

City of Lincoln & Lancaster County Planning Department



ePlan

ePlan Submittal

Project Coordinator Manual



March 30, 2010

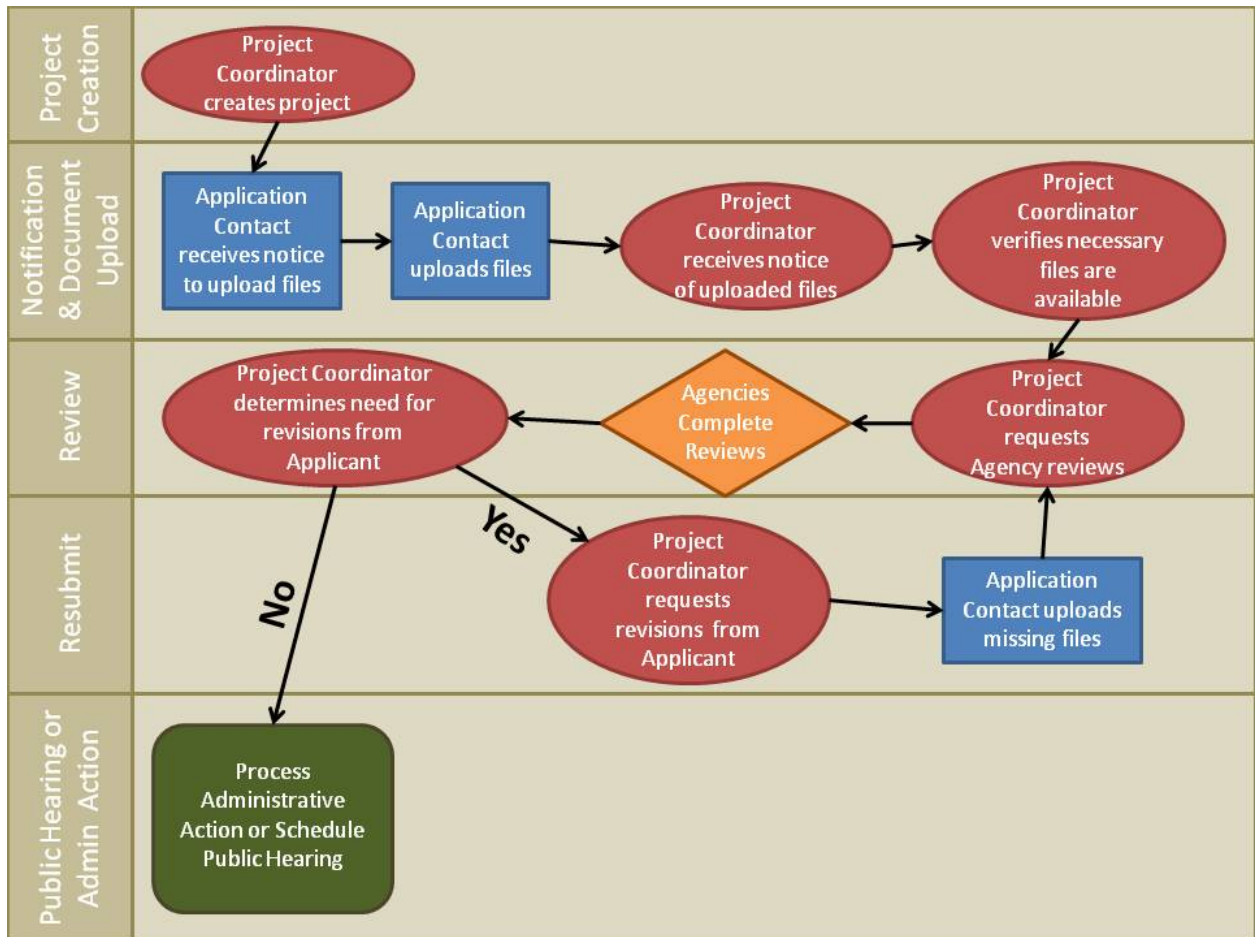
1. Purpose Statement

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 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 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 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.



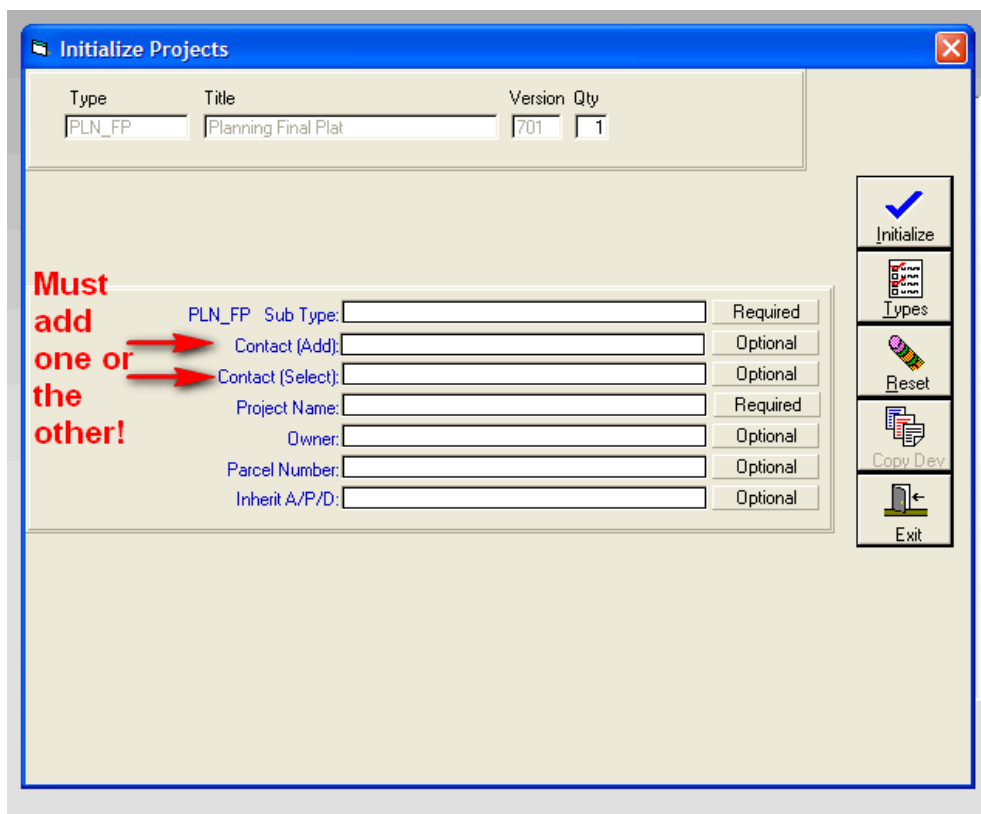
3. Steps

A. Project creation

Begin by initializing the application in Permits Plus. After the application is initialized in Permits Plus, the “PL-10 ProjectDox Workflow” can be started. Please note in addition to the required fields on the “Initialize Projects” (or Activities) window, you **MUST** enter a contact person. Select “Contact (Add)” to add the Application Contact person manually. Select “Contact (Select)” to select them from the CAED list. Make sure that you enter a **valid email address** no matter how you enter the Contact information.

IMPORTANT: If an application has associated requests, you must initialize all applications and add the associated file numbers to the Permits Plus General Information screen **BEFORE** generating the “PL-10 ProjectDox Workflow.”

