

ePLAN *Review* CITY OF AUSTIN

Project Dox Applicant Handbook



Development
CITY OF AUSTIN
SERVICES DEPARTMENT

Building a Better and Safer Austin Together

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INTRODUCTION

The City of Austin's goal is to be the Best Managed City in the US. To that end, the Development Services Department has partnered with several vendors to offer electronic plan application, submittal, electronic payments, and electronic plan review (ePlan Review).



WHAT IS ePLAN REVIEW?

ePlan Review is a web-based electronic plan and document workflow solution powered by Project Dox, that allows citizens and City staff to initiate and complete the development plan submission, payment, review, and approval process online as opposed to a manual, paper-based process.

Project Dox creates an online, virtual project workspace which enables people from many different locations and disciplines to share the same information at the same time, facilitating communication and increasing productivity.

Here's what Project Dox does to enable online project information management:

- All the shared project information (documents, drawings, annotations, and project email) is centralized in one location so it becomes visible, accessible and usable by everyone who has been invited to the project
- The user friendly interface makes it easy for users at all technical skill levels to leverage the "power tools" in Project Dox
- Project Dox enables multiple-users access to the same information at the same time, enhancing team collaboration
- Automation features make sure that when actions take place in the workspace, those who need the updated information can be informed immediately
- Tools for interacting with information, such as view and markups, online discussions, and group email, make interacting with information timely, meaningful and productive for the whole team
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, emails, forms, annotations and markups, plus much more

Project Dox's web-enabled collaboration empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, paper means.

How Does ePlan Review Work?

When an applicant (architect, engineer, homeowner, business owner, contractor, or agent) submits an application requiring drawings, ePlan will invite the applicant by email to upload the electronic drawings and all relevant certificates and documents. Review staff will then have simultaneous access to review the plans and note any corrections directly on the plans to ensure absolute clarity. Applicants will be notified when corrections are needed and the updated plans can be electronically resubmitted to the City. When the plans are approved, and all fees are paid, Applicants can download the final approved stamped plans. For security, while a project is in development only those with an invitation to the project will be able to access information about it. Once a project is complete, relevant information will be available to the public through [Austin Build + Connect](#). See below for the workflow process. (Figure 1)

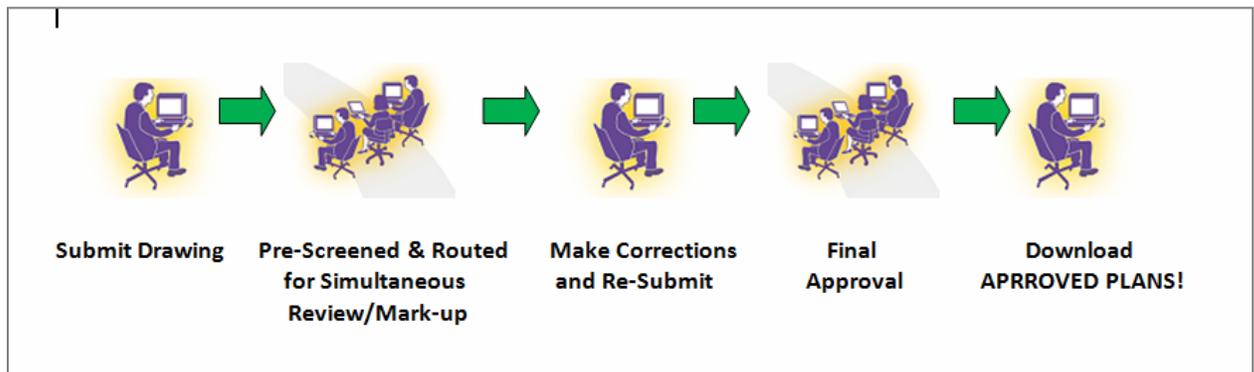


Figure 1 – Workflow

Workflow Summary

1. Customer submits application using the [Austin Build + Connect](#) portal, or brings in a paper application and payment.
2. Applicant prepares PC to use the Project Dox program (currently requires Internet Explorer 9 + and ActiveX & Silverlight plug-ins). As of March 2018 this is no longer a requirement)
3. The online application generates a project in ePlan.
4. ePlan sends “Invitation” email to customer containing:
 - Project Name (70 character limit)
 - User Name/ID (One time occurrence. This is the applicant’s email address)
 - [First time Applicants only] Temporary Password (Applicant must reset password upon initial log in)
5. Applicant logs into Project Dox, opens respective project, accepts task, invites team members, uploads documents, and verifies task completion.
6. Applicant completes “Applicant Upload” task triggering Intake quality check.
7. Intake performs prescreen quality check and if it passes, forwards to Plan Reviewers.
8. Plans Reviewers (City, County, State) perform plan review, and determine approval or rejection.
9. Applicant receives email notice with project status and instructions:
 - If corrections are needed - Upload corrected documents to send the project back for re-review, or

- If fees are due – Login to [Austin Build + Connect](#) to pay fees or pay fees in person if your fees are not yet available in AB+C.
10. Case Manager electronically stamps final plan set and uploads plans into Approved folder in Project Dox.
 11. Project Dox emails Applicant notice to download approved final plans.
 12. Applicant places 1 set of documents and plans containing ePlan approval stamp on job site. (Inspectors will also have access to the approved ePlans on their tablets.)

What Technology Do I Need To Use ePlan Review?

As a web-based system, the current version of Project Dox requires Internet Explorer Version 9 or greater running on a Windows operating system. Active X and Silverlight will also be needed and can be downloaded from the Project Dox login page. The Reviewer's change marks and thumbnails in the project can only be viewed when using Internet Explorer. Other browsers can be used for Project Dox, just not for viewing documents. These requirements expire with the next version, about Q1 2018, at which time you can use any browser.

If you are installing Silverlight on a Macintosh system, the following requirements must be met:

- Silverlight versions after 1.0 run only on Intel processor based Macintosh
- Minimum Intel Core Due 1.83-gigahertz (GHz) or higher processor with 512-MB of RAM
- Silverlight 5 requires Mac OS 10.5.7+ and Firefox 3.6+ or Safari 4+; Silverlight 4 requires Mac OS 10.4.11+ and Firefox3+ or Safari 3+

Logging in the First Time

The first time you are invited to join a project in Project Dox, you will receive an email notification, similar to the one below (Figure 2). This email will contain a temporary password and a link to Project Dox.

