

# City of Lincoln & Lancaster County Planning Department



# ePlan

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## ePlan Submittal

## *Review Agency Manual*



March 25, 2010

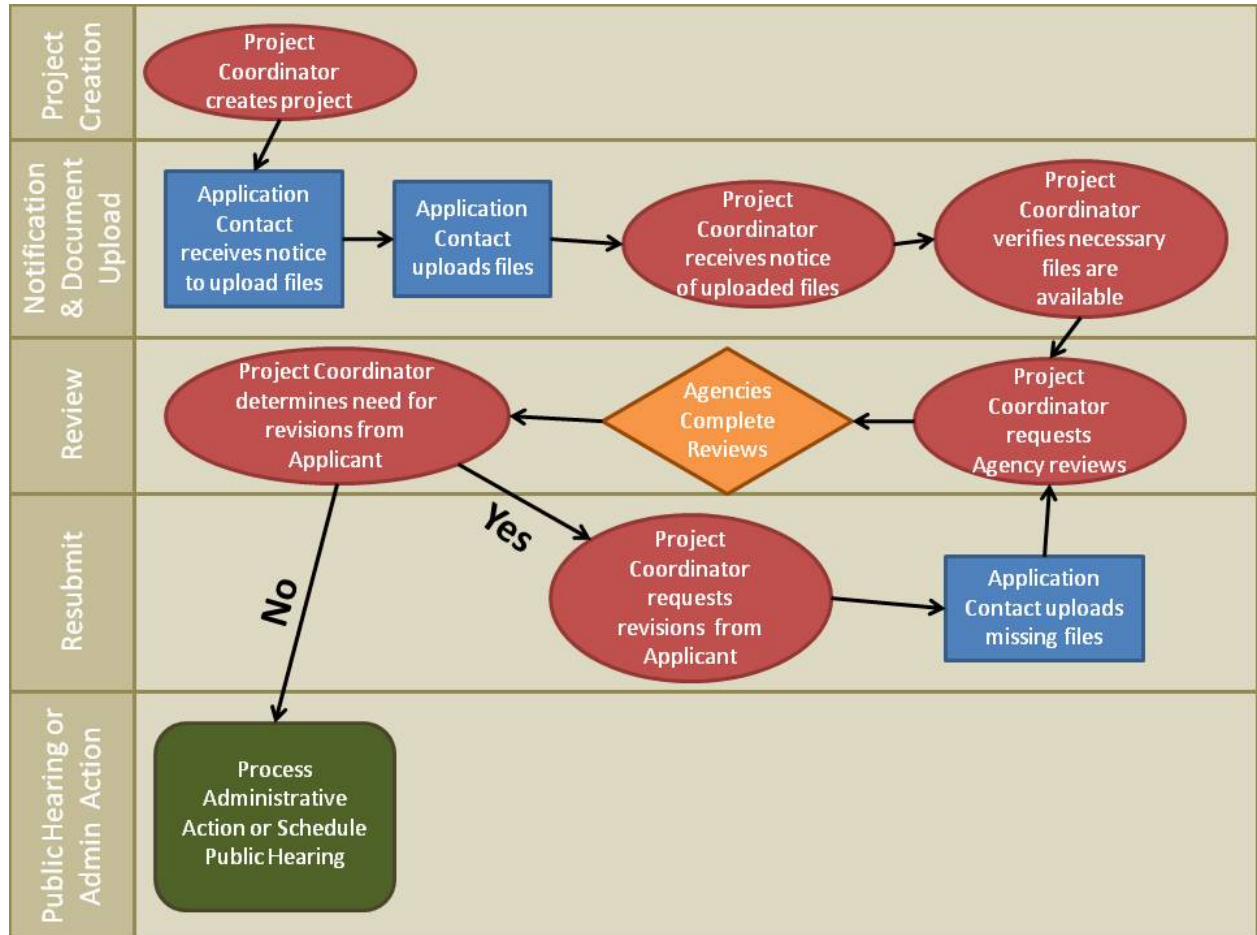
## **1. Purpose Statement**

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 replaces the existing paper-based review of all Planning applications with a computer-based approach. This new 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 Review Agencies as a general reference guide. There are text descriptions and screen images of the step-by-step tasks necessary to complete an application submittal and review 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 as part of instructional classes and to serve as a subsequent point of reference as applications are being submitted and reviewed.