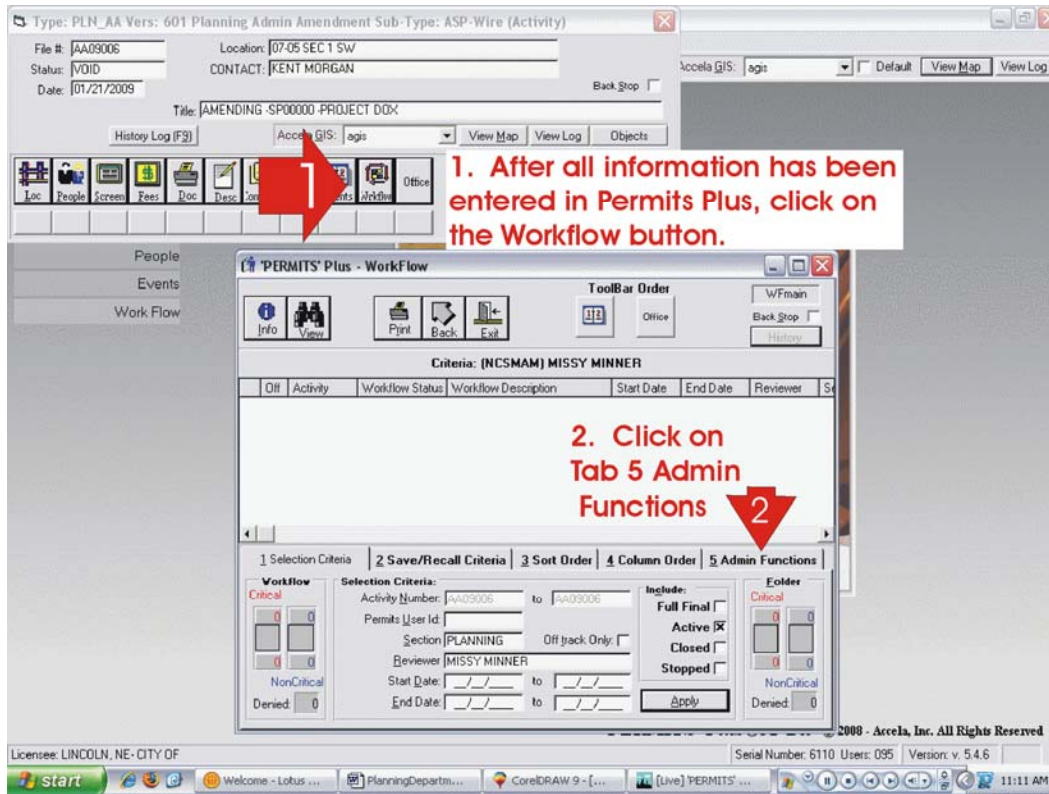
Once the ProjectDox project has been successfully initiated, the Project Coordinator (i.e., Planner) will be notified via email that the project was created.



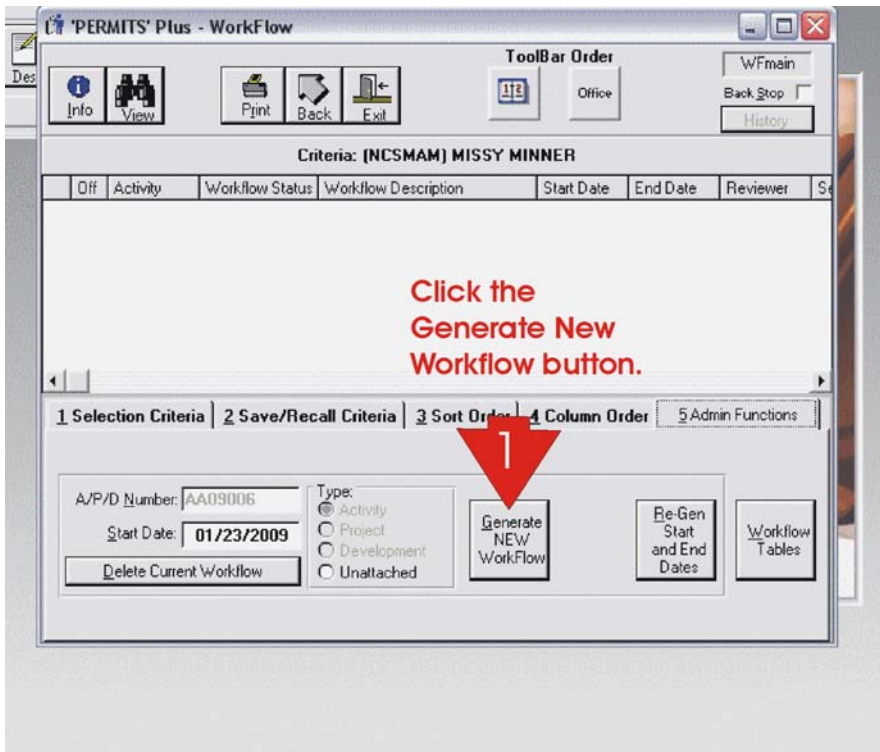
Remember to go back in to Permits Plus and enter the other information about the application, including the Applicant information on the people screen!

Click on the “Workflow” button.

Click on Tab “5 Admin Functions.”



Click “Generate New Workflow.”



Change the Use field from “No” to “Yes” on Workflow Type PL-10.



Click “Generate Once.”

An email notification is automatically sent to the Application Contact that they are to upload their files for review.

Project Coordinator will automatically receive email notification when files have been uploaded to the project.

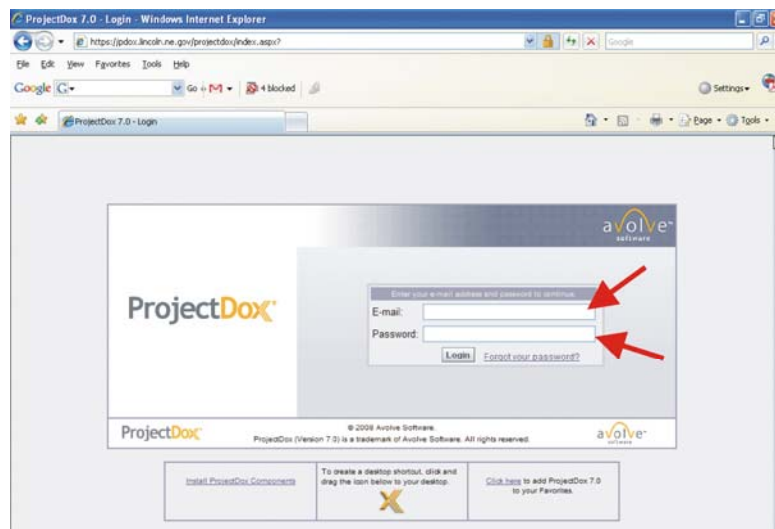
Project Coordinator verifies that all files needed to begin the review process have been uploaded by checking them in ProjectDox.

B. Logging In –

Open the notification email.

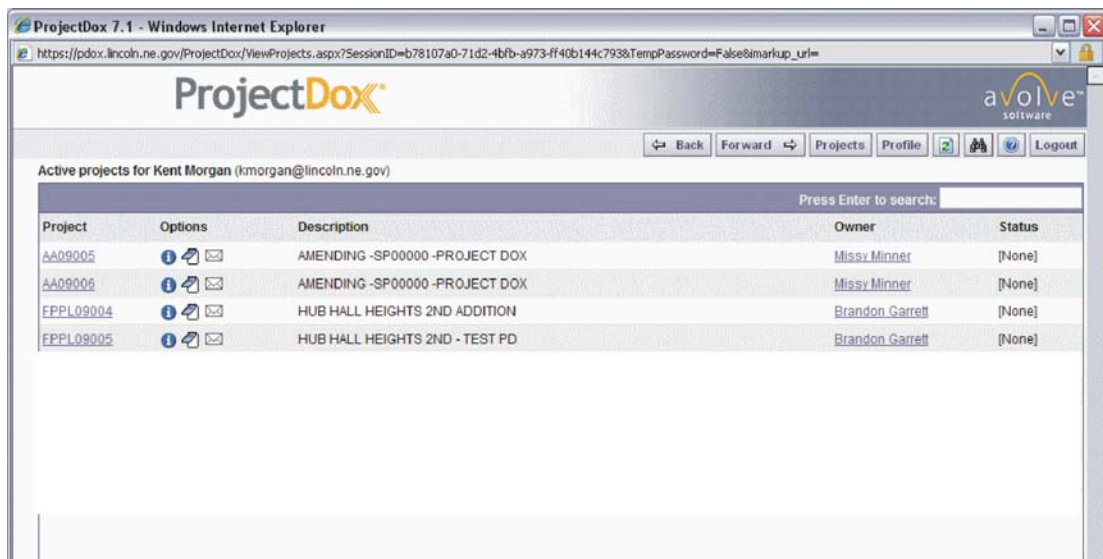
Click on the “Project Access Link” in the email.

Log into ProjectDox. User name is email address. Use the temporary password included in the email notification for initial login¹. 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 Initial log in requires the installation of ProjectDox components. See ePlan Submittal website (lincoln.ne.gov keyword = eplan) for instructions.

Click on the Application number for this project in the “Active projects for ...” section of the “Projects” page.



Please note, if there are Associated Requests, only the application number the workflow was generated under will show up on the ProjectDox project list.

This opens the file folder structure window.

