Application Contact Manual
ePlan Submittal for Project Dox
City of Lincoln & Lancaster County
Planning Department
Updated May 2022

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

Overview

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

Contents

A. Logging In

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

Enter your email address and password. Click Login.

B. Home Page

Once you are logged in, you will be taken to the new Home screen. In the **upper left** corner, there are **2 tabs – Tasks and Projects**.

Tasks – This list will show your tasks for projects.

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

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

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

On the project list, click the "Project" name to enter the project. The icons shown under the "ACTION" column will take you to a specific tab within the project. From left to right, these are Tasks, Project Status, Reports, Project Information and Files.

Click the refresh link to refresh the screen. Click Save Settings if you have customized the project list layout grid and want to save those settings.

On the task list, click on the "Task" name to accept the workflow task and access the eform. You can also click on the Accept button to Accept the workflow task, then click on the Complete button to access the eform. Click on the application number or "Project" to enter the project.

Tasks   Projects

Refresh   Save Settings

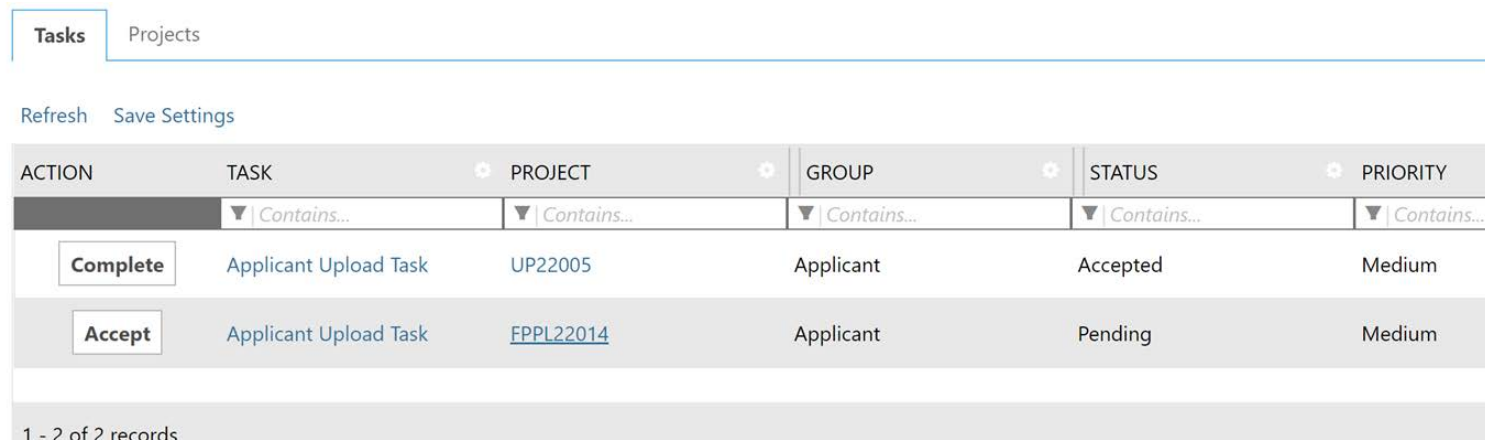| ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY
▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...
Complete	Applicant Upload Task	UP22005	Applicant	Accepted	Medium
Accept	Applicant Upload Task	FPPL22014	Applicant	Pending	Medium

1 - 2 of 2 records

C. Applicant Upload Task

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

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

2. To accept the task, click on the Accept button, then click Complete to access the eForm. You can also click on the Application Upload Task link under the Task column to automatically accept the task and access the eForm.

Tasks	Projects				

Refresh   Save Settings

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY
▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	
Complete	Applicant Upload Task	UP22005	Applicant	Accepted	Medium
Accept	Applicant Upload Task	FPPL22014	Applicant	Pending	Medium

1 - 2 of 2 records

3. You are able to complete your workflow task entirely from the eForm without accessing the project or folders within the project. The top of the eForm has information about the project.