## 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. Application Reviews

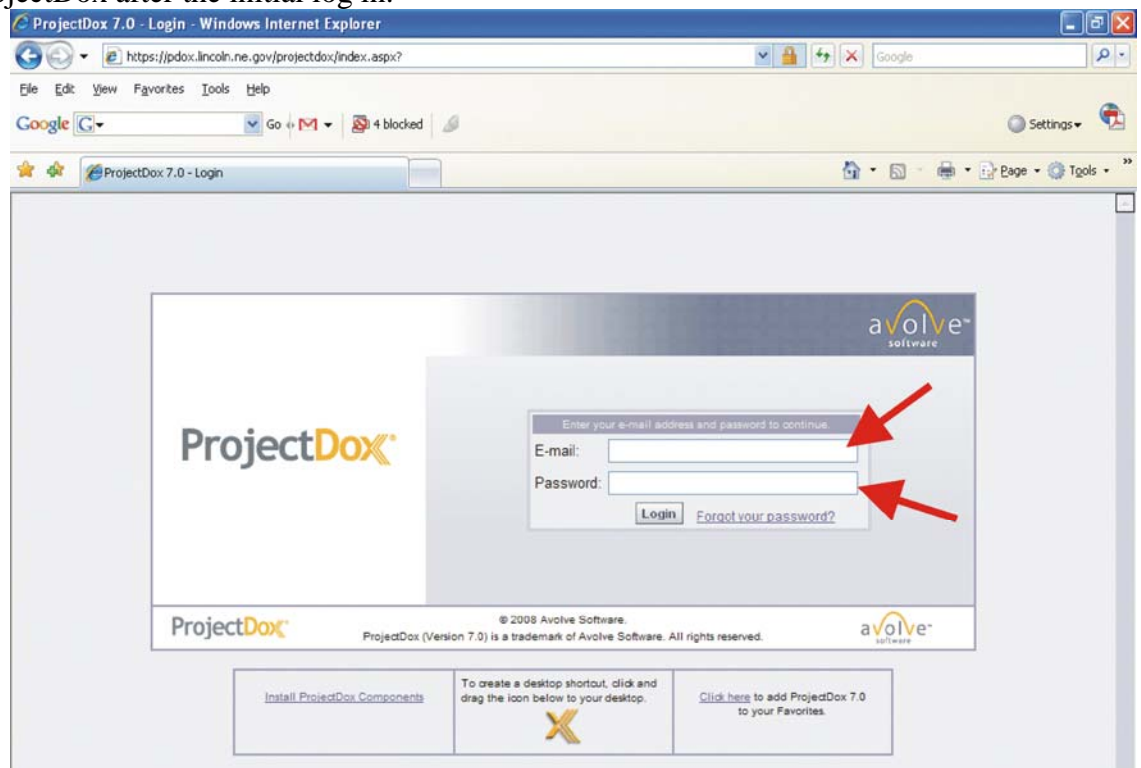
Reviewers receive email notification of a review task for an application, and any associated requests, submitted to the Planning Department.

#### A. Logging In

Open the application review notification email.

Click on the “Project Access Link” in the email.

Log into ProjectDox. User name is email address. Use the temporary password included in the email notification for initial login<sup>1</sup>. 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.



<sup>1</sup> Initial log in requires the installation of ProjectDox components. See ePlan Submittal website (lincoln.ne.gov keyword = eplan) for instructions.