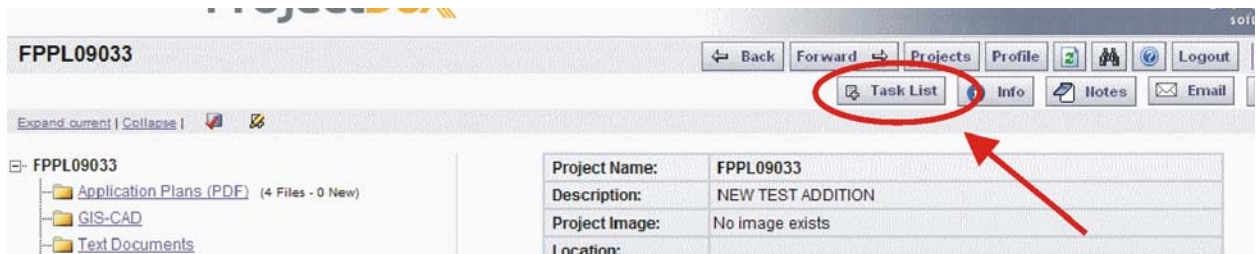
Click on the “Application Plans (PDF)” folder to verify the necessary files have been uploaded.



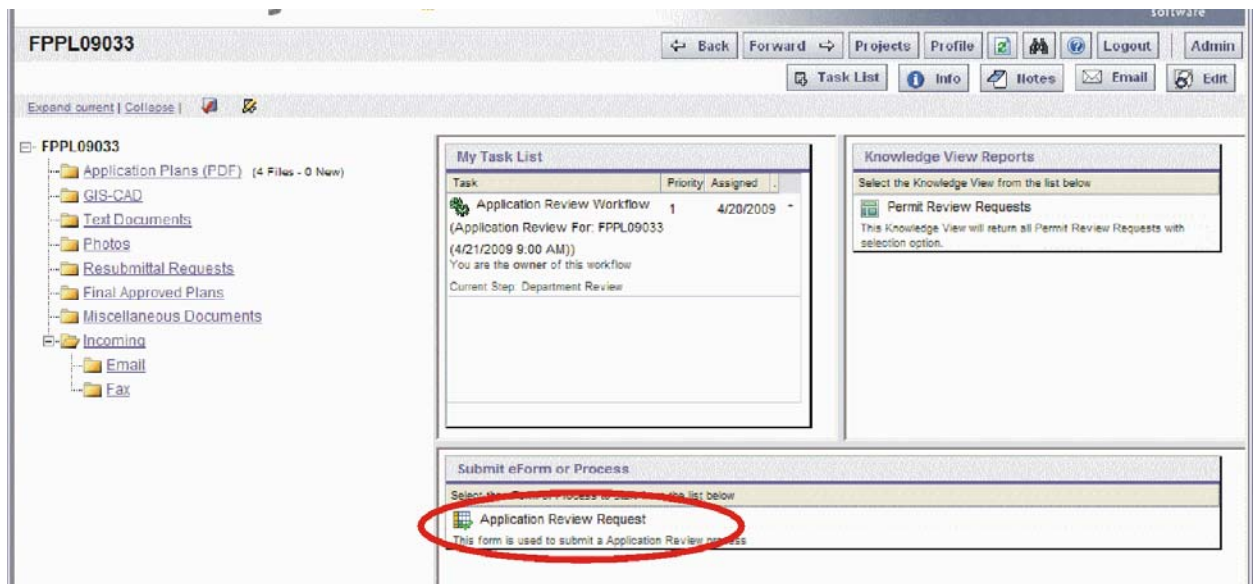
Files that have been uploaded are shown as thumbnail images. Click on the file name to view the file.

Verify that the necessary files exist in the “GIS-CAD” folder as well as the “Text Document” folder.

When all files have been accounted for, click on the “Task List” button inside of the project that is being reviewed.



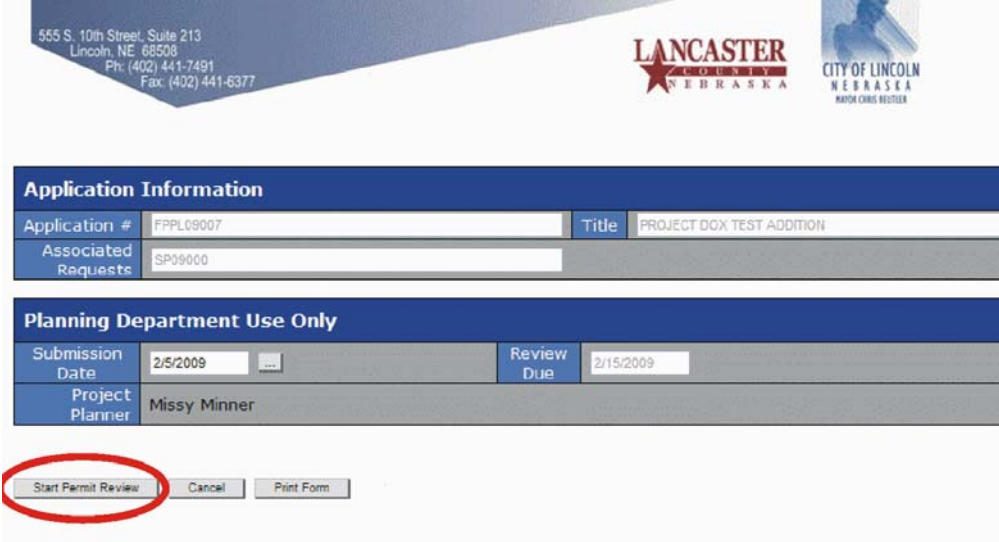
Start review process by clicking on “Application Review Request”



Verify all associated data – application number, title and associated requests (if any) in the “Application Information” section.

Click “Start Permit Review” to open Review Agencies section of eForm.

If any information such as: Project Name or Associated Requests are incorrect or missing, click Cancel, make any necessary changes in Permits Plus and restart the process by clicking “Start Permit Review” again.



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NEBRASKA

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NEBRASKA
MAYOR CHRIS BEUTLER

Application Information			
Application #	FPPL09007	Title	PROJECT DOX TEST ADDITION
Associated Requests	SP09000		

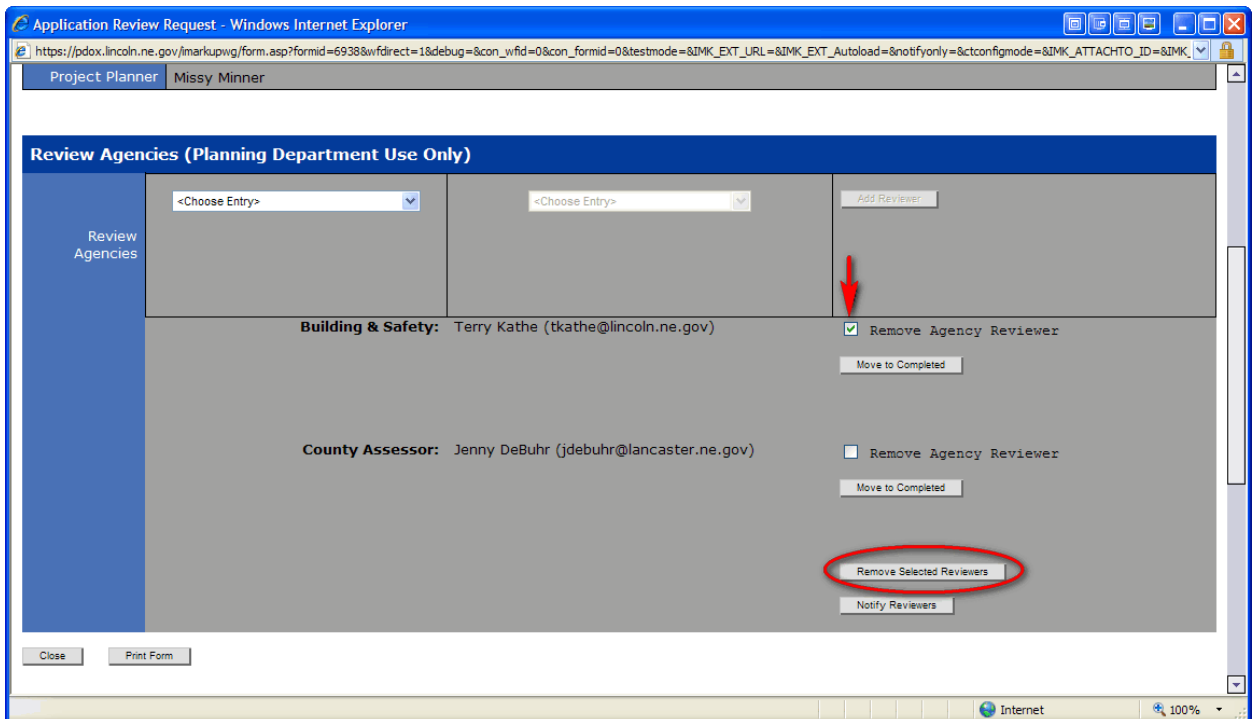
Planning Department Use Only			
Submission Date	2/5/2009	Review Due	2/15/2009
Project Planner	Missy Minner		