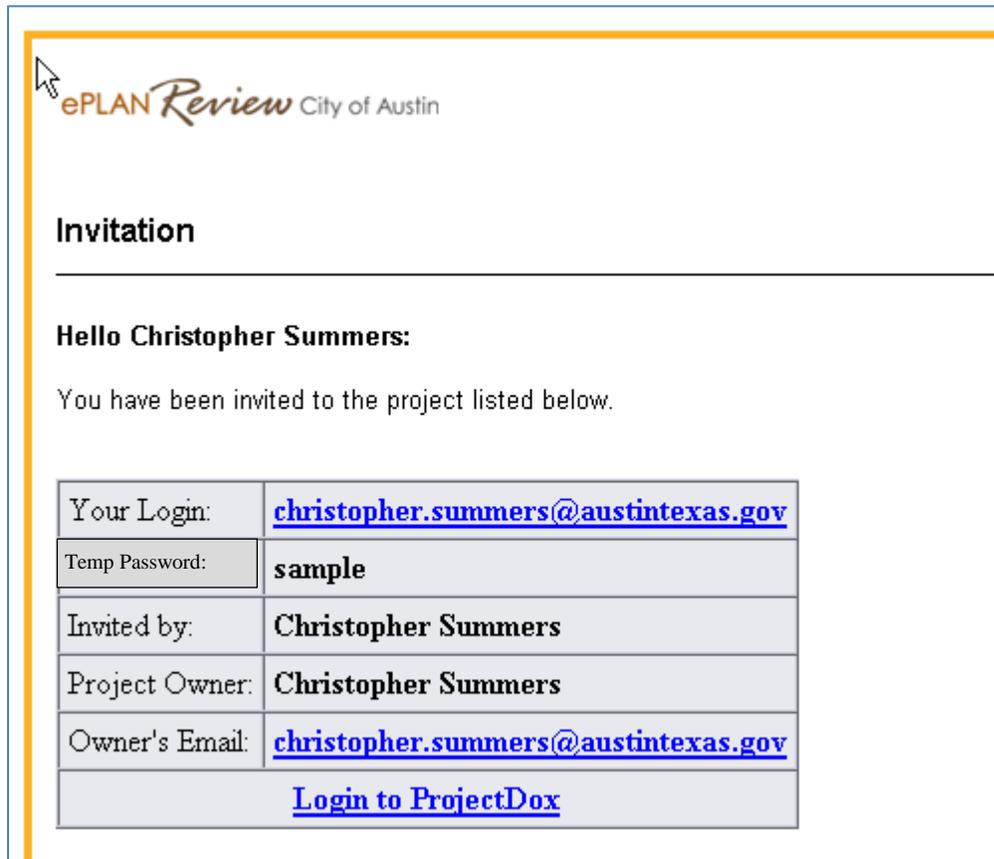


Figure 2 – Email Invitation

NOTES:

Project Dox uses pop-up windows (browser windows with no toolbars). If you login but no Project Dox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to allow pop-ups for the Project Dox site (blockers can be configured to allow pop-ups for specified sites).

The login page has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary Project Dox ActiveX controls. Click the [Install Project Dox Components](#) link to run the installation. Alternatively, your network administrator or IT department may use other methods to install the components.

The login page also typically has a link for adding a desktop shortcut to the Project Dox site, and a link for adding it to your favorites.

1. Click on the link that says “**Login to Project Dox.**” This will automatically open a web browser and take you directly to the login screen. *You can also open a web browser and type in your Project Dox URL.*

A login screen will appear, similar to the picture below. (Figure 3)

2. Type or paste the temporary password into the Password Field and click **“Login.”** The password is case sensitive and must be entered exactly as it was provided to you in the email.

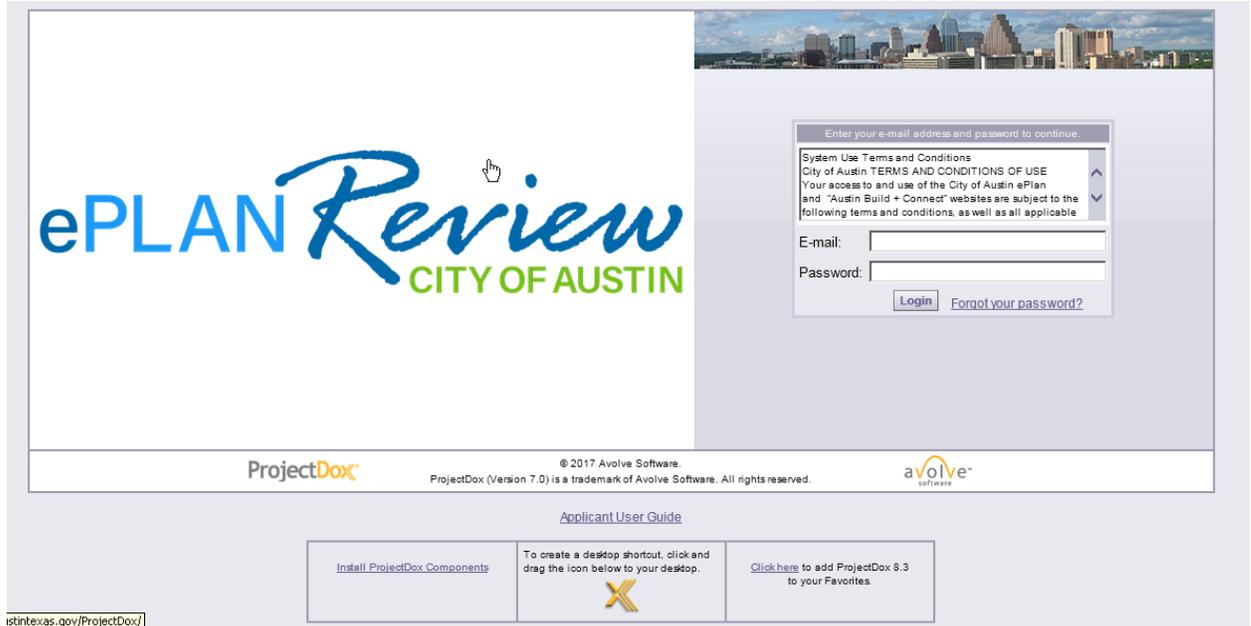


Figure 3 - Login Screen

3. Once you successfully log in, you will be taken to your User Profile, where you will need to reset your password, create a security question and answer, and enter some additional information about yourself.
4. Fill in all of the required fields (those marked with a red asterisk * and highlighted in yellow - Figure 4), and click **“Save.”** You can return to this screen at any time by clicking the **“Profile”** button on the Main Tool Bar.

The screenshot shows a 'Profile Information' form with several sections. A red box highlights the 'Change Password' section with fields for 'New password:*' and 'Confirm new password:*'. Another red box highlights the 'Password Reset Question & Answer' section with fields for 'Security question:*' and 'Security answer:*'. A third red box points to the 'Profile Information' title. A fourth red box points to the 'Required fields' section, which includes fields for 'First Name:*', 'Last Name:*', 'Email:*', 'Title:*', 'Company:*', 'Address 1:*', 'Address 2:', 'City:*', 'State/Province:*', 'Postal Code:*', 'Phone:*', 'Mobile:', 'Stamps:', and 'Language:*'. A fifth red box points to the 'Required fields are indicated by an asterisk and highlighted' text.

Figure 4 - Completing User Profile

- After saving your profile information, you will be taken to the Home Page (Figure 5), where your list of Active Projects will display. When tasks have been assigned, they will also display on home page in the Active Task List. Once logged in, applicants will have the ability to invite others to their project and reassign tasks to others in their work group.

The screenshot shows the Home Page of the ePLAN Review system. The 'Active Projects List' section displays a table with the following data:

| Project | Options | Description | Owner | Status | Create date |
|-------------------------------------------|---------|-----------------------------|------------|-----------------------|-----------------------|
| 2016-112158 PSL_Folger0201-11599359 | | 110 SAN ANTONIO ST | Web.L10101 | Approved and Released | 9/14/2016 9:09:33 AM |
| 2017-027830 PSL_Folger0201-11605709 | | 500 1/2 W WILLIAM CANNON DR | Web.L10101 | Approved and Released | 3/9/2017 8:50:26 AM |
| 03-02-2017 11:34-AM - test permit project | | Permit project description | Web.L10101 | Awaiting Upload | 3/22/2017 11:34:20 AM |

The 'Active Task List' section below shows 'No tasks are available at this time.'

Figure 5 - Home Page

Logging in After the First Time

When logging into Project Dox after your first time, you will use the password that you entered in your User Profile page. After logging in, you will be taken to your home page. From this page, you can view all of the projects you have been invited to and all tasks for you to complete.

Forgot Your Password?

If you ever forget your password, click on the “**Forgot Your Password?**” link next to the “**Login**” button. The use of the “**Forgot Your Password?**” link requires that you have logged in at least once and no longer have a temporary password associated to your account.