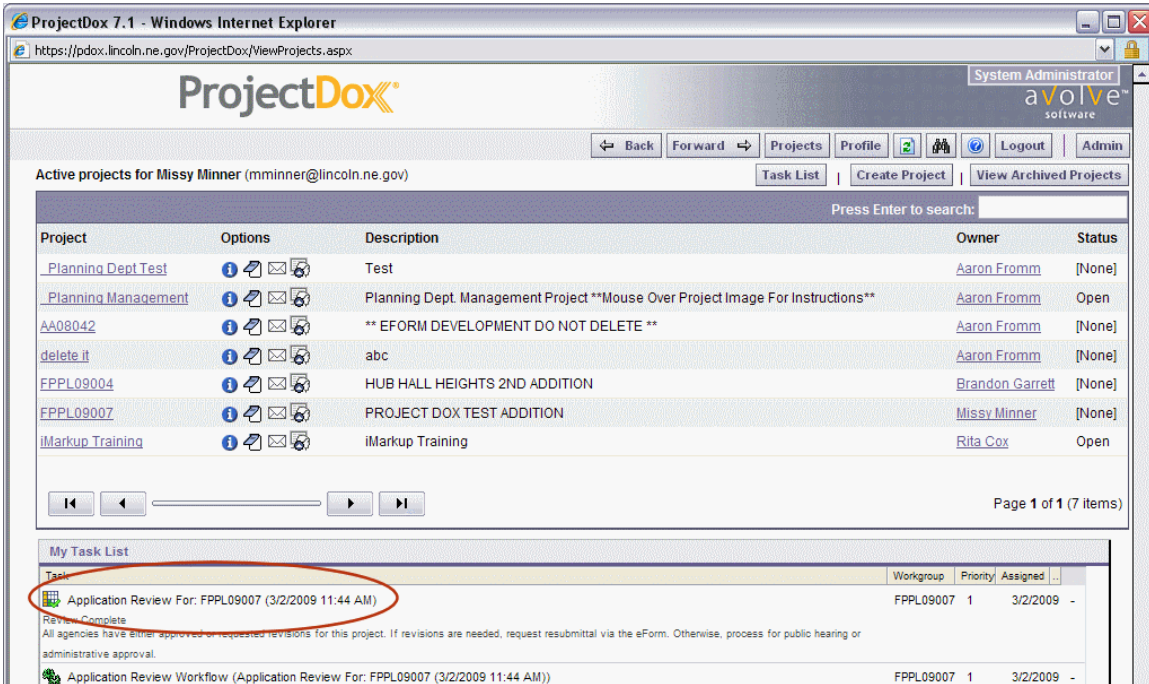
## B. Accessing the Project

The link in the email loads the eForm that contains the section for text comments.

If the link in the email is not used, log into ProjectDox as described previously to view the list of projects for which you are a Reviewer.

Click on the application number for the review being completed to enter the project. The file folder structure that contains the application files is displayed.

A third option is to log into ProjectDox and utilize the “My Task List” option. Clicking on the task for the application being reviewed will load the eForm – similar to clicking the link in the notification email.



The screenshot shows the ProjectDox 7.1 web interface in a Windows Internet Explorer browser. The page title is "ProjectDox 7.1 - Windows Internet Explorer" and the URL is "https://pdox.lincoln.ne.gov/ProjectDox/ViewProjects.aspx". The user is logged in as "System Administrator" (a.volve software). The page displays "Active projects for Missy Minner (mminner@lincoln.ne.gov)".

Project	Options	Description	Owner	Status
<a href="#">_Planning Dept Test</a>		Test	<a href="#">Aaron Fromm</a>	[None]
<a href="#">_Planning Management</a>		Planning Dept. Management Project <b>**Mouse Over Project Image For Instructions**</b>	<a href="#">Aaron Fromm</a>	Open
<a href="#">AA08042</a>		<b>** EFORM DEVELOPMENT DO NOT DELETE **</b>	<a href="#">Aaron Fromm</a>	[None]
<a href="#">delete.it</a>		abc	<a href="#">Aaron Fromm</a>	[None]
<a href="#">FPPL09004</a>		HUB HALL HEIGHTS 2ND ADDITION	<a href="#">Brandon Garrett</a>	[None]
<a href="#">FPPL09007</a>		PROJECT DOX TEST ADDITION	<a href="#">Missy Minner</a>	[None]
<a href="#">iMarkup Training</a>		iMarkup Training	<a href="#">Rita Cox</a>	Open

