City of Lincoln - Lancaster County

PLANNING DEPARTMENT

Application Review

555 S. 10th Street, Suite
Lincoln, NE 68508
Ph: (402) 441-7491
Fax: (402) 441-6377

LANCASTER COUNTY NEBRASKA

CITY OF LINCOLN NEBRASKA MAYOR CHRIS BEUTLER

City of Lincoln & Lancaster County Planning Department

ePlan

ePlan Submittal

Application Contact Manual

avolve software

January 23, 2015

1. Purpose Statement

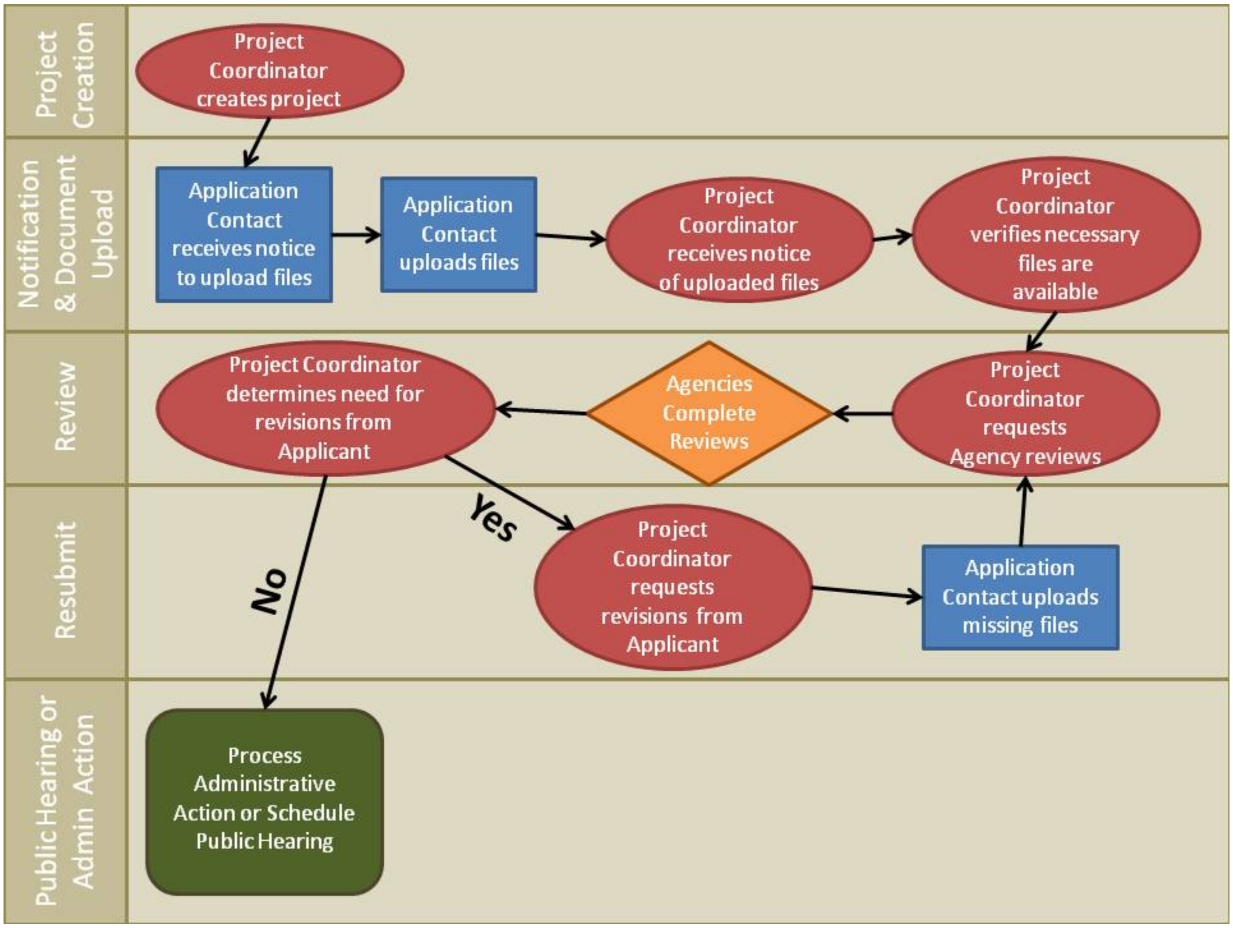
This Manual provides basic documentation on the steps involved in using *ProjectDox* software for the City-County Planning Department's ***ePlan Submittal*** process. The ***ePlan Submittal*** process replaced the existing paper-based review of all Planning applications with a computer-based approach. 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 Contacts as a general reference guide. There are text descriptions and screen images of the step-by-step tasks necessary to complete an application submittal 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.

ePlan Submittal

2. 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. The following chart outlines how this process will be fulfilled as part of the ***ePlan Submittal*** initiative.



3. Submitting Application

A. Application Contact submits in person at the Planning Department[1]
- Completed application form
  - Valid email address for Application Contact person required
- Fee Payment
- Certificate of Title or Ownership Opinion (Final Plats only)

B. Project Coordinator verifies information and enters it in database

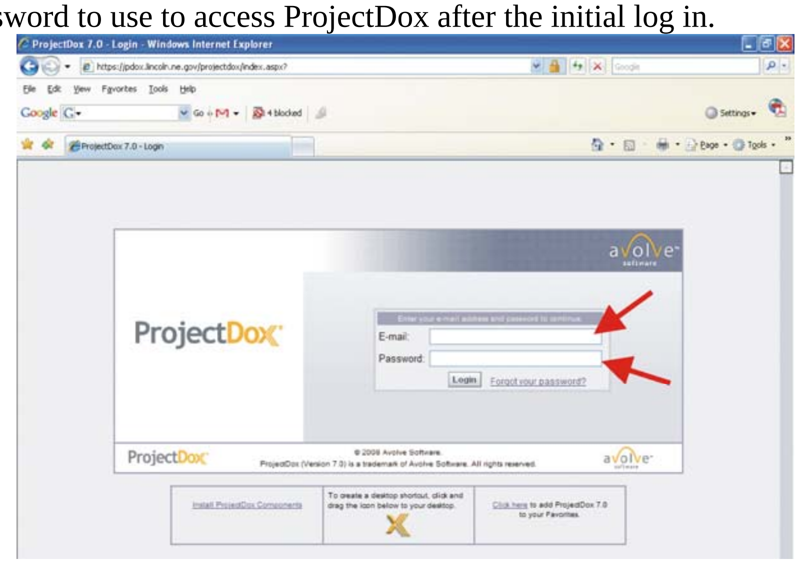
C. Project Coordinator creates ProjectDox project

D. Application Contact, upon returning to office, receives email notification to upload project application files to ProjectDox[2]

NOTE: Applications WILL NOT be routed for review until all necessary files have been uploaded into ProjectDox. Planning Commission filing deadline is based on the date files are uploaded, NOT the date application form is dropped off in Planning.