C. Invite Reviewers

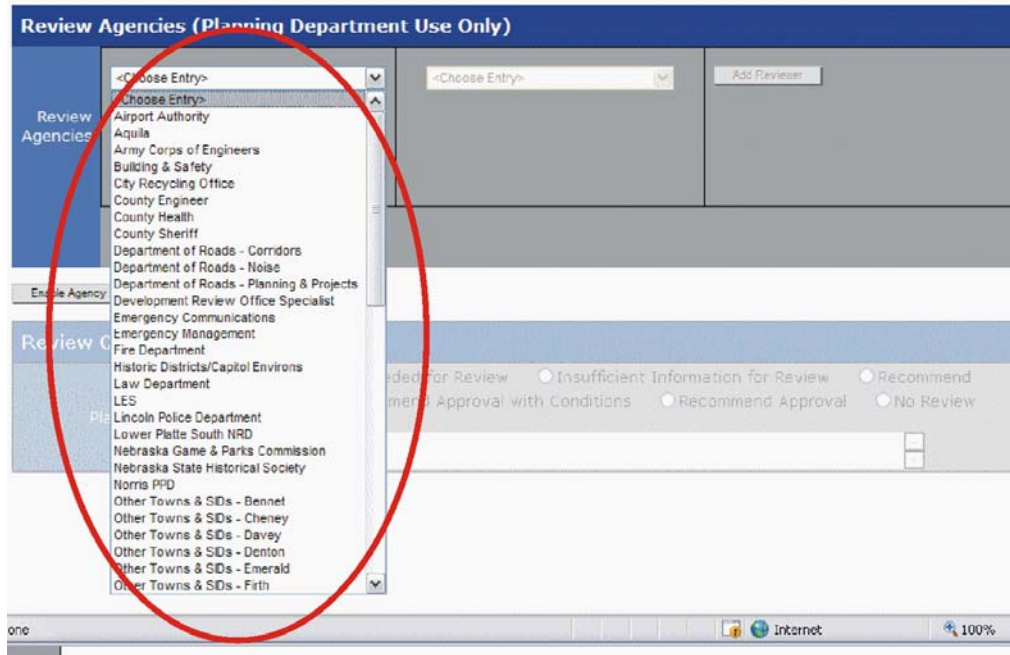
The Project Coordinator will be responsible for inviting any agency needed to participate in the review process.

An assumed list of Reviewers, based on the type of application, will display. This assumed list of Review Agencies and Reviewers exists for all application types except Comprehensive Plan Amendments. Any Reviewer listed that does not need to review the application should be removed manually. Reviewers that are not listed should be added manually.

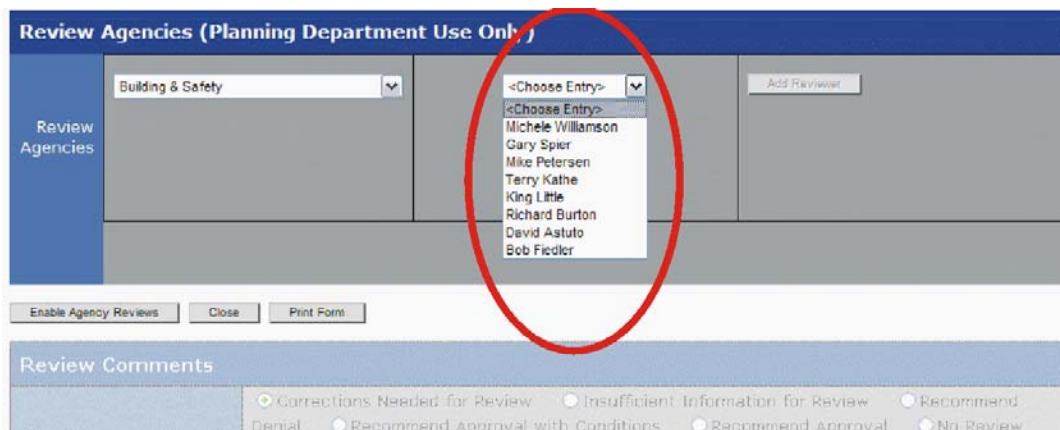
- Remove Reviewer **Before** Sending Invitations:
 - i. Check the box for all Reviewers that you wish to remove
 - ii. Click on the Remove Selected Reviewers button



- Adding a Reviewer
 - i. Select the agency to be added from the drop down list.



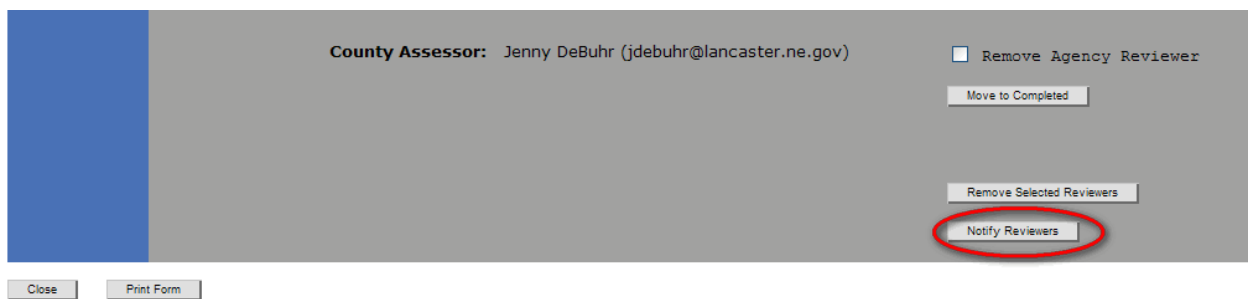
- ii. Select Agency Reviewer to be added.



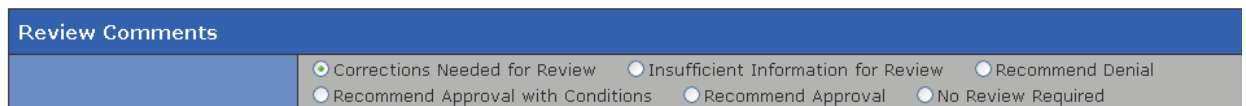
- iii. Click on the “Add Reviewer” button to add the Reviewer to the list of invitees. NOTE: The agency Reviewer has not been sent an email at this point. They are only part of a list of users that can be invited. You can remove any of these users from the list before you invite them. (See Step C – Remove A Review Before Sending Invitations.)



- iv. Once the list of reviewers is finalized, click on the “Notify Selected Reviewers” button. This will show and enable the “Enable Agency Reviews” button.



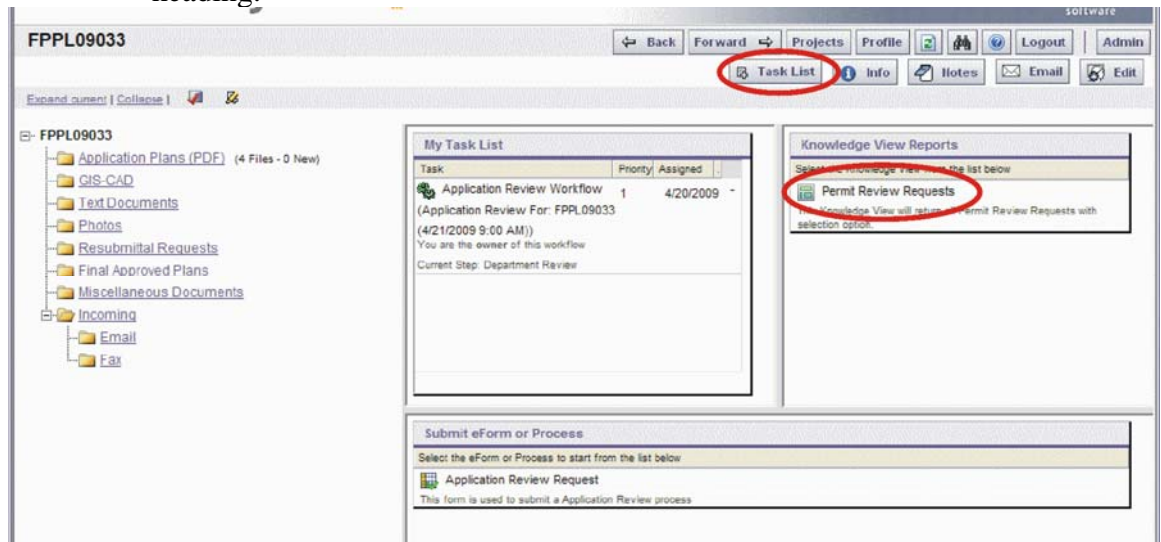
- v. Click “Enable Agency Reviews” to activate the Review Comments section of the eForm and send email notifications to the selected Reviewers.

