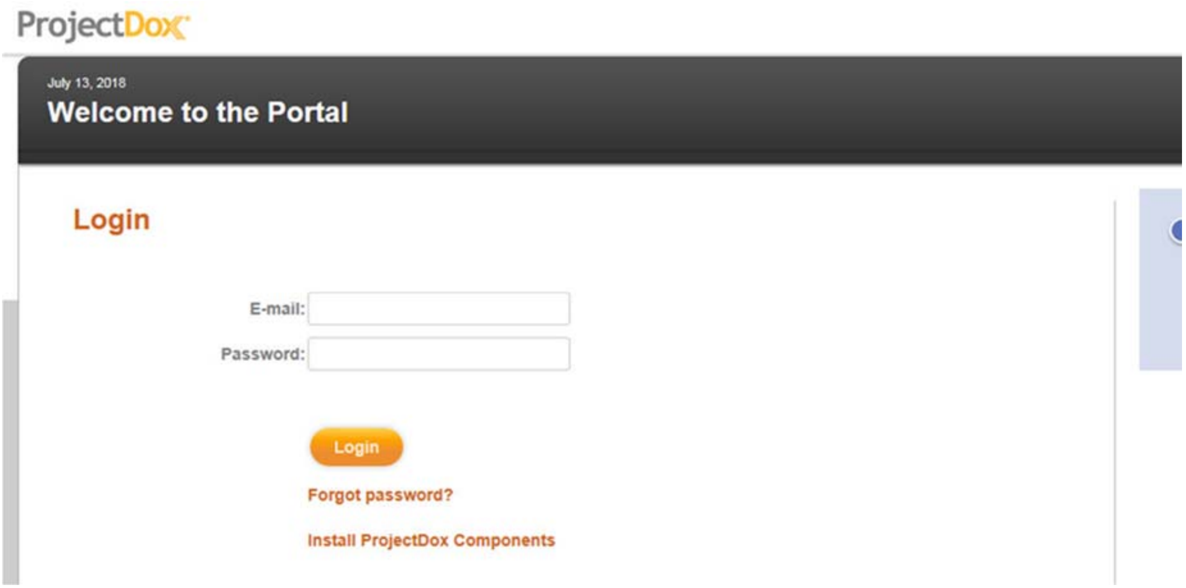
A. *Logging In*

Access the website using the url: https:\\pdox.lincoln.ne.gov

Enter your email address and password. Click Login.



B. *Home Page*

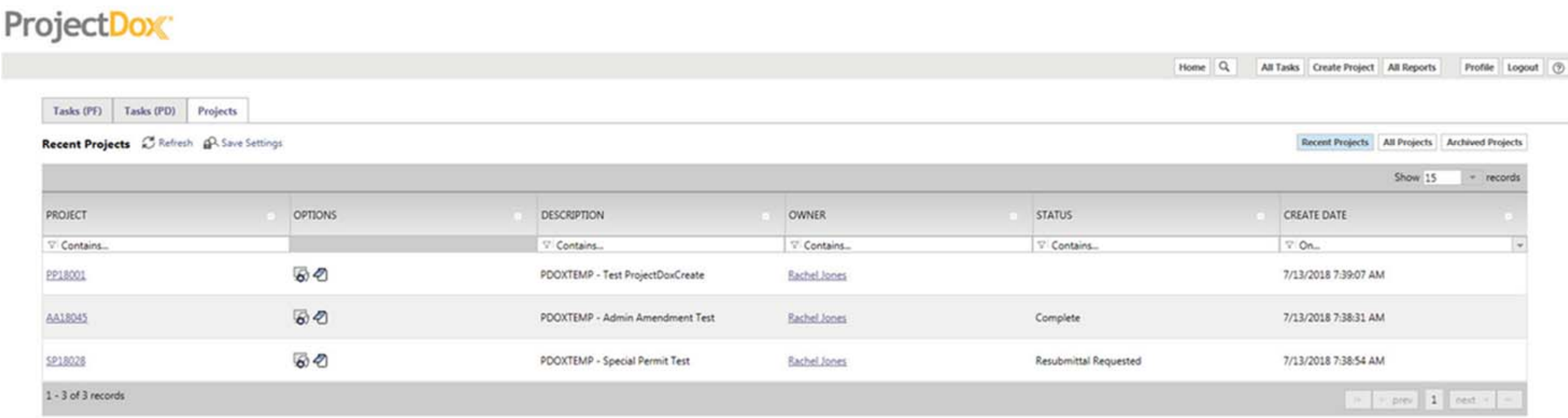
Once you are logged in, you will be taken to the new Home screen. In the **upper left** corner, there are **3 tabs - Tasks (PF), Tasks (WF) and Projects**.