NAVIGATION BASICS

Home Page Navigation

Main Tool Bar – This group of buttons provides your primary navigation functions

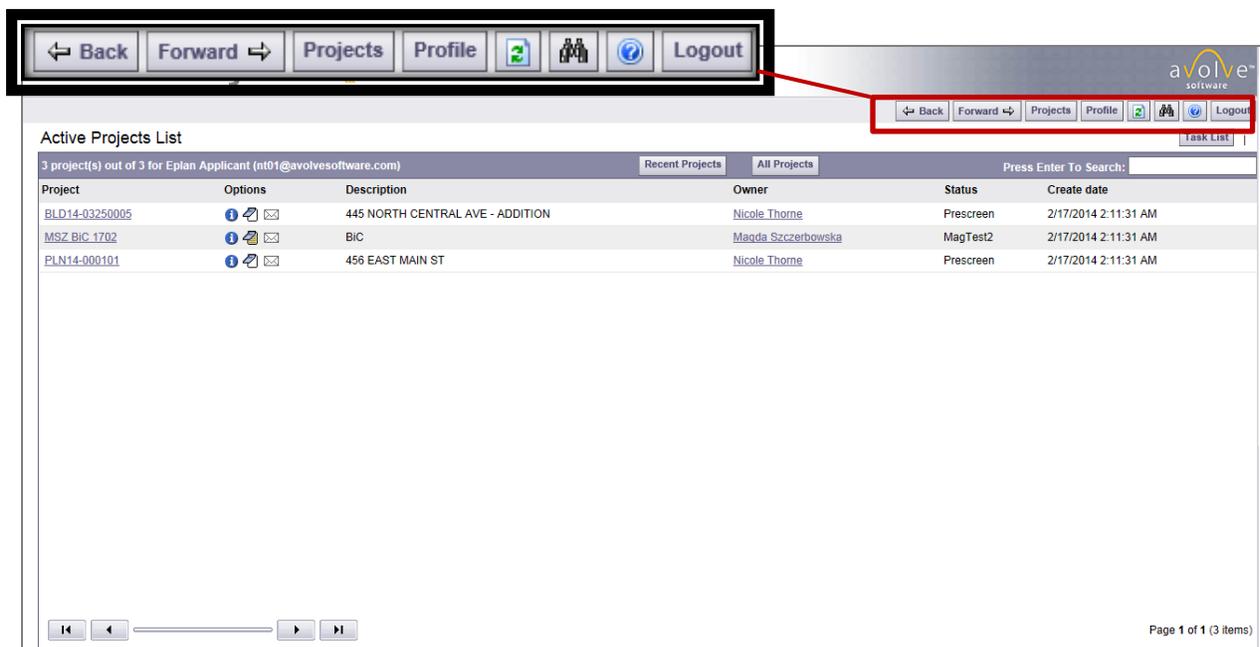


Figure 6 - Navigation Buttons

- “**Back**” and “**Forward**” – function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed
- “**Projects**” – will take you back to the home page where your list of active projects and tasks are displayed
- “**Site Wide Reports Tab**” – allows you to generate several types of reports for a project. See the “Run Reports” section for more information about reports
- “**Profile**” – will take you to your User Profile, where you can edit your personal information or change your password
- “**Reload**”  – will refresh the current page

- **“Search”**  – allows you to search for a project based on the key information entered into the Project Info Page. It also allows you to search for keywords within a project
- **“Help”**  – takes you to the Project Dox Help site. Use the index or search functions to find instructions on specific aspects of Project Dox
- **“Logout”** – logs you out of ePlan Review

Project Navigation

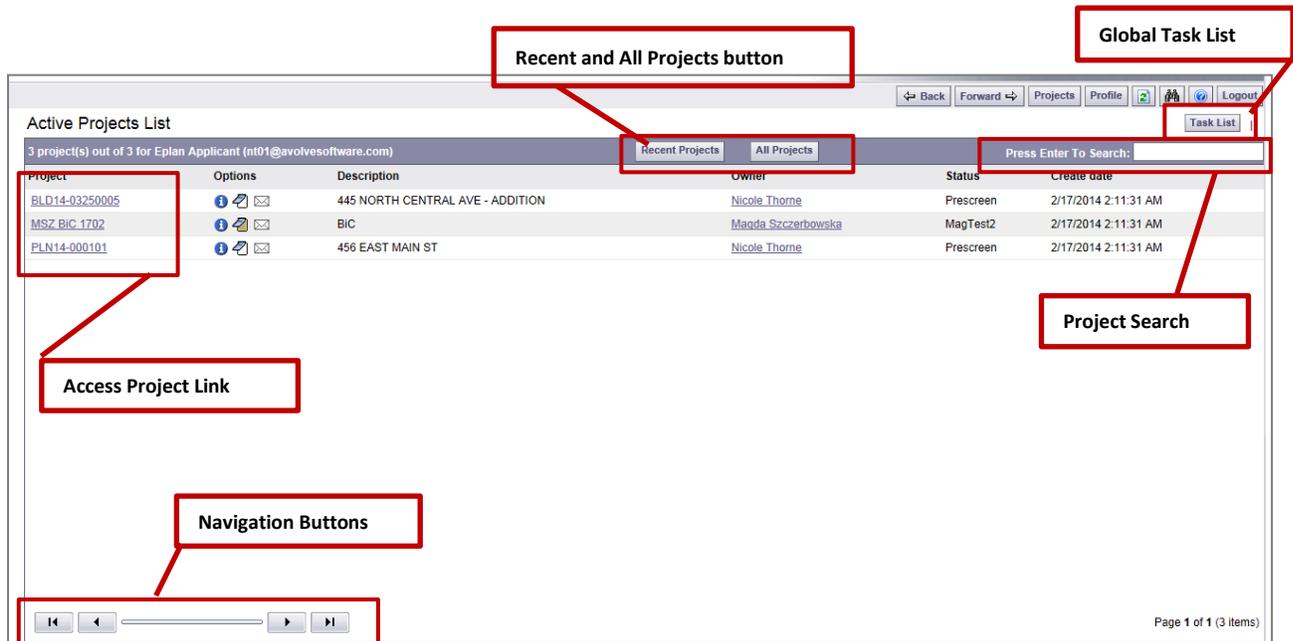
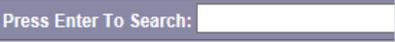


Figure 7 - Project Navigation

- **“Project Search Field”**  – is a partial word search that will provide results that contain the words entered into the Search Field for any of the columns listed: Project, Description, Owner, and Status. For example, a search for “14” with the above projects would result in two of three projects displaying because these projects have a “14” contained in the Project field
- **“Project Sorting Buttons”**  – After conducting a project search, you can view all of your projects again by clicking on the **“All Projects”** button. The **“Recent Projects”** button will show the 15 most recently accessed projects with the most recently accessed always displaying at the top
- **“Active Projects List”** – The Active Project List provides you with basic information about every project assigned to you. You can sort your projects by name (or number), description, owner, creation date, or status by clicking the header of each of column. You can access a project by clicking on the project link, which will take you to the project’s main page.

Note: Hovering over a Project Name displays the date when the project was created.

- **“Task List”**  – shows any tasks requiring action from you for all projects in a separate page

- **“Navigation Buttons”**  – The Project List and the Task List are set to display a limited number of entries at a time. You can use these buttons to move to the first, previous, next, or last page

Project Options Toolbar

Each project has the Project Options Toolbar displaying the project related features. (Figure 8)