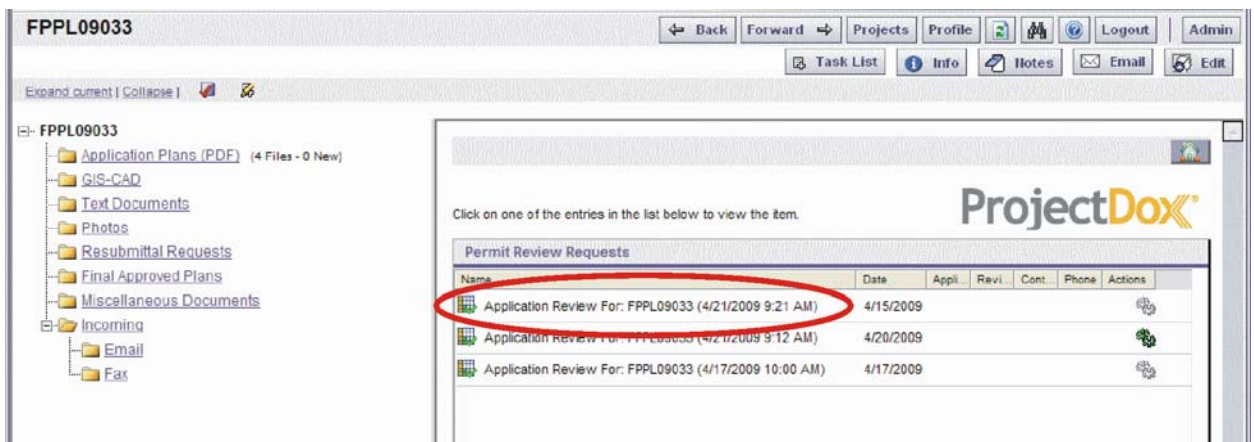
- Removing a Reviewer **After** Sending Invitations:

It is important to note that ProjectDox uses email to invite Reviewers, therefore once the email invitation has been sent it cannot be retracted. If you have already sent the invitations and decide to remove a Reviewer, contact the removed Reviewer to let them know that they no longer need to participate in the review process for this project.

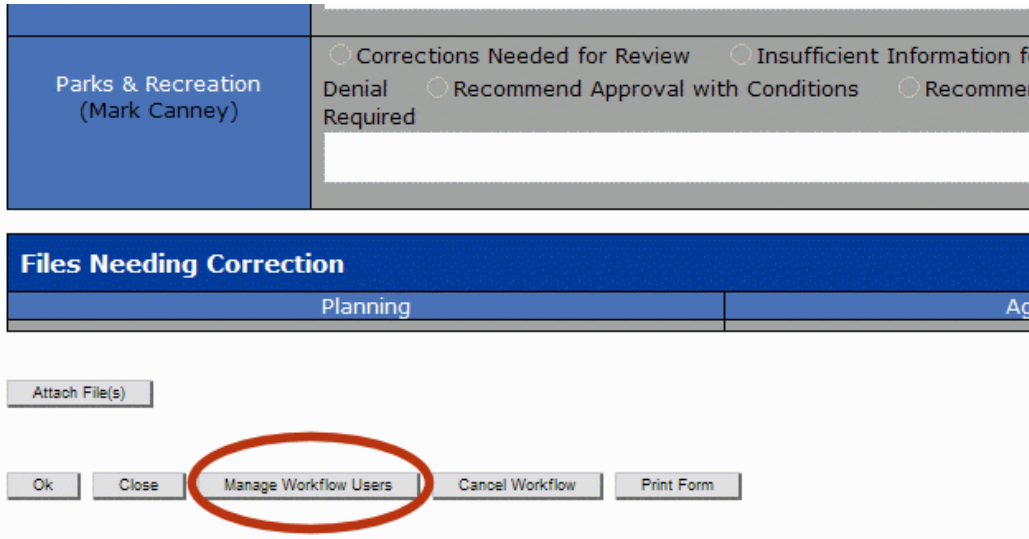
- Click on the “Task List” button.
- Click “Permit Review Requests” under the “Knowledge View” heading.



- Click on the “Application Review for ...” Name to open the eForm.

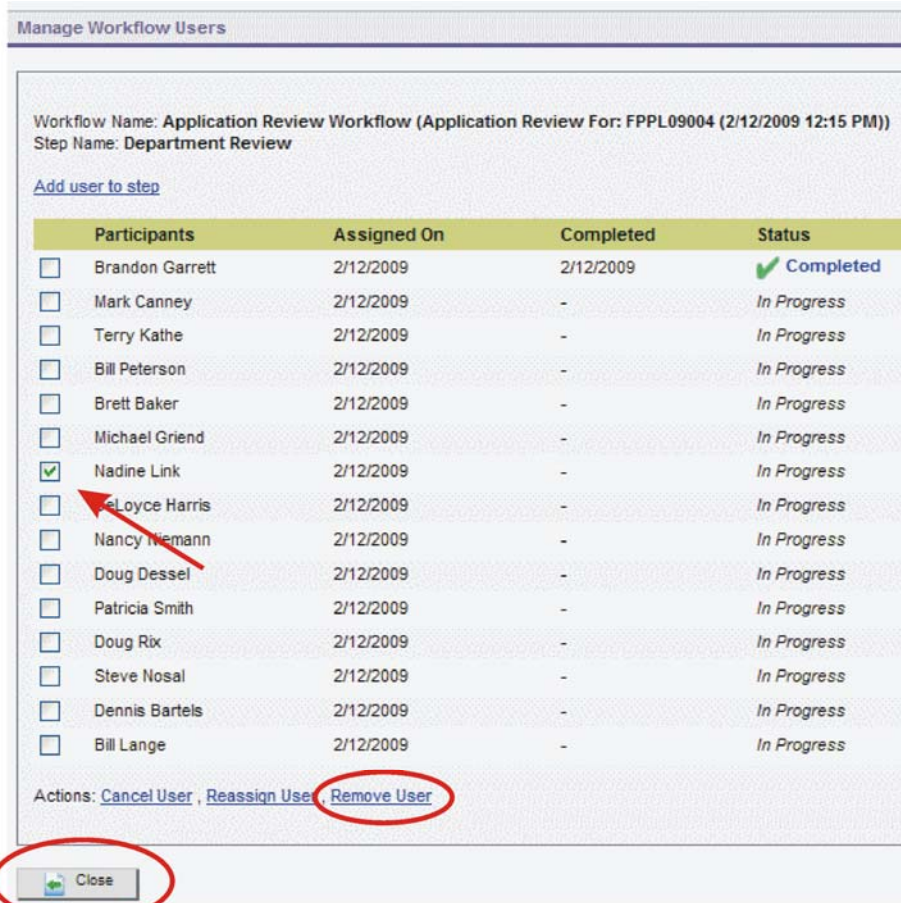


- iv. Select the “Manage Workflow Users” button at the bottom of the eForm.



The screenshot shows a form for 'Parks & Recreation (Mark Canney)'. At the bottom, there is a row of buttons: 'Ok', 'Close', 'Manage Workflow Users', 'Cancel Workflow', and 'Print Form'. The 'Manage Workflow Users' button is circled in red.

- v. Place a check next to the Reviewer you are removing.
- vi. Select Remove User.
- vii. Click on Close.



The screenshot shows the 'Manage Workflow Users' window. It displays a table of participants for the 'Application Review Workflow (Application Review For: FPPL09004 (2/12/2009 12:15 PM))' at the 'Department Review' step. A red arrow points to the checkbox for 'Nadine Link', which is checked. At the bottom, the 'Remove User' button is circled in red.

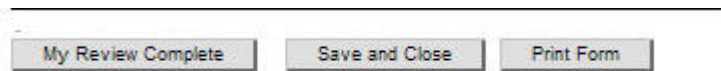
Participants	Assigned On	Completed	Status
<input type="checkbox"/> Brandon Garrett	2/12/2009	2/12/2009	✓ Completed
<input type="checkbox"/> Mark Canney	2/12/2009	-	In Progress
<input type="checkbox"/> Terry Kathe	2/12/2009	-	In Progress
<input type="checkbox"/> Bill Peterson	2/12/2009	-	In Progress
<input type="checkbox"/> Brett Baker	2/12/2009	-	In Progress
<input type="checkbox"/> Michael Griend	2/12/2009	-	In Progress
<input checked="" type="checkbox"/> Nadine Link	2/12/2009	-	In Progress
<input type="checkbox"/> eLoyce Harris	2/12/2009	-	In Progress
<input type="checkbox"/> Nancy Niemann	2/12/2009	-	In Progress
<input type="checkbox"/> Doug Dessel	2/12/2009	-	In Progress
<input type="checkbox"/> Patricia Smith	2/12/2009	-	In Progress
<input type="checkbox"/> Doug Rix	2/12/2009	-	In Progress
<input type="checkbox"/> Steve Nosal	2/12/2009	-	In Progress
<input type="checkbox"/> Dennis Bartels	2/12/2009	-	In Progress
<input type="checkbox"/> Bill Lange	2/12/2009	-	In Progress

D. Complete Review Tasks

The next step is for invited Reviewers, including the Project Coordinator, to complete their individual reviews.