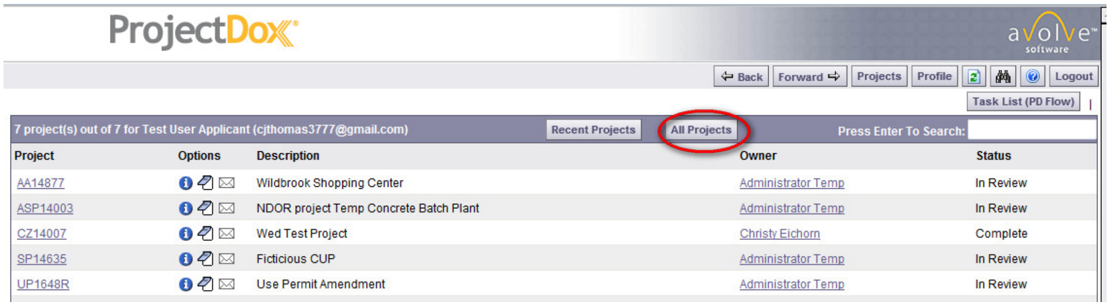
E. **Application Contact** clicks on the "Project Access Link" in the notification email.

F. Application Contact logs into ProjectDox. User name is email address. Use the temporary password included in the email notification for initial login[3]. Enter requested information to set up user account. At that time, create a new password to use to access ProjectDox after the initial log in.



[1] Various eCommerce options are being explored. This would allow the submittal process to be done entirely via the web, without coming into the Planning Dept. No estimated timeline for implementation has been established.
[2] Refer to Appendix E for guidelines on easements to be included on application files.
[3] Initial log in requires the installation of ProjectDox components. See ePlan Submittal website (lincoln.ne.gov keyword = eplan) for instructions.

G. Application Contact clicks on the Application number for this project in the "Active projects for ..." section of the "Projects" page. By default, the program will show only those projects recently accessed. To see all of your projects, click the "All Projects" button.



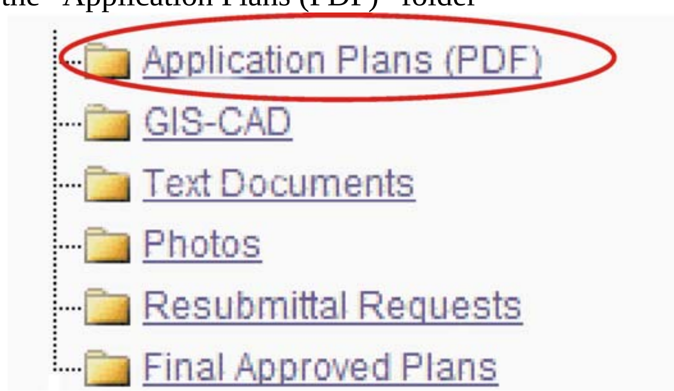
Please note, if multiple applications on the same property were requested at one time, also known as Associated Requests, only one of the applications will show up on the ProjectDox project list. This is because all related projects are reviewed concurrently.

This will display a screen that shows the file folder structure.

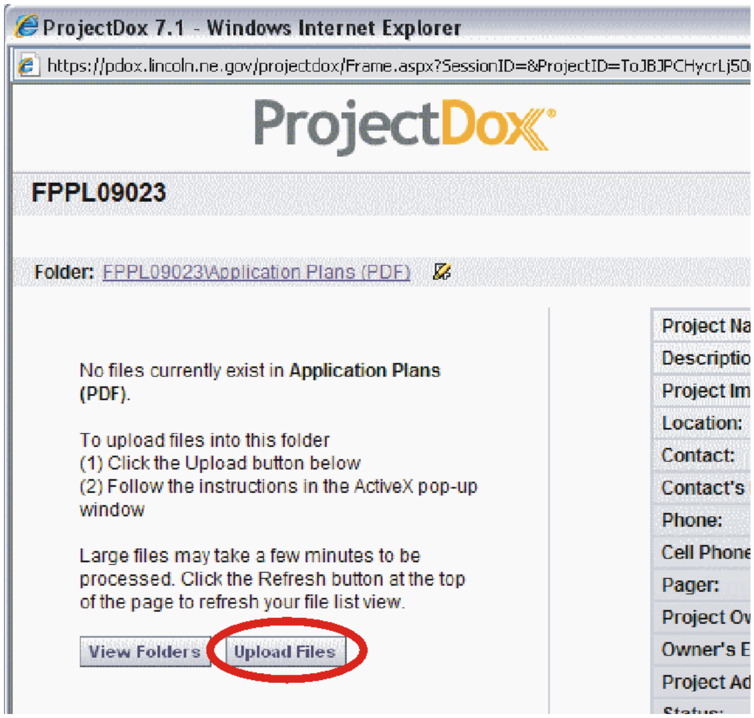
Next upload your application files and supporting documents to ProjectDox.

See Appendix A for file naming conventions for Application Plans (PDF) folder .