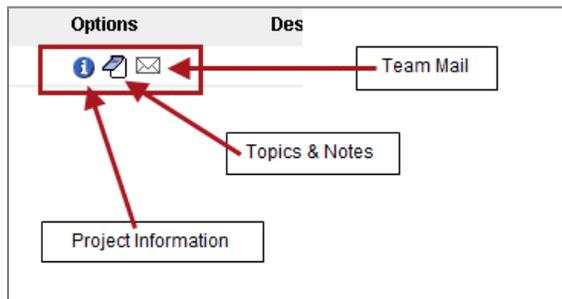


Figure 8 - Option Buttons

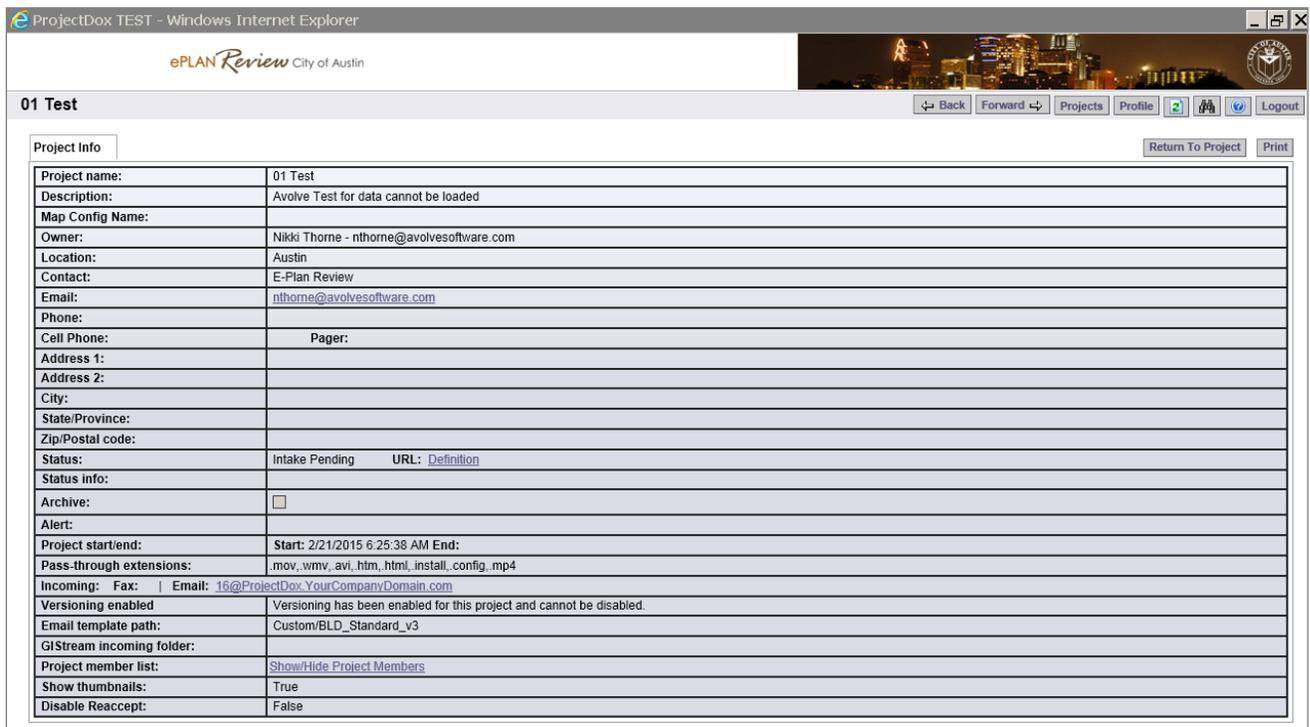
- **“Project Info Tab”**  – displays basic project information
- **“Topic and Notes”**  - allows for electronic conversations to be recorded between members of the project. Only staff members have access to this feature at the project level
- **“Team Mail”**  - allows for an email to be composed and sent from the project to project members. This is saved as part of the project

PROJECT INFORMATION PAGE

The Project Information Page (Figure 9) lists non-editable items for the project:

- Project Name and Description
- Map Config Name: Displays GIS Map associated to the project (The GIS module will be implemented soon)
- Location and Contact Information
- Project Status: Status of the overall project as determined by the administrator or workflow
- Status Info: Additional field available for entry by an administrator
- Archive: Selection of this checkbox by an administrator will remove the project from the user’s active projects list
- Alert: Will display project alerts and messages
- Project Start/End: Project Start is the date the project was created (this is not editable)

- Pass-through Extensions: List of file types that can be uploaded into the project without being published by ePlan Review. These files will display in the projects with the  icon and require you to have the software on the computer to be able to view the file. Some common entries are: .bmp, .png, .tiff, .jpg
- Versioning Enabled: Whether versioning has been enabled for this project (See section VERSIONING AND FILE HISTORY, for more information)
- Email Template Path: Identifies the location of project specific email templates in the server configuration to be used by the project
- GStream Incoming Folder [Not yet implemented]:
- Project Member List: Displays the list of project members, their contact information, and login status
- Show Thumbnails: Whether drawing file thumbnails display in the project

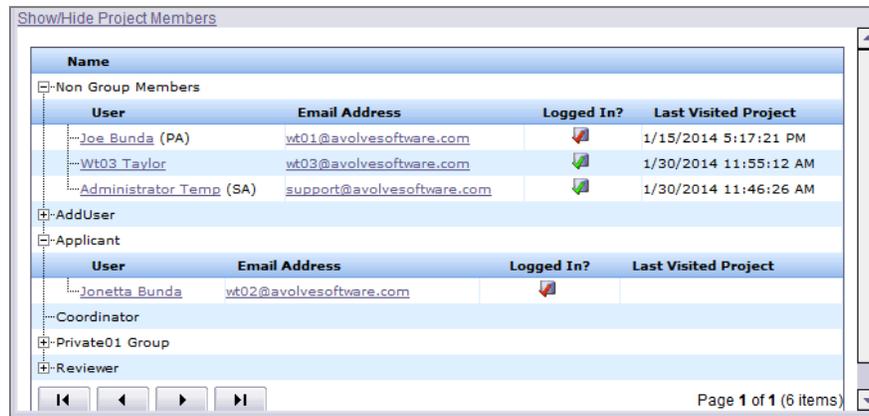


| | | |
|--------------------------|--|----------------------------------------------------------------------------|
| Project name: | | 01 Test |
| Description: | | Avolve Test for data cannot be loaded |
| Map Config Name: | | |
| Owner: | | Nikki Thorne - nthorne@avolvesoftware.com |
| Location: | | Austin |
| Contact: | | E-Plan Review |
| Email: | | nthorne@avolvesoftware.com |
| Phone: | | |
| Cell Phone: | | Pager: |
| Address 1: | | |
| Address 2: | | |
| City: | | |
| State/Province: | | |
| Zip/Postal code: | | |
| Status: | | Intake Pending URL: Definition |
| Status info: | | |
| Archive: | | <input type="checkbox"/> |
| Alert: | | |
| Project start/end: | | Start: 2/21/2015 6:25:38 AM End: |
| Pass-through extensions: | | .mov, wmv, avi, htm, html, install, config, mp4 |
| Incoming Fax: | | 16@ProjectDox.YourCompanyDomain.com |
| Versioning enabled: | | Versioning has been enabled for this project and cannot be disabled. |
| Email template path: | | Custom/BLD_Standard_v3 |
| GStream incoming folder: | | |
| Project member list: | | Show/Hide Project Members |
| Show thumbnails: | | True |
| Disable Reaccept: | | False |

Figure 9 - Project Information Page

Show-Hide Member List

Select the link once to display a hierarchical list of group and non-group members for the project, click again to hide it. (Figure 10)



The screenshot shows a window titled "Show/Hide Project Members" with a tree view on the left and a table of details on the right. The tree view includes "Non Group Members", "AddUser", "Applicant", "Coordinator", "Private01 Group", and "Reviewer". The table displays user information for the selected item.

| User | Email Address | Logged In? | Last Visited Project |
|-------------------------|----------------------------|-----------------------------------------------------------------------------------|-----------------------|
| Joe Bunda (PA) | wt01@avolvesoftware.com |  | 1/15/2014 5:17:21 PM |
| Wt03 Taylor | wt03@avolvesoftware.com |  | 1/30/2014 11:55:12 AM |
| Administrator Temp (SA) | support@avolvesoftware.com |  | 1/30/2014 11:46:26 AM |

Page 1 of 1 (6 items)

Figure 10 - Project Members Listing

The interface behaves in standard Windows fashion: clicking on a + sign will expand an item to view its contents, clicking a – sign will collapse it.

