# Reviewer Manual ePlan Submittal for Project Dox City of Lincoln & Lancaster County Planning Department Updated June 2022

It is recommended to use Microsoft Edge in Internet Explorer mode as your browser when accessing ProjectDox. You may experience limited functionality for the review tools if using Chrome. Instructions for setting up Internet Explorer mode are available on the ePlan Submittal website.

### **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 Reviewers as a general reference guide. There are text descriptions and screen images of the step-by step tasks necessary to complete a project 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 and 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 Notification**

Reviewers will receive email notification of a review task for an application. They will be notified via e-mail for each round of review a project may undergo. The e-mail will look similar to this:

## **Plan Review Task Assignment**

Attention Rachel:

You have been assigned a task on Project: SP22010

You have 10 calendar days to complete your review. Please log in to ProjectDox using the links below to begin your task.

Project: SP22010 Project Name: Snowy Meadow CUP Task: Department Review Project Contact: [Rachel Christopher (rchristopher@lincoln.ne.gov, 4024417603) Project Access | Login to ProjectDox

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

### Logging In

- 1. Log into Project Dox by clicking the link in the e-mail or going to the Planning Department Homepage, navigating to the Development Review page, clicking on "ePlan", then clicking on "Log in to Project Dox".
- 2. Enter your email address.
- 3. If this is your first time logging in and you have trouble, please contact the Planning Department for assistance.

**Note:** Initial log in requires the installation of ProjectDox components. See ePlan Submittal website (lincoln.ne.gov keyword = eplan) for instructions.

jectDox.
Velcome to the Portal
E-mail:
Password:
Login Forgot password? Install ProjectDox Components
You need an account to submit and manage applications. Don't have an account?
Create An Account

#### Completing a Review

The Home page has two tabs, Tasks and Projects. The Tasks tab lists pending tasks assigned to you. The Projects tab lists the projects you have entered recently. You can also access a project by clicking the link for the project number on the Tasks tab. The lists on each tab can be filtered by searching in the boxes for "Contains..." under each column header. For example, the results are filtered in the screenshot below by project SP22020.

A task with a red due date box is overdue and should be prioritized over other reviews.

#### Accept Your Task

- Accept the task as shown circled below. <u>You must first accept your review task before you can open a file or make</u> <u>markups</u>. The button will change to say "Complete" but you do not need to click it again yet. You will complete the task once you have reviewed the documents.
- 2. Next, you must review the documents. Click on the project link to open the project, view documents, and make any comments and markups.

ProjectDox City of Lincoln and Lancaster County							
			Home Q Pro	oject: Enter project name	create P	Project All Tasks	Logout ? Admin
Tasks Projects							
Refresh Save Settings				Quick Filter:	Select One	All Overdue Pri	iority Show 7 🗸 records
ACTION TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION
▼  Contains	▼Jap22010	▼   Contains	Contains	▼   Contains	<b>▼</b>   On	✓ ▼  On	✓ ▼  Contains
Accept Planner Review Departme Review cycle #1	ent SP22010	Planner Review	Pending	Low	6/10/22 11:35 AM	5/31/22 11:35 AN	M Snowy Meadow CUP
1 - 1 of 1 records		$\backslash$					K ← ∢Prev 1 Next ► →
Step 1: A	Accept task	Step 2: 0	pen project	page			Page 5

### Project Page

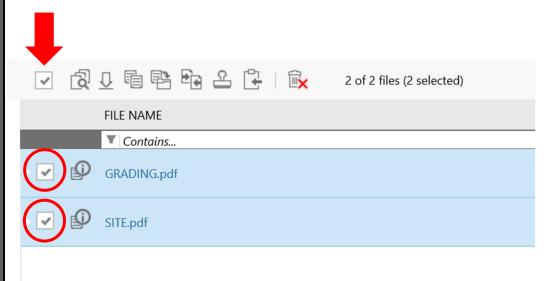
Take a look at the files that have been uploaded by opening the "Files" tab. This tab contains the documents you are being asked to review. The files are located in the folders for Application Plans, GIS-CAD, and Text Documents. You can make comments and draw on these documents using Markups. (See Page 11 for information on Markups)