Page 1 of 1 (7 items)

**My Task List**

Task	Workgroup	Priority	Assigned	..
Application Review For: FPPL09007 (3/2/2009 11:44 AM)	FPPL09007	1	3/2/2009	-
<p><b>Review Complete</b></p> <p>All agencies have either approved or requested revisions for this project. If revisions are needed, request resubmittal via the eForm. Otherwise, process for public hearing or administrative approval.</p>				
Application Review Workflow (Application Review For: FPPL09007 (3/2/2009 11:44 AM))	FPPL09007	1	3/2/2009	-

## C. Submitting Review Comments

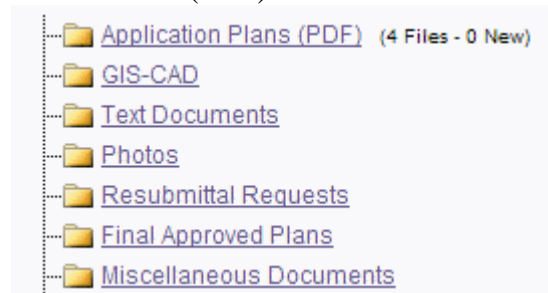
Reviewers enter comments in ProjectDox via:

1. PDF Markup
2. eForm Text Comments

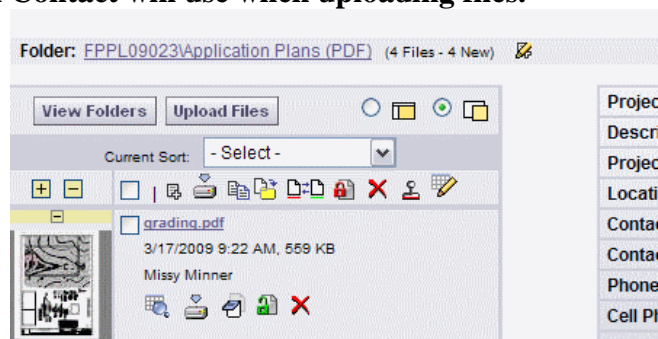
### 1. PDF Markup

Complete the application review by marking up the pdf drawings.

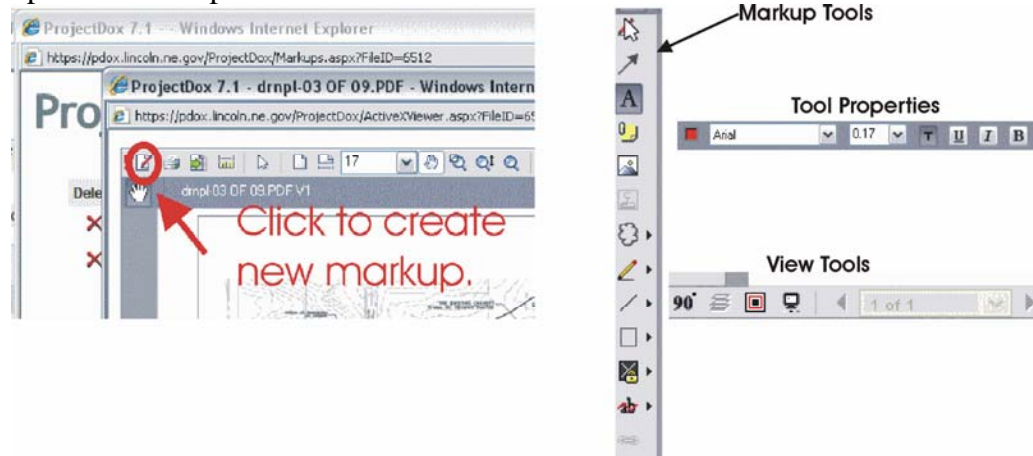
Click on the Application Plans (PDF) folder.



