Project Coordinator Manual

ePlan Submittal for Project Dox

City of Lincoln & Lancaster County

Planning Department

Updated October 2018

It is recommended to use Internet Explorer as your browser when accessing ProjectDox.

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 Project Coordinator (Project Planner) 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 requires expeditious communications between the Planning Department, the Reviewing Agencies, and the Application Contact.

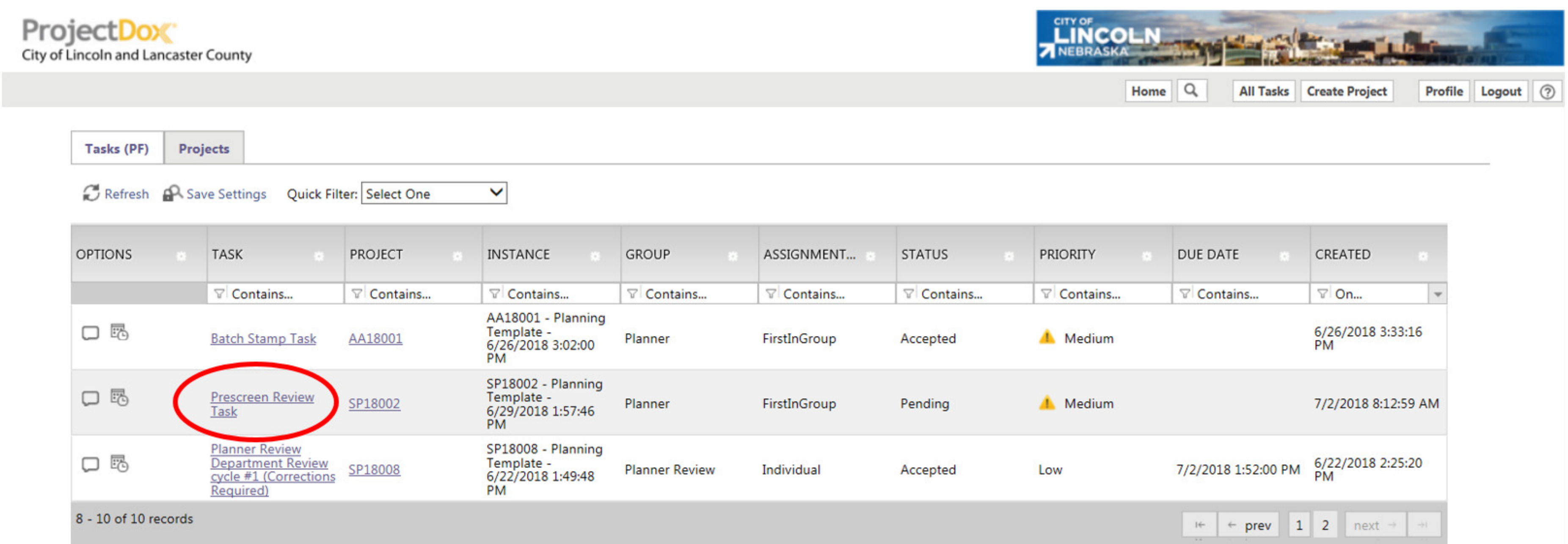
Contents

Project Creation

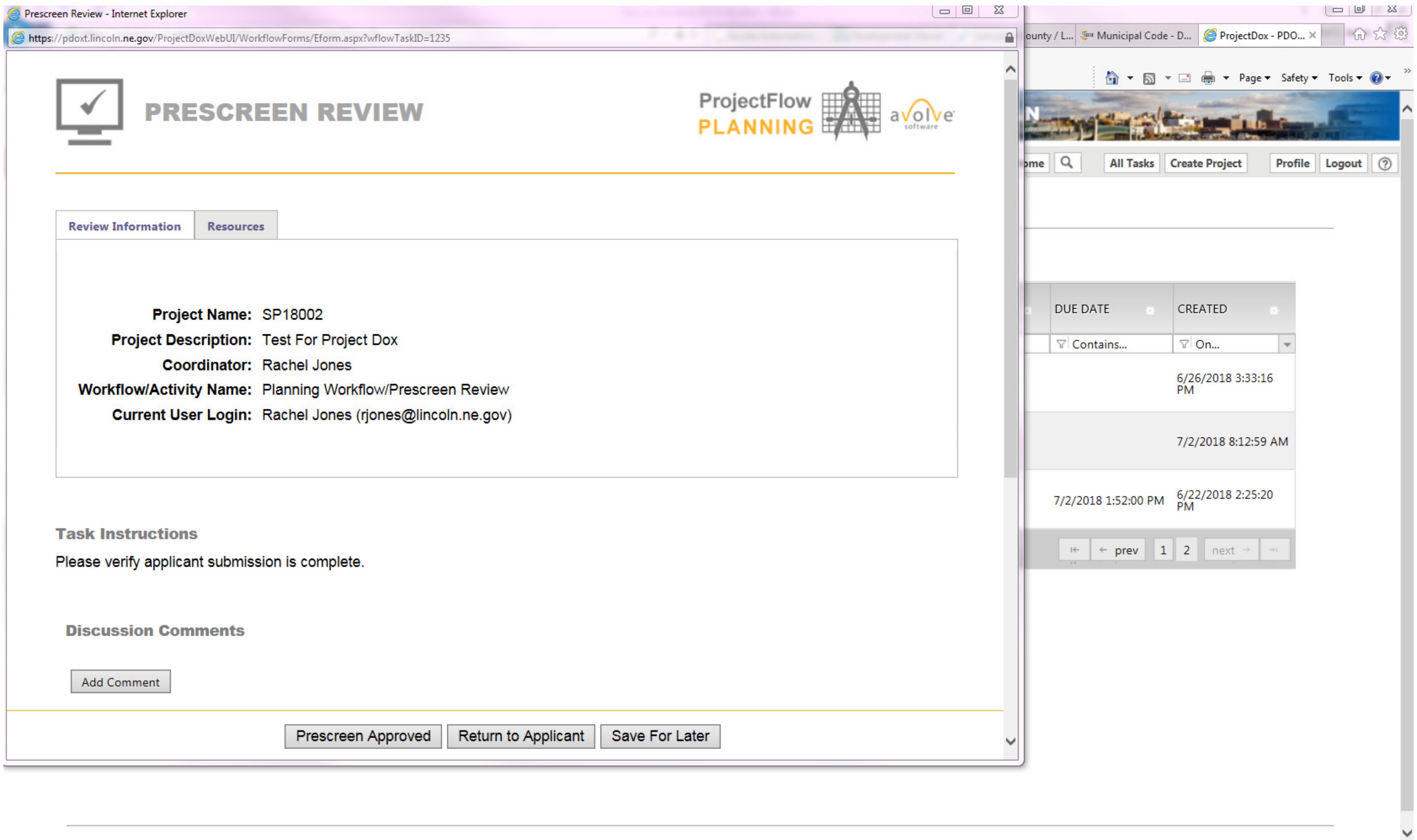
Begin by initializing the application in Automation using the Automation Intake form. After the application is initialized navigate to the workflow tab and change the workflow status to “Create Project Dox Project”. SEE AUTOMATION MANUAL FOR SPECIFIC INSTRUCTIONS. (Note: *If the project does not create, check your contact information in Automation to confirm that you have the correct e-mail address*)

Prescreen Review

1. Once the applicant has uploaded files, they complete the Applicant Upload task. The planner is then assigned the Prescreen Review task.
2. Open the Prescreen Review notification email.
3. Click on the “Project Access Link” in the email **or** click on “Log in to Project Dox” from http://lincoln.ne.gov/city/plan/dev/eplan/eplan.htm
4. Log into ProjectDox. User name is email address.
5. Click on the Prescreen Review task and accept it.

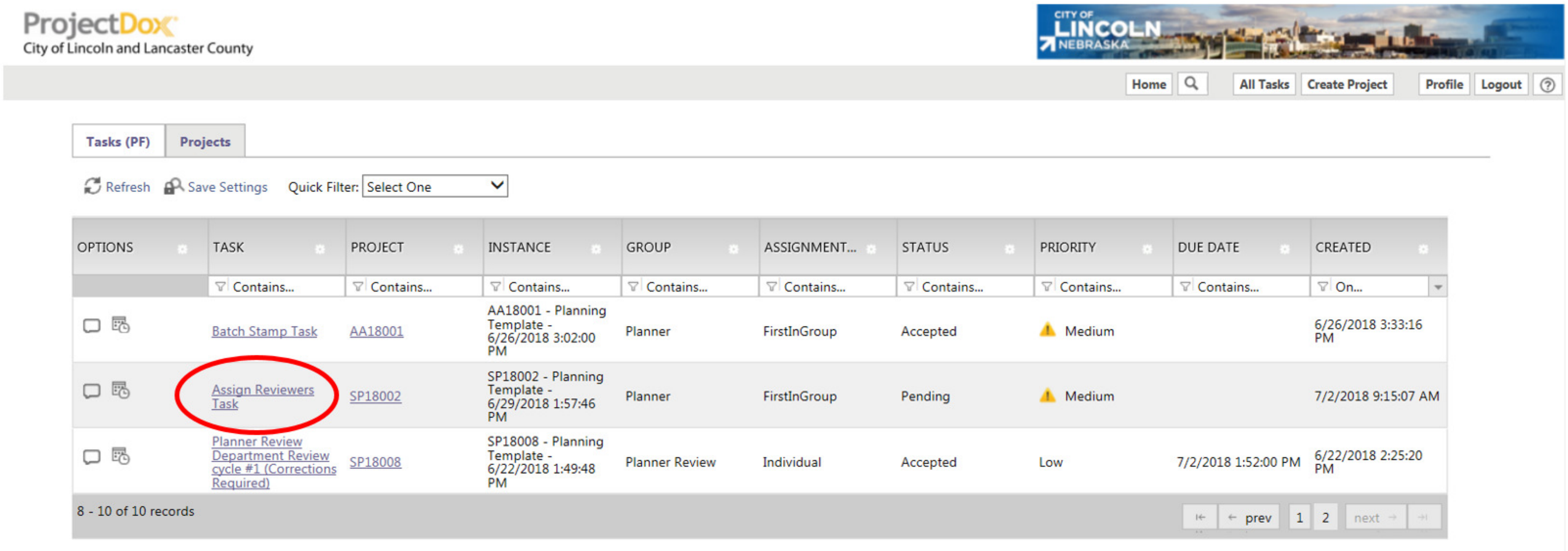


6. Review the submissions and choose either “Prescreen Approved” to move the project forward, or “Return to Applicant” if files are missing. “Return to Applicant” will require the applicant complete another Applicant Upload task. “Prescreen Approved” will move the workflow to the assign reviewers stage.



Assign Reviewers

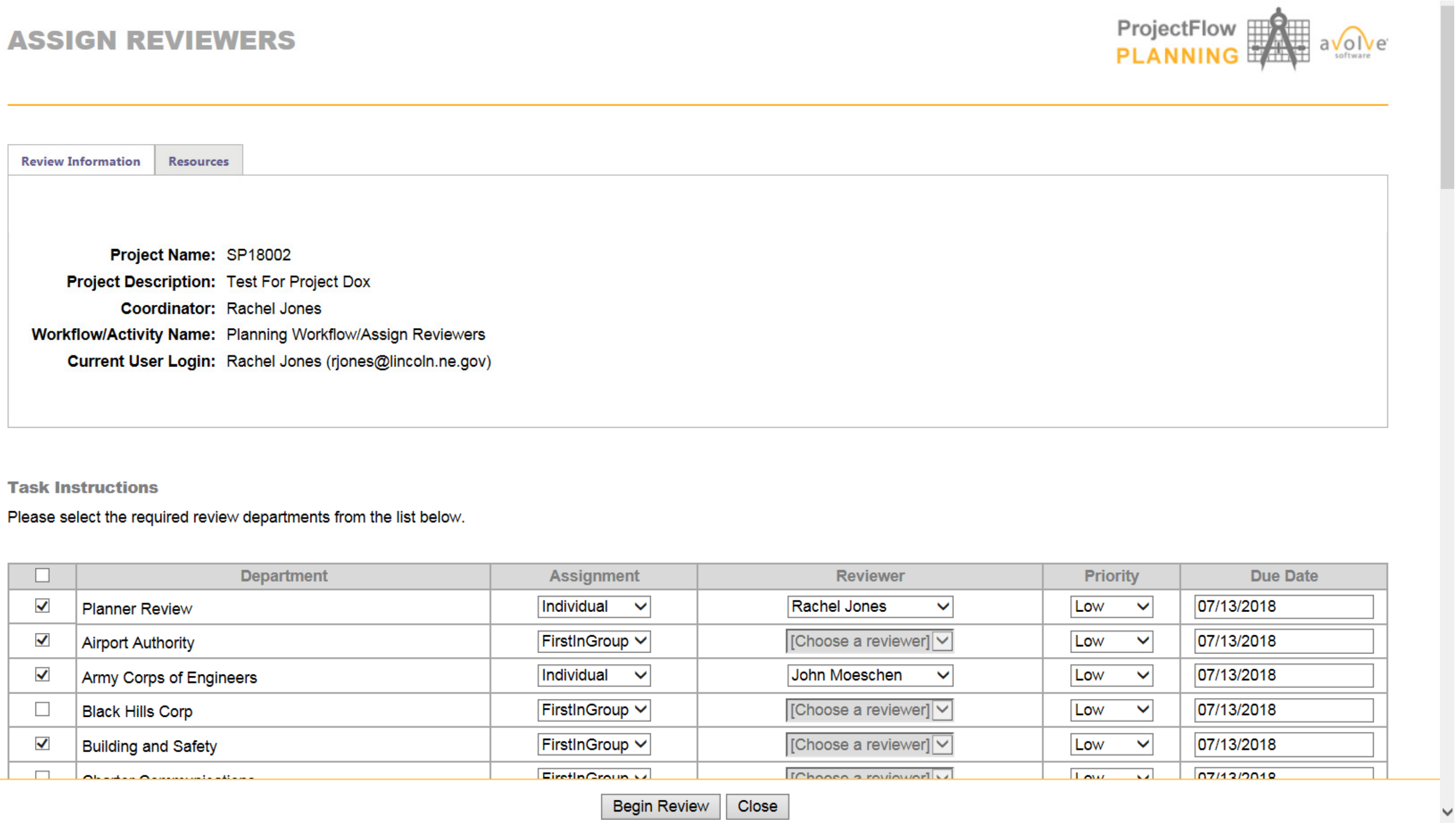
1. Click on the Assign Reviewers task and accept it.