### **Viewing Files**

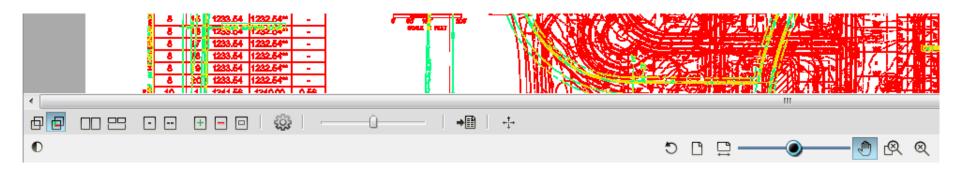
ck on the file name link.					
	Home Q Project: Enter project name	Create Pro	ject All Tasks	Logout	Admin
Discuss Reviews SP22010: Snowy Mea	adow CUP				
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FILE NAME		STATUS	REVIEWED	UPLOADED	DATE
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SITE.pdf		New	Ģ	Missy Minner	5/31/22 11:03 AM
					Page 6
	Discuss Reviews SP22010: Snowy Mea Discuss Price Pric	Home Image: Contains   Image: Discuss Reviews SP22010: Snowy Meadow CUP Project: Enter project name Image: Discuss Reviews SP22010: Snowy Meadow CUP Image: Discuss Reviews R	Home Project: Enter project name Create Project name     Discuss Reviews SP22010: Snowy Meadow CUP     Discuss Reviews SP22010:     Status     FILE NAME     STATUS     Contains     Contains     Contains     New	Home Project: Enter project name Create Project All Tasks   Discuss Reviews SP22010: Snowy Meadow CUP   Status SP22010: Snowy Meadow CUP     Image: Contains     FILE NAME     STATUS   REVIEWED   Image: Contains     Image: Contains </td <td>Home Project: Enter project name Create Project All Tasks Logout   Discuss Reviews SP22010: Snowy Meadow CUP   Status Status REVIEWED UPLOADED     FILE NAME STATUS REVIEWED UPLOADED     Contains Contains Contains Contains</td>	Home Project: Enter project name Create Project All Tasks Logout   Discuss Reviews SP22010: Snowy Meadow CUP   Status Status REVIEWED UPLOADED     FILE NAME STATUS REVIEWED UPLOADED     Contains Contains Contains Contains

#### **Comparing Two Files**

The compare feature allows a graphical comparison of two files. Check the boxes next to the two thumbnail images to be compared. Then click on the compare tool icon. Two versions of the same file can also be compared (see Page 17 on File History).



The comparison toolbar appears at the bottom of the viewing window. The toolbar contains several commands for different comparison options. The slider tool is used to change the transparency of the two files for clearer viewing of the differences.



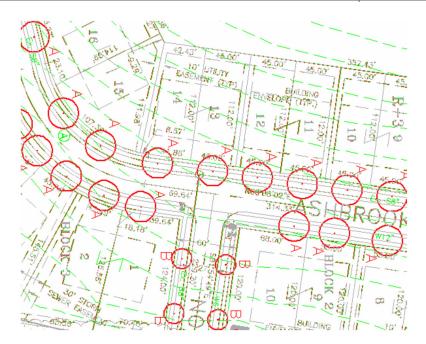
#### Comparison Toolbar Options:

- **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.
- Additions Only added areas (areas not present in the open version that are in the compare version) are displayed in green.
- Deletions Only deleted areas (areas present in the open version that are not in the compare version) are displayed in red.
- 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.

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.

$< \leftarrow >$ (left arrow)	Nudge position left
$\langle \rightarrow \rangle$ (right arrow)	Nudge position right
<↑> (up arrow)	Nudge position up
$<\downarrow>$ (down arrow>	Nudge position down
<+> (plus key)	Nudge scale up
<-> (minus key)	Nudge scale down



The "Overlay Differences" viewing option is shown above.