Tasks (PF) – This list will show your tasks for projects created using the new workflow template. This list will not contain any items until we begin using the new template. We anticipate that will happen later in July or early August.

Tasks (WF) – This list will show your tasks from projects created in the existing system.

Projects – This list will show projects of which you are a member in both the old and new system.

Use the **Home button** in the **upper right** to return to this page from any screen.

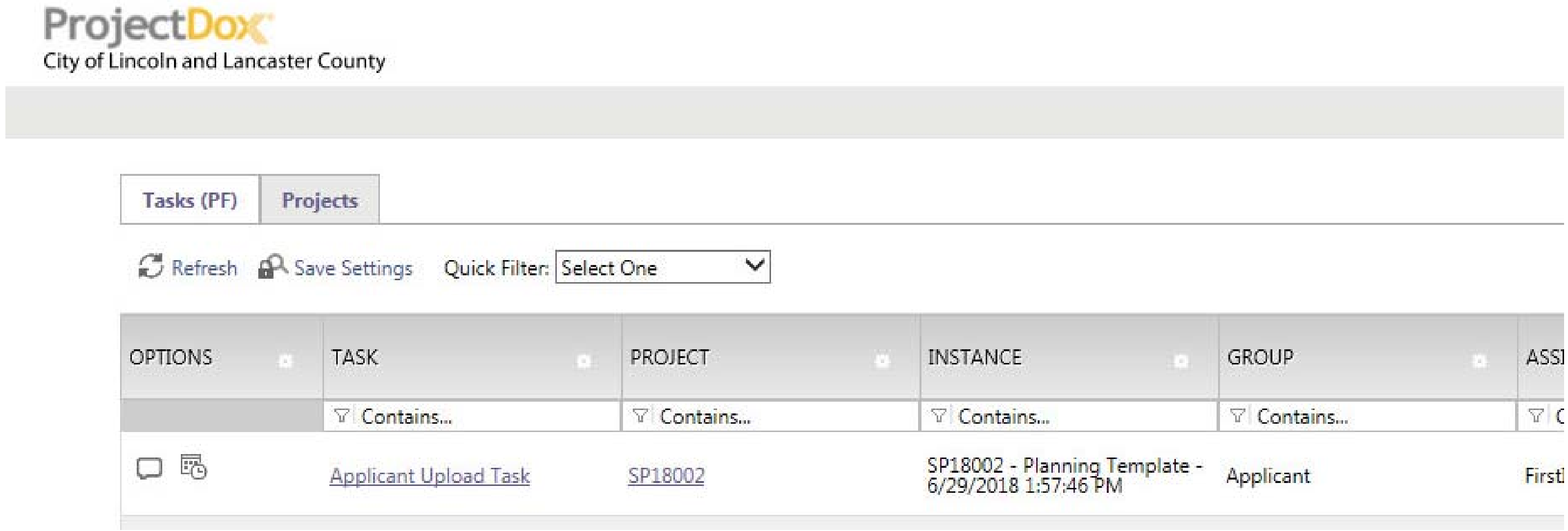


You will still see only your recent projects on the Project list. Click the All Projects button to view all projects. Use the filter options to search for specific tasks or projects. The grids can also be sorted in ascending or descending order by clicking on the column headings.

Click on the “Task” name to accept the workflow task and access the eform. Click on the “Project” name to enter the project.