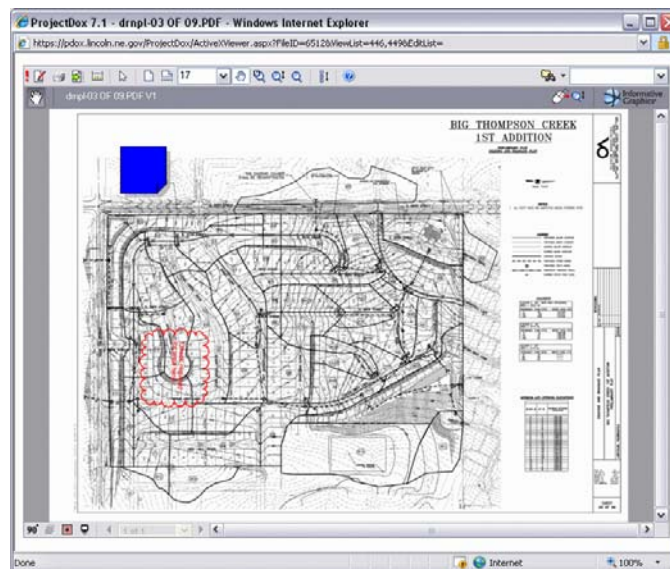
Open the pdf you are going to review by clicking on the file name next to the thumbnail image. **Refer to Appendix A for the file naming conventions the Application Contact will use when uploading files.**



Once the pdf opens in the viewer, click on the markup button and select “New” to open the markup tools.



Select the appropriate markup tool and enter your markup comments.



In order to make the markups easier to read and identify, Reviewers or Agencies (if there are multiple reviewers in one agency) will be assigned colors. The assigned color will be used for any markups made by that Reviewer or Agency. **See Appendix C for key to color-coding.**

Additional help on the markup tools is available by clicking on the help button in

the viewer. 

Once you have completed your markups, click on the markup button and select “Save as” to save them. **Refer to Appendix D for information on naming conventions for saved markups.**

## Viewing Files

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

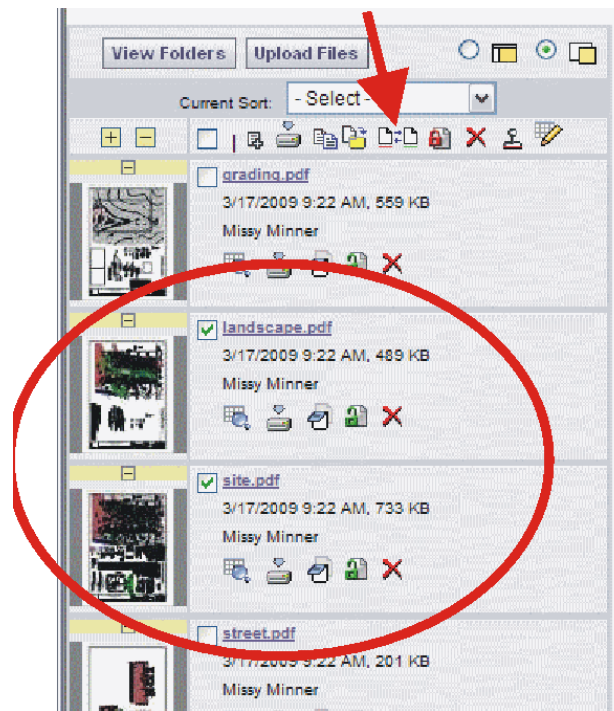
By default, the file will open on the right hand side of the same window. To open files in a new window, select the new window option before opening the file.