#### Aligning Files for Comparison

Files that have been drawn at different scales can be aligned for overlay comparison. The Set Alignment Point tool assists you with this. It allows you to define identical locations on each file that are used as common alignment points when the two files are overlaid.

- 1. Check the boxes next to the two thumbnail images to be compared, then click the Compare tool icon: CR open two versions of the same file by clicking the New V2 icon next to the file.
- 2. Set the Alignment points on the first document:

Select Open File (Only) from the Compare toolbar:

Use the Zoom tool to magnify and area that includes two points that can be found on BOTH files.

Click the Set Alignment Points button:

Left click point one.

5.

Move the mouse across the document to the second point, a blue line should appear. Left click the second point.

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3. Set the Alignment points on the second document:

Select Compare File (Only) from the Compare toolbar:

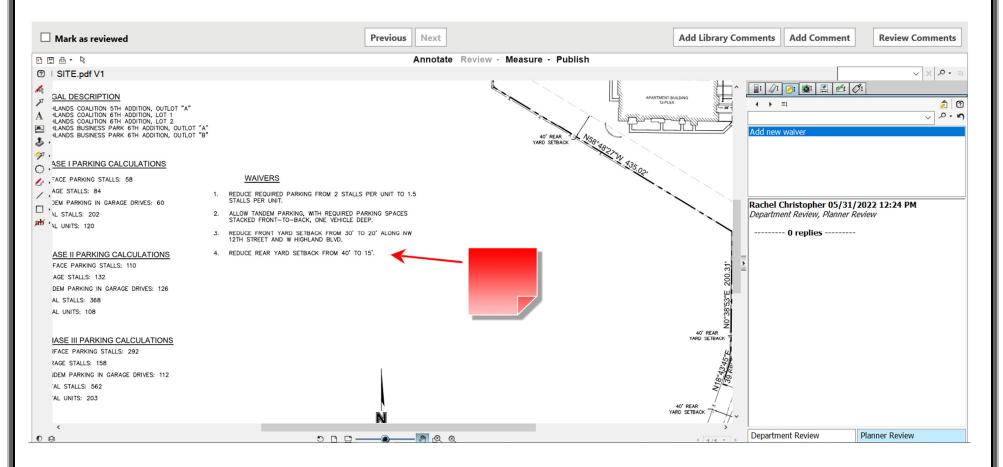
Select the exact same points on the second file that you chose on the first file.

4. Select the Overlay or Overlay Differences option on the Compare toolbar:

It may be necessary	v to further nudge	the files into	nlace for prope	er comparison (s	ee nrevious nage
It may be necessar	y to fulfiller huuge		place for prope		ice previous page

#### Markups

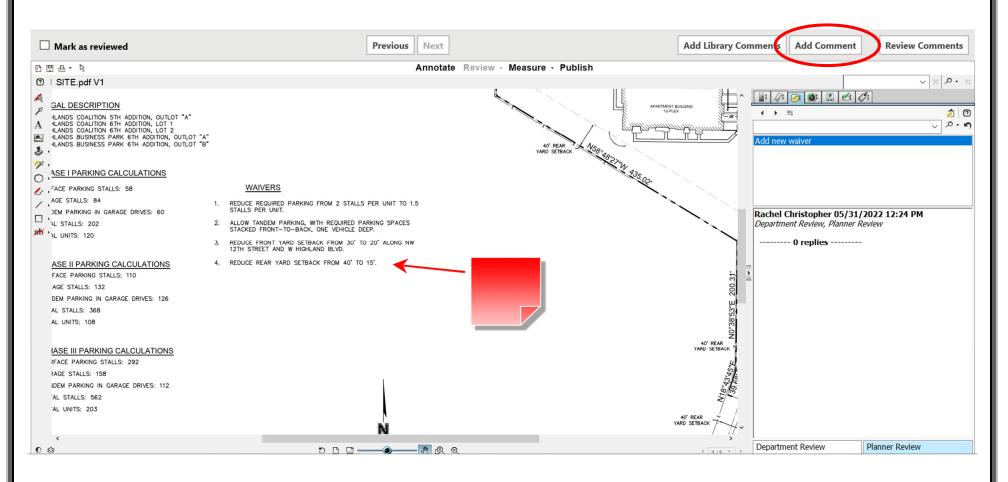
- 1. In the document, click the Markup tool in the upper left-hand corner of the screen:
- 2. Select "New".
- 3. Markup tools will pop up on the left-hand side of the screen. Use these tools to draw, add text, arrows, bubbles and other markups to the document.
- 4. Once you have created all your markups, click on the save icon to save the markups under your name:



#### **Making Additional Comments**

In addition to markups, reviewers can make additional comments on each document. This is in lieu of the text box that was previously available in the eForm. In each document, you can click "Add Comment" towards the top right corner.

(There is also a button for "Library Comments". Library Comments are standard boilerplate comments that can be chosen from a list. The Planning Department is not utilizing Library Comments for our projects.)



A window opens where a general comment can be made on that document. The reviewer has the option to mark the comment as "Informational Only - No Applicant Response Required" at the bottom of the window. This is checked if no changes need to be made based on the comment. Click "Add" to save the comment.

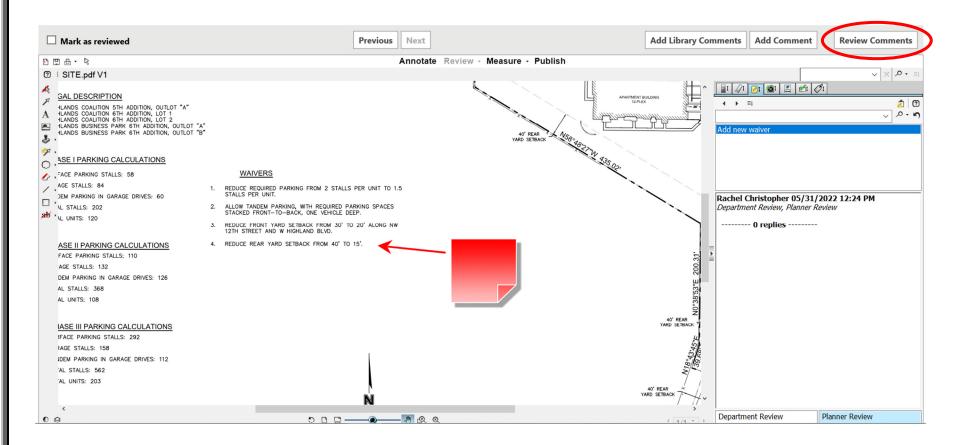
ProjectDox - ProjectDox 9.2 - Work - Microsoft Edge		
https://pdox92t.lincoln.ne.gov/ProjectDoxWebUI/Workflow/WorkflowGeneralComplexity	ommentsEditor?projectID=2422&co	prrectionID=
nter a comment to add to the review comment list.		
Use Rich-Text (NOTE: Rich-Text formatting does not export to Excel.)		
Add lot labels for surrounding properties.		

□ Informational Only - No Applicant Response Required

Add Close

#### **Review Comments Matrix**

Yours and others' comments and markups on a document are stored in the Review Comments matrix, which is accessed using the button at the top right corner.