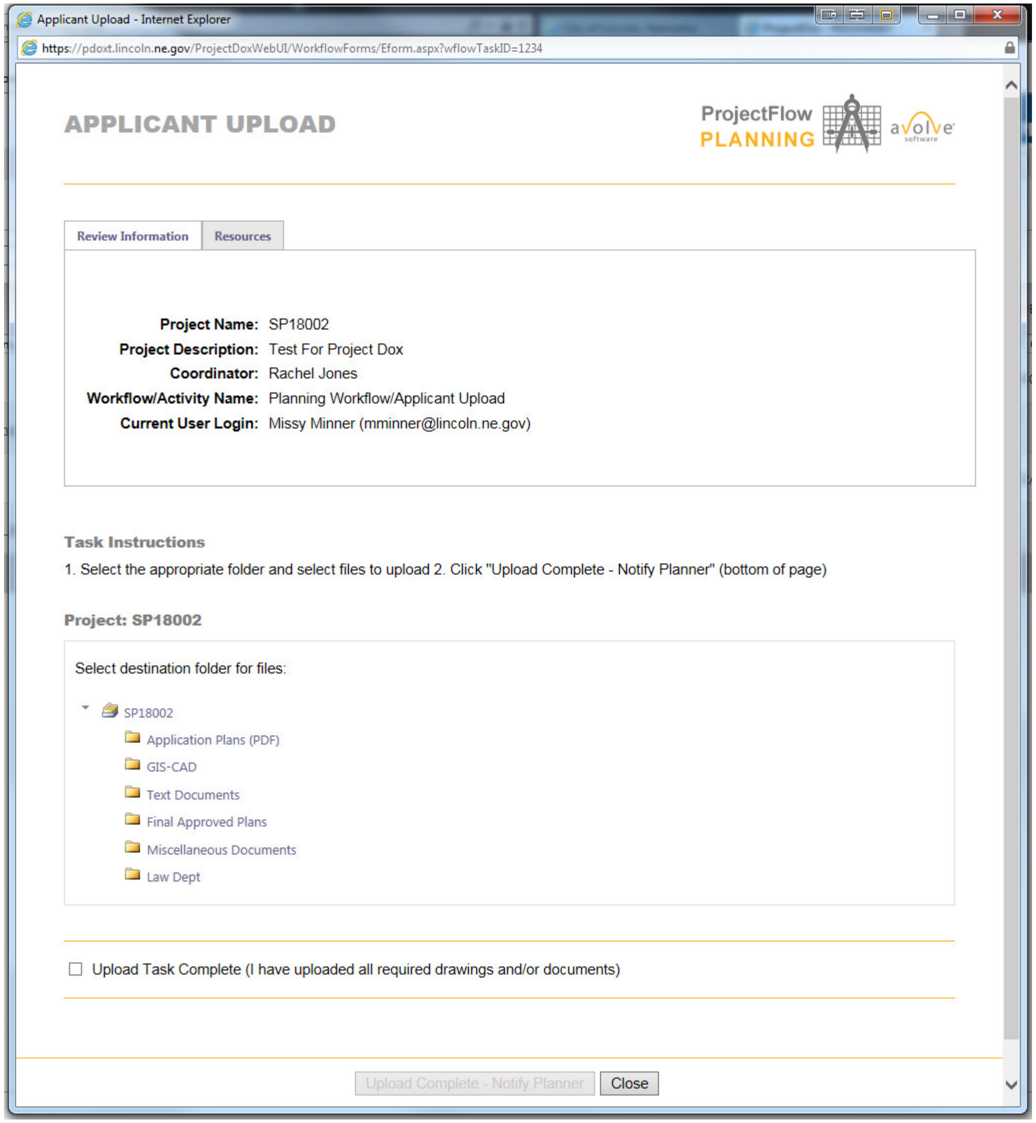
C. Applicant Upload Task

1. After submitting your application and paying the applicable fees to the Planning Department, you will be notified of a pending Applicant Upload task. You will receive an email notification of the task. Additionally, it will show up on your task list in ProjectDox.

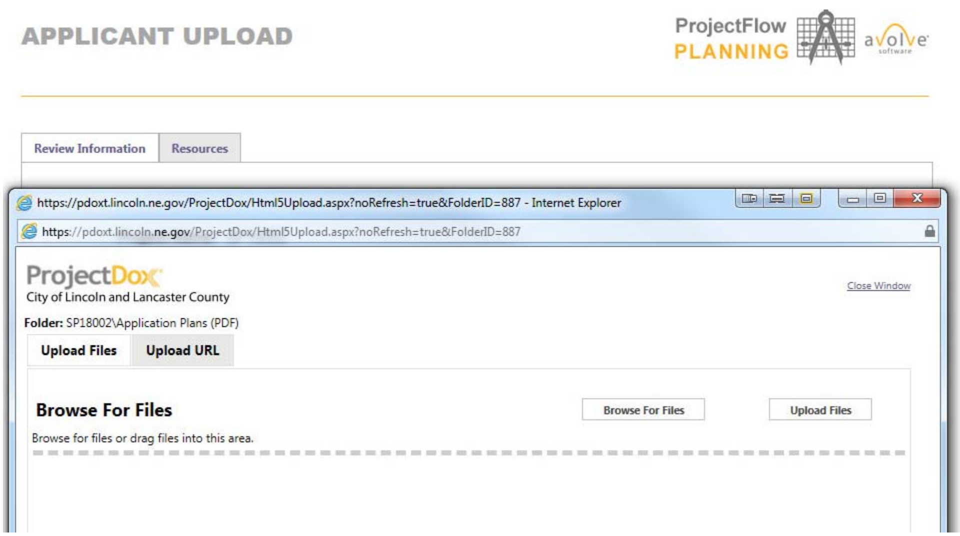


Please note: CAD files that include Xrefs are not supported by ProjectDox. We will require a new CAD file that does not use XRefs if we encounter one in the system. The use of XRefs in your uploaded CAD files may delay your project.