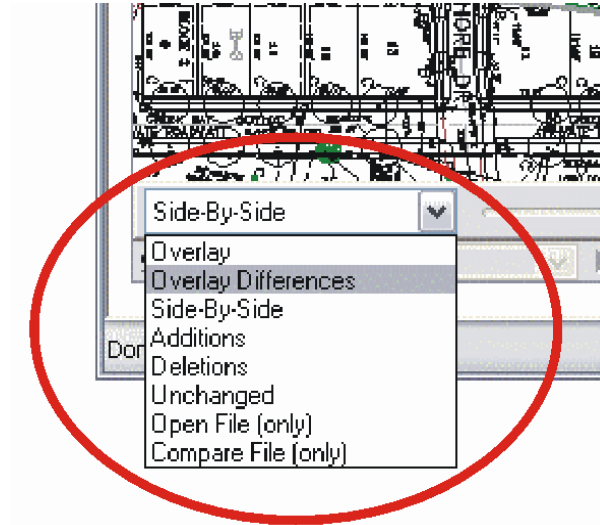
## Comparing Files

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**.

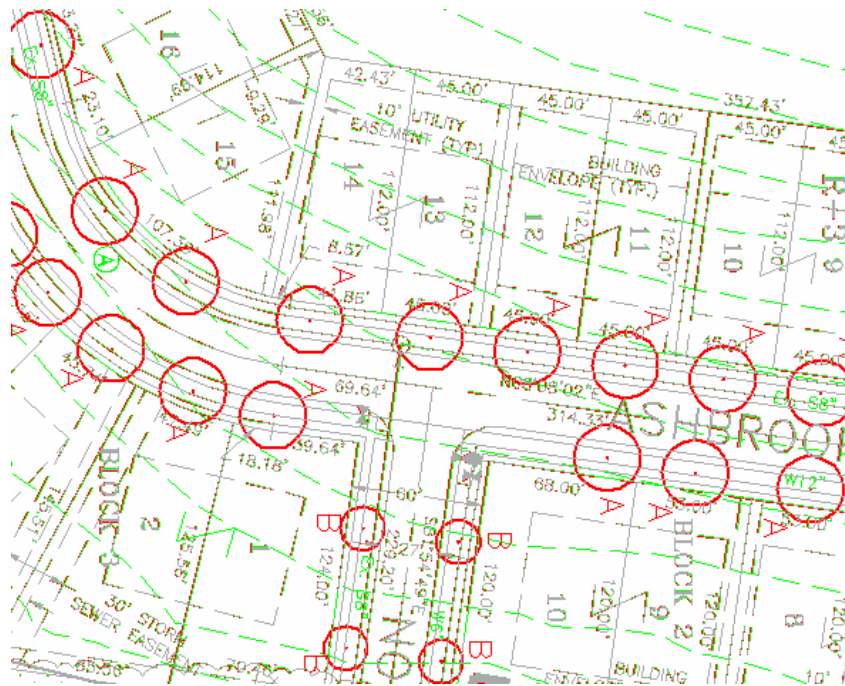
**Additions** – Only added areas (areas not present in the open version that are in the compare version) are displayed in **green**.

**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.

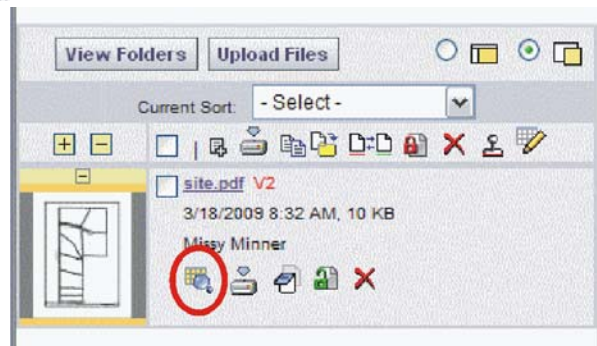
Hold down the Control key (<Ctrl>) while pressing the hot keys to nudge the compare file into place.