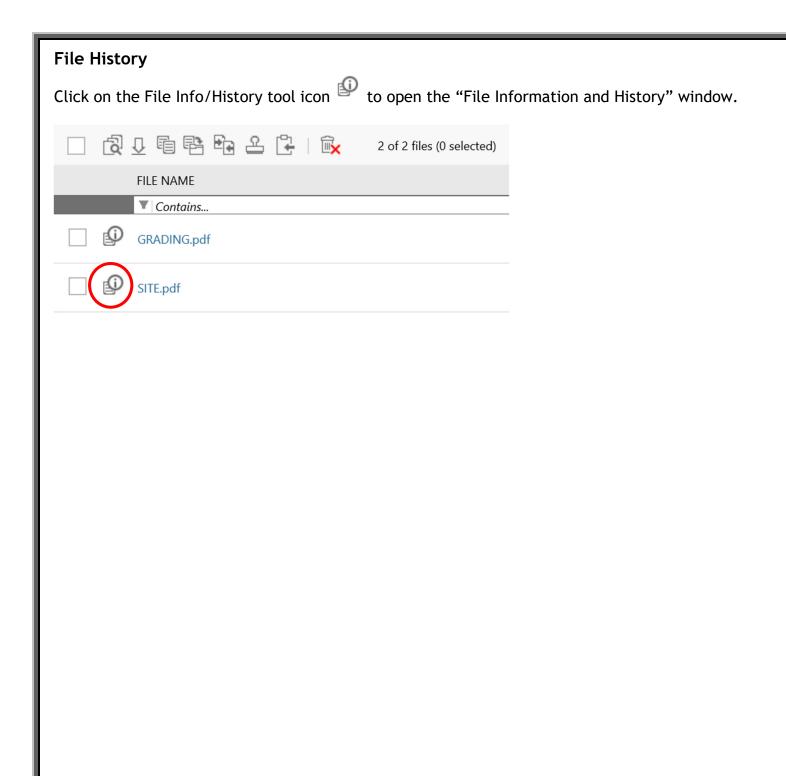
The Review Comments matrix opens in a new window. It is possible to filter the comments being viewed using the options at the top. Each comment/markup is assigned a status of Unresolved, Resolved, Question, or Info Only. During subsequent review cycles, the applicant and reviewers may enter responses on the right-hand side as needed to resolve questions or other issues.

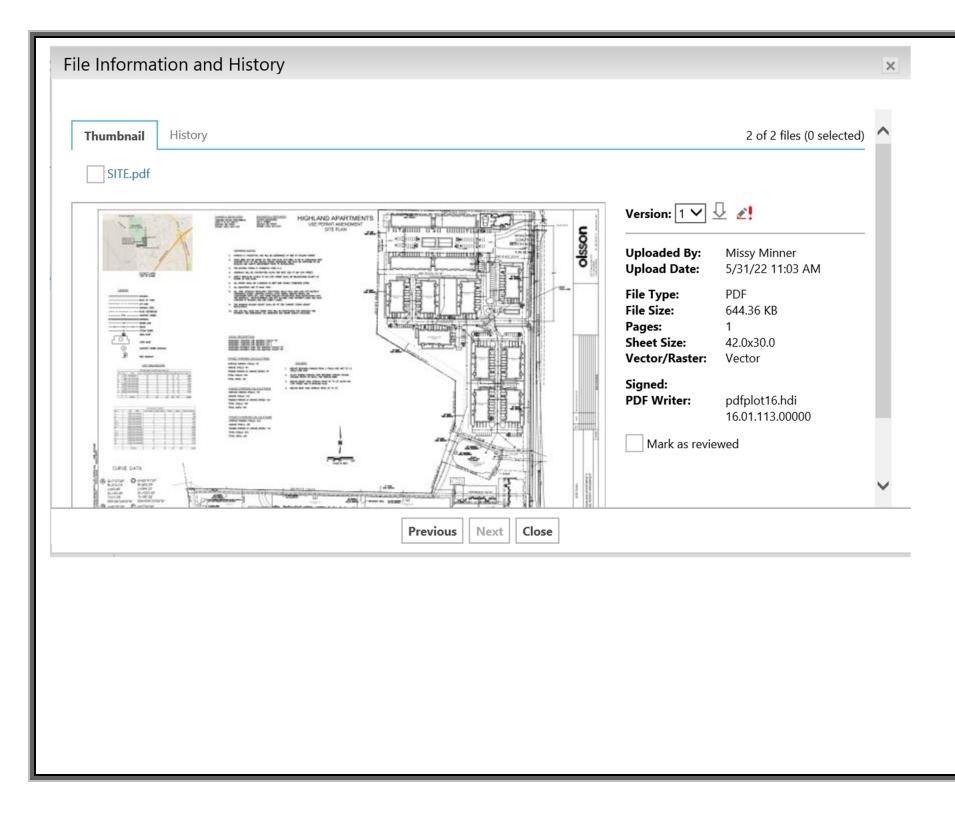
NOTE: The status on each comment/markup <u>MUST</u> be changed to <u>Resolved</u> before a recommendation of approval can be made on a project, except for those with status of Info Only.