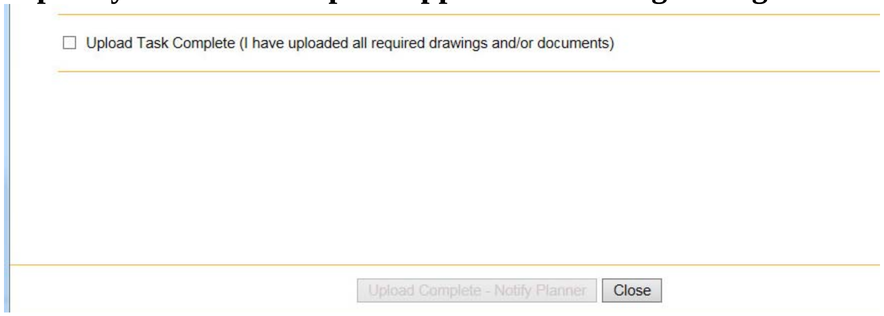
2. Click on the Application Upload Task link for the appropriate project. You will be prompted to accept the task. Click OK when prompted to continue on to the eForm.



3. You are able to upload your project files directly from the eForm. Click the appropriate folder from the list to open the File upload dialog. (Your folder list may look slightly different.)



4. Click Browse for Files. Navigate to the files on your server and select them.
5. Click Upload Files.
6. If you need to upload additional files to other folders, close this window to return to the eform. Select the folder to which you will upload files and repeat the steps above.
7. When all files have been uploaded, select the check box for "Upload Task Complete".
8. When you check the Upload Task Complete box, the "Upload Complete – Notify Planner" button will become available. Click this button to complete your task. Please note, the Planner will not receive your files until you click this button to complete your task. **It is VERY IMPORTANT that you complete your task to keep the application moving through on schedule.**



Upon receiving the files, the Planner will review the submitted documents. If it is determined that everything required for review has been submitted, he or she will route the application to the appropriate agencies for their review and comment.

If information required for the review is missing, you will receive a Prescreen Corrections task.

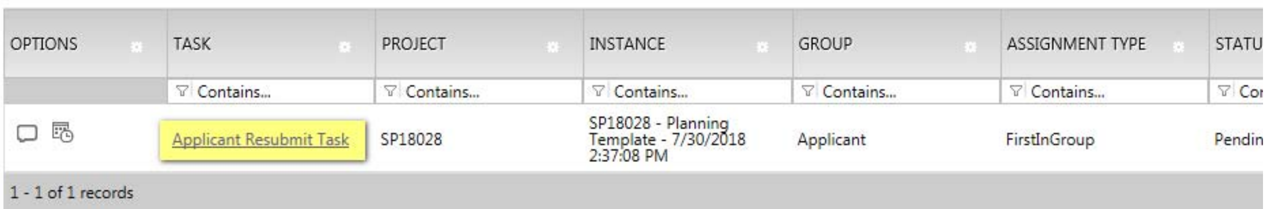
You will need to accept the Prescreen Corrections task, address the missing information as indicated in the information on the eForm and complete that task PRIOR to your application being sent out for reviews.

Note: In the initial review, you will have the ability to upload additional files after completing the applicant upload task. If you are uploading files as part of a resubmittal request, you are limited to uploading files ONLY when the Resubmit Request task is active.

D. Resubmittal Request

In the event that corrections or edits are required to the site plans and exhibits as a result of the reviews, you will be sent an Applicant Resubmit Task. This task will be accepted and completed in a manner similar to the Applicant Upload task.

Click the Applicant Resubmit Task link to accept the task and open the eForm.



When the eform opens, you will see the comments from the reviewers on the eform. You will also see the View/Edit Changemark Items button.