H. Click on the "Application Plans (PDF)" folder

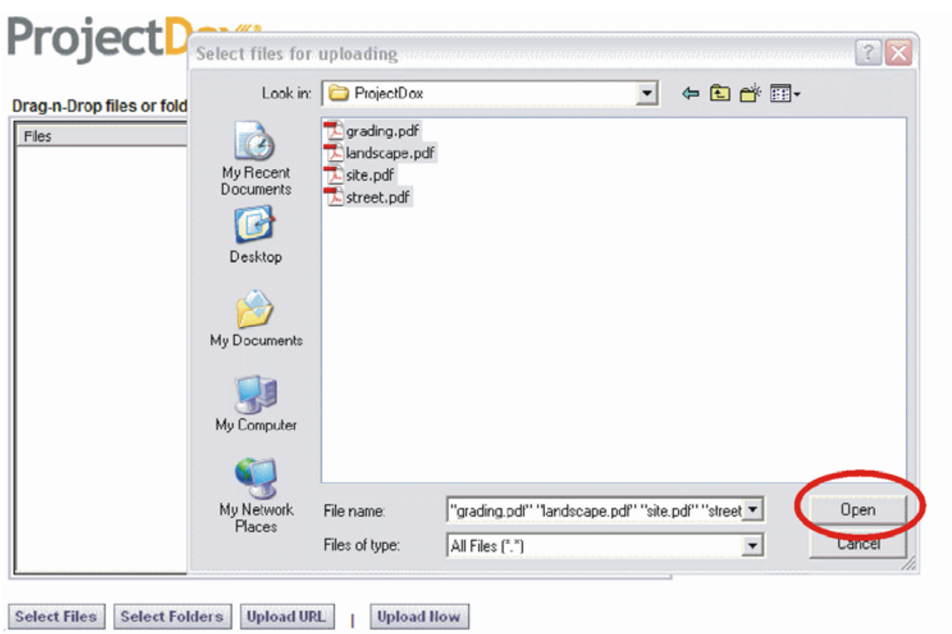


Click on the "Upload Files" button.

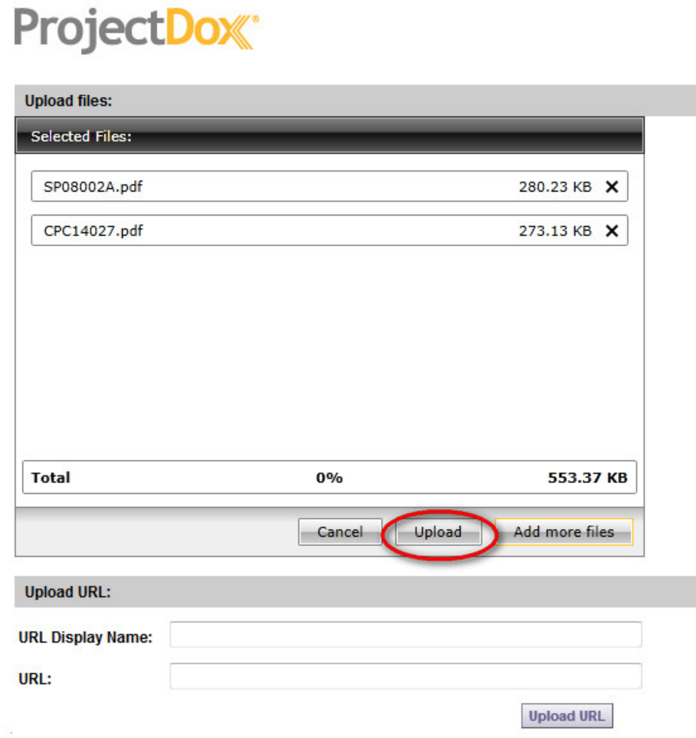


Select **all** the files to be uploaded to this folder in the select files dialog that opens. Files must be in **pdf** format. When creating pdf files, resolution should not be set lower than 600 dpi on drawings and not lower than 300 dpi on text documents.

Click Open.

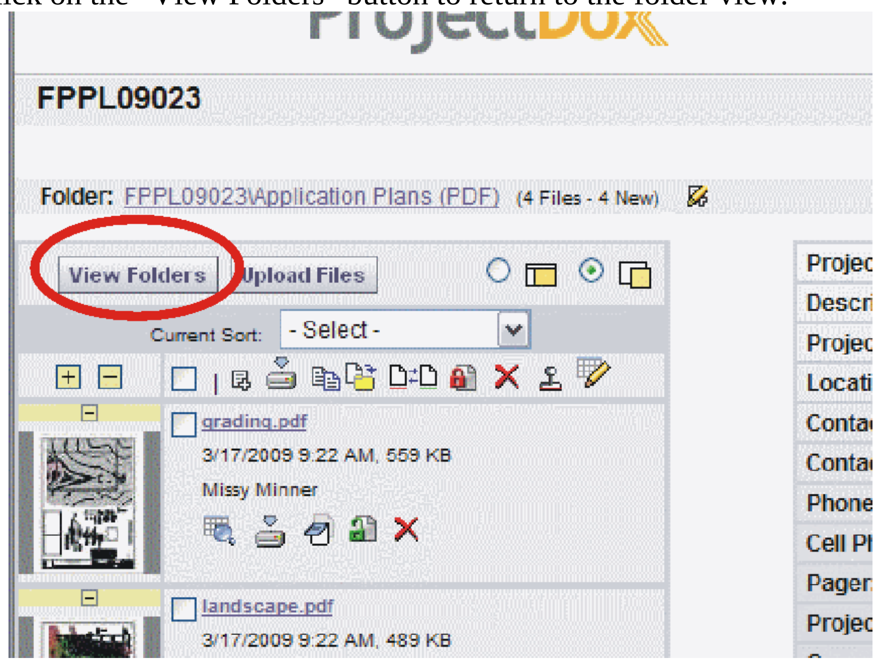


Once **all** the files have been selected, click the “Upload” button.



Click “Close” on file upload confirmation window.

Click on the “View Folders” button to return to the folder view.



Repeat the upload process for all applicable folders.

GIS-CAD

See Appendix A for file naming conventions for GIS-CAD folder (same as Application Plans (PDF) folder).

See Appendix B for supported file formats in this folder.

Submitted files must be in the City County projection and utilize the correct geographic coordinates to be considered valid. If files are not in City County projection along with the correct geographic coordinates, resubmittal in the correct projection and geographic coordinates will be required. Please contact the Project Coordinator for assistance.

Text Documents

Memos of explanation, legal descriptions, etc. should be uploaded in **pdf** format to the Text Documents folder by clicking on the "Text Documents" folder and following the same upload files procedure previously outlined.

Photos

If desired, photos and other images that further describe the application should be uploaded in a supported image format to the Photos folder. See Appendix B for supported file formats in this folder. Follow the previously outlined upload procedure.