APPLICANT UPLOAD

ProjectFlow PLANNING   avolve

Task Information	Resources

Task Information

Project Name: FPPL22014
Project Description: Snowy Hill Acres Addition
Coordinator: Rachel Christopher
Workflow: Planning Workflow
Current User Login: Greg Minner (gminnerfamily@gmail.com)
Task Due Date: 5/28/22 3:21 PM

Continue down the form to the "Task Instructions" section. If you are unsure what to do next, click the Watch video link to see instructions on completing the form and task. Otherwise continue to Step 1 of 3 – File Upload.

Task Instructions   Watch video

Please follow the steps below:

STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required

File Upload for: FPPL22014 ?

Please click appropriately for the **type of files** you are uploading.   **Watch video**

Upload Application Plans (PDF)	Upload GIS-CAD

Uploaded files:

No files uploaded yet.

STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

☐ *Upload Task Complete (I have uploaded all required drawings and/or documents) *Required

STEP 3 of 3: Click the "Submit" button below to complete your task

| Submit | Close |

4. Click Upload Application Plans – PDF to upload your PDF files.
5. Click Browse For Files. Navigate to and select the files you wish to upload. Click Open in that window.
6. Once the files are listed in the window, click Start Upload.

ProjectDox
City of Lincoln and Lancaster County

Close Window

Folder: FPPL22014\Application Plans (PDF)

Browse For Files | or drag files into this area.

Start Upload

7. Repeat the upload process for your CAD files by clicking on the Upload GIS – CAD button.
8. When all files have been uploaded, continue to Step 2 of 3 - Confirmation.

9. Check the Upload Task Complete box.
10. When all files have been uploaded, continue to Step 3 of 3 - Submit.
11. Step 3 of 3 – Submit is the final step of your task. Once you check the box to confirm that you have uploaded all of your files, the Submit button will become active.

Please note, the Planner will not receive your files until you click this button to complete your task. **It is VERY IMPORTANT that you complete your task to keep the application moving through on schedule.**

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

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

You will need to accept the Prescreen Corrections task, address the missing information as indicated in the information on the eForm and complete that task PRIOR to your application being sent out for reviews.
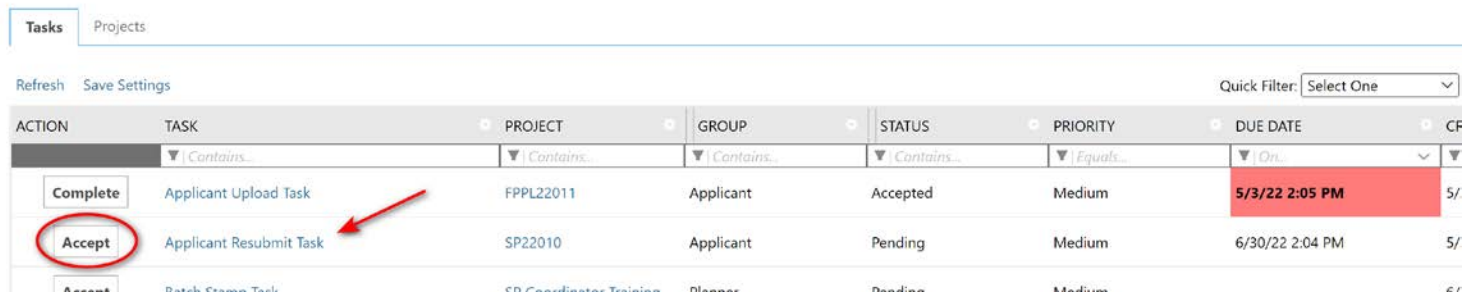
Note: In the initial review, you will have the ability to upload additional files after completing the applicant upload task. If you are uploading files as part of a resubmittal request, you are limited to uploading files ONLY when the Applicant Resubmit task is active.

D. Resubmittal Request

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

You can access the task from your task list or the project list.

Find the task in your task list and click Accept button, then click the Complete button to access the eform. You may also click the Applicant Resubmit Task link to accept the task and access the eform in a single click.

At the top of the eform you see the task name, general project information and the link to the help video if you need additional instructions.