You can navigate in the display to see users (as provided by your permissions) and information about them:

- User's name
- Email address
- Group membership
- Indication if a user is logged in to Project Dox
 -  Green checkmark = logged in
 -  Red Checkmark = not logged in
- Date and time of a project member's last visit to the project

PROJECT VIEW

Entering a Project

On the Active Projects List on the home page, click the link under the "Project" column to access the project view.

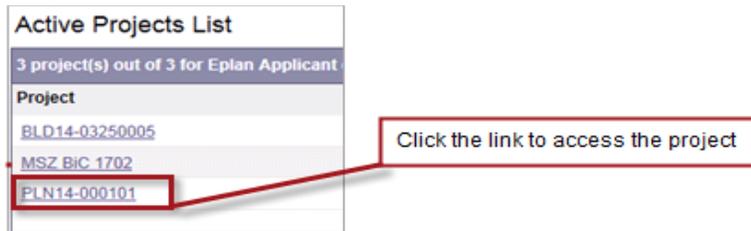


Figure 11 - Selecting a Project

The left side of the screen displays the folder structure of the project. The right side of the page contains an abbreviated version of project information and the **Project Feature Tool** bar in the upper right. (Figure 12)

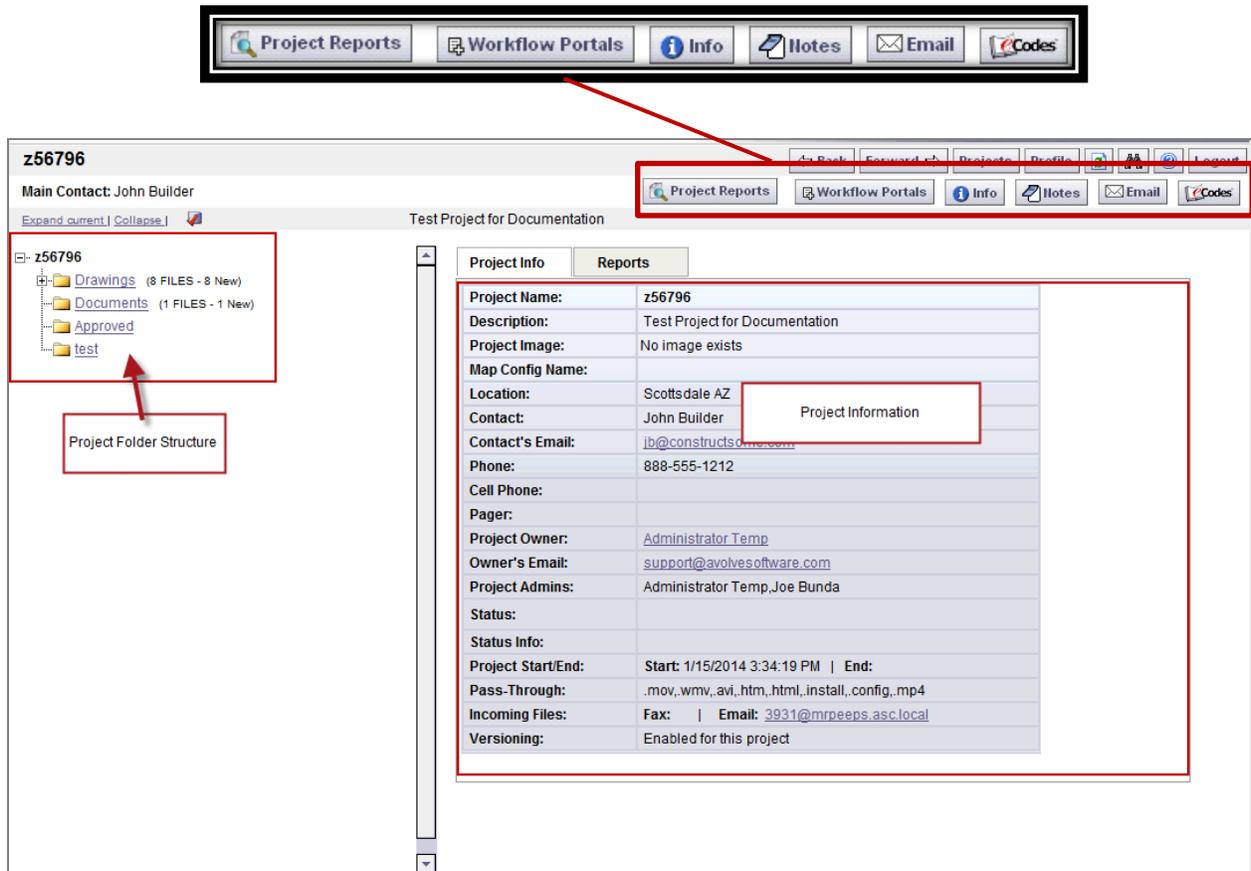


Figure 12 - Project Page

Accepting Tasks

After you log in you will see your home page with your active projects listed at the top (Figure 13). The bottom part of the screen will be your Active Task List. Click on the task name to accept the task. Click on the Project Name to enter the project and upload your updates.

| Active Task List | | | | | | | | |
|-----------------------------------|-----------------------------------|-----------------------------------------------------|----------|----------|-----------|----------------------|----------------------|---------------|
| Project Name | Task | Attached To | Status | Priority | Due date | Created On | Updated On | Updated By |
| Applicant invite1 | ApplicantResubmit | Christopher.Applicant@austintexas.gov for Applicant | Accepted | | 4/29/2015 | 5/11/2015 4:20:37 PM | 5/14/2015 2:13:35 PM | Christopher.A |

Navigation buttons: Home, Previous, Next, End

Figure 13 - Active Task List

Task eForm

Once you accept your task, the following eform will open (Figures 14 & 15). On this eform will be instructions to assist you in completing the task. You can invite others to your project and reassign this task to someone else in your group. Lastly, you can see what the reviewers have commented on each file in your project.

ProjectDox Plan Review Form - Windows Internet Explorer

City of Austin
ePLAN Review
City of Austin

[Click here to go to the projects folder](#)
[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information | Contact Information | Resources | Checklist Report (0) | Routing Slip

Project Name: Applicant invite1
 Review Coordinator: Chris Summers (Christopher.Summers@austintexas.gov)
 Review Cycle: 4
 Workflow/Activity Name: Plan_Review_Workflow / ApplicantResubmit
 Activity Instructions: Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.
 Current User Logon: Chris Applicant (Christopher.Applicant@austintexas.gov)

Additional people I want to add to the project

First Name: Stacey
 Last Name: testing applicant reassignment
 Email Address: testing applicant reassignment@testing.com
[Invite](#)

REASSIGN APPLICANTS | Return To Group | Reassign Applicants

CHANGEMARKS - Review Cycle: ALL

Filter Changemarks by Group:

- All
- Environmental Review

Filter Changemarks by Keyword: [SEARCH](#) [REFRESH](#)

[Click Here to Load Changemarks...](#)

| Status | File | Cycle | Department | File | Markup | Description | Details | Applicant Response |
|--------|-----------------------------------------------------------------------------------|-------|----------------------|----------------------------|--------|-------------|------------------------------|--------------------------------|
| No |  | 1 | Environmental Review | ARCH-FLOR-1_AppUPLOAD1.pdf | asd | EV 1 | This is the first CC review | This is the applicant response |
| No |  | 1 | Environmental Review | ARCH-FLOR-1_AppUPLOAD1.pdf | asd | EV2 | Second EV note on this sheet | This is second |

Show Only Unresolved Changemarks

CHECKLISTS

Filter Checklists by Group:

- All
- Environmental Review

[SEARCH](#)

| Cycle | ID | Group | Comment Text | Status | Updated | Update |
|-------|-----------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|---------------------|---------------------|
| 1 | SITE Plan-EV2 | Environmental Review | Add ECM Appendix P-6 notes to the general notes sheet. OR Provide the current ECM Appendix P-6 notes | NotMet | Christopher Summers | 6/5/2017 3:19:32 PM |
| 1 | SITE Plan-EV200 | Environmental Review | The applicant is advised that both City of Austin and Travis County review and approval are necessary for resubdivisions, preliminary plats, final plats, and amended plats located in Suburban Watersheds of the City of Austin ETJ | NotMet | Christopher Summers | 6/5/2017 3:19:17 PM |
| 1 | SITE Plan-EV46 | Environmental Review | Please add the following note to the plat notes: Erosion/sedimentation controls are required for all construction on each lot, including single family and duplex construction, pursuant to the Land Development Code and the Environmental Criteria Manual. | NotMet | Christopher Summers | 6/5/2017 3:19:41 PM |

DEPARTMENT REVIEW - Review Cycle: 1

| CYCLE | DEPARTMENT | REVIEWED BY | STATUS & NOTES |
|-------|----------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | ENVIRONMENTAL REVIEW | CHRISTOPHER SUMMERS CHRISTOPHER.SUMMERS@AUSTINTXAS.GOV | <p>REJECTED</p> <p>FILE EDIT VIEW FORMAT</p> <p>See check list and changemarks</p> <p>VIEW CHECKLIST</p> <p><input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE</p> <p>APPLICANT RESPONSE</p> <p>FILE EDIT VIEW FORMAT</p> <p>This is where applicants respond to comment summaries</p> |

For checklist response form →

Task Instructions

- I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "Met" or "Not Met". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.
- I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.
- I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

Figure 14 - Task eform

| SELECTED CORRECTIONS | | | | | | | |
|----------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|---------------------|---------------------|--------|
| CATEGORY1 | CATEGORY2 | COMMENT | RESPONSE | STATUS | UPDATED BY | STATUS UPDATED | REMOVE |
| SITE Plan | Boat Dock | Add ECM Appendix P-6 notes to the general notes sheet. OR Provide the current ECM Appendix P-6 notes | This is where applicants get to respond to the reviewer checklist items so that all can be cleared. | <input type="radio"/> Met <input checked="" type="radio"/> Not Met | Christopher Summers | 6/5/2017 3:19:32 PM | |
| SITE Plan | | The applicant is advised that both City of Austin and Travis County review and approval are necessary for resubdivisions, preliminary plats, final plats, and amended plats located in Suburban Watersheds of the City of Austin ETJ | | <input type="radio"/> Met <input checked="" type="radio"/> Not Met | Christopher Summers | 6/5/2017 3:19:17 PM | |
| SITE Plan | Final Plat | Please add the following note to the plat notes: Erosion/sedimentation controls are required for all construction on each lot, including single family and duplex construction, pursuant to the Land Development Code and the Environmental Criteria Manual. | | <input type="radio"/> Met <input checked="" type="radio"/> Not Met | Christopher Summers | 6/5/2017 3:19:41 PM | |

Figure 15 - Checklist response form

You can filter comments by review cycle and see a thumbnail of the file and the change marks along with comments the reviewer made. This markup name is a hyperlink which will take you directly to the file and zoom into the area of the change mark. You can click the [View Checklist](#) link to access the response form. At the bottom are three checkboxes you must select in order to complete the task.

Accepting Your Task

When you logged in, there is an Active Project list at the top of the screen and your Active Task list at the bottom. Another way to accept your task is to click the Task list button in the Project View.



It looks like this when you have a task:

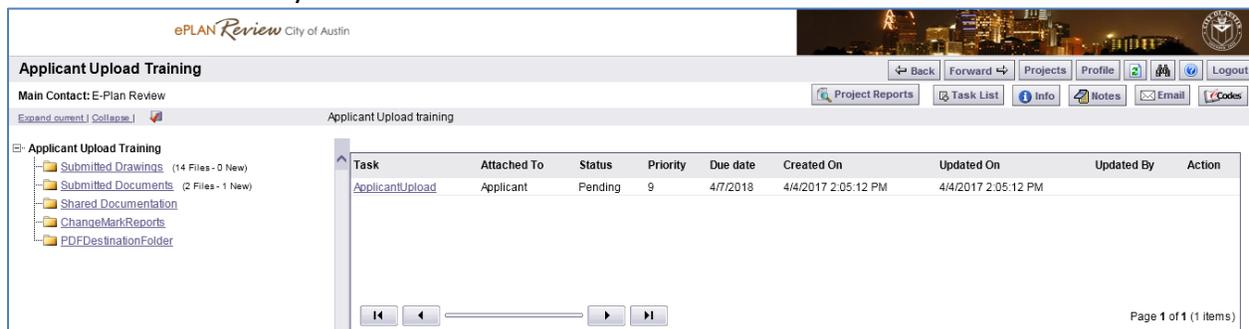


Figure 16 Open project task list

Again, you can click the name of the task as you did from the home page to open your task eform.

Project Folders

Navigation in the folder structure follows conventions typical in Windows: click a “+” sign to view a folder’s subfolder; click a “-” sign to collapse the view back to a single folder. Note that the folder names are actually links: click on a folder name to view its contents. You can also expand or collapse the view by clicking on the links above the folder structure.

NOTE:

About “Page Loading.” Page loading means that not all the contents of a list may load at first opening – this results in faster loading of a screen. An example of this behavior can be seen when viewing the list of files in a folder. With page loading, there may appear to be 20 files in the folder. However, when you scroll to the bottom and keep the mouse button depressed, another batch of 20 files will appear. If you continue this process, eventually all the files will be loaded. If your site is set for page loading, and you wish to select all the files in a folder, you will need to follow the above process until no more files load. Then you can click the checkbox to select all files in the folder.

If a folder contains files a count of the files will be displayed, next to the folder name

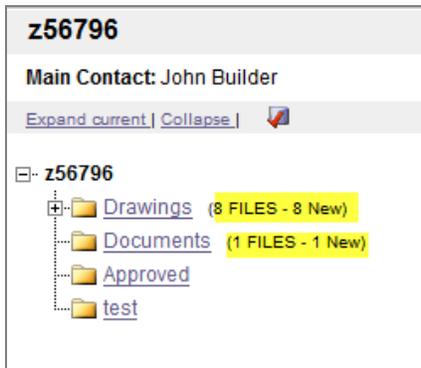


Figure 17 - File Counts

For example, the Drawings folder in the figure above contains eight files, and all eight of them are “New.” A file is considered “New” for three days after it arrives in the folder. Once a file’s age in the folder passes three days, it will be part of the “FILES” count, and drops out of the “New” count.

View Project Files

To view project files, enter the project folder by clicking the folder name. The left side of the window will display the files within the folder. Use the expand and collapse icons +/- to display just the filename or the thumbnail for the folder or choose the +/- icons at the top of each file to collapse each file individually.

By default, each file will be listed with a thumbnail, file name, upload date and time, file size, author (who uploaded the file), and relevant file action icons based on your permissions. To return to the folder view, click the “**View Folders**” button.

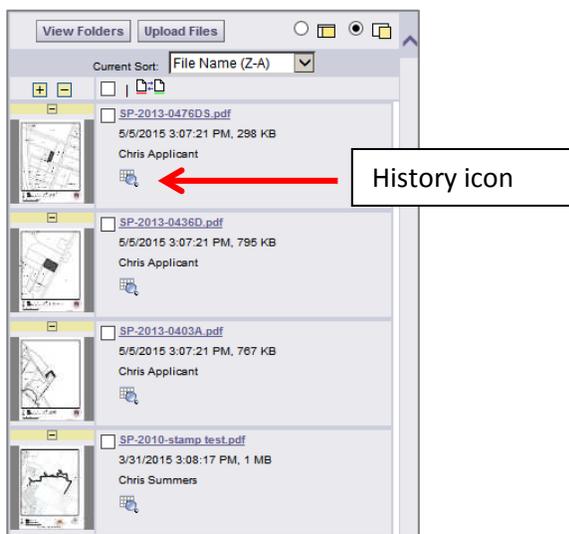


Figure 18 - Folder Contents

To see a larger version of the thumbnail without opening the file, hover the cursor over the file.