Project Coordinator is automatically notified, via email, that files have been uploaded into ProjectDox. He or she will then verify that all files needed for review have been submitted. They will begin the review process and tentatively schedule the project for Planning Commission public hearing or other appropriate action.

ePlan Submittal

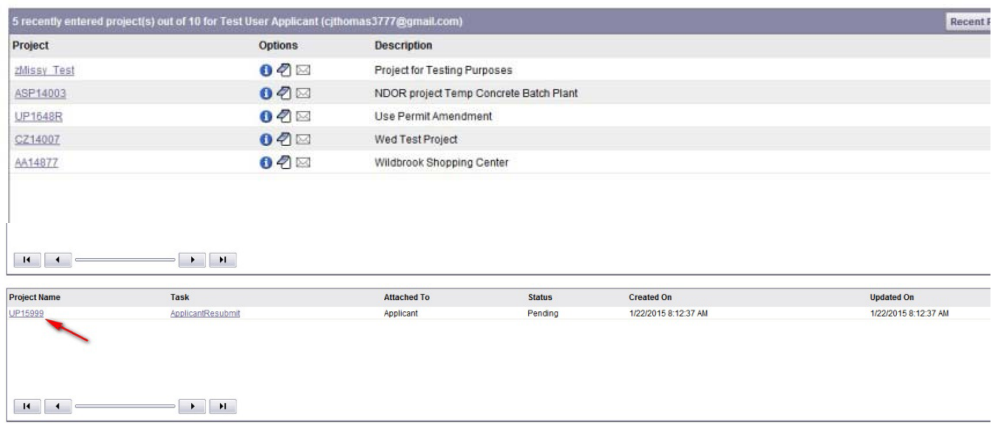
4. Resubmittal Process

Following the submission of the Reviewers' comments, if the Project Coordinator determines that resubmittal **is not** required, he or she will process the application for administrative action or public hearing as appropriate.

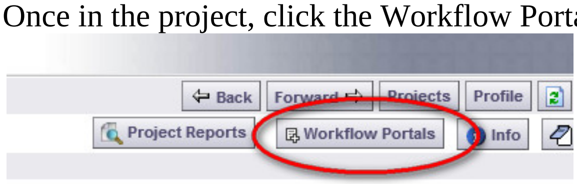
If the Project Coordinator determines that resubmittal **is** required, a resubmittal notification email is sent to the Application Contact.

A. Accessing the Resubmittal Request

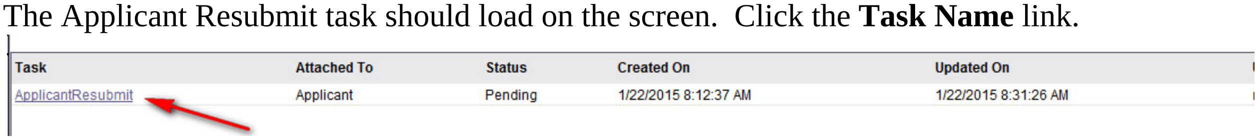
Upon logging into ProjectDox you will see recently viewed projects in the top portion and pending tasks in the bottom portion of the window. Click the **Project Name** link for the desired project (in either section) to view the project.



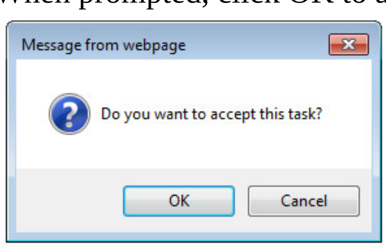
Once in the project, click the Workflow Portals button.



The Applicant Resubmit task should load on the screen. Click the **Task Name** link.

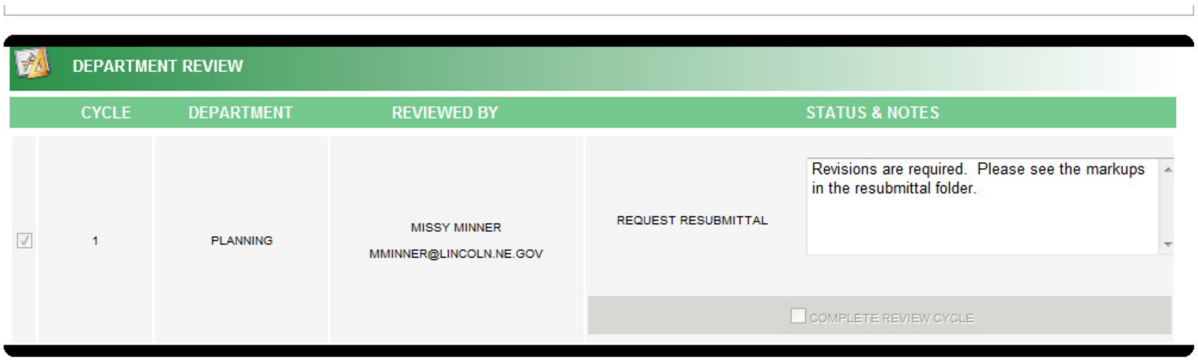


When prompted, click OK to accept the task and open the resubmittal eForm.



Below is an example of the eForm notification that one or more agencies have requested additional information, clarifications, or corrections. The Project Coordinator is the main point of contact for all communications.

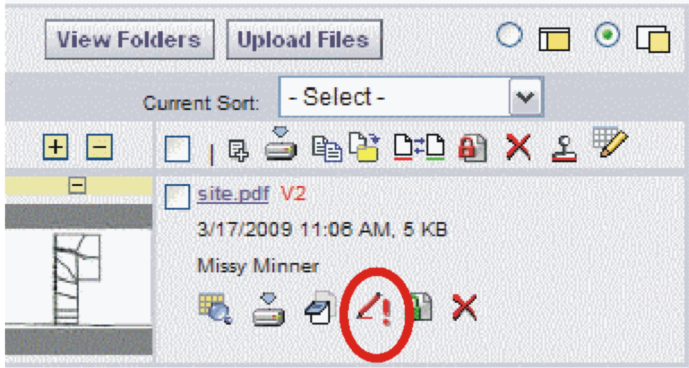
Information about the changes requested is found in the "Department Review" section under the "Status & Notes" heading.