- Note that only the people invited to the review (not the Application Contact or applicant) will be able to see the eForm comments.
- Only the Reviewer associated with an agency's section will be able to edit that section.
- All other Reviewers will be able to read the reviews of other Reviewers but will only be able to edit their own.

The Planner should NOT click on “My Review Complete” until all other agencies have completed their review. This keeps the workflow on the Department Review step allowing the option to add additional reviewers. If you would like to start your review, please use the “Save and Close” button to save your work.

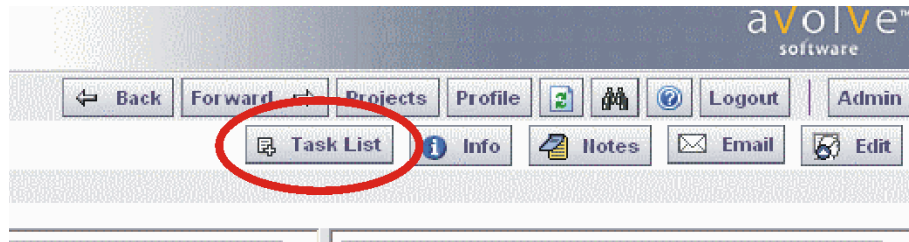


See [Review Agency Manual](#) for specific instructions on completing review tasks.

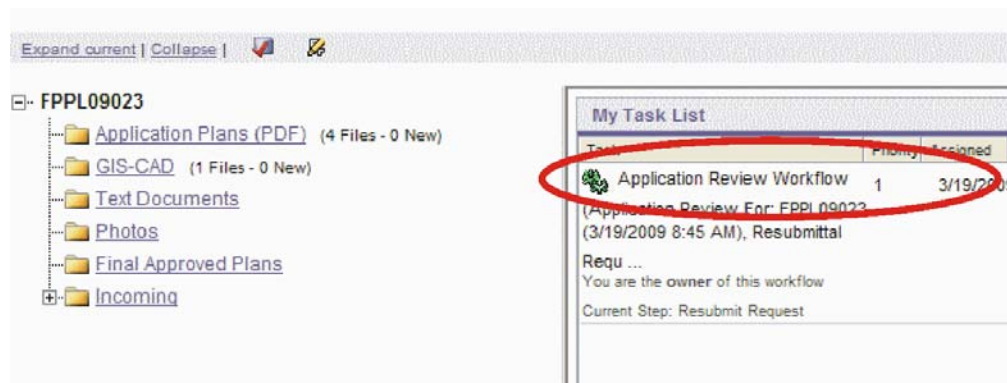
E. Compiling Review Comments

Email notification will automatically be sent to the Project Coordinator after **each** Reviewer has completed his or her review. An email notification will also be sent when **all reviews** have been completed.

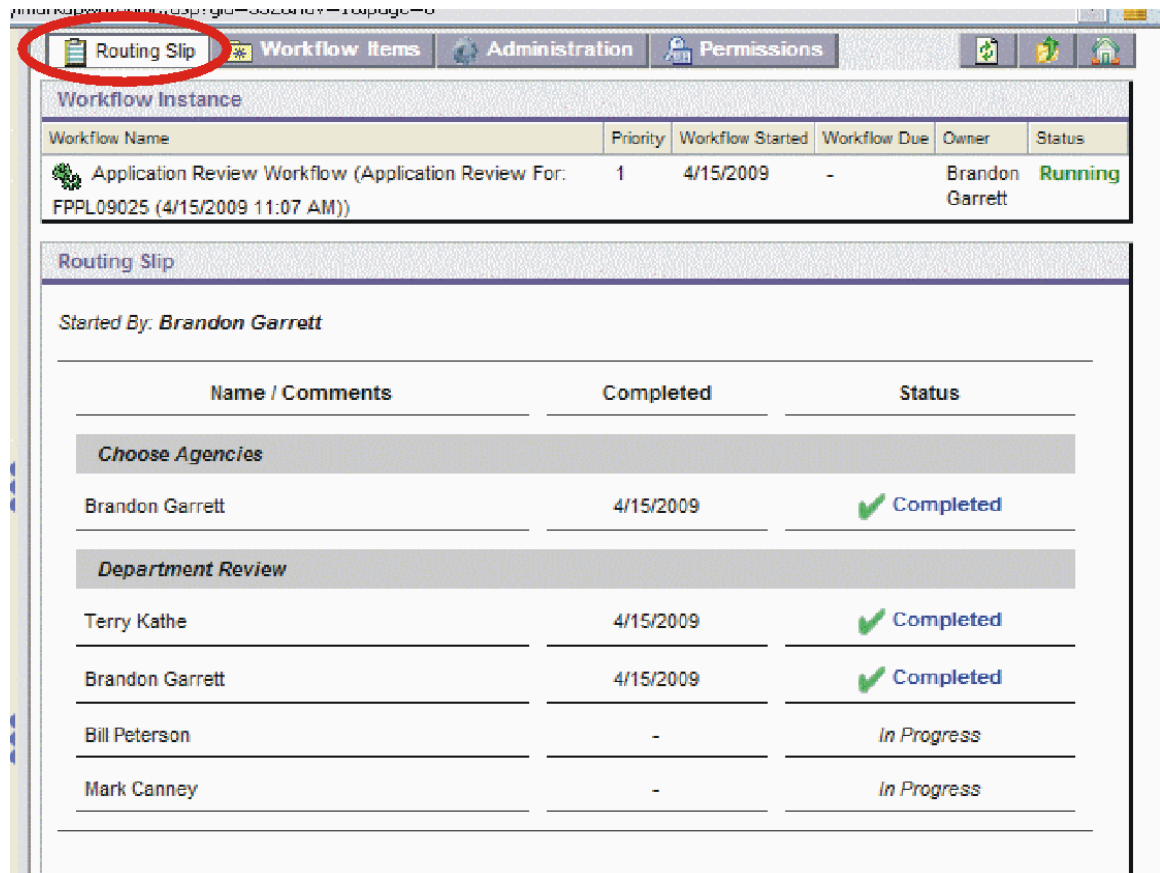
The status of the application review can be checked at any time during the process by clicking on the Task List button in the project of interest.



In the “My Task List” section, click “Application Review Workflow.” Workflows are distinguished from pending tasks in the task list by the workflow icon.



If not already selected, click on the Routing Slip tab. The routing slip for the entire workflow will display. The section titled, “Department Review” shows the list of invited reviewers, the Status of their review, as well as the date completed when applicable.



Workflow Instance

Workflow Name	Priority	Workflow Started	Workflow Due	Owner	Status
Application Review Workflow (Application Review For: FPPL09025 (4/15/2009 11:07 AM))	1	4/15/2009	-	Brandon Garrett	Running

Routing Slip

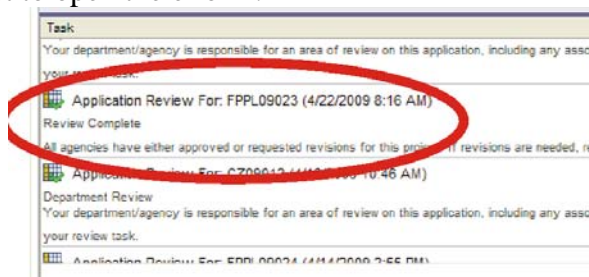
Started By: *Brandon Garrett*

Name / Comments	Completed	Status
Choose Agencies		
Brandon Garrett	4/15/2009	✓ Completed
Department Review		
Terry Kathe	4/15/2009	✓ Completed
Brandon Garrett	4/15/2009	✓ Completed
Bill Peterson	-	In Progress
Mark Canney	-	In Progress

After all reviews have been completed, the Project Coordinator will determine whether resubmittal is required or if the project can move forward for administrative action, public hearing, or other appropriate action.

ProjectDox will open a “Review Complete” task once all agencies have completed their reviews. The Project Coordinator will complete this part of the review on the Review Comments eForm.

Click on the link to the “Review Complete” task in the notification email or select it from your task list to open the eForm.



Task

Your department/agency is responsible for an area of review on this application, including any associated review task.