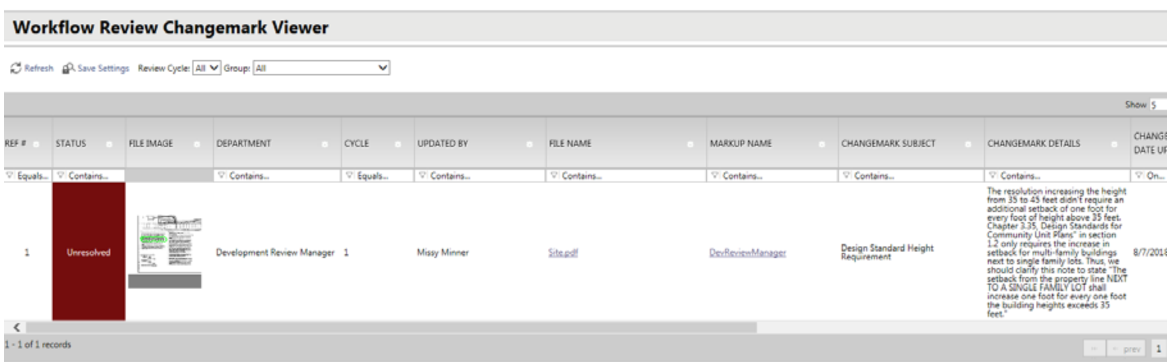
Task Instructions

1. Address all changemarks and comments 2. Select the appropriate folder and select files to upload (if required) 3. Click "Resubmit Complete" (bottom of page)

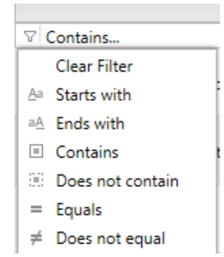
View/Edit Changemark Items (1)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Planner Review	Missy Minner mminner@lincoln.ne.gov	Corrections Required	See markup for corrections required.	
Development Review Manager	Missy Minner mminner@lincoln.ne.gov	Corrections Required	Clarification required in notes regarded height. See markup.	

Click on the View/Edit Changemark Items button to open the Workflow Review Changemark Viewer. This allows you to view the changemarks, without having to open the file. You also have the option of opening the file to view changemark items if you prefer.



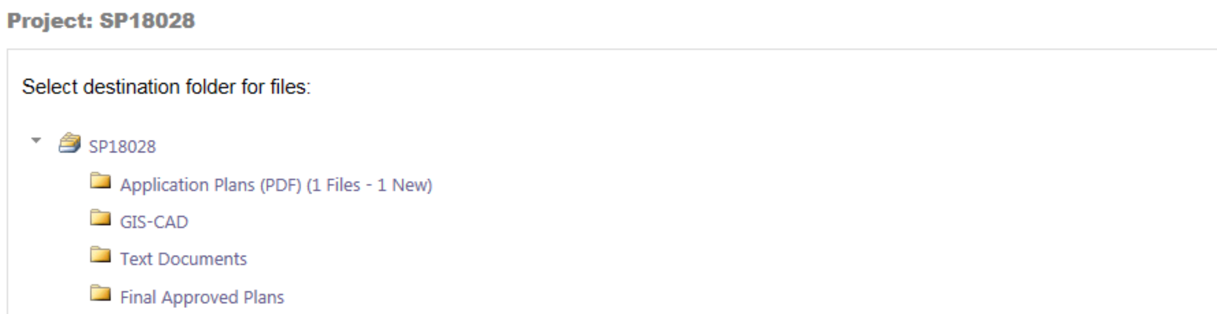
There are several options to restrict the changemarks that show up in the viewer. At the top of the viewer, you can filter based on the review cycle or by reviewer using the available drop down.



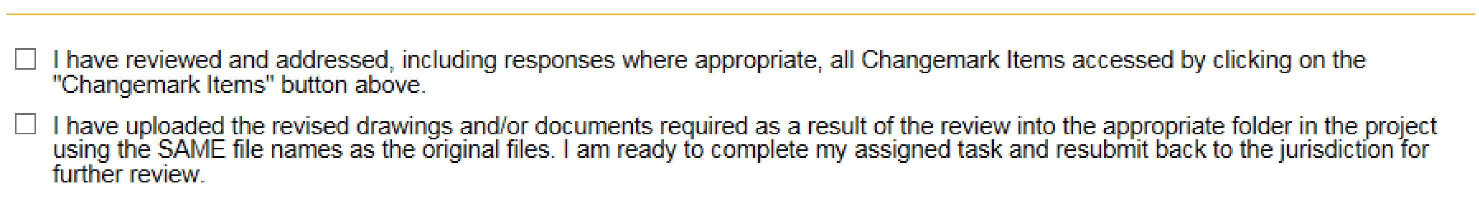
You can also search by using the filter field just under the gray headings in the grid. Additionally, you can change the criteria or clear the filter by clicking on the filter.