Instructions continue on next page…

2. The eform for routing will open as shown below. It contains a list of all possible reviewers, with only the standard reviewers checked based on the application type. Only the reviewing agencies whose boxes are checked will be send a review request. The coordinating planner should be selected automatically as a reviewer. Ensure that you as the coordinating planner are selected as an individual reviewer. Add and/or remove other reviewers as needed. Click the "Begin Review" button.

In the new ProjectDox version, the planner will NOT receive an email each time a reviewer completes their review. Instead, you will need to check the Department Review Status Report. The planner WILL receive a notification once all reviews are completed.



ASSIGN REVIEWERS

ProjectFlow PLANNING

avolve software

Review Information | Resources

Project Name: SP18002
Project Description: Test For Project Dox
Coordinator: Rachel Jones
Workflow/Activity Name: Planning Workflow/Assign Reviewers
Current User Login: Rachel Jones (rjones@lincoln.ne.gov)

Task Instructions

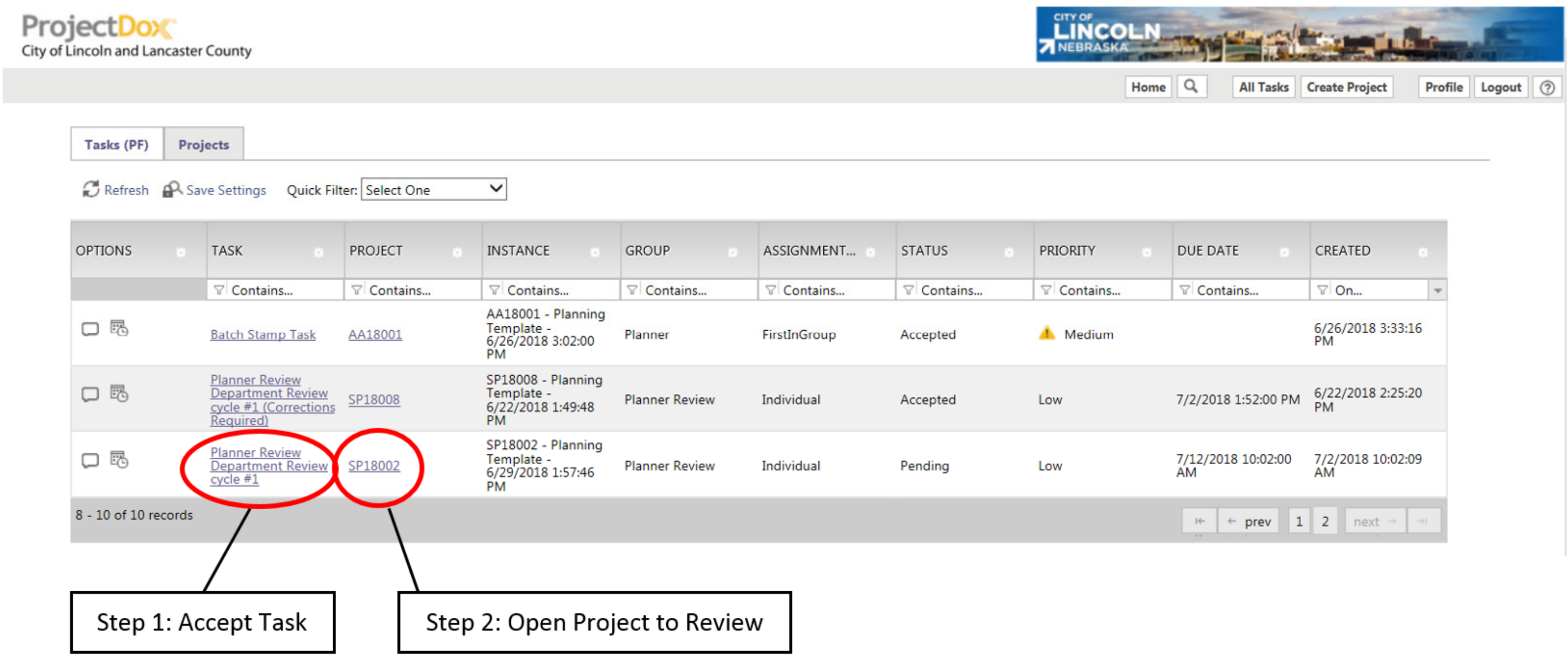
Please select the required review departments from the list below.

☐	Department	Assignment	Reviewer	Priority	Due Date
☑	Planner Review	Individual	Rachel Jones	Low	07/13/2018
☑	Airport Authority	FirstInGroup	[Choose a reviewer]	Low	07/13/2018
☑	Army Corps of Engineers	Individual	John Moeschen	Low	07/13/2018
☐	Black Hills Corp	FirstInGroup	[Choose a reviewer]	Low	07/13/2018
☑	Building and Safety	FirstInGroup	[Choose a reviewer]	Low	07/13/2018
☐	Charter Communications	FirstInGroup	[Choose a reviewer]	Low	07/13/2018

Begin Review | Close

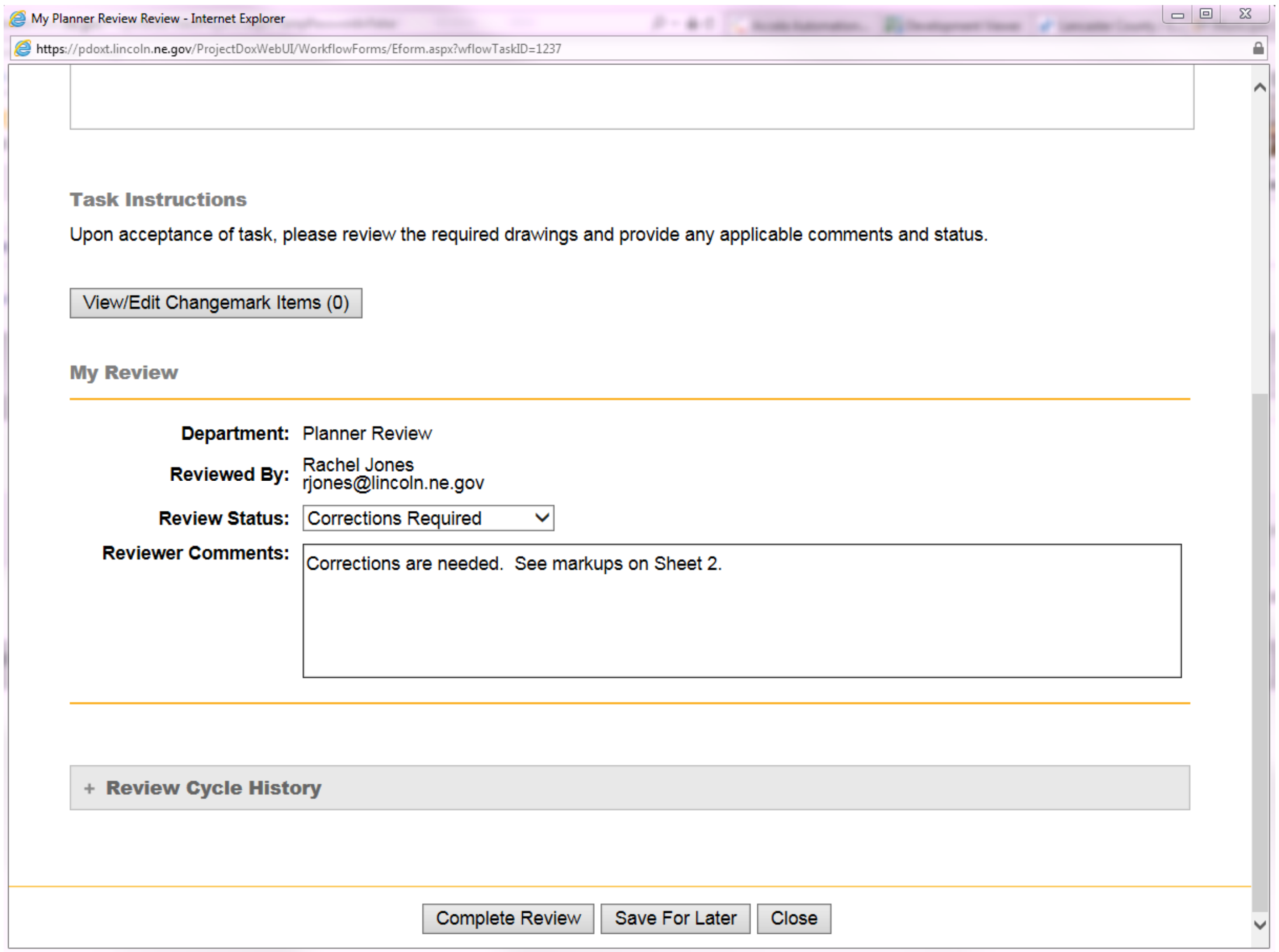
Planner Review

1. Click on the Planner Review task and accept it. <u>You must first accept your task before you can make any markups.</u> The Review task window will open.
2. Before you can put comments in the Review task window, you must first review the documents. Click on the project link to open the project, view documents, and make any markups.



Instructions continue on next page…

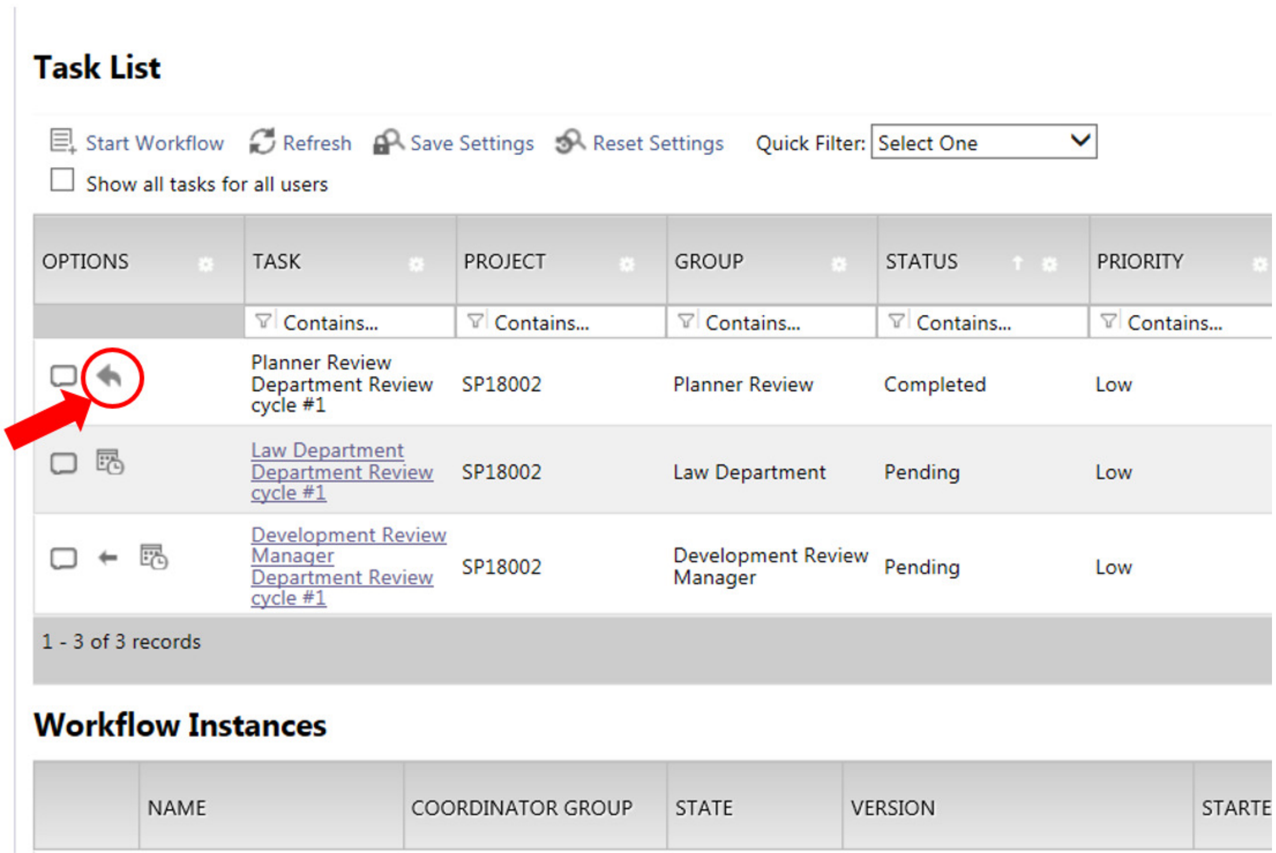
3. In your Review task window, choose a status and put text comments in the box provided. You can refer to your comments from a previous round of review by clicking the + next to Review Cycle History. If you want to review other's comments, you must navigate to the Department Review Status Report (see instructions on Page 33). Click "Complete Review" to submit your review.



Modifying Comments After Completing Your Review

You have the option to change your recommendation or text comments after you have already completed your review task. NOTE: If all reviews have been completed by all reviewers, the system will automatically move the project on to the next task and you will not be able to modify your review.

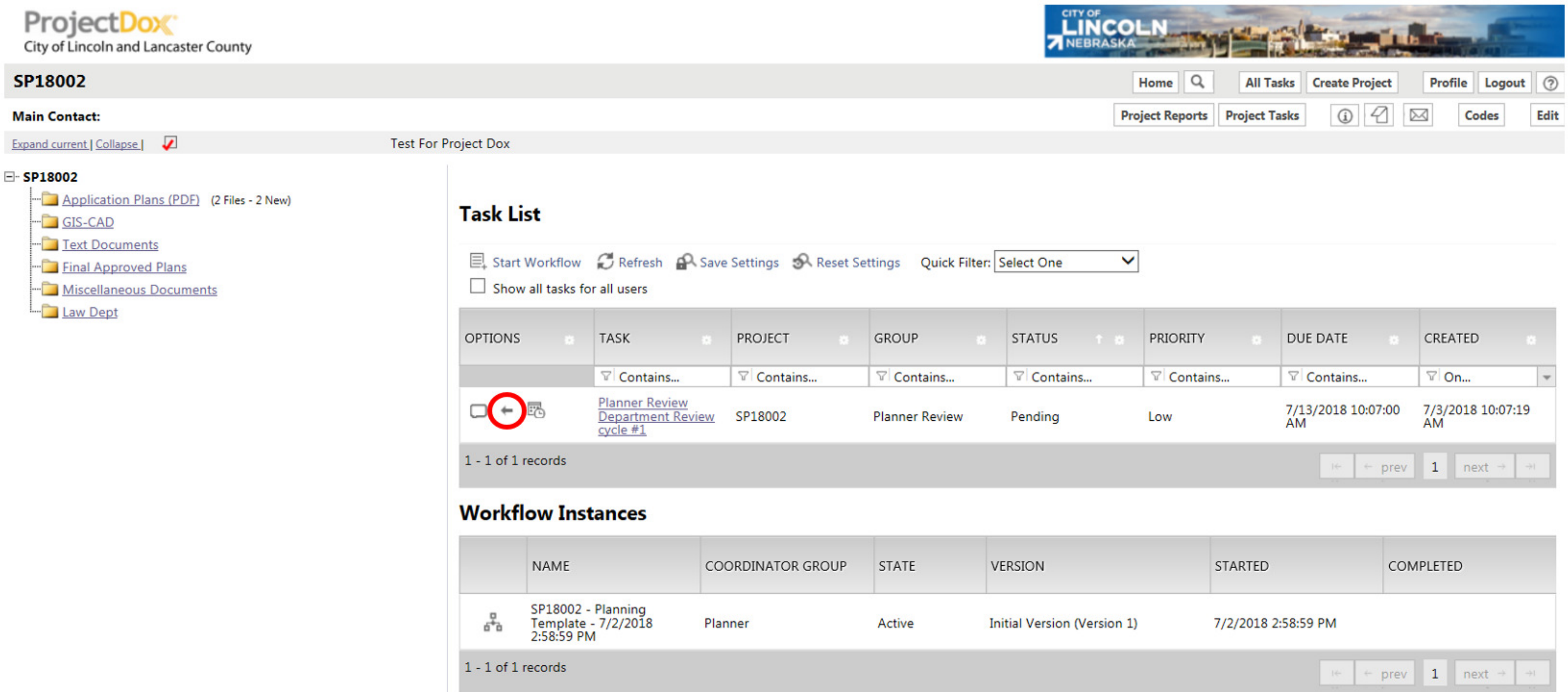
Re-accept your task by clicking on the back arrow icon next to it in the Task List as shown below. Your task window will re-open, allowing you to make any necessary changes.



Reassigning a Task

If you need to reassign a review task, the project planner can reassign it using these steps:

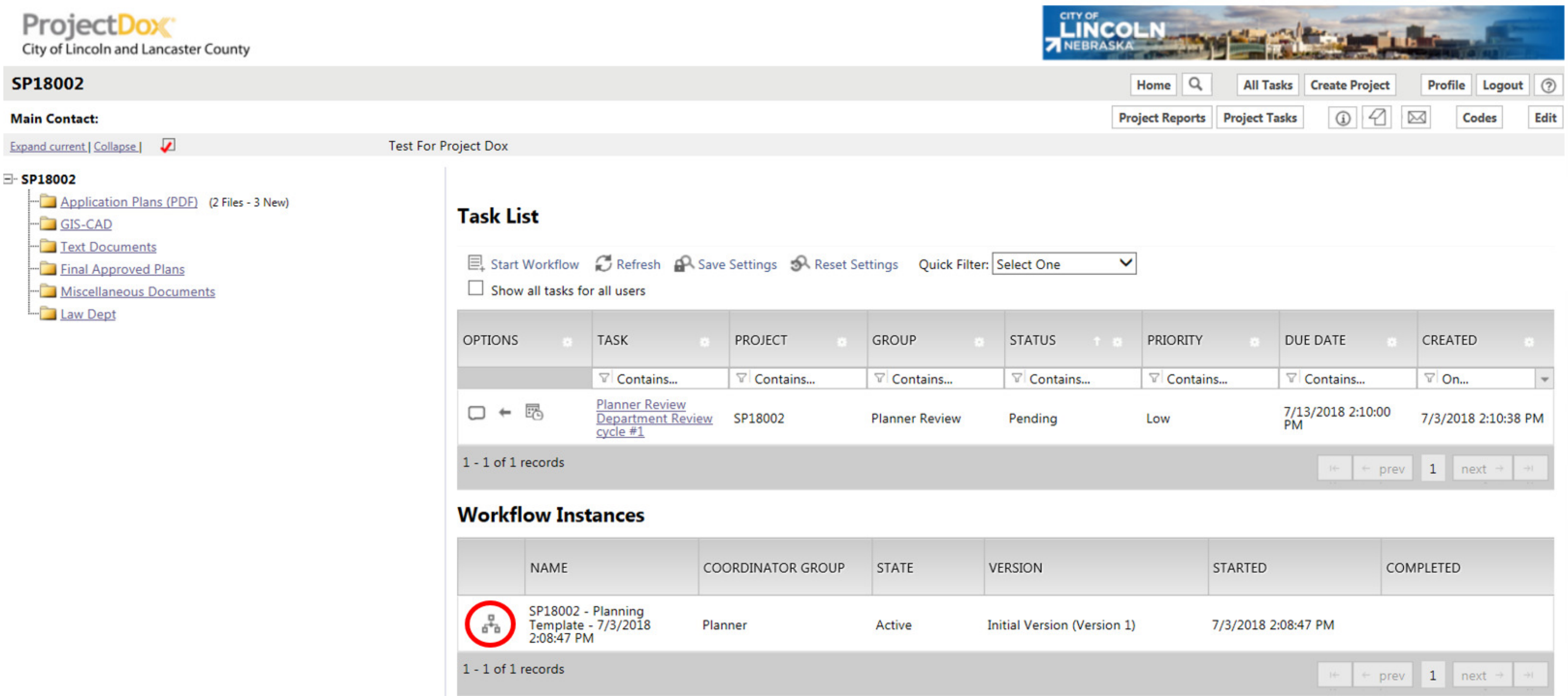
1. Click the "Reassign Task" arrow to the left of the task as shown below. A new window will open.
2. Click the + sign.
3. Click "Reassign to User" next to the person you want to reassign the task to.



Add a Reviewer

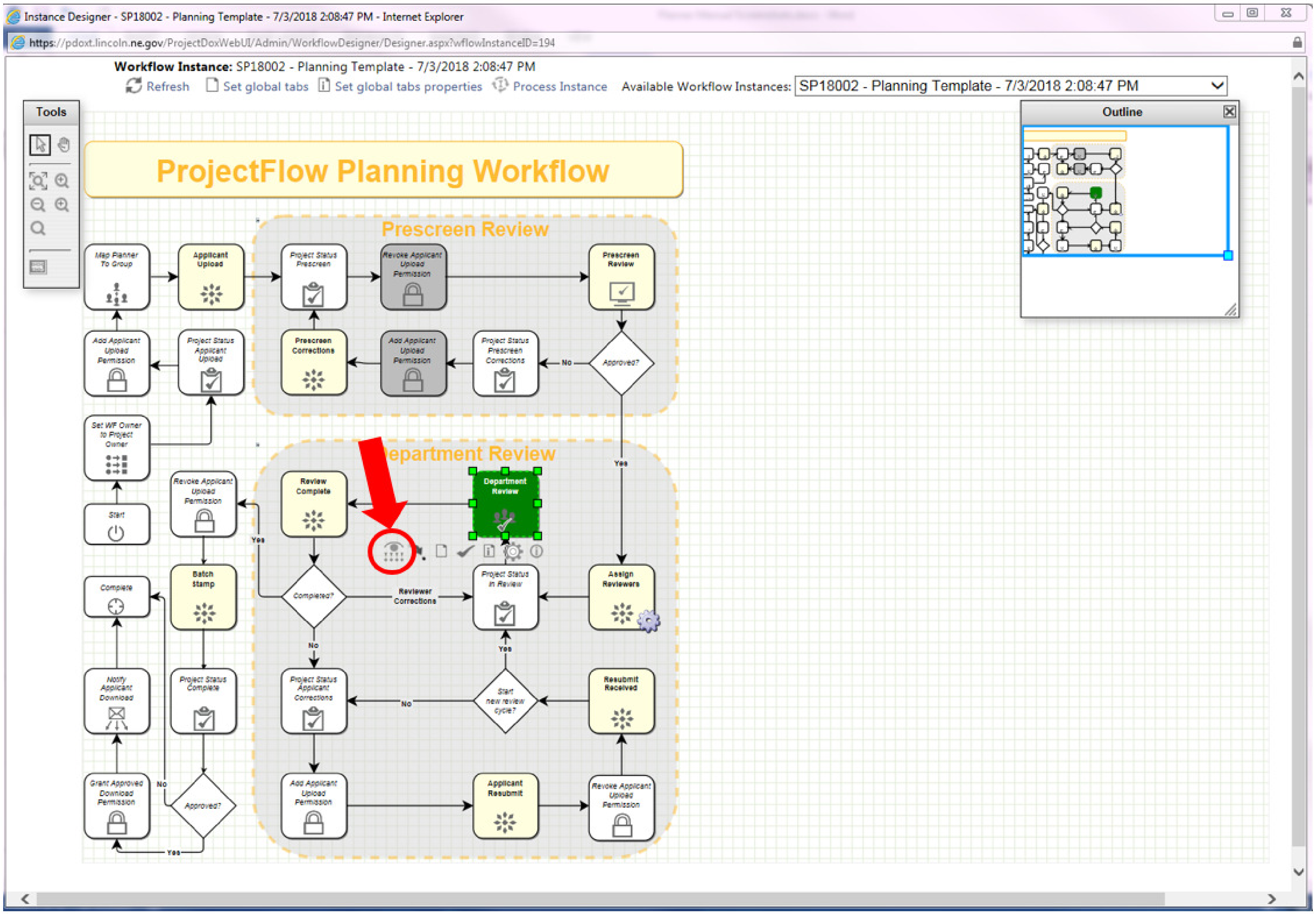
A reviewer can be added after the application has been routed for review using these steps:

1. Click the “lobster” icon as shown below.

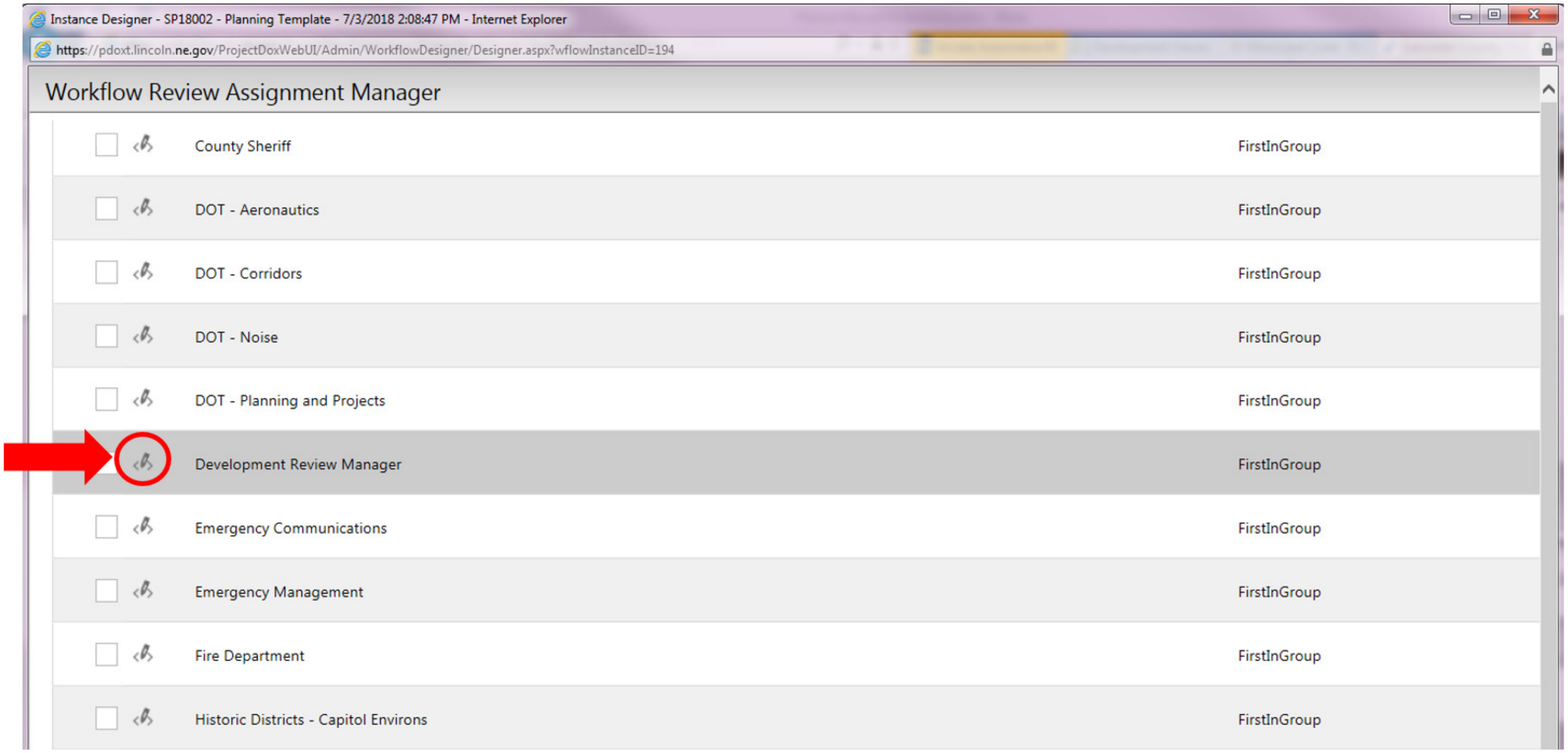


Instructions continue on next page…

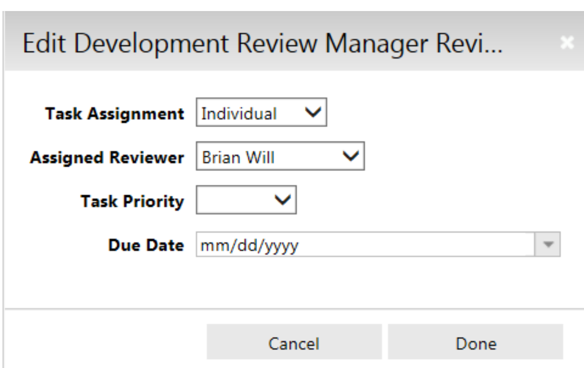
2. The ProjectFlow window opens. Click on the green active task for Department Review, then click the eyeball symbol as shown below.



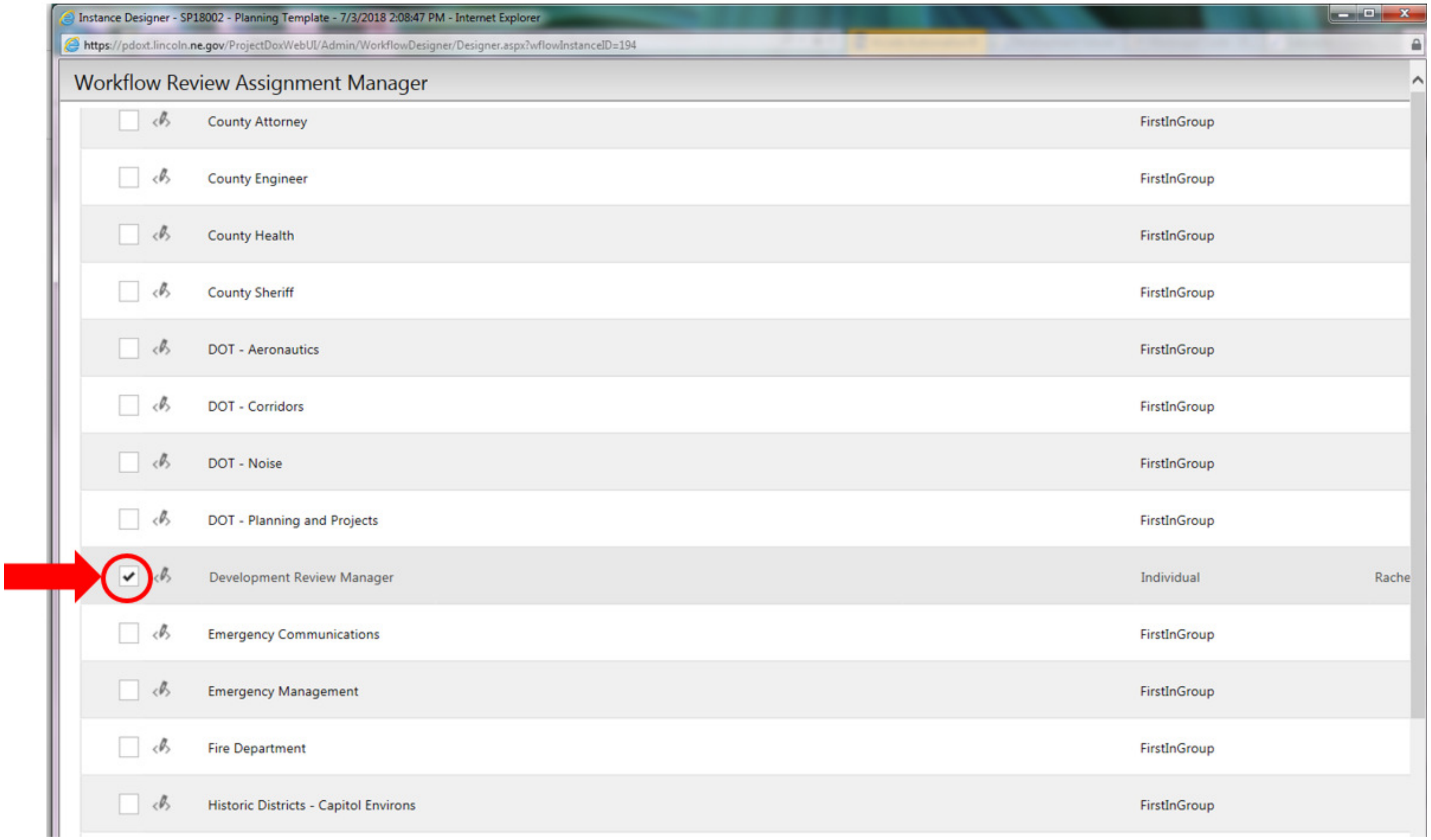
3. The Workflow Review Assignment Manager window opens. Click the “crab” icon next to the group you want to add.



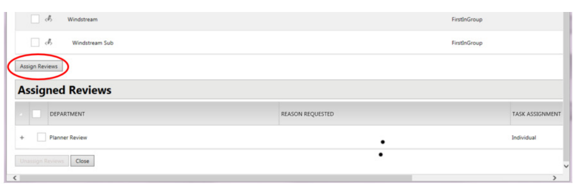
4. Fill out the information by choosing a reviewer (first in group or individual), task priority, and due date. Click “Done”.



5. Check the box to the left of the group you want to add as shown below.



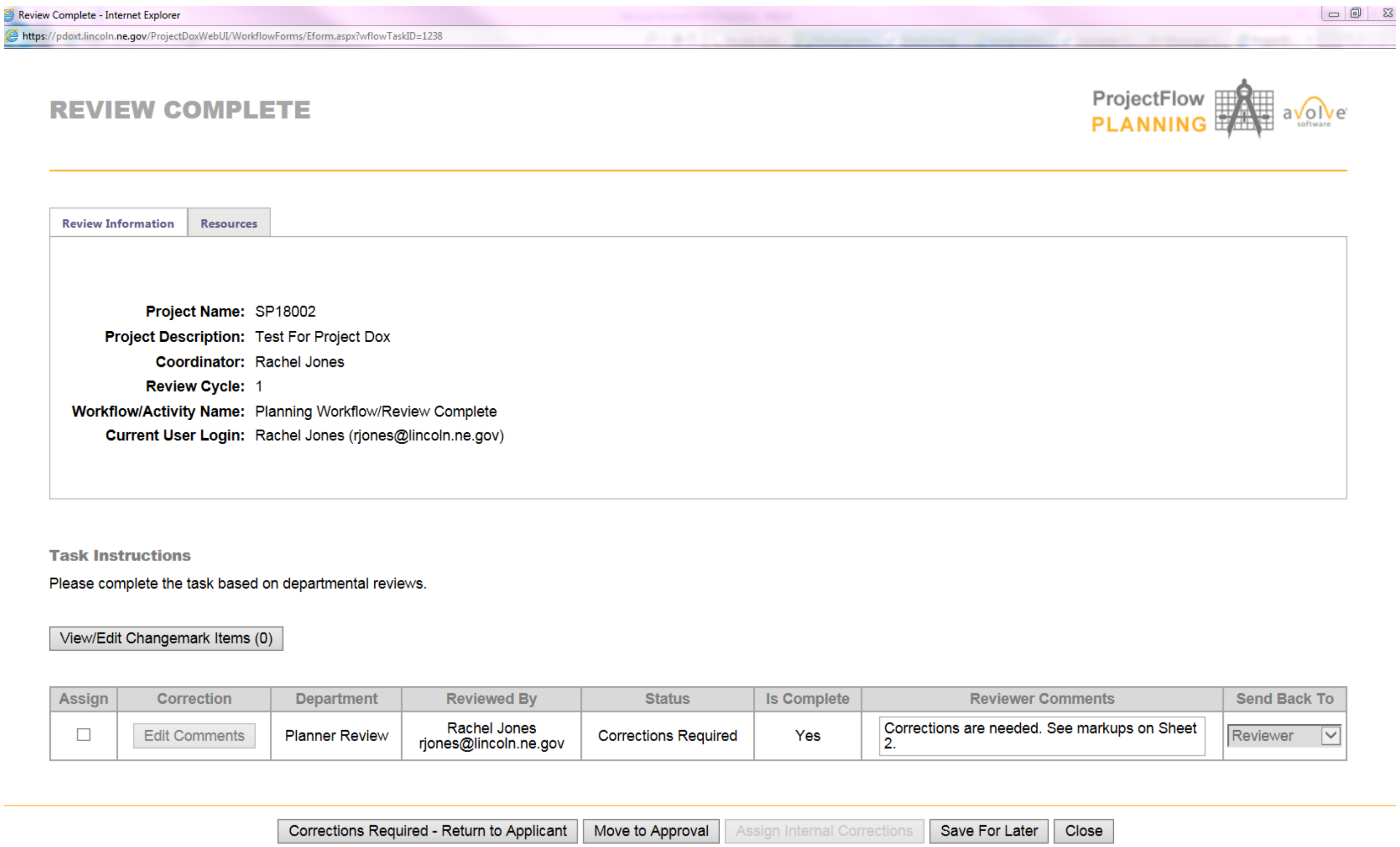
6. Click the "Assign Reviews" button at the bottom of the window. The new reviewer now appears in the Assigned Reviews list. Click the "Close" button.



Complete the Review Cycle

1. Once all reviewers have completed their reviews, the workflow will assign the Review Complete task to the planner and send the planner a notification email. If there are outstanding reviews that must be closed out by the planner, refer to the section above for instructions on how to close out their review for them.
2. Click on the Review Complete task and accept it.
3. Choose either "Move to Approval" or "Corrections Required – Return to Applicant". Selecting "Corrections Required" will require the applicant to upload revised plans and complete the Applicant Resubmit task. Selecting "Move to Approval" will assign the Batch Stamp Task to the planner to create and stamp the final approved plan.

   Alternatively, the planner can assign internal corrections to a reviewer if they need to revise their comments (Note: if you assign internal corrections, the workflow cannot move forward until the reviewer makes the requested change and completes the assigned task; this may not be a good option if on a tight timeline).



Review Complete - Internet Explorer

https://pdoxt.lincoln.ne.gov/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wflowTaskID=1238

REVIEW COMPLETE

ProjectFlow PLANNING avolve software

Review Information | Resources

Project Name: SP18002
Project Description: Test For Project Dox
Coordinator: Rachel Jones
Review Cycle: 1
Workflow/Activity Name: Planning Workflow/Review Complete
Current User Login: Rachel Jones (rjones@lincoln.ne.gov)

Task Instructions

Please complete the task based on departmental reviews.

View/Edit Changemark Items (0)

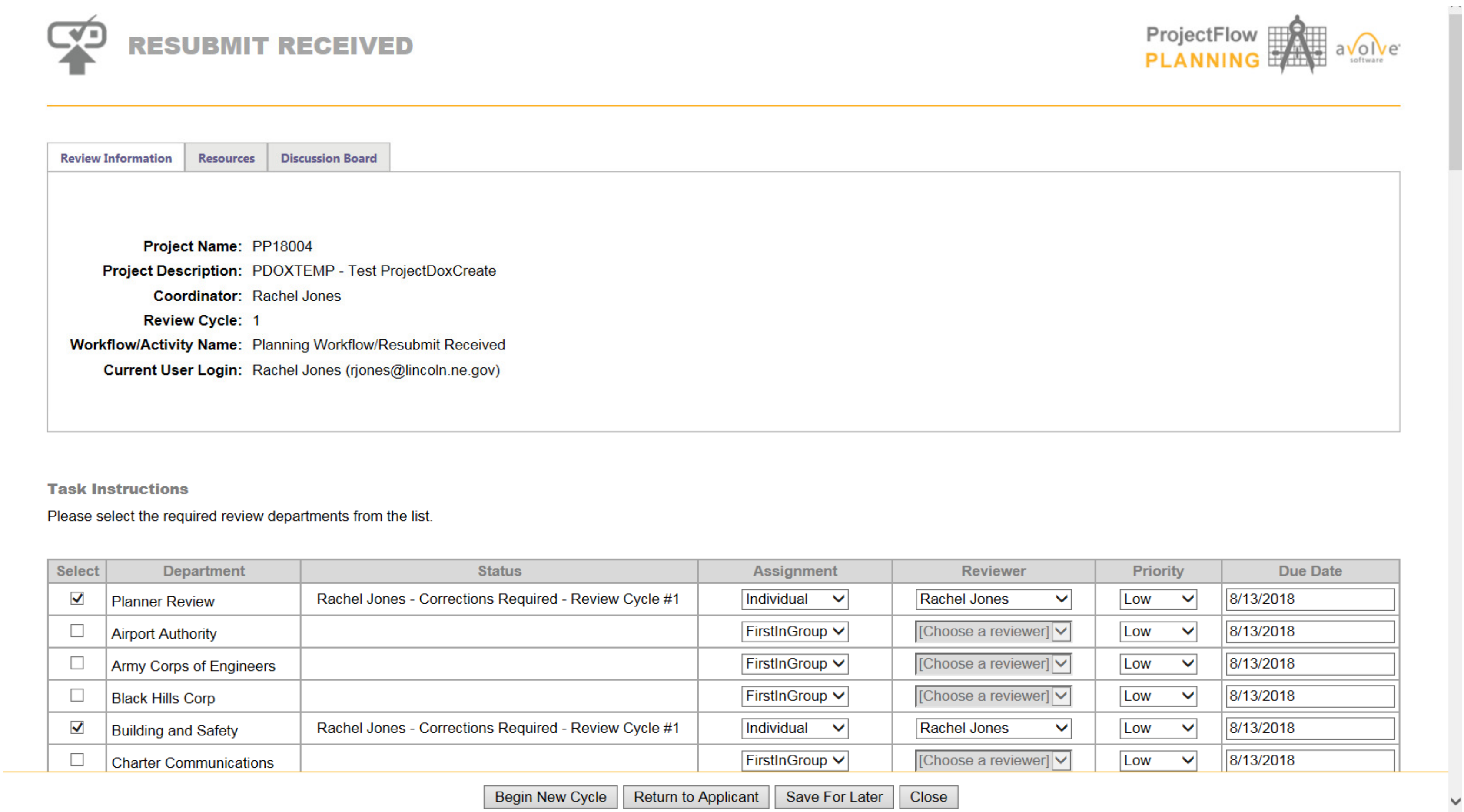
Assign	Correction	Department	Reviewed By	Status	Is Complete	Reviewer Comments	Send Back To
☐	Edit Comments	Planner Review	Rachel Jones rjones@lincoln.ne.gov	Corrections Required	Yes	Corrections are needed. See markups on Sheet 2.	Reviewer

Corrections Required - Return to Applicant | Move to Approval | Assign Internal Corrections | Save For Later | Close

Subsequent Rounds of Review

The applicant will not have permission to upload during the Department Review step during review rounds 2 and on. The applicant will only be able to upload during the first review cycle. The applicant will make revisions, upload revised plans, and complete their Applicant Resubmit task. The planner is then assigned the Resubmit Received task.

The Assign Reviewers window for review rounds 2 and on will default to select those reviewers who were routed the review in the previous round. If reviewers selected status of “Recommend Approval” in the previous round, they will be automatically unchecked in the routing list for the next round. Add/remove reviewers as needed by selecting or deselecting the check box next to their listing. Click “Begin New Cycle” to initiate the new review.



RESUBMIT RECEIVED

ProjectFlow PLANNING

Review Information | Resources | Discussion Board

Project Name: PP18004
Project Description: PDOXTEMP - Test ProjectDoxCreate
Coordinator: Rachel Jones
Review Cycle: 1
Workflow/Activity Name: Planning Workflow/Resubmit Received
Current User Login: Rachel Jones (rjones@lincoln.ne.gov)

Task Instructions

Please select the required review departments from the list.

Select	Department	Status	Assignment	Reviewer	Priority	Due Date
☑	Planner Review	Rachel Jones - Corrections Required - Review Cycle #1	Individual	Rachel Jones	Low	8/13/2018
☐	Airport Authority		FirstInGroup	[Choose a reviewer]	Low	8/13/2018
☐	Army Corps of Engineers		FirstInGroup	[Choose a reviewer]	Low	8/13/2018
☐	Black Hills Corp		FirstInGroup	[Choose a reviewer]	Low	8/13/2018
☑	Building and Safety	Rachel Jones - Corrections Required - Review Cycle #1	Individual	Rachel Jones	Low	8/13/2018
☐	Charter Communications		FirstInGroup	[Choose a reviewer]	Low	8/13/2018

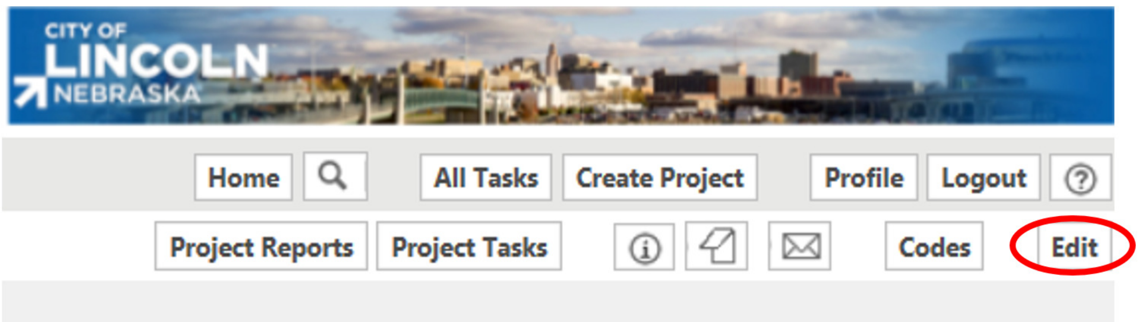
Begin New Cycle | Return to Applicant | Save For Later | Close

Batch Stamping

Batch Stamping is the step in which the planner creates the final approved plan PDF using the final sheet versions and electronically stamp the plan set. This task is assigned to the planner at the point that all reviews are submitted on a given review cycle and the planner chooses the “Move to Approval” button in the final Review Complete task to indicate that all comments have been addressed and the plans are ready to approve.

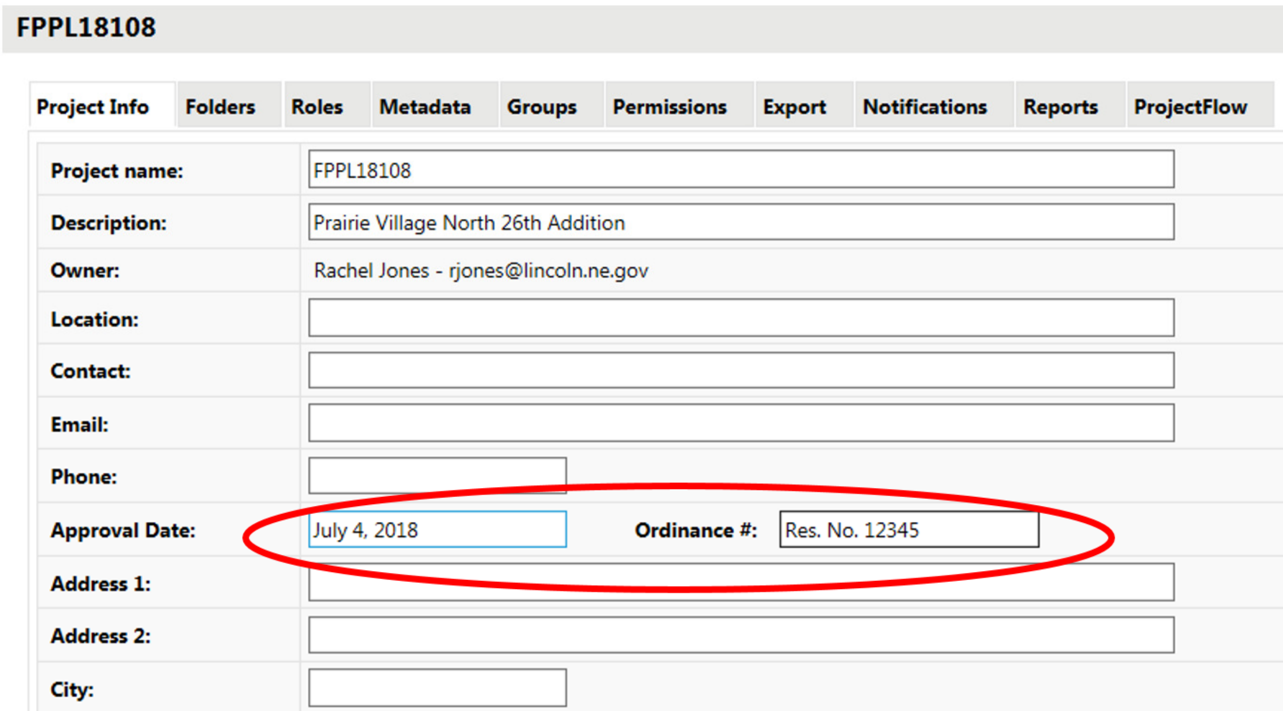
Batch stamping will be used for all application types EXCEPT final plats.

1. On the project page, click the “Edit” button in the top right corner of the screen.



Instructions continue on next page…

2. Fill out the Approval Date and Ordinance # fields as shown below. **<u>For applications approved by Planning Commission or City Council, you will need to specify whether it is an Ordinance or Resolution in your entry. You do not need to enter anything under the Ordinance # field for Administrative Amendments.</u>** Scroll to the bottom and click “Save”, then “Return to Project”.



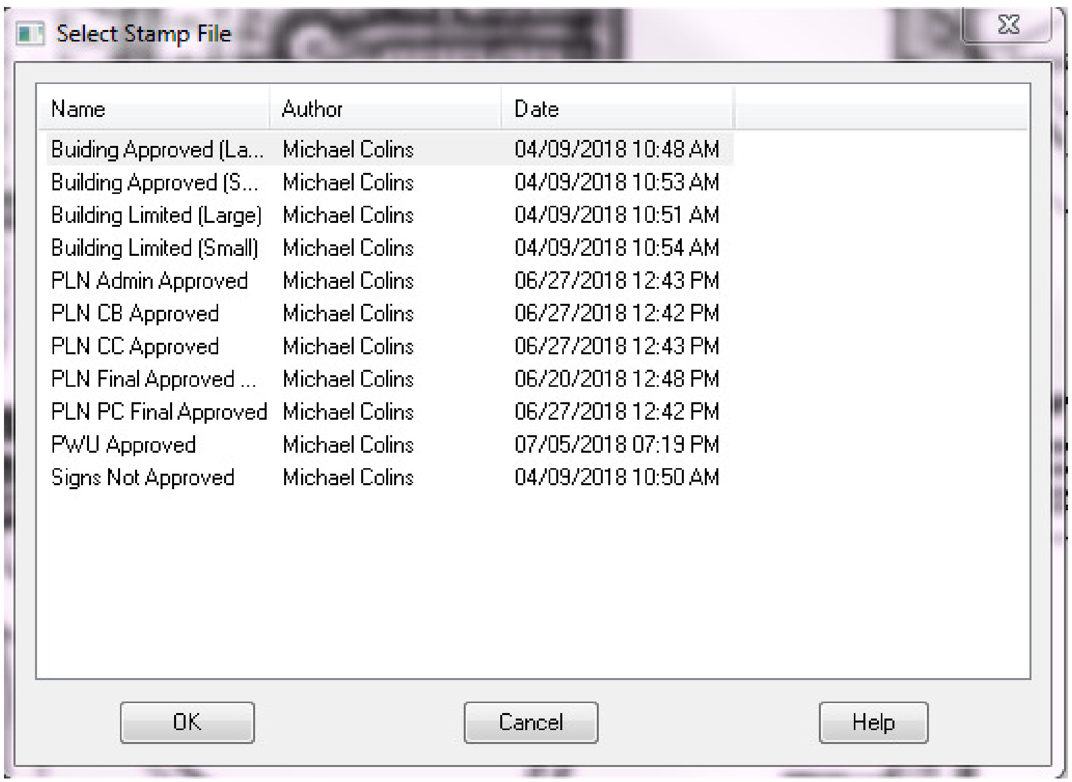
Instructions continue on next page…

3. The planner will now electronically add the main approval stamp as a markup. Open the file that will comprise the first page of the Final Approved Plan. **NOTE: All sheets that will make up the final approved plan MUST be clean at this point (i.e., have no other markups). If the sheet(s) are not clean, the reviewers' markups will be burned into the Final Approved plan in addition to the approved stamp, which we don't want.** If necessary, request the applicant upload new final versions prior to Batch Stamping in order that they will not have any reviewer markups.

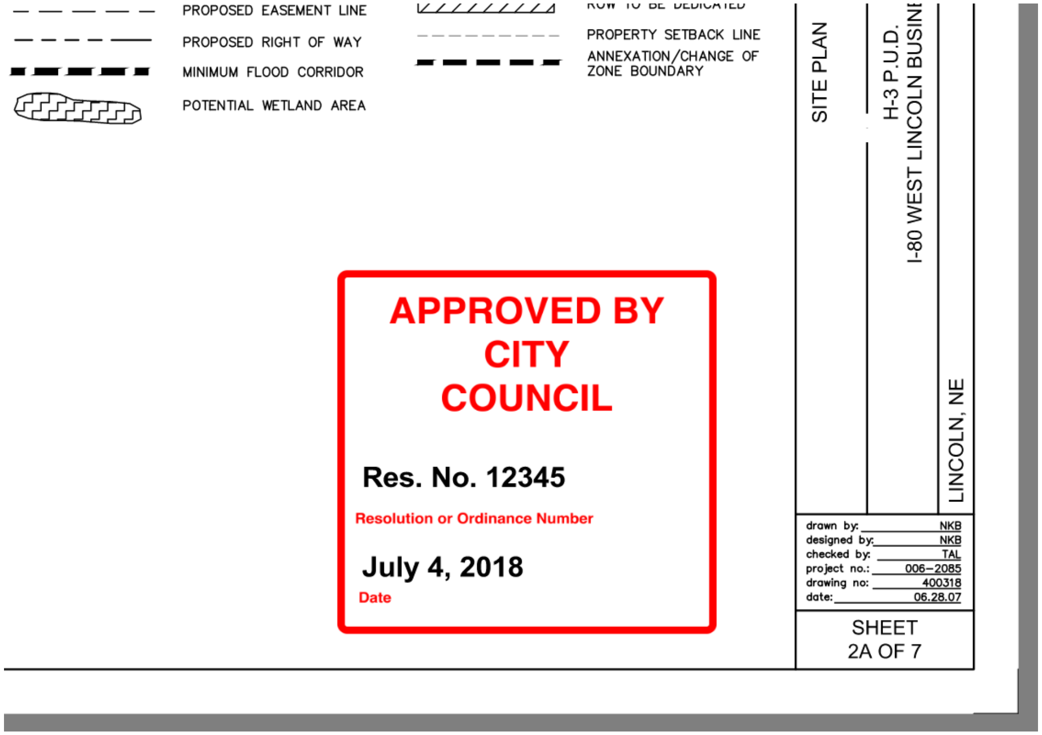
4. Initiate a new markup.

5. Click the Stamp tool in the markup tools on the left hand side: 

6. Choose the appropriate stamp from the list. All of Planning Department's stamps begin with PLN. Then click OK.

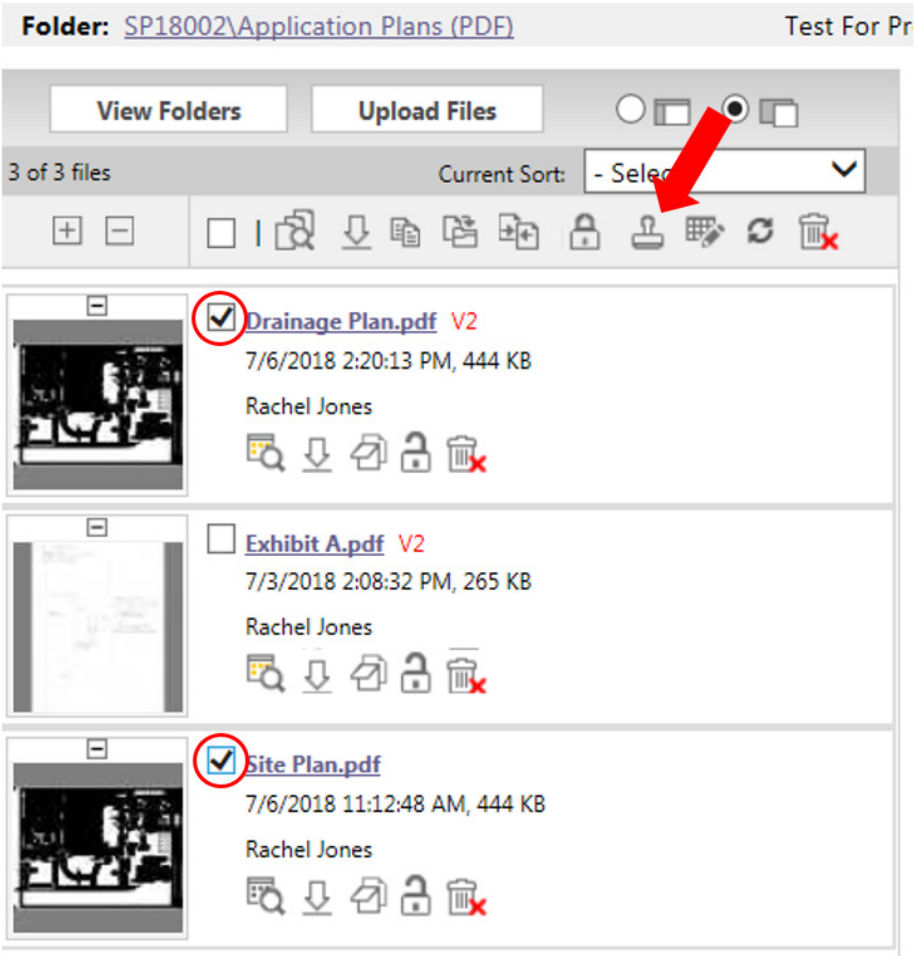


7. Click and drag on the plan to draw the stamp. Click the  tool and re-size and adjust the stamp location as needed. Save your markup as "Final Approved Stamp".



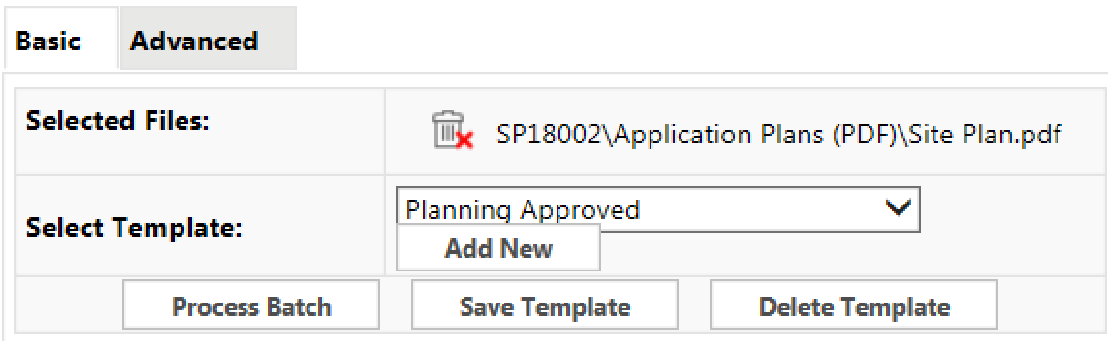
Instructions continue on next page…

8. The planner will now generate the Final Approved Plan file and electronically add the “Final Approved Plan” stamp in the bottom right corner of every page. In the Application Plans folder, check the boxes for all sheets/files that will comprise the Final Approved Plan. Click the Batch Stamp Icon. The Batch Stamp options open off to the right.



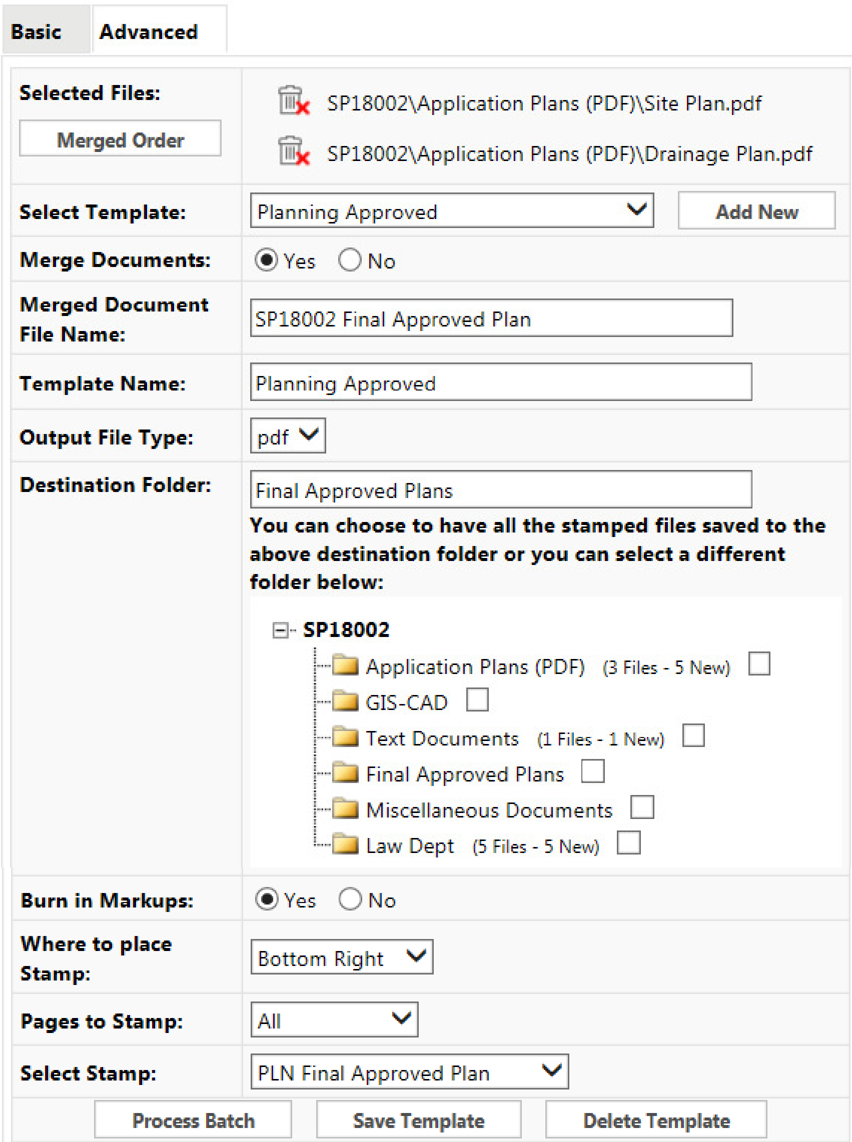
9. If the final approved plan constitutes one sheet/file, select the template “Planning Approved”. Then click “Process Batch.” The final stamped version is now in the Final Approved Plan folder.

If the final approved plan will be created from multiple sheets/files, see instructions on the next page.

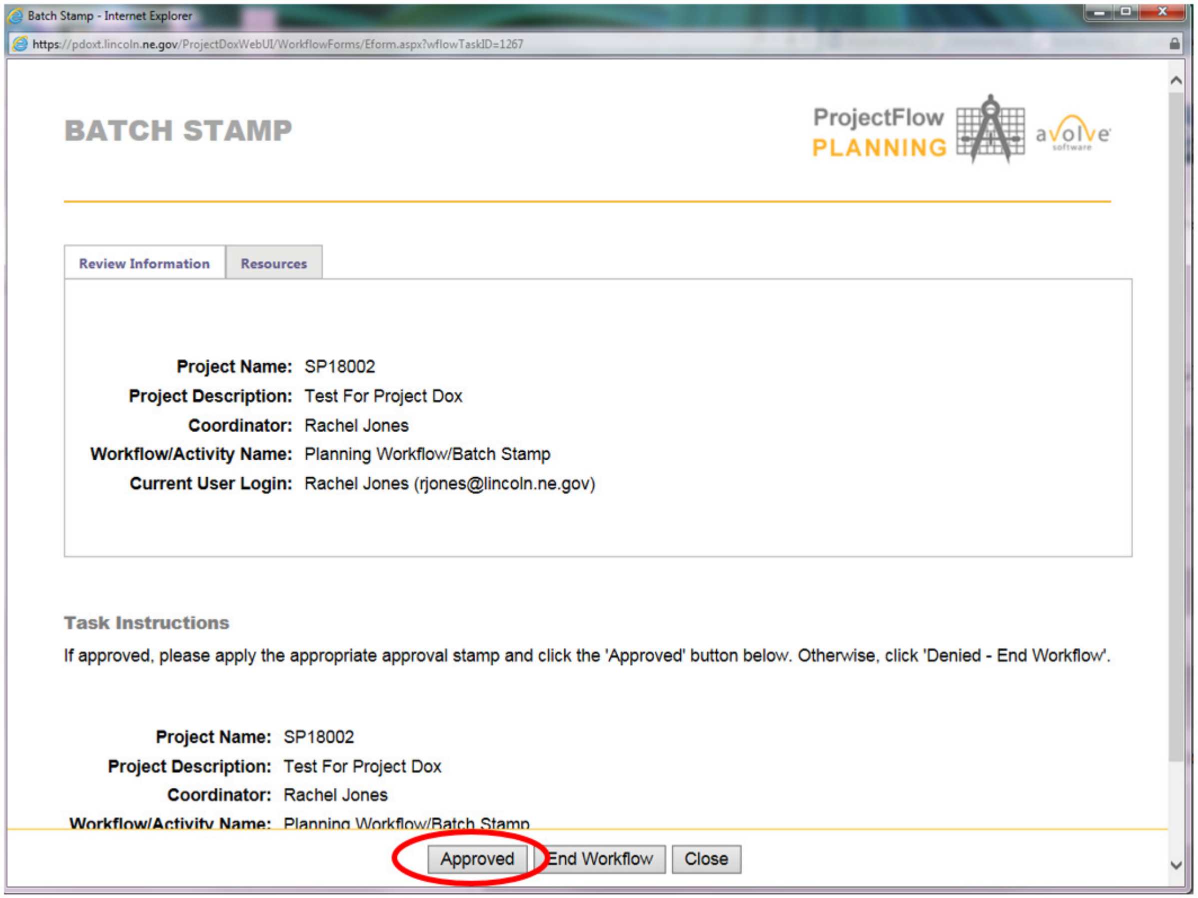


Instructions continue on next page…

10. If the final approved plan will contain multiple sheets/files, click the Advanced tab. Select the template "Planning Approved." If needed, adjust the order in which the pages will be merged by changing the option for Merge Documents to "Yes", then click the "Merged Order" button. Enter a file name. All other settings can be left as they are. Click the "Process Batch" button. The final, stamped version now appears in the Final Approved Plans folder.



11. Click on the Batch Stamp task and accept it. The Batch Stamp task window opens. Click the “Approved” button in your Batch Stamp task window. Completing this task sends an email notification to the applicant that their stamped approved plans are ready to download. Applicants should print and submit two (2) stamped copies, one for the City Clerk and one for the Planning Department file.

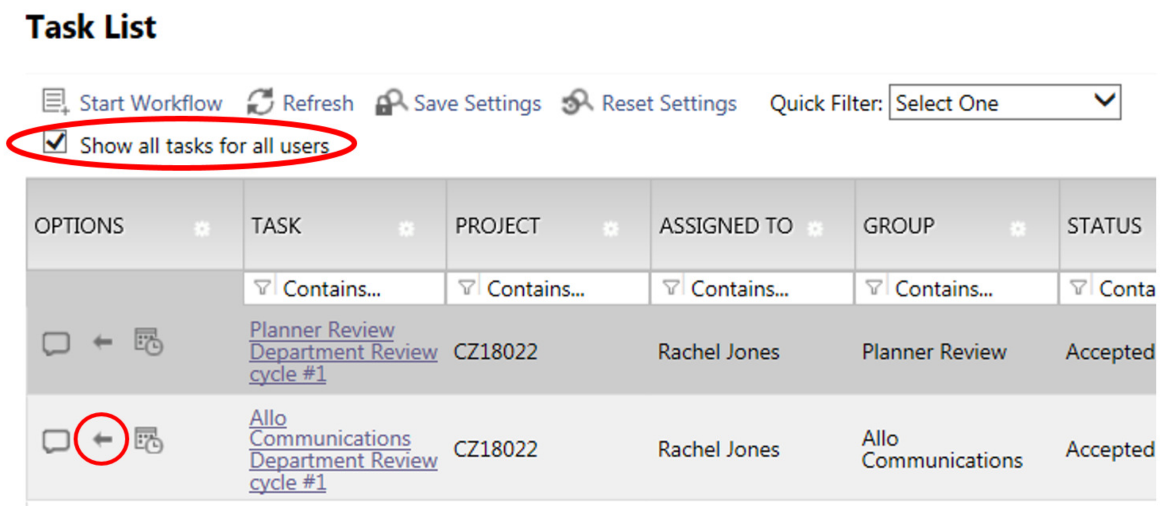


Completing a Reviewer or Applicant Task For Them

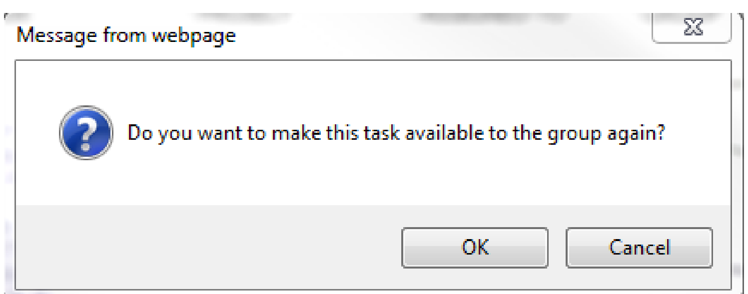
If the applicant uploads revised plans but forgets or refuses to complete the Applicant Resubmit task, the planner can do this on their behalf. The planner can also close out a reviewer's task if they are unwilling or unable to complete their review. In all cases, it is preferable that the person complete their task themselves.

In the Task List, check the box for "Show all tasks for all users".

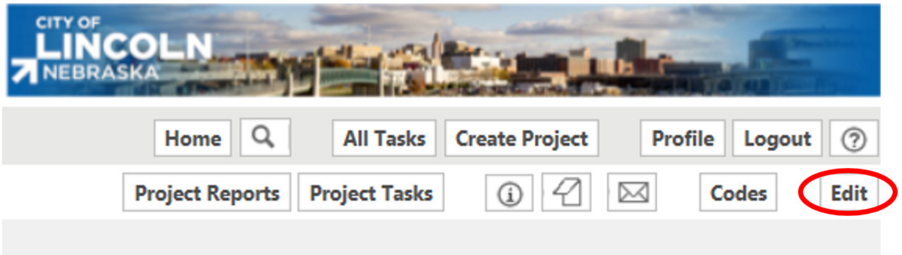
If the person has accepted their task, the status will read "Accepted" and an arrow appears next to their task as shown below. If there is an arrow, follow the step just below to reassign the task. If there is no arrow, start with the instructions on the next page.



Click on the arrow to reassign the task back to the wider group (in this case, the Allo group). Click OK in the dialog box as shown below. A second dialog box appears – click "Reassign to Group".



You must add yourself to that group so you can complete the task on their behalf. Click the Edit button in the top right corner of the screen



Then open the Groups tab.

Instructions continue on next page…

Click the Group you want to edit on the left hand side of the screen.

Search for your name in the All Users box at the bottom of the screen, then click “Add Selected User”. Your name now appears in the Selected Members list.

Selected Members:

Search:

Remove (All)	Name	Company	Title	Email
☐	Missy Minner			mminner@lincoln.ne.gov
☐	Al Schroeder			aschroeder2@allophone.net
☐	Brec Wilshusen			bwilshusen@allophone.net

Page **1** of **1** (3 items)

Remove Selected Users | Remove All Users

All Users | **Groups** | **New User**

Search:

Check All	Name	Company	Title	Email
☐	Aaron Hummel			ajandseven@aol.com
☐	Aaron Hummel			firechief@citywaverly.com
☐	Abby Littrell			alittrell@lincoln.ne.gov
☐	Adam Miller			amiller@lincoln.ne.gov
☐	Adil Khalaf			AKhalaf@lincoln.ne.gov
☐	Alan Wood			awood@eslaw.com
☐	Alejandro Herrera			aherrera@avolvesoftware.com

Page **1** of **52** (358 items)

Instructions continue on next page…

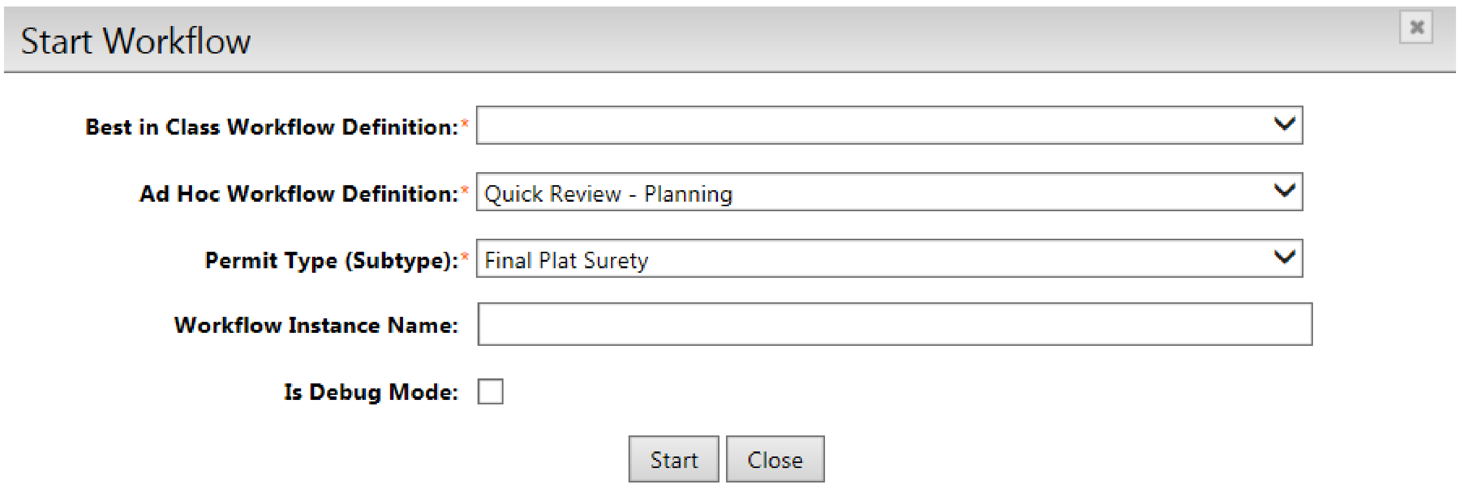
Click the “Return to Project” button at the top right of the screen. Open and accept the task in question. Choose the appropriate status and complete the task. For completing an overdue reviewers’ task, choose the status “Did Not Complete.”

<u>If the task has NOT been accepted by the reviewer or applicant, follow the same steps as above, skipping the first step of clicking the reaccept arrow, and starting with adding yourself to that group via the Edit button and Groups tab.</u>

Quick Review

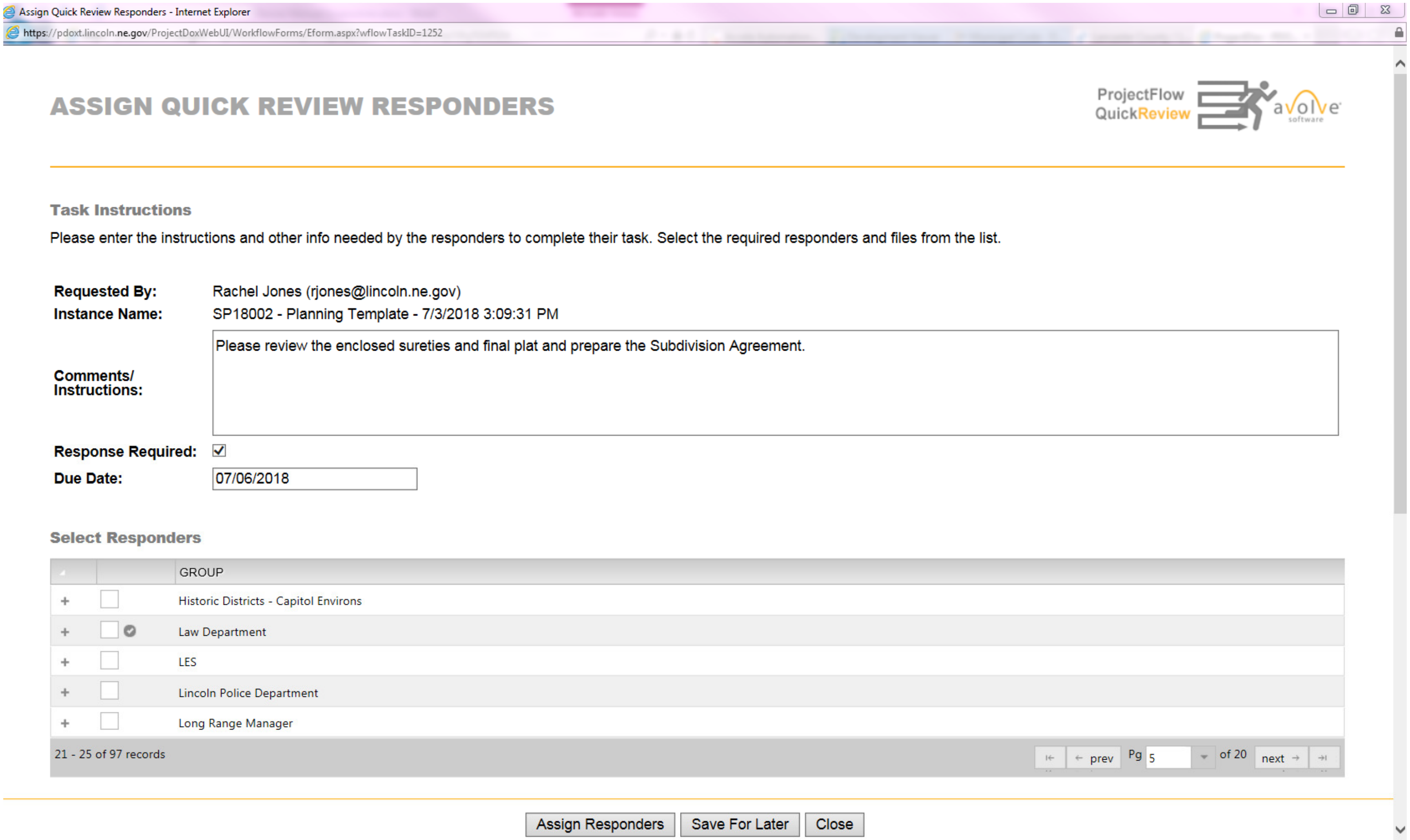
The planner can initiate a "Quick Review" that allows a separate review request to be sent at any point during the workflow. You will use this most often to request Law Department prepare the Subdivision Agreement for final plats.

1. Navigate to the project for which you want to create a Quick Review.
2. Copy and upload all necessary files for the Law Department into the "Law Dept" folder (final plat, memo, escrows, ownership certificate, etc.)
3. From within the project page, click "Start Workflow" under the Task List.
4. Choose the options as shown below under the second and third dropdown menus. Click "Start". The Assign Quick Review Responders window will open.



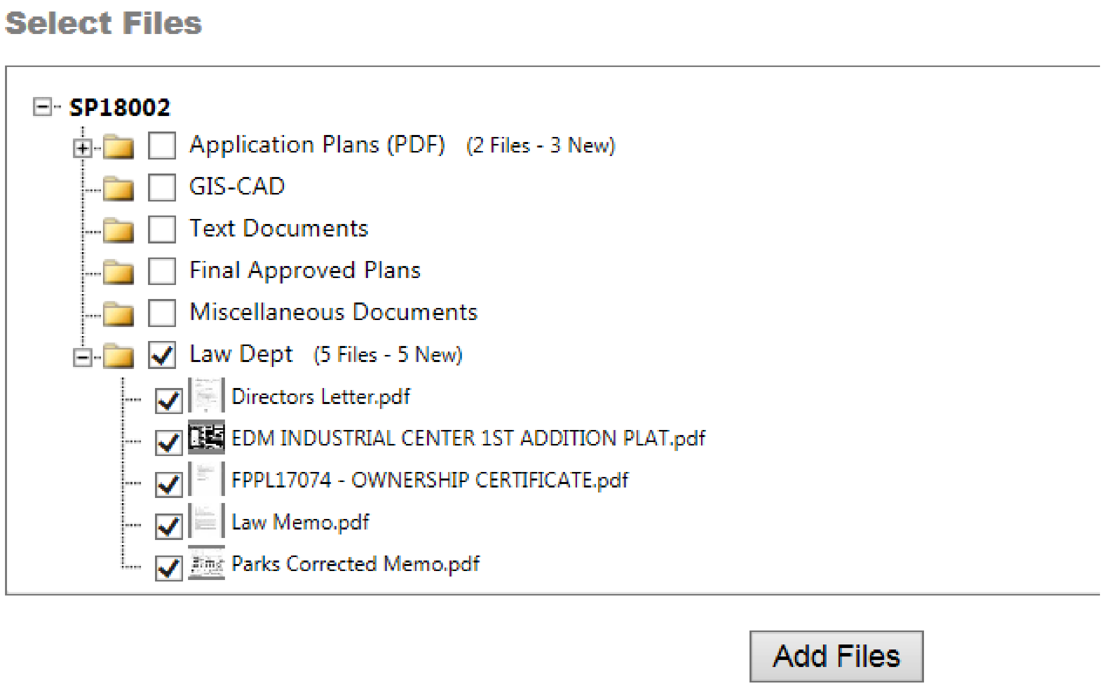
Instructions continue on next page…

5. Add comments/instructions as needed and select the desired reviewer(s).



6. Scroll down and select the folder(s) and/or file(s) you want to be reviewed. The Quick Review will enclose all the selected folders/files for direct viewing by the Quick Reviewer within their task window. For a Law Department final plat review, select the “Law Dept” folder.

   Click the Add Files button, then click Assign Responders at the bottom.



7. If and when the Quick Reviewer completes their review task, the planner receives a Quick Review Complete task as shown below. Click on the Quick Review Complete task and accept it.

	Quick Review Complete	SP18002

8. The Quick Review Complete window opens, from which the sender's comments/markups can be viewed. The planner has the button option to either complete the review or follow-up with a response back to the Quick Reviewer if continued coordination is needed.

Responder Comments

GROUP NAME	FULL NAME	EMAIL	TASK STATUS	RESPONDER COMMENTS
Law Department	Rachel Jones	rjones@lincoln.ne.gov	Completed	Sureties are acceptable. Subdivision agreement sent on 7/5.

1 - 1 of 1 records ← prev 1 next →

File Comments

THUMBNAIL	FILE NAME	SENDER COMMENTS
	Directors Letter.pdf	

GROUP NAME	FULL NAME	EMAIL	TASK STATUS	RESPONDER COMMENTS
Law Department	Rachel Jones	rjones@lincoln.ne.gov	Completed	OK

THUMBNAIL	FILE NAME	SENDER COMMENTS
	EDM INDUSTRIAL CENTER 1ST ADDITION PLAT.pdf	

GROUP NAME	FULL NAME	EMAIL	TASK STATUS	RESPONDER COMMENTS
Law Department	Rachel Jones	rjones@lincoln.ne.gov	Completed	OK

THUMBNAIL	FILE NAME	SENDER COMMENTS
	FPPL17074 - OWNERSHIP CERTIFICATE.pdf	

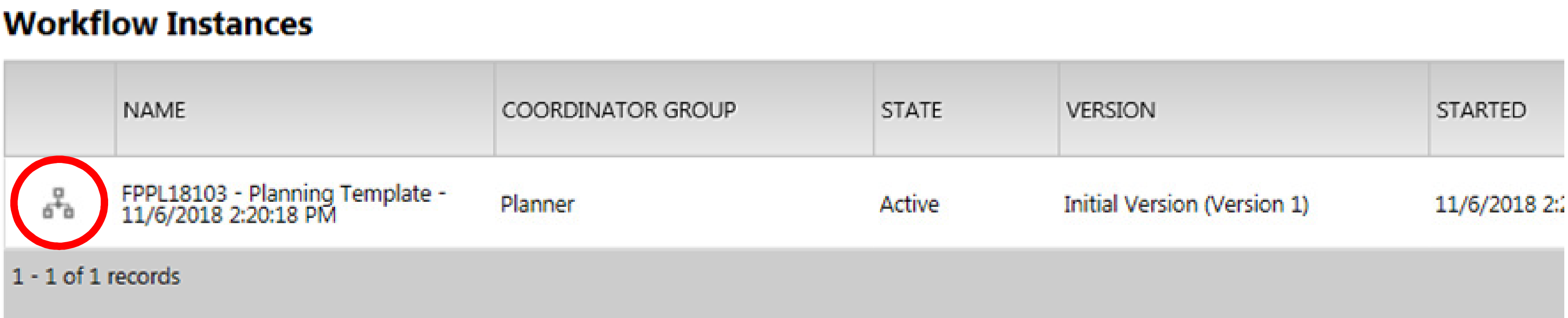
GROUP NAME	FULL NAME	EMAIL	TASK STATUS	RESPONDER COMMENTS
Law Department	Rachel Jones	rjones@lincoln.ne.gov	Completed	OK

Complete Quick Review | Follow-up | Save For Later | Close

Jumping Steps in the Workflow

In some cases it will be valuable to jump ahead to a new step in the workflow. You will use this process for closing out the ProjectDox for Affidavits of Correction and Final Plats since we skip the batch stamping step for those application types.

1. Click the lobster icon under Workflow Instances on your Task List page for that project.

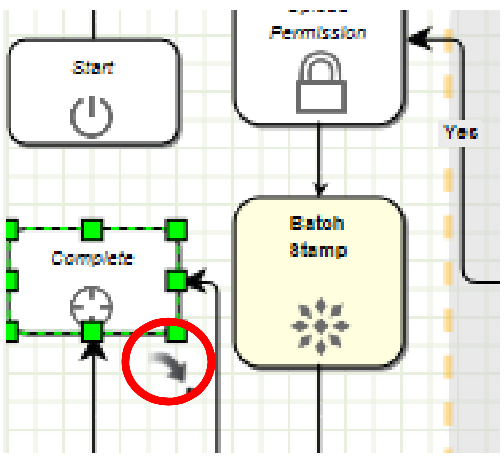


Workflow Instances

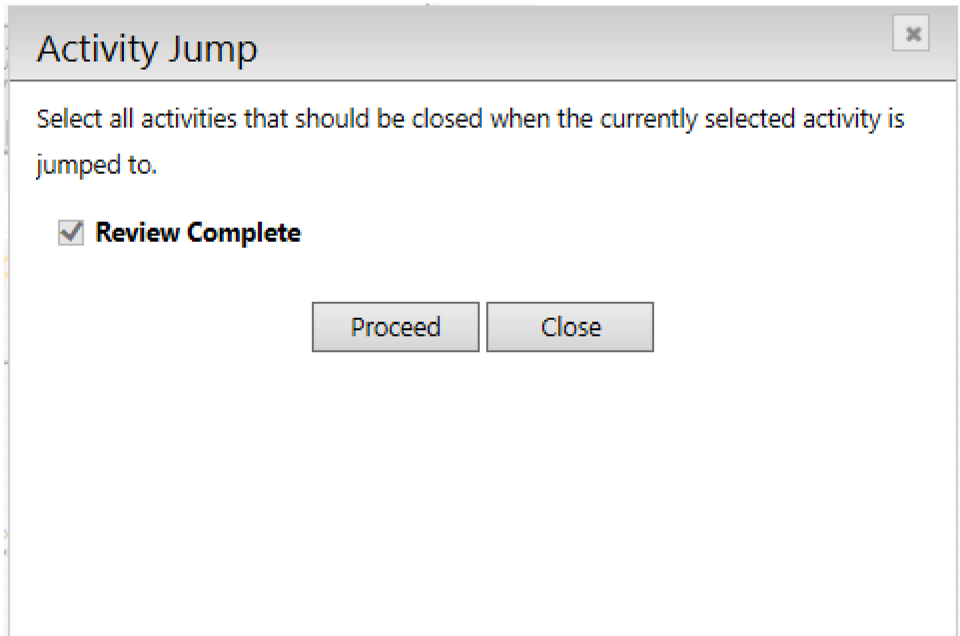
	NAME	COORDINATOR GROUP	STATE	VERSION	STARTED
	FPPL18103 - Planning Template - 11/6/2018 2:20:18 PM	Planner	Active	Initial Version (Version 1)	11/6/2018 2::

1 - 1 of 1 records

2. Click on the step you want to jump TO. In many cases this will be the "Complete" step at the very end. It will outline in green. Click on the "Jump To" arrow circled in red below.



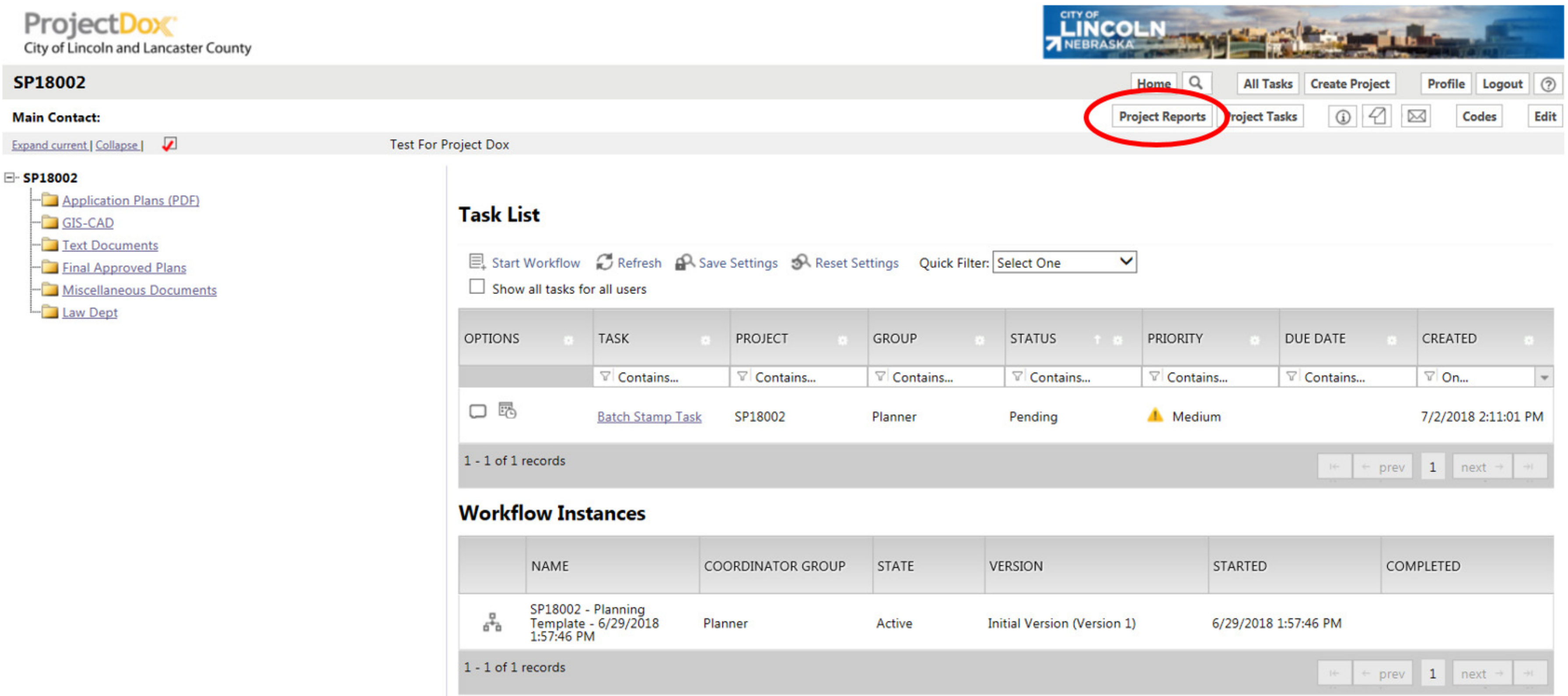
3. Click the “Proceed” button, then “OK” in the warning message that pops up. You have now jumped to the desired step in the workflow. If you jumped to the Complete step at the end of the workflow, your ProjectDox workflow for that application is now closed out.



4. If you jumped to the Complete step at the end of the workflow, go to the “Edit” button in the project and manually update the status from “In Review” to “Complete”.

Reports

Several reports are available to the project manager/planner. To view a report, navigate to the applicable project. Click “Project Reports” in the top right corner of the screen.



The report you will use most often is "Department Review Status" which is the former Agency Review Report that compiles all reviewer comments submitted to date into a matrix format.

ProjectDox
City of Lincoln and Lancaster County

CITY OF LINCOLN NEBRASKA

SP18002

Home | All Tasks | Create Project | Profile | Logout

Main Contact:

Project Reports | Project Tasks | Codes | Edit

Expand current | Collapse |

Test For Project Dox

SP18002
- Application Plans (PDF)
- GIS-CAD
- Text Documents
- Final Approved Plans
- Miscellaneous Documents
- Law Dept

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report	Project	Discussion Board Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist items for a workflow.
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displays the status of all reviews for a workflow.
	ProjectFlow - Discussion Board Plan Review Report	Workflow	Discussion Board Plan Review Report
	ProjectFlow - Parallel Review - Department Review Sta...	Workflow	Displays the status of all reviews for each of the sub-workflows in a parallel review.
	ProjectFlow - Parallel Review - Workflow Routing Slip	Workflow	Displays the sequential route of all tasks for each of the sub-workflows in the parallel review.
	ProjectFlow - Review Details Report	Workflow	Lists the review comments, checklist and changemark details for a workflow instance review cy...
	ProjectFlow - Timesheet Logs	Workflow	Displays a list of all timesheet values entered in a specific project

Page **1** of **2** (21 items)

Tips - New Features

- With the upgrade to ProjectDox Version 9.1.3, applicants are restricted from uploading files during certain review cycles. Applicants only have permission to upload files during the first round of review. They are prevented from uploading during review round two and subsequent rounds. Applicants should therefore ensure that all necessary documents are uploaded prior to requesting a re-review.

- Elimination of “Miscellaneous Documents” and “Resubmittal Requests” folders: Instead of copying files into the “Resubmittal” folder, applicants are granted permission at the end of a review cycle to view markups and any other comment documents within the “Application Plans” and “Text Documents” folders. L.E.S., Parks, and other reviewers that create documents the applicant needs to view should upload into one of these two folders, preferably Text Documents.