	A Projecti	https://pdox9		Show All	Response:	Show All	22&wflowTas			=1654019715702 keyword	Close Window	
	Refresh	Type: Show A	II V Cycle: S	show All 🗸	Time:	Show All	~				Watch video	
		[Select One] 🗸	Apply (0 selected)				Add Con	nment	Add L	ibrary Comments	Please enter your responses 0	
Status of		Ref.# 1	Add new waiver	Planner Review	Rach	el Christopher	5/31/2	2 12:31 F	PM	Cycle 1	Type your response here.	^
comment/ markup	· 주	Unresolved		SITE.pdf				٢	$\oslash$			
		Markup										
		Ref.# 2	Planner Review		Rachel Christopher 5/31/22 12:42 PM Cyc				PM	Cycle 1	Type your response here.	-
		Unresolved	Add lot labels for surrounding prope	erties.								
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		Ref.# 3	Planner Review		Rach	el Christopher	5/31/2	2 12:45 F	PM	Cycle 1	No response required.	н.
	⑦	Info Only Comment	An Airport Height Permit will be req	uired at time of bui	ilding permit.							Ŀ.
	<b>E</b> ×											

There are two ways to change the status of a comment or markup. The first is clicking in the colored box with the status and choosing a different option. The second is checking the box next to one or more items, selecting the desired status from the menu, and clicking "Apply". The two options are illustrated below. All changes made to the matrix automatically save in real time.

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Refre							Watch video					
$\langle$	[Select One]	Apply	2		Add Comment	Add Library Comments	Please enter your responses	0				
	Kei.# 1	Add new waiver	Planner Review R	achel Christopher	5/31/22 12:31 PM	VI Cycle 1	Type your response here.		^			
잔 오	Unresolved Markup		SITE.pdf			Ø						
7	Info Only	Planer Review	R	achel Christopher	5/31/22 12:42 PM	M Cycle 1	Type your response here.		_			
다 다 다 (	Question Resolved Unresolved Option 1											
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	Ref.# 3	Planner Review	R	achel Christopher	5/31/22 12:45 PN	M Cycle 1	No response required.		н.			
↔ ↔	Info Only Comment	An Airport Height Permit will be rec			~							





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 "Version:" dropdown and click the thumbnail image or the file name link.

If markups are associated with the file, the markup icon *equal* 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 if the download icon  $\stackrel{4}{\smile}$  is present. File Information and History X History Thumbnail 2 of 2 files (0 selected) SITE.pdf Version: 1 🗸 🕹 🛃 HIGHLAND APARTMENTS olsson Uploaded By: Missy Minner COLORADOWN DAVIS Upload Date: 5/31/22 11:03 AM PDF File Type: File Size: 644.36 KB Pages: 1 Sheet Size: 42.0x30.0 Vector/Raster: Vector Signed: PDF Writer: pdfplot16.hdi 16.01.113.00000 Mark as reviewed Close Previous Next

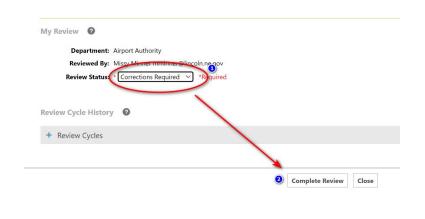
### Completing the eForm

The next step after reviewing and creating a markup is for reviewers to complete their review eForm:

- 1. Navigate to the Tasks tab.
- 2. Click the "Complete" button to open and complete the eForm.

Tasks Files	Status Info Reports [	Discuss Reviews	SP22010: Snowy M	Meadow CUP
Start New Wor	kflow			
Refresh Save Se	ettings Reset Settings			Quick Filter: Selec
ACTION	TASK	PROJECT	GROUP	STATUS
	Contains	Contains	Contains	Contains
Complete	Planner Review Department Review cycle #1	SP22010	Planner Review	Accepted

3. In the eForm window, choose a status as shown below. You can view yours or others' comments and markups by clicking the "Review Comments" button to access the Review Comments matrix, or scroll down to expand the Review Cycle History. Click "Complete Review" to submit when you are finished.