Once you have addressed the edits and corrections required on the application drawings as noted in the reviewer comments and changemarks, you are ready to upload the revised files. Revised files MUST BE UPLOADED USING THE SAME NAME AS THE ORIGINAL UPLOAD! This is VERY important as it allows the system to automatically version the files and allows the utilization of tools for versioned files.

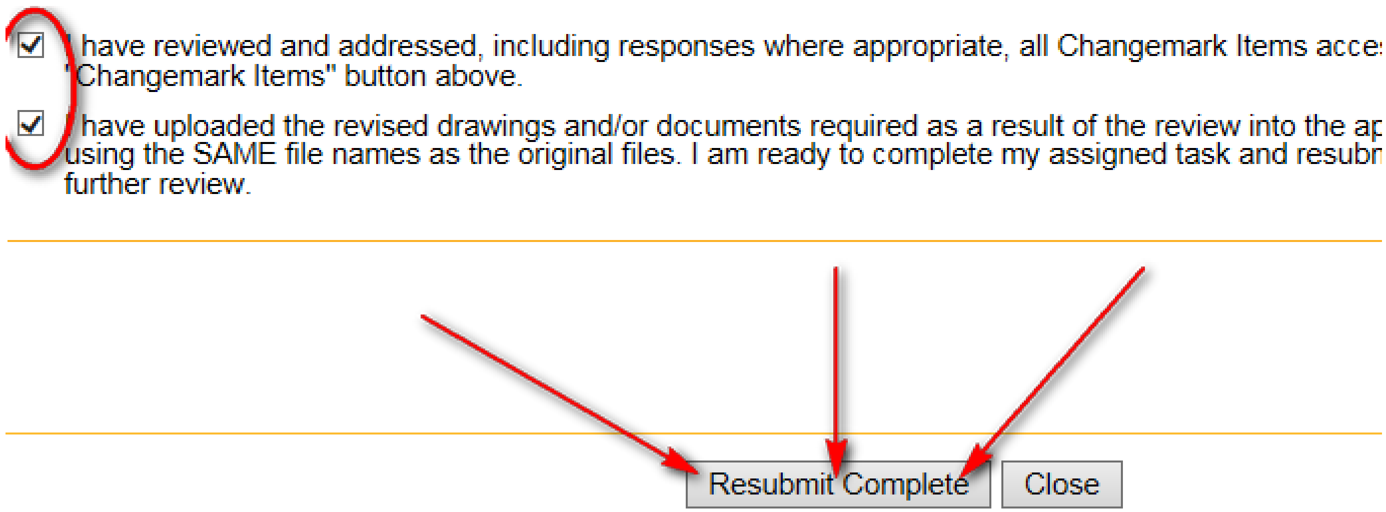
Files can be uploaded from within the eform by selecting the folder in which you wish to upload and following the prompts on the screen.



After you have uploaded all revised files USING THE SAME FILE NAME AS THE ORIGINALS, there are 2 checklist reminders to ensure that you have completed the resubmittal items. Place a checkmark in both boxes when you are ready to complete your resubmittal and send it back to the Planner for additional review and processing. YOU MUST COMPLETE this step in order for the Planner to be notified that you are ready for your application to continue through the process.



Once you check the boxes, the “Resubmit Complete” button will become available for you to click. Click on the button to complete your task and notify that Planner that your application is ready to proceed with the next steps.



If you do not click on the Resubmit Complete button, the planner will not be able to determine when you are ready to proceed with your application!!!!

Once you click the “Resubmit Complete” button, the ability to upload files is revoked. Please make sure that you have uploaded ALL revised files prior to clicking the button to complete your task.

E. *Final Approved Plans*

The Planning Department will now electronically stamp final approved plans. Once the plans have been stamped, you will receive notification that the stamped plans are available for download and print from the Final Approved Plans folder.

For **City applications, you will need to print 2 copies of the final approved plans** and deliver them to the Planning Department office for distribution. **County applications require 3 printed copies of the final approved plans** be delivered to the Planning Department for distribution. There will not be a workflow task to accept and complete for this specific step in the process.

The electronic stamping process will not apply to final plat applications nor Affadavits of Correction for final plats. The approval process for those applications will not change. The unsigned, approved final document will still need to be printed and brought to the Planning Department to be filed with the Register of Deeds.