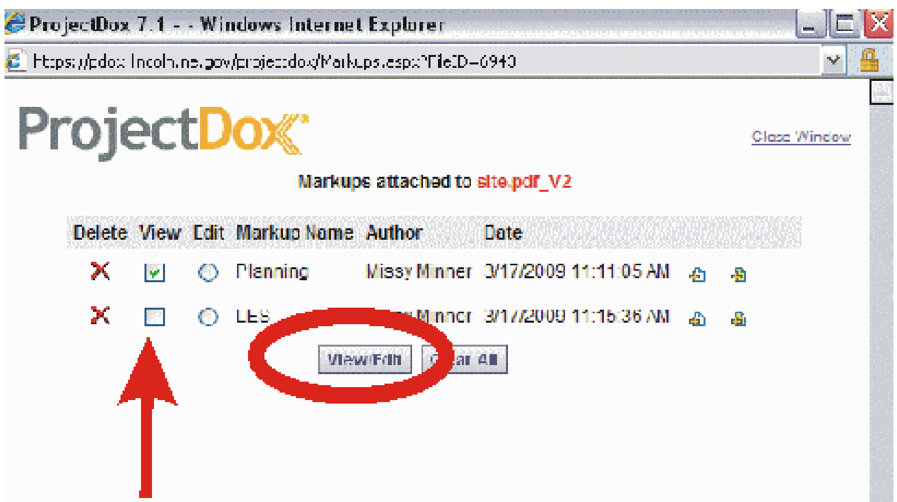
Minimize the eForm and go to the "Resubmittal Requests" folder to view the marked up pdf files, director's letter (if applicable), as well as any other documents that may be included. A "markup" is a digital redline version of the document(s) previously uploaded that shows specifically what changes are being requested. Please note: the original PDF file has not been changed.

B. Retrieving the Markups

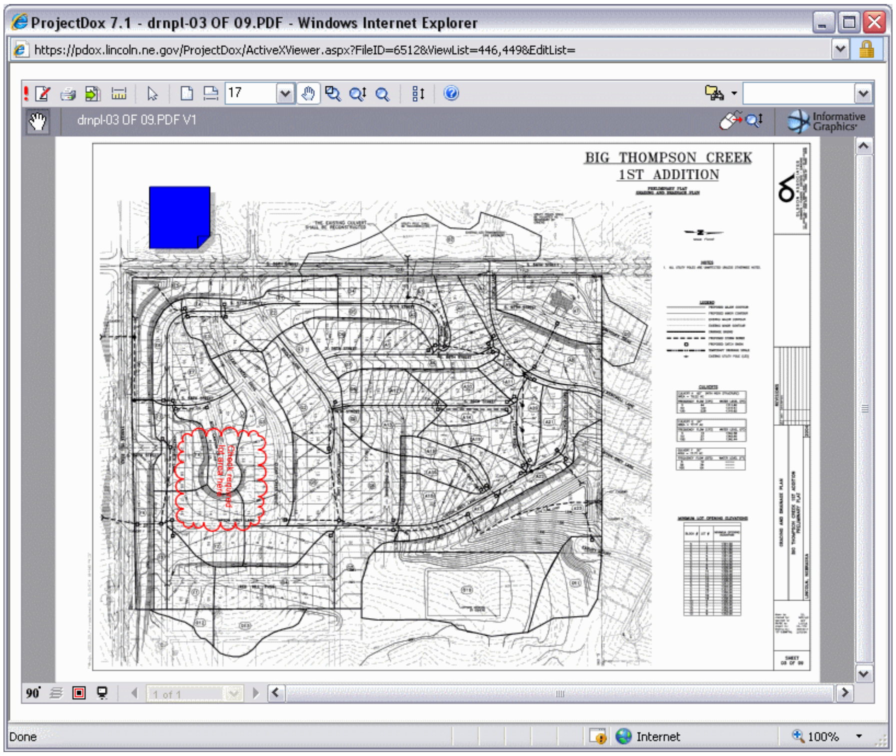
When a Reviewer creates a markup layer on a file, it can be viewed by clicking on the markup icon in the document list in the Resubmittal Requests folder.



If multiple markup layers exist, select the markup layers you wish to view and click the View button.



Markup layers will appear as different icons and graphics on the file.



Clicking on a change mark icon (ie. "Post-It-Note") will display additional detail about the Reviewer's comments.

When viewing a "marked up" file, click the "Printer" button to print the original pdf with the mark up icons on it. Only the markup layers selected for viewing will print. The change marks can be printed in a list format. Other notations can only be printed on the original file. To print the original pdf file, click on the file name next to the thumbnail image instead of clicking on the markup icon.

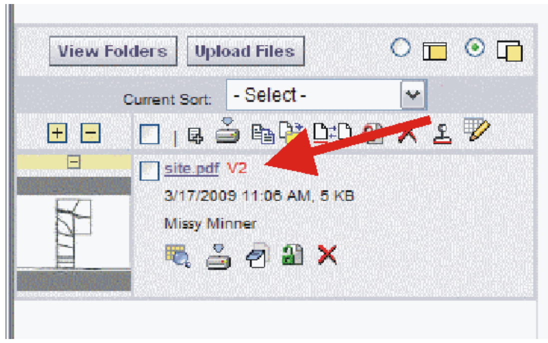
C. Making Changes for Resubmittal

Revisions, based on the markups and comments, should be made to the files stored on your system – not those stored in ProjectDox. Once revised documents have been prepared, they will be uploaded into ProjectDox.