<<-> (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

## 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.

## ProjectDox<sup>®</sup>

[Close Window](#)



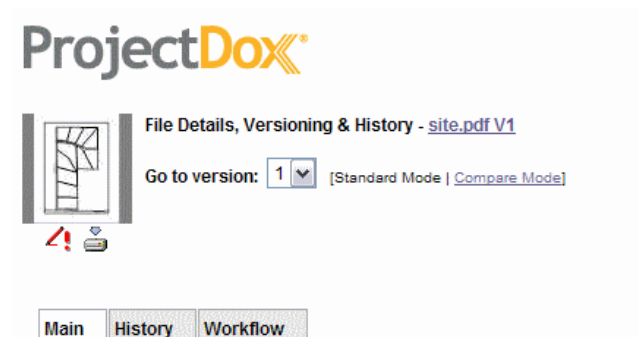
Main		History	Workflow
Uploaded: 3/18/2009 8:32 AM   Uploaded By: Missy Minner			
Original Author:	<input type="text"/>	Description:	<input type="text"/>
Last Modified:	3/18/2009 8:27 AM	Last Modified by:	<input type="text"/>
<input type="button" value="Save"/>			

## 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.



## 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.

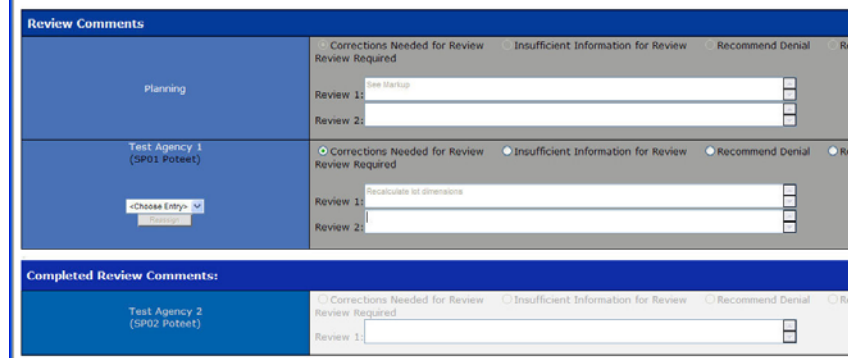


## 2. eForm Text Comments

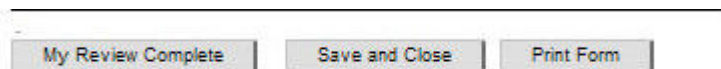
The next step is for invited Reviewers, including the Project Coordinator, to complete their individual review section of the eForm. All Reviewers will be able to read the comments of other Reviewers but will only be able to edit their own comments.

Select your review determination radio button on the eForm.

Enter your review comments for the Project Coordinator (if any). If an application has more than one review cycle, there will be a separate box on the eForm for your review comments. You will only be able to enter comments in the current review cycle box. However, your previous comments will be available for viewing.



If a reviewer is not part of the current review cycle, but has participated in the past, their comments will show up under the Completed Review Comments section.



**Click the “My Review Complete” button to finish your review task (REQUIRED).**

Click the “Save & Close” button to save your comments to the eForm. This allows you to add additional comments and complete your review at a later time. Please note, you must still click “My Review Complete” to complete your review task.

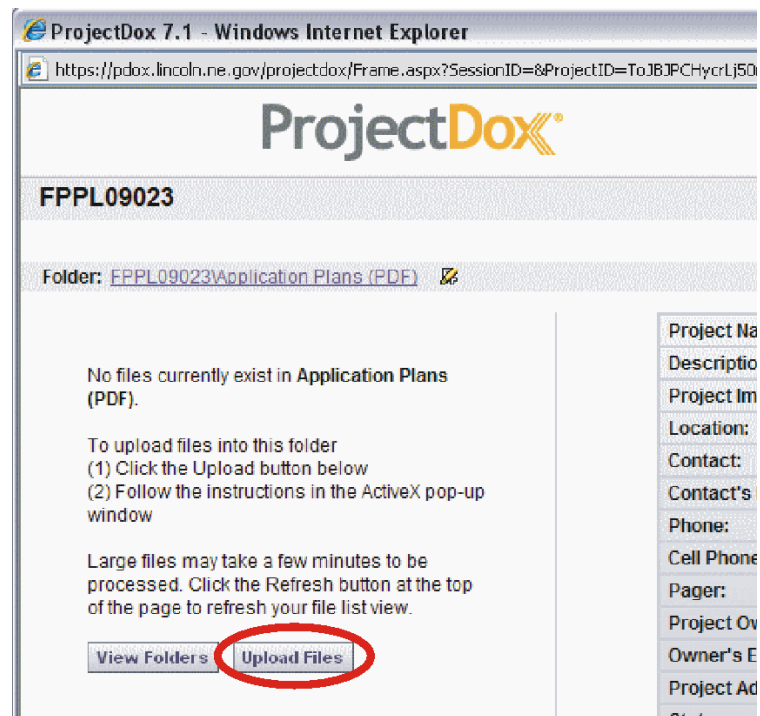
Use the “Print Form” button to print the form if you want to keep a hard copy for your records.