To view a large version of the file, left click on the file name or thumbnail image. The Viewer will launch and display the selected file. There are two modes for displaying the Project Dox Viewer window:

- Set Project Dox Viewer in right-side panel 
- Set Project Dox Viewer in separate window 

By default, the Viewer displays in the right panel of the Project Dox window. (Figure 19)

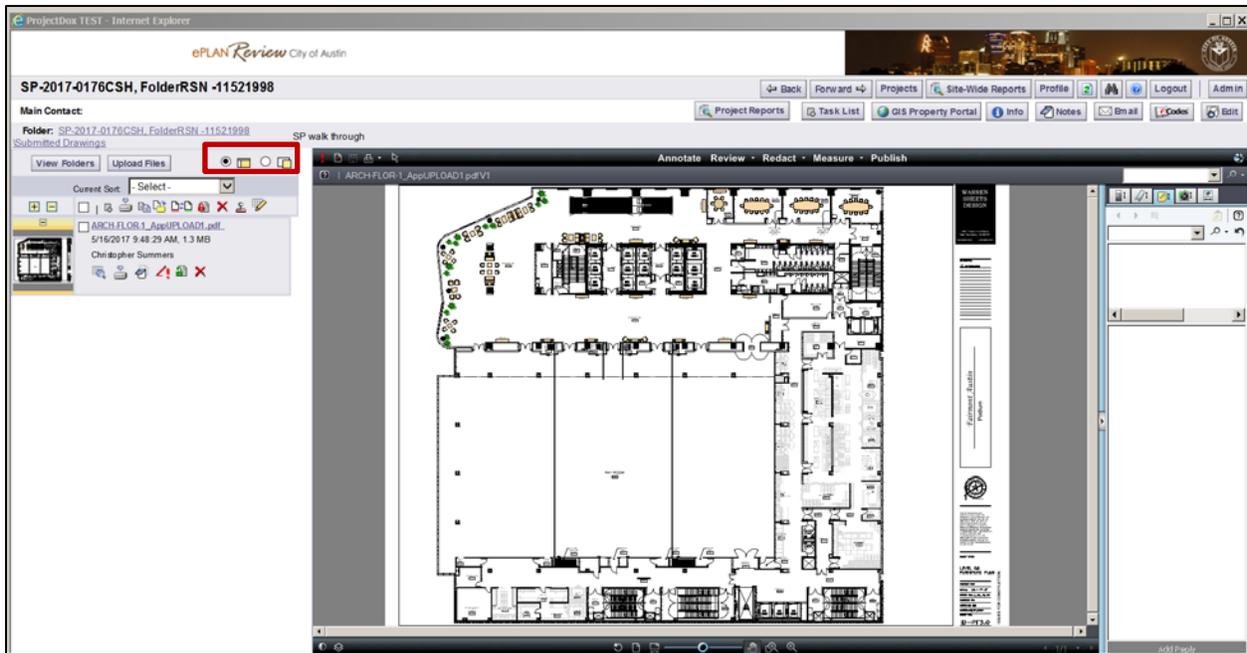


Figure 19 - Viewer Display in Right Panel

To launch the Viewer in a separate browser window, click the  radio button above the file list. You can switch it back at any time by clicking the .

- Using the Viewer in separate window mode allows you to have multiple Viewer windows open simultaneously
- Separate window mode can take advantage of multiple monitors: Viewer and Project Dox windows can be viewed and moved independently between monitors

UPLOADING FILES

You can upload files to any project for which you have Upload privileges by clicking Upload Files:



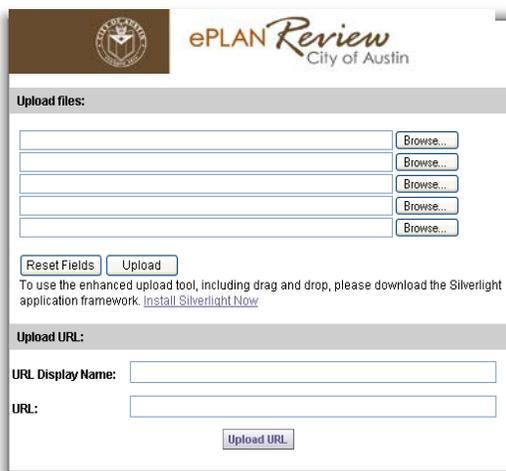
Figure 20 - Upload Files Button

The types of files that are allowed to be uploaded to the project are determined by a System Administrator. If a file type is selected that is not allowed for the site you will either receive a message indicating the file type is not allowed, or when browsing to select the file will not find it in the display of file types to be added to ePlan Review. There are two types of controls that allow files to be uploaded:

- Project Dox Standard Upload Control – single file upload (including zip files)
- Project Dox Silverlight Upload – allows for batch file upload (highly recommended)

The appearance of the resulting screen will show whether Silverlight is installed and active. Figure 21 shows the *Upload* dialogs presented by the Project Dox and Silverlight uploaders.

TIP Files can be consolidated into .Zip files to save on upload time to the ProjectDox application. When the ZIP file is uploaded the ProjectDox application will unzip the file and process the files into the folder as individual single page or multi-page files. Zip files cannot be retained in folders within the ProjectDox application.



Project Dox Uploader



Silverlight Uploader

Figure 21 - Uploader Screens Comparison

File Standards

All drawing files must be single sheet, vector based .PDF files named according to the US National CAD Standard naming convention (eg.EP-5-15: electrical power- details-pg.15) which can also be found on the ePlan Resources page. All other documents can be multi-page .PDF, or MS Word documents. Engineer's seals should also be applied to every drawing, where applicable. Scanned copies are not acceptable.

Scale:

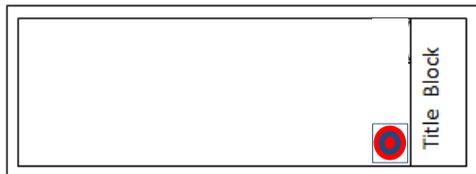
Plans must be generated at a defined scale (i.e. $\frac{1}{4}'' = 1'$, $\frac{1}{2}'' = 1'$, etc...) to allow staff to verify dimensions and areas using the Adobe Acrobat measurement tools. Graphic scales should also be included.

Page Orientation:

All plans must be set to landscape orientation with the top of the page at the top of the monitor. A north arrow shall be included on all plans. Other document types may be set to either landscape or portrait orientation with the top of the page at the top of the page.

Tile Block & Approved Seal:

Please leave a clear 3x3 inch space next to the title block on each page so the APPROVED seal will not overwrite information on the drawing.



Submitted Documents

Here is a brief list of the documents that should be uploaded with your drawings:

Commercial Building projects

Structural plans or structural verification, sealed by Engineer if required

Complete Architectural Plans, including key floor plan

Historic Landmark Commission request, if applicable

Building Design Calculation Worksheet (If Green Building Options are required, Submit GBP Conditional Approval letter signed & sealed by project architect & attached to each set of Plans with Building Plan application)

Complete Mechanical Plans:

- a. HVAC
- b. Stove hood(s)
- c. Walk-in cooler(s) / freezer(s)

Complete Plumbing Plans/Med Gas Plans and if applicable, AW Auxiliary Water application

Water/Wastewater Tap Receipts OR Approval Document for OSS, if applicable

Complete Electrical Plans

Completed Commercial Electrical Permitting Application (Multi-phased or multi-level projects)

Energy Calcs: Lighting, Envelope and/or Mechanical (Comcheck-EZ) Provide narrative describing how the project intends to comply w/Sec. C406 of the 2012 IECC.