D. Uploading Revised Documents

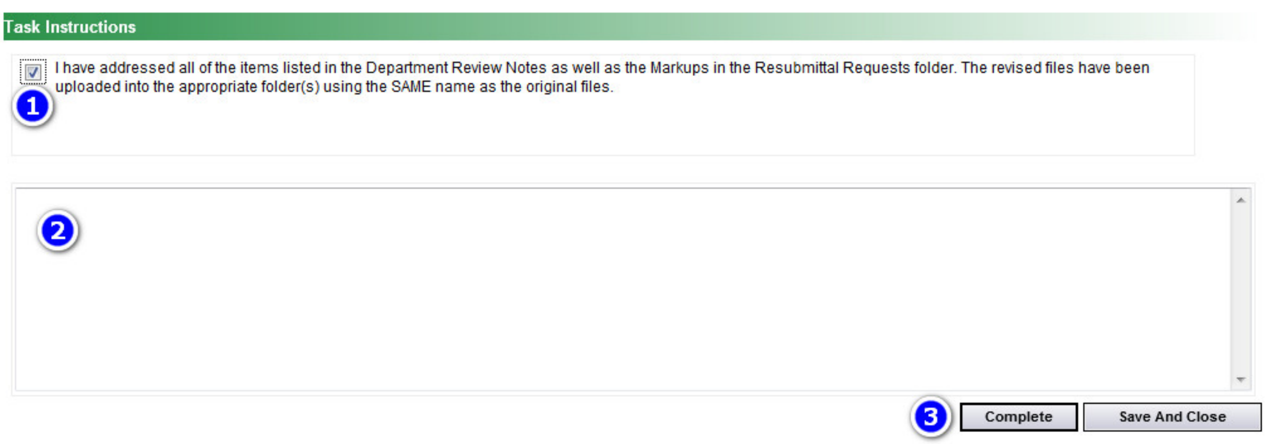
After making the revisions noted, upload the revised files using the instructions given for the initial upload (Starting at Step 3G on page 3 of this manual). It is imperative that the revised file(s) has(have) the EXACT SAME NAME as the original file(s). This allows the system to create versioned documents creating a record of history for the application.

When versioning exists on the document, there will be a **RED V#** following the file name. The **V#** indicates the version number. See example below.



Once the requested revisions have been made and uploaded back to the appropriate folder, you will need to go back to the eForm to complete the resubmittal. **Completion of this step IS REQUIRED BY THE APPLICANT** as it notifies the Planner that the resubmittal is complete and the application is now ready to move forward. Go back to the eForm and find the Task Instructions section.

1. Click the checkbox indicating that you have completed the requested revisions and uploaded the revised files.
2. Comments back to the Project Planner regarding the resubmittal request (if any) may be added in the text box below the checklist instructions.
3. **Click "Complete" to complete the resubmittal process and notify the Planner**.



Note: The "Save and Close" button allows you to save your comments without completing the task. It does NOT send the resubmittal to the Planner, nor does it complete your resubmit task!!! Clicking COMPLETE is required for the process to move ahead.

This review process will continue until the application has been accepted for further action.

5. Working with Files

A. Viewing Files

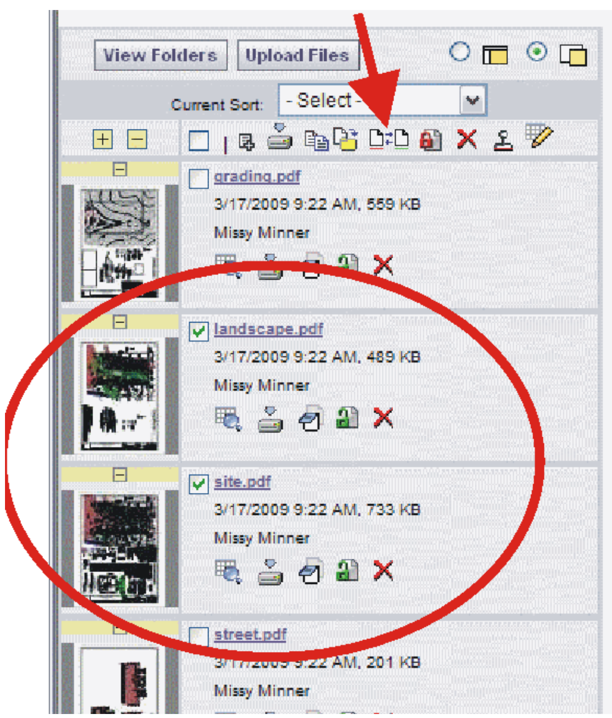
To view uploaded files, click on the thumbnail image or file name link.

By default, the file will open on the right hand side of the same window. To open files in a new window, select the new window option before opening the file.

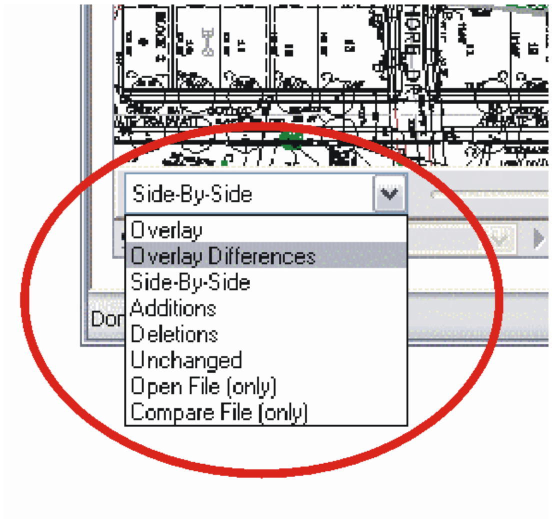
B. Comparing Files

The compare feature allows a graphical comparison of two files.

Check the boxes next to the two thumbnail images to be compared. Click on the compare tool.

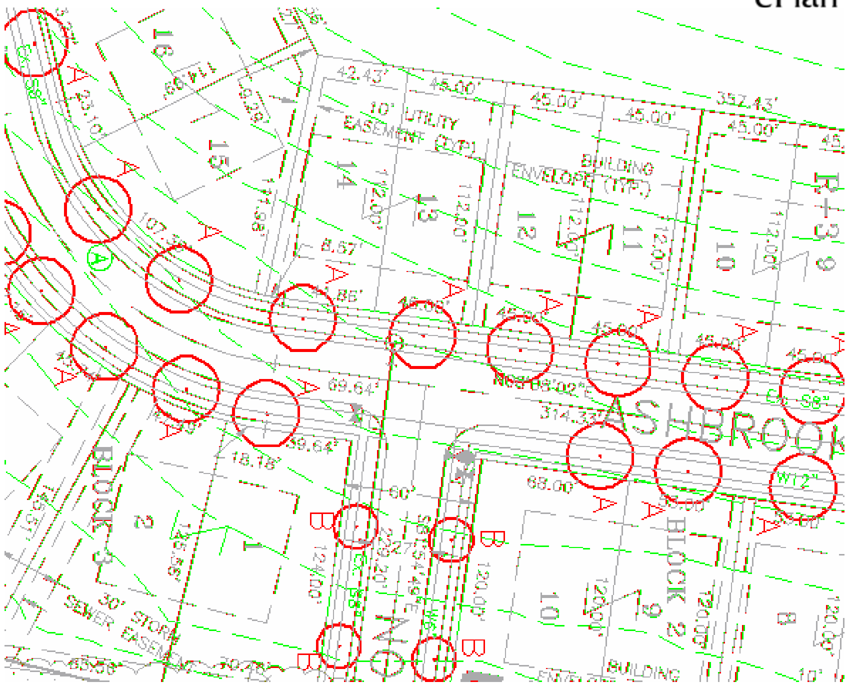


The comparison toolbar appears at the bottom of the viewing window. The toolbar contains several commands from a drop down menu for different comparison options. The slider tool (when present) is used to change the transparency of the two files for clearer viewing of the differences.