If your text comments are more than a paragraph or two, type them in a word processing document, create a pdf and upload the file to the “Miscellaneous Documents” folder.

To upload your document, click on the “Miscellaneous Documents” folder.



Click on the “Upload Files” button.



Select the file(s) to be uploaded in the select files dialog that opens. Files must be in **pdf** format.

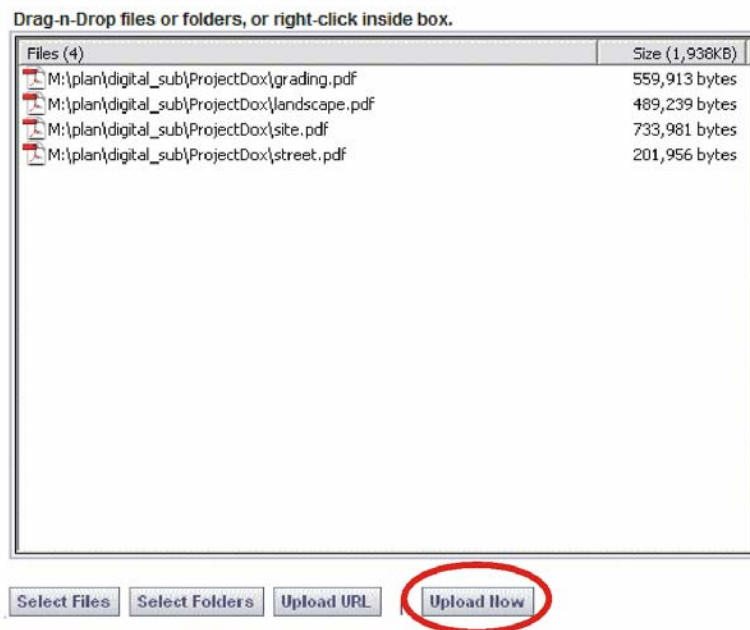
Click Open.



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

Click OK to confirm upload.

ProjectDox



Click “Close” on file upload confirmation window.

#### **D. Completion of Review Process**

Once the Project Coordinator receives comments from the various Reviewers, he or she determines if the application should be (1) scheduled for public hearing, (2) referred for administrative action, or (3) returned to the Application Contact for revisions.

If the application needs to be sent back for revisions, the Project Coordinator fills in an “Application Revision & Review Comments” eForm within ProjectDox. This eForm is used by the Project Coordinator to notify the Application Contact of the need for additional information, clarification, and/or changes to the Submittal. This step maintains the Project Coordinator as the sole point of contact for all communications regarding the application.

Once the Application Contact has completed the necessary revisions, the Application Contact will upload this new digital information onto the City’s *ePlan Submittal* site. At this time, the Project Coordinator will automatically receive an email message that the revised files have been uploaded. The Project Coordinator reviews the revised files to determine general compliance with the request. Depending upon the specifics of the situation, the Project Coordinator will most likely send out an additional request to the Reviewers for them to once again complete a review of the documents. This process may continue until the application is ready for public hearing, administrative action, or other appropriate action.