## Reassigning a Task

If you need to reassign your review task to another person in your department after you have accepted it, you may click the symbol to the left of your task as shown below. A separate window will open. Click the "+" sign to expand the menu and choose the person you wish to assign the task to.

Tasks	Files	Status	Info	Reports	Discuss	Reviews	SP220	010: Snowy	Meadow CUP
Start Ne	ew Workf	low							
Refresh	Save Sett	ings Re	set Settir	ngs					Quick Filter: Select One
ACTION		TASK			PRC	JECT	GROU	JP	STATUS
		▼ Coi	ntains		<b>Y</b>	Contains	T Coi	ntains	Contains
Comp	lete よ		er Review v cycle #*	v Department 1	SP2	2010	Planne	er Review	Accepted

## Modifying Your Comments After Submitting a Review

You have the option to change your recommendation or text comments after you have already completed and submitted a review. However, 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. Your task window will re-open, allowing you to make any necessary changes.

Tasks	Files	Status	Info Reports	Discuss	Reviews	SP22010:	Snowy Mea	adow CUP
Start N	ew Workfl	ow						
Refresh	Save Setti	ngs						Quick Filter: Select Or
ACTION		TASK		PROJ	ECT	GROUP		STATUS
		▼   plann	er	T C	ontains	Contain	s	▼ Contains
		Planner R Review cy	eview Department vcle #2	SP220	010	Planner Rev	view	Completed

## Subsequent Rounds of Review

Based on your comments, you may be routed on new round(s) of review. You will receive a notification email and a new Department Review task will appear in your Task List.

To complete your new review task, follow the same steps outlined in the sections above, as needed. If you are ready to recommend approval of a project, remember to change the status of all of your comments and markups to "Resolved" in the Review Comments matrix. You will not be allowed to submit a recommendation of approval without all items having a status of either "Resolved" or "Info Only".

#### Global File Compare

This feature enables the comparing of files in different projects. It is not available to applicants, only reviewers and project coordinators. The Global File Compare tab will only show up on projects created after it was implemented in February 2021, however you can compare files from ANY two projects on the system.

In the review eForm, go to the Global File Compare tab as shown below. Enter the two project numbers having documents you wish to compare, then expand the folders and check the boxes next to the two files you wish to compare. Click "Compare Selected Files."

🕻 My Planner Review Review - W	/ork - Microsoft Edge	-
🧔   🔂 https://pdox92t	lincoln.ne.gov/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wf	lowTaskID=8993&RemoteInvoke=false
MY I	PLANNER REVIEW REVIEW	ProjectFlow PLANNING
Task Information Re	sources Discussion Board Global File Compare	
	OPEN FILE	COMPARE FILE
Select Project	SP22010	FPPL22013
Select File	<ul> <li>SP22010</li> <li>Application Plans (PDF) (2 - 2 New)         <ul> <li>GRADING.pdf New</li> <li>SITE.pdf New</li> <li>GIS-CAD</li> <li>Text Documents</li> <li>Final Approved Plans</li> <li>Miscellaneous Documents</li> <li>Law Dept</li> </ul> </li> </ul>	<ul> <li>FPPL22013</li> <li>Application Plans (PDF) (2 - 0 New)</li> <li>GRADING.pdf V2</li> <li>SITE.pdf V2</li> <li>GIS-CAD</li> <li>Text Documents</li> <li>Final Approved Plans</li> <li>Miscellaneous Documents</li> <li>Law Dept</li> </ul>
		Compare Selected Files Page 24

## Quick Review

This feature allows the coordinating planner to request a review outside the normal workflow. Reviewers may receive such a request from time to time. The reviewer will be notified by email of the request.

- 1. Accept your Quick Review Response task by clicking "Accept" as shown below.
- 2. Then click the task name to the right to open the task window.