In Step 1 of 4, of the Applicant Resubmit Task, you will need to click on the Review Comments button to view the information about the corrections being requested in the Workflow Review Changemark Viewer.

This allows you to view the changemarks, without having to open the file. You also have the option of opening the file to view changemark items by clicking on the thumbnail image if you prefer.

There are several options to restrict the changemarks that show up in the viewer. At the top of the viewer, are numerous filter options to limit the number of comments shown or you can opt to show all (default) as shown below.

The response area on the right side of the screen can be used to send any comments, questions or responses you have about the requested changes.

Clicking the down arrow under the "Cycle" column allows you to download the marked-up pdf locally.

Items marked "Unresolved" need to be addressed on the plans. Updated/corrected documents will be uploaded into the system in the next step. Items marked "Info Only" are for informational purposes and do not necessarily require edits to the plans.

Once you have addressed the edits and corrections required on the application drawings as noted in the reviewer comments and changemarks, you are ready to proceed to Step 2 of 4 - uploading the revised files.

Step 2 of 4 – Once you have edited the application drawings as noted in the reviewer comments and changemarks, you are ready to upload the revised files. To allow the system to automatically version the files and utilize tools for versioned files, you will be asked if your revised files are named the same as the original files uploaded.

**Please note: sitev2.pdf is NOT the EXACT SAME NAME as site.pdf!** If your revised files are saved with the EXACT SAME NAME as the previously uploaded files, click Yes and continue with the upload by clicking on the appropriate folder in which to upload your documents like in the original submittal upload.

If you saved your files with different names, click No to be prompted through the steps to properly version the revised application documents. (Details follow on next page.)

If you are uploading new files (not previously uploaded), click on the New Files tab to proceed with uploading those documents.

STEP 2 of 4: Upload any new or updated files into this project

Version Upload for: SP22010 ❷

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files	New Files

Are your updated files named exactly the same* as the prior versions? | Yes | No | **Watch video**

* *"name-v2.pdf" is not an "exact" file name match to "name.pdf"*

Uploaded files:

Select folder to open file list.

▸ 📁 Application Plans (PDF) (2 - 0 New)

📁 GIS-CAD

📁 Text Documents

If your revised documents are not named EXACTLY THE SAME as the prior versions of the documents, you will click No and the follow window will open.

In the example shown, the file SITE.pdf contained mark-ups which needed to be edited and re-uploaded with those corrections. If there were other files that required revisions, those would also be listed here.

Upload File Versions

Project: SP22010

Select: [Files w/Markups ∨]   File(s) with markup comments **that may** require new versions

[**Start Upload**]

Application Plans (PDF)\SITE.pdf   [**Select File**]

Orange files are **new uploads**
Blue files are new **version uploads**
Red files appear to be same as previously uploaded (**will likely be discarded**)

Click on the "Select File" button to the right of the file that you need to replace with the new version that is named something different. Browse to the correct file on your local system in the file browser window that opens.
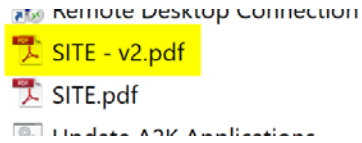
In this example, SITE – v2.pdf is the revised version of SITE.pdf. We want to upload that file as "Version 2" of SITE.pdf. Since original file name DOES NOT match the new version's file name, we will have the system create that version for us.

Select the revised version of the file to upload, click Open. Then click Start Upload. You should see a green message that says the files uploaded successfully. You are ready to proceed to steps 3 & 4 to complete the Applicant Resubmit Task.

Upload File Versions

Project: SP22010

Select: [Files w/Markups ∨]   File(s) with markup comments **that may** require new versions

[Start Upload]

SITE - v2.pdf is new version of SITE.pdf   0B/644.36KB ✗

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

STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit

Confirmation   ❓

☐   *I have reviewed and addressed, including responses where appropriate, all Review Comments Items accessed by clicking on the "Review Comments" button above.   *Required

☐   *I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.   *Required

STEP 4 of 4: Click the "Submit" button below to complete your task

Submit   Close

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

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

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

E. Final Approved Plans

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

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

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