Health Department application, if applicable

AW WWW Industrial Waste application, if applicable

Approved Site Plan case # OR a Site Development Exemption request

Concurrent letter and copies of the submitted site plan (the same plan that is submitted to Site Plan for review)

Electric Service Planning Application form signed by the Austin Energy Utility Official

Original approved project number (*for Revisions only*)

Texas Accessibility Standards (TAS) required
(residential projects, multi-family projects, and commercial projects less than \$50,000 are exempted)

Texas Department of Health (TDH) Demolition/Renovation Notification Form or Asbestos letter (see submittal requirements)

List of special structural Inspections Required (part of Building Application)

Texas Department of L. R.

Previously approved BP/MEP case number ____ .

Subdivision & Site Plan Projects

Legible 4" x 4" Location Map on a separate 8½" x 11" sheet

Signed Submittal Verification and Inspection Authorization Form

TIA Fee plus five (5) copies (if TIA is required)

Sealed Engineer's Summary Letter (same engineer as sealed on plans)

Plans (24" x 36" format **only**) for formal (Refer to completeness check results for required #)

Full size tax maps (1"=100') showing properties within **500'** of the red-lined site area (limits of construction) **or** For projects located outside of Travis County, submit a list of names and addresses of *all property owners within a 500' radius of the site.*

Current Tax Certificates (not required if tax exempt)

Engineering Reports (Refer to completeness check results for required #)

Project Description Form

If applicant indicates they are requesting waiver/ variance(s) on the application, then a letter requesting the waiver/ variance(s) must be submitted as well, plus additional fees if applicable. (*If a Late Hours Permit is required, a waiver of Compatibility Standards must be submitted, if applicable.*)

Uploading Files Using Silverlight

Silverlight provides for enhanced file uploading including batch upload, and drag and drop file selection from a Windows explorer viewer into the Upload window list. Silverlight can be installed from the Project Dox the login page by clicking the "**Install Project Dox Components**", and requires administration rights on the computer for installation. The version of Silverlight may need to be altered depending upon your system's operating system version. Check the system requirements document or speak with your System Administrator if you have questions.

To install Silverlight:

1. Click "**Run**" in the Silverlight file installation dialog and then click "**Install Now**" on the Install Silverlight screen (Figure 22).



Figure 22 - Install Silverlight Screen

To upload files:

1. Use one of the two following methods:
 - Click "**Browse**" to locate and select the files you would like to upload to the current folder. Click "**Open**" to select the file(s)

2. Open a Windows Explorer window and use drag and drop to place the selected files into the control window. (When using drag and drop to move files, the Add dialog box should be closed.) When you have completed your selection, click **“Upload,”** or to begin again, click **“Cancel”**

Figure 23 shows the Uploader dialog with files selected. You can delete selected files from the list by clicking the **“x”** to the right of the file size. You can also click **“Cancel,”** **“Upload,”** or **“Add more files”**.

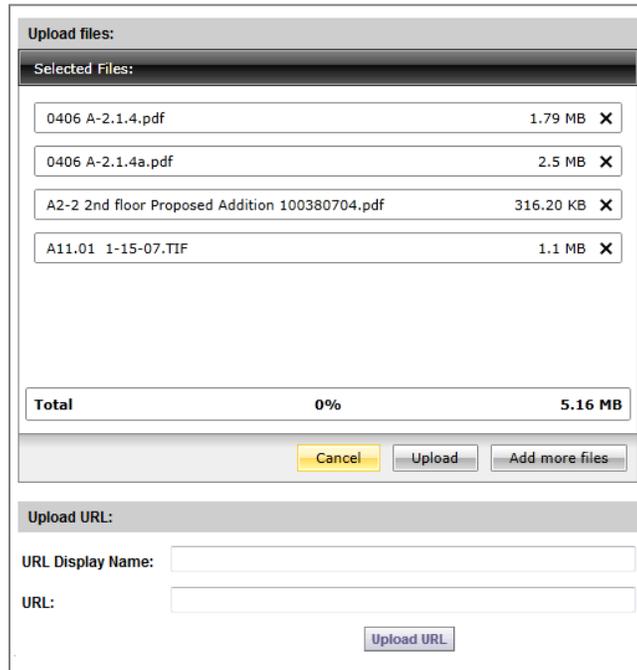


Figure 23 - Files Selected for Upload

3. When the file *uploading* has completed, a dialog box appears, Figure 24. The publishing process will continue in the background until completed.

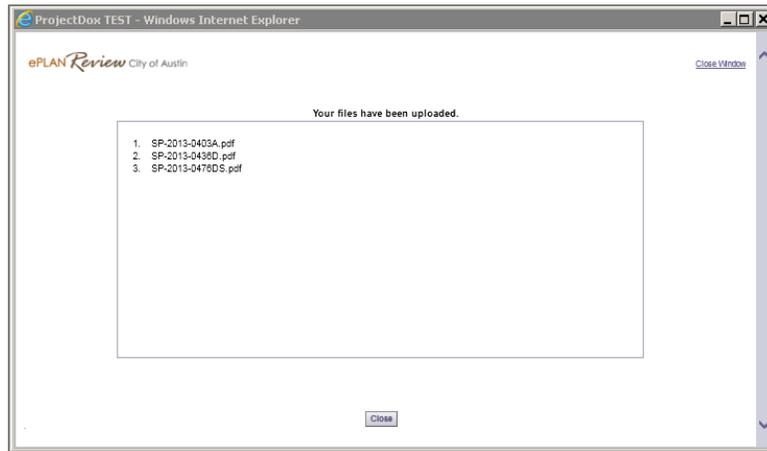


Figure 24 - Upload Complete

Uploading Files with Project Dox Uploader

If Silverlight is not installed, you will be presented with the standard Project Dox Upload control. This feature is restricted to the number of the files that can be uploaded and requires you to browse and select each file for placement in the upload dialog window. We highly recommend using the Silverlight upload control to allow for more efficient uploads to the Project Dox site. Silverlight will only be required until March 2018.

1. From the Project page select the folder where you want to upload your file.
2. Click the “**Upload Files**” button (next to View Folders).
3. The Upload dialog appears. (Figure 25)
4. In the Upload Files area, click “Browse...” to locate and select the files you want to upload to the current folder. The maximum size file name is limited to 70 characters.

Figure 25 - Project Dox Uploader Dialog

5. In the resulting dialog box, navigate to, and click to select the file to upload (Figure 26):

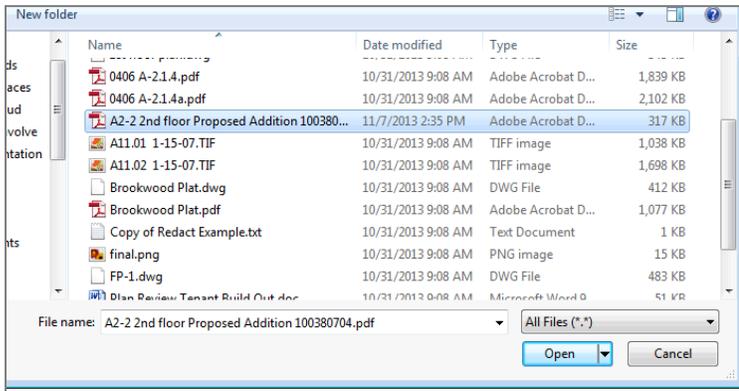


Figure 26 - Upload File Selection

6. Click “**Open**” to add the file to the list of files to upload.
7. You’ll be taken back to the Uploader dialog box. Click “**Reset Fields**” to clear all file selections, or “**Upload**” to upload the files to the project folder.
8. When the file uploading has completed, the publishing process will continue in the background.

File Name and Submittal Standards

The City of Austin requires the [US National CAD Standard](#) file naming conventions. Plans/documents must use this format for naming conventions. Only searchable, vector based PDF drawings are accepted for calculations. Reports and other supporting documentation (non-drawing files) document types may include .bmp, .jpg, .png, and .docx.

The file names should align with the following syntax: **Discipline Designator**, (Level 1 & 2, the Level 2 discipline designator is optional.) **Major Group**, two **Minor Groups**, **Status**, and **Discipline Section Sequence Number**. For example, AD-3-01 is