Overlay – Both versions are overlaid and both files display in their original colors
Overlay Differences – The compare file version opens overlaid on the open file. The open file displays in **red** (deleted portions), the compare file displays in **green** (added portions). Unchanged portions appear in **grey**.
Side-by-Side – Both versions are displayed in a split screen
Deletions – Only deleted areas (areas present in the open version that are not in the compare version) are displayed in **red**.
Additions – Only added areas (areas not present in the open version that are in the compare version) are displayed in **green**.
Unchanged – Only areas that are present in both the compare and open versions are displayed in **grey**.
Open File (only) – Only the file that was opened first is displayed.
Compare File (only) – Only the file that was opened for compare is displayed.

The Overlay Differences viewing option is shown.



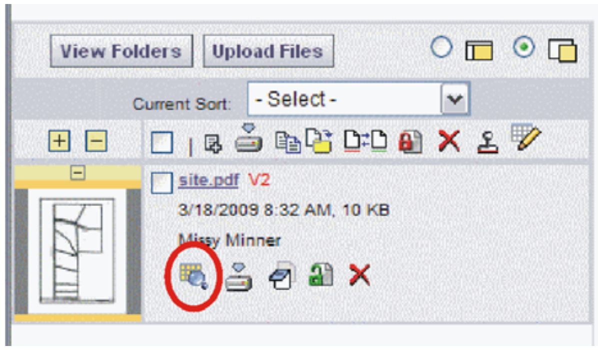
When using the overlay views, hot keys can be used to nudge and re-scale a compare file to an open file allowing interactive small adjustments to align the files more precisely.

Hold down the Control key (<Ctrl>) while pressing the hot keys to nudge the compare file into place.

<←> (left arrow)	Nudge position left
<→> (right arrow)	Nudge position right
<↑> (up arrow)	Nudge position up
<↓> (down arrow>	Nudge position down
<+> (plus key)	Nudge scale up
<-> (minus key)	Nudge scale down

C. File History Window

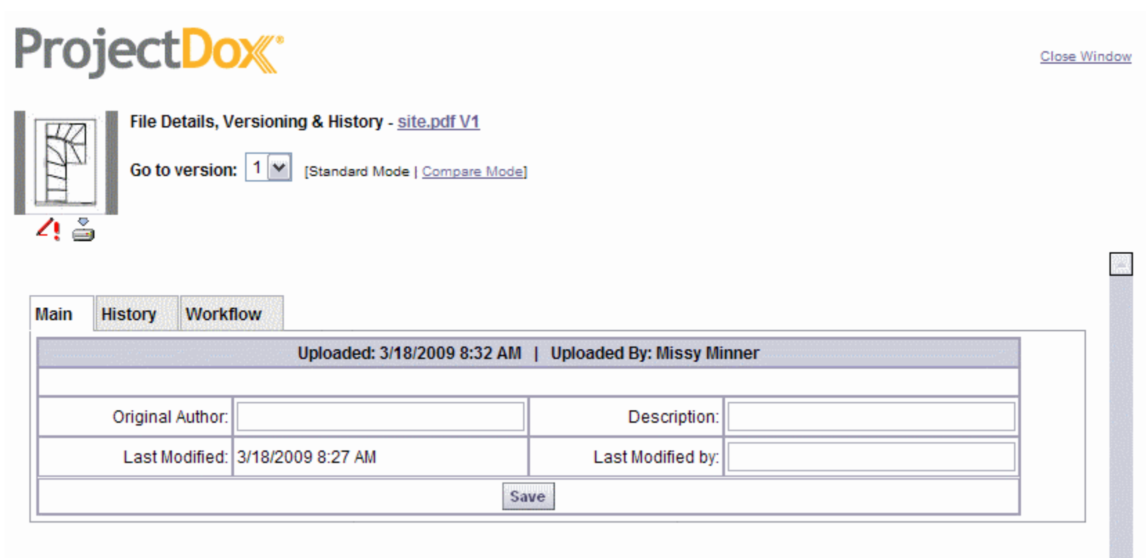
Click on the History tool to open the “File Details, Versioning & History” window.



The **Main** tab shows document details, including the last modification date and by whom.

The **History** tab lists all activity for the file including the event (viewed, uploaded, marked up, etc.), the name of the user performing the event, and the date the event occurred. *Note that the Upload and Download history will be recorded whenever a user clicks the Upload or Download button – regardless of whether that upload or download action completed.*

The **Workflow** tab lists the workflow history of the selected file, whether that workflow is active or inactive, priority, due date, start date, and workflow initiator.

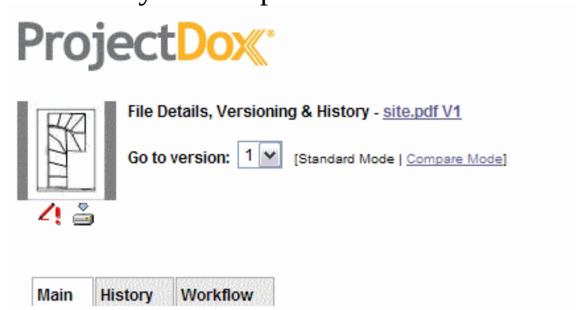


D. File History– Standard Mode

To view the file, click the thumbnail image or the file name link. When multiple versions of a file exist, select the desired version number from the "Go to version:" dropdown and click the thumbnail image or the file name link. *Note that the file name link also indicates the version to be viewed.*

If markups are associated with the file, the markup icon will be available below the thumbnail image. Click this icon to select the markups you would like to view.