Application Review For: FPPL09023 (4/22/2009 8:16 AM)
Review Complete

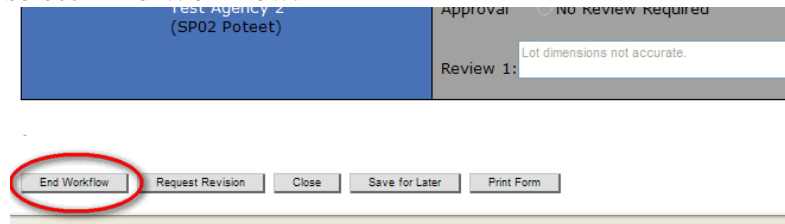
All agencies have either approved or requested revisions for this project. If revisions are needed, request them through the Review Comments eForm.

Application Review For: C709012 (4/16/2009 10:46 AM)
Department Review

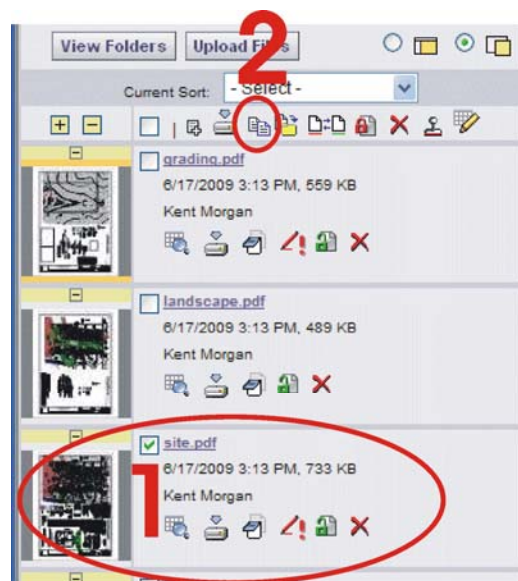
Your department/agency is responsible for an area of review on this application, including any associated review task.

Application Review For: FPPL09024 (4/14/2009 3:55 PM)

If the application is ready to be forwarded for administrative action, public hearing or other appropriate action, not including requesting resubmittal from the Application Contact, select “End Workflow.”



If Resubmittal is required of the Application Contact, any markups, made by Review Agencies, which need to be forwarded to the Application Contact will need to be copied to the “Resubmittal Requests” folder. The Project Coordinator has the ability to copy and delete – but not edit - markups copied to this folder. This means the Project Coordinator will need to create a **new markup** on the file in the “Resubmittal Requests” folder if only a portion of the markups on a layer are being sent to the Application Contact.



To copy a markup layer to the “Resubmittal Requests” folder, place a check in the box next to the thumbnail image of the file(s) containing the markups you want to copy. *Note: You will copy all the markup layers. Then delete the layers that don’t need to go back to the applicant from the pdf in the “Resubmittal Requests” folder. If not all the comments on a layer go back to the applicant, the Project Coordinator will need to create a new markup layer that contains only the comments to be sent to the applicant.*

Click the copy button to copy the selected files and their markup layers.

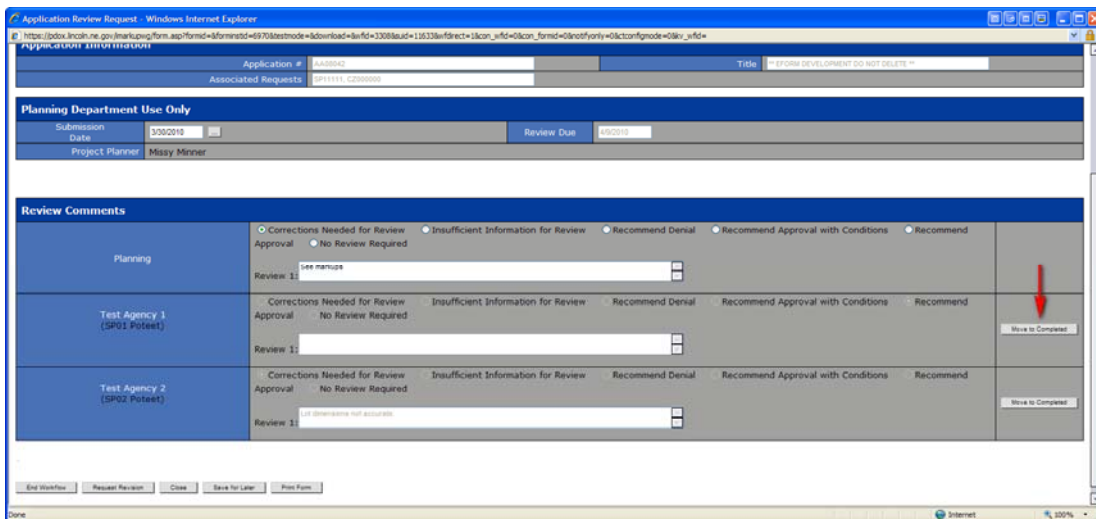


Click on the copy icon next to the destination folder i.e. “Resubmittal Requests” to add the markups to the folder.

From the “Resubmittal Requests” folder, delete the markups that are not to be sent to the Application Contact. Create a new markup layer for the comments that need to be addressed in the revised files. Make sure that you save the new markup layer!

The Development Review Specialist will upload a pdf copy of the Director’s Letter to the “Resubmittal Requests” folder. Make sure this document has been uploaded before requesting resubmittal from the applicant.

Go back to the Review Comment (blue) eForm. Look at the Review Comments section of the eForm to determine which agencies will NO LONGER need to participate in further reviews of the application. Click on the “Move to Completed” button to move those agencies to the Completed Review Comments section.



Next click the “Request Revision” button to launch the “Application Revision & Review Comments” (red) eForm.

	Review 1: <input type="text" value="Lot dimensions not accurate."/>
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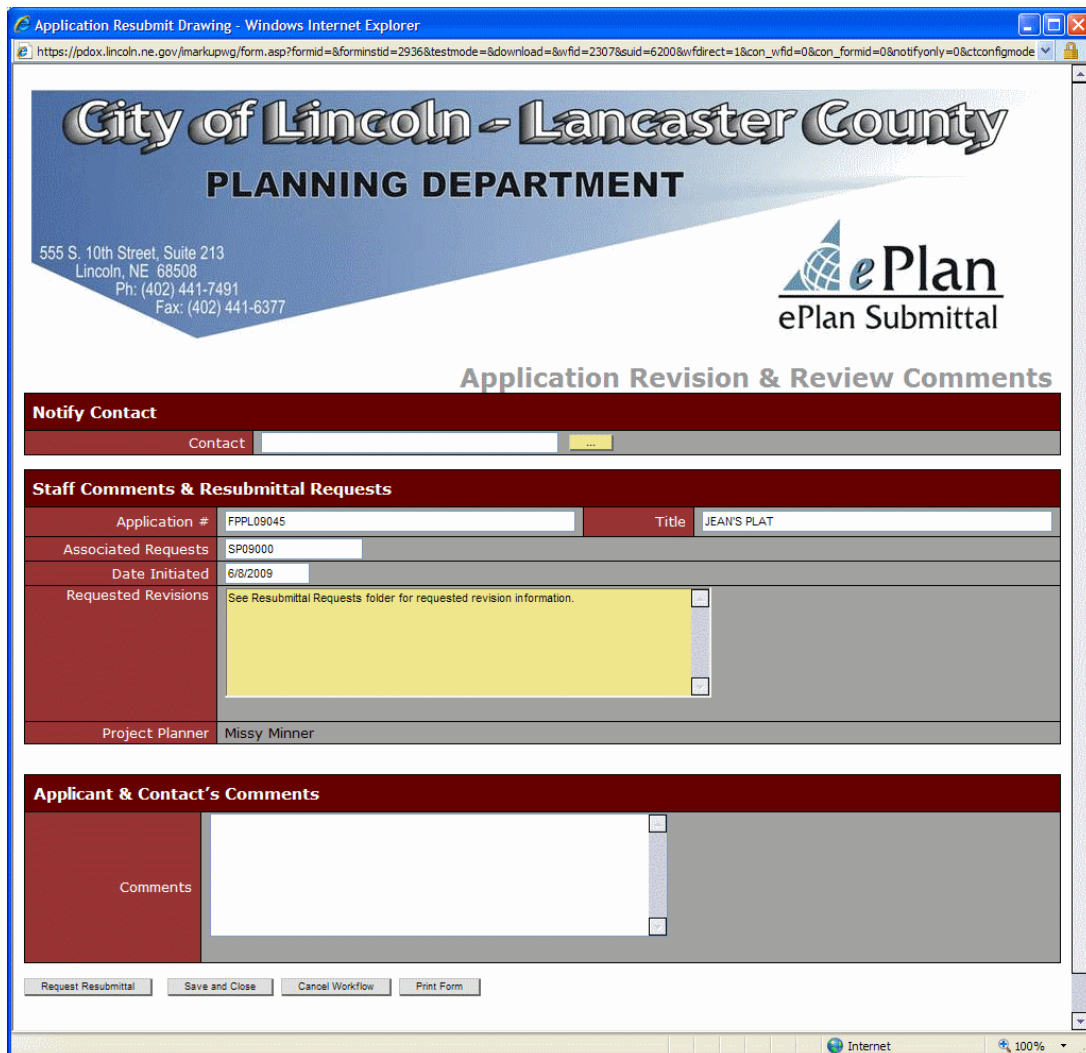
Completed Review Comments:	
Test Agency 1 (SP01 Poteet)	<input type="radio"/> Corrections Needed for Review Review Required Review 1: <input type="text"/>