Tasks Files	Status Info Repo	rts Discuss Revie	ews <b>SP22010:</b> Sr	nowy Meadow CUP			
Start New Work	Start New Workflow						
Refresh Save Set	tings			Quick Filter: S	elect One 🗸 🗸	$\Box$ Show all tasks for all us	
ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY	DUE DATE	
	Contains	▼ Contains	▼ Contains	Contains	Contains	▼ On	
Accept	Applicant Resubmit Task	SP22010	Applicant	Pending	Medium	6/30/22 2:04 PM	
Accept	Quick Review Respons	sp22010	Airport Authority	Pending	Low	6/6/22 2:06 PM	
1 - 2 of 2 records							

3. The Quick Review Response window opens. You can access any files that you have been assigned to review directly from within this window. The planner may have written instructions to you which appear towards the top of the window under Selected Cycle Comments/Instructions. Scroll down and open/review the documents. Put your general comments in the Responder Comments box at the top of the window. You MUST also put a comment in the box next to each of the documents - "OK" is sufficient at a minimum. Click "Complete" when you are finished to send your comments to the planner.

k Review Response - Wo	rk - Microsoft Edge			- 🗆
https://pdox92	t.lincoln.ne.gov/ProjectDox	WebUI/WorkflowForms/Eform.aspx	?wflowTaskID=8999&Remo	oteInvoke=false
QUICK RI	EVIEW RESP	ONSE		ProjectFlow QuickReview
Task Instruction		vings and provide any applicable comme	nts and status. sdfsdfsd	
Requested By: Instance Name: Cycle: Selected Cycle Comments/Instructions:	Rachel Christopher (rchristoph SP22010 - Planning Template 1 sdfsdfsd	-		
Responder Commen	its			
GROUP NAME	FULL NAME	EMAIL	TASK STATUS	RESPONDER COMMENTS
Airport Authority	Rachel Christopher	rchristopher@lincoln.ne.gov	Accepted	
		Complete	Save For Later Close	

## Reports

Several reports are available to reviewers. To view a report, navigate to the applicable project. Click the "Reports" tab on the project screen. The report you will likely use most often is "Plan Review - Department Review Status" which shows all reviewer recommendations submitted to date in a matrix format.

	City of Lincoln and Lancaster County					
			Home Q Project: Enter project name Create Project All Tasks 💄 Logout 🔮 Admin			
Tasks File: Refresh Save						
ACTION	REPORT NAME	REPORT TYPE	REPORT DESCRIPTION			
	Contains	Contains	V Contains			
līα	Current Project - All Emails Sent	Project	All template emails sent from within this project			
Ιō	Current Project - All Group Users	Project	All project users listed by group and name			
līq	Current Project - All Logged Events	Project	All logged events for a project between specified dates			
līq	Current Project - All Uploaded Files with Sheet Sizes	Project	All uploaded files with sheet sizes within this project			
lΩ	Current Project - Combined Discussions	Project	Project discussion comments, discuss file and workflow form discussions			
līα	Current Project - Discussion Comments with All Participants	Project	Project discussion comments listing all topic participants			
lα	Current Project - Timesheet Logs	Project	All timesheet values entered for this project			
IΩ	Current Project - Unpublished Files	Project	All unpublished files within this project			
lα	Current Project - User Activity History by Date	Project	All logged project events by a named user between specified dates			
ιö	Dynamic Review - Department Review Status	ProjectFlow	The status of all reviews for each of the sub-workflows in a dynamic review			
līα	Dynamic Review - Workflow Routing Slip	ProjectFlow	The sequential route of all tasks for each of the sub-workflows in a dynamic review			
τā	Plan Review - Department Review Status	ProjectFlow	Status of departmental reviews for a specified workflow			
ιö	Plan Review - Discussion Board Plan Review	ProjectFlow	Discussions within workflow task forms used within this project			
ΞQ	Plan Review - Review Comments	ProjectFlow	Lists the review comments, checklist and changemark details for a workflow instance review cycles.			