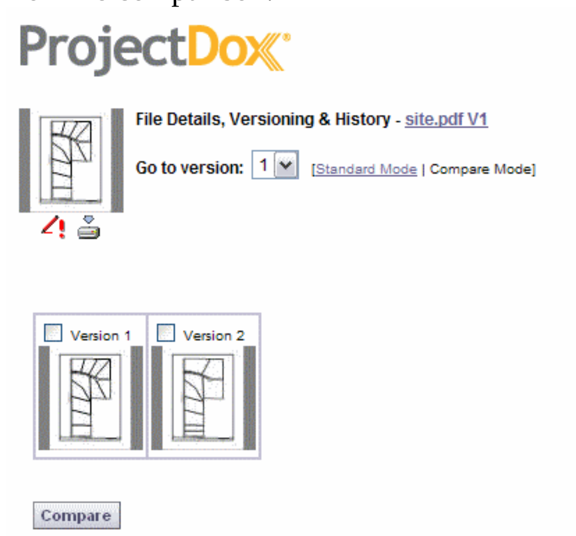
Files can be downloaded to your computer when the download icon is present.



E. File History – Compare Mode

When multiple versions exist for a file, select "Compare Mode" to view thumbnails images of the available versions. Select the check boxes for the two versions to be compared. Click "Compare" to view the two files in Compare Mode in the file viewer.

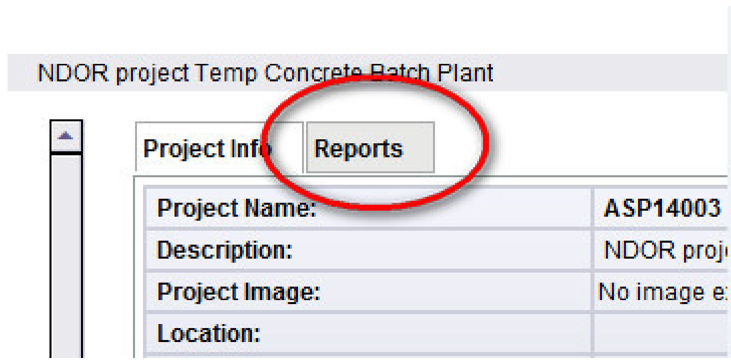
See Section **5B – Comparing Files** on page 15 of this manual for additional information on file comparison.

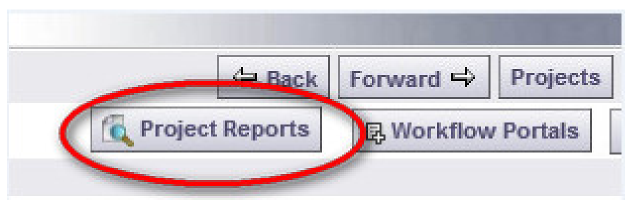


6. Reports

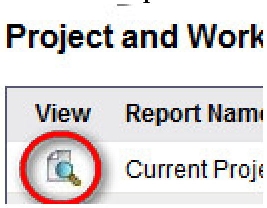
We have made available a report to keep track of the resubmittal comments between the planner and applicant. This report can be accessed two ways from within the project; the "Reports" tab or the "Project Reports" button.

NOTE: It takes a little while for the report to be generated in the background once you click either access.

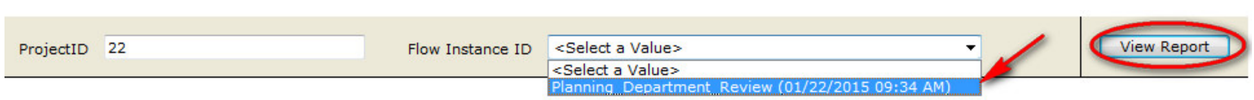




Click the "View Report" button.



Next you must select the "Planning Department Review" instance for the report. There should only be one, but it must be selected manually. Click "View Report."



Appendix A

ePlan Submittal

Document Upload File Names

Use the following file names when uploading documents into ProjectDox.

Note: Not all sheets may apply to all applications.

In instances where there are multiple sheets, include a sequence number.

Example – site1.pdf and site2.pdf if there are 2 pages to the site plan.

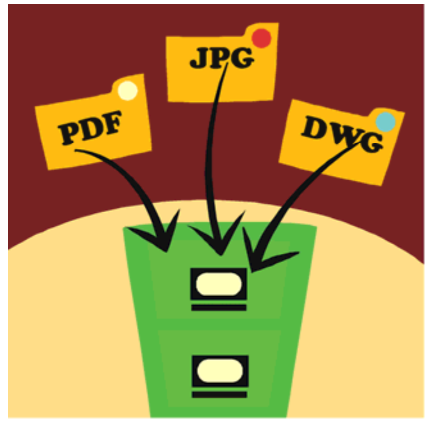
Folder	Sheet Title	File Name
"Application Plans (PDF) " *(Uploaded by Application Contact)*	Cover sheet	Cover
	Site Plan (e.g., boundary, lots)	Site
	Grading & Drainage Plan	Grading
	Utility Plan	Utilities
	Street Profile	Street
	Landscape Plan	Landscape
	Sign District Plan	Signs
	Conservation Easement	Easements
	Change of Zone	Zoning
	Existing Conditions	Existing
	Annexation	Annex
"Text Documents" *(Uploaded by Planning Staff)*		
	Application Form	Application Form.pdf
	Application Summary Letter	Application Letter.pdf
	Certificate of Title	Certificate of Title.pdf
	Resolution	Res A-#####.pdf
	Ordinance	Ord #####.pdf
	Petition(s) to Vacate *(all in 1 file)*	Petition.pdf

Appendix B

ePlan Submittal

Acceptable File Formats

The following list shows acceptable file formats for each of the folders in the Planning Department ProjectDox application.



FOLDER NAME	ACCEPTABLE FILE FORMATS
Application Plans (PDF)	PDF
GIS-CAD	DWG DGN DXF RAR (use for zipping ESRI data files)
Text Documents	PDF
Photos	PDF JPG TIFF
Final Approved Plans	PDF