End Workflow	Request Revision	Close	Save for Later	Print Form
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F. Requesting Resubmittal

If resubmittal is required, an “Application Revision & Review Comments” (red) eForm will be composed by the Project Coordinator. The Project Coordinator will also create a “consolidated markup” in the “Resubmittal Requests” folder. Any additional correspondence to the Application Contact - for example Director’s Letter - will be converted to PDF format and uploaded in the Resubmittal Requests folder.

The eForm notifies the Application Contact that one or more agencies have requested additional information, clarifications or corrections. The Project Coordinator remains the main point of contact for all communications.



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ePlan
 ePlan Submittal

Application Revision & Review Comments

Notify Contact

Contact: []

Staff Comments & Resubmittal Requests

Application #	FPPL09045	Title	JEAN'S PLAT
Associated Requests	SP09000		
Date Initiated	6/6/2009		
Requested Revisions	See Resubmittal Requests folder for requested revision information.		
Project Planner	Missy Minner		

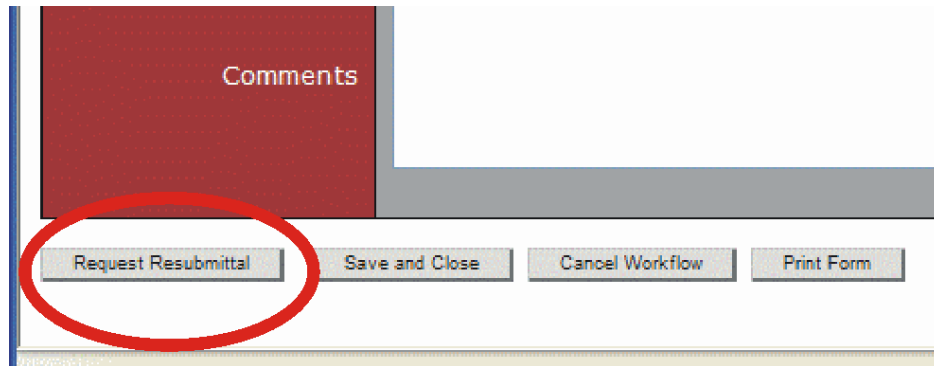
Applicant & Contact's Comments

Comments: []

Request Resubmittal | Save and Close | Cancel Workflow | Print Form

Additional text comments may be added to the “Requested Revision” section under the “Staff Comments & Resubmittal Requests” heading on the Resubmittal eForm.

Click on “Request Resubmittal” to send the resubmittal eForm to the Application Contact.



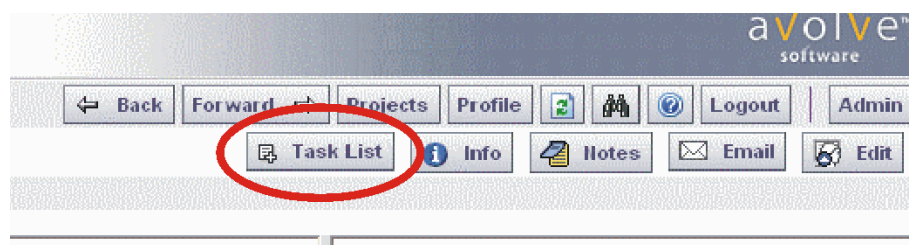
Once the Application Contact has uploaded the revised files, the Project Coordinator will receive email notification of the Resubmittal Complete task. Open the task and click the “Start Next Review” button to determine the reviewers who are to participate in this review. Follow the same selection and notification procedure used in the initial review. If the project does not need to be routed for additional review, select the “End Workflow” button.




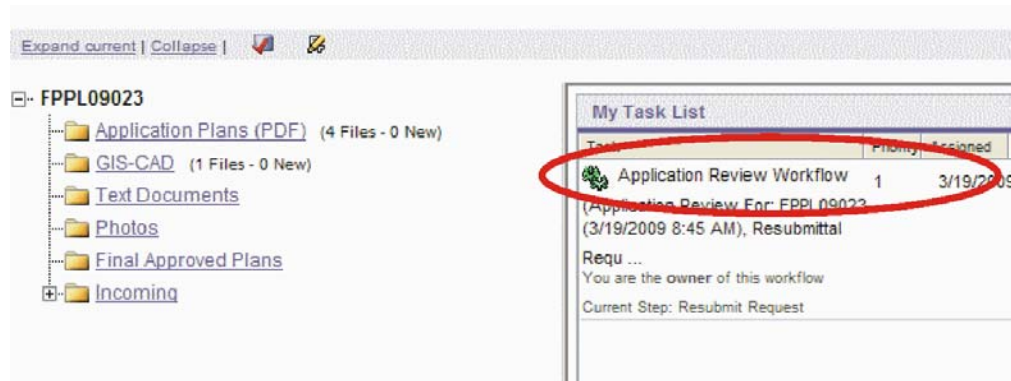
The Review and Resubmittal processes can be repeated until the Application is ready for administrative action, public hearing, or other appropriate action.

Reviewing the Resubmittal Request eForm

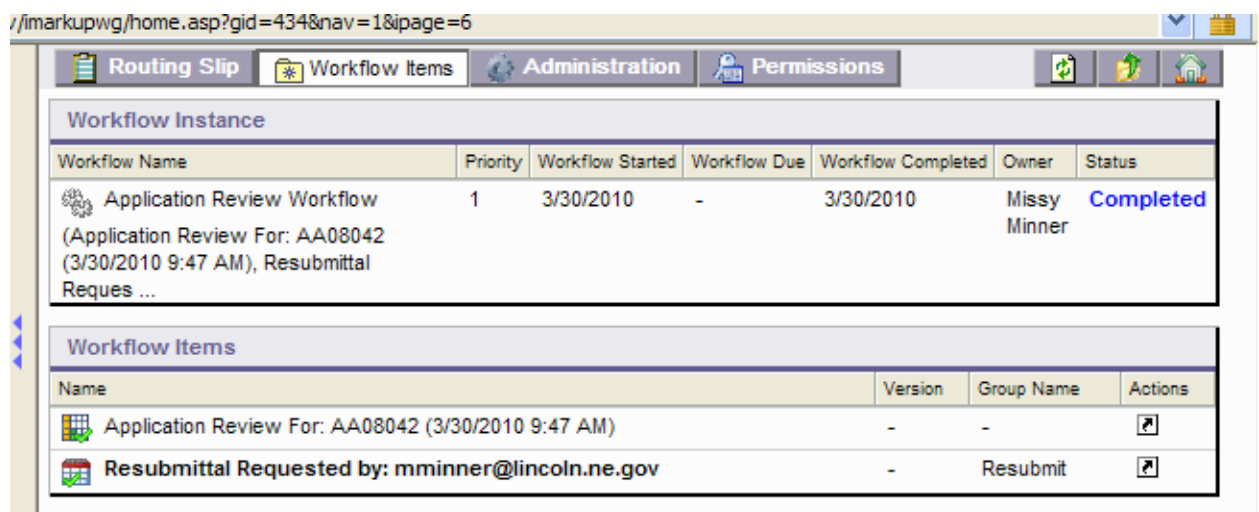
To review the information on the “Application Revision & Review Comments” (red) eForm, click on the Task List button in the project of interest.



In the “My Task List” section, click “Application Review Workflow.” Workflows are distinguished from pending tasks in the task list by the workflow icon. 



Click on the Workflow Items tab. “Application Revision & Review Comments” eForms are labeled “Resubmittal Requested by:...”. Click on the name to view the completed resubmit request eForm.



G. “Planner Correspondence” folder

A “Planner Correspondence” folder has been created for the storage of any communication you have and want to keep track of with the project – for example, email messages, meeting notes, notes to the file, etc. This folder is available to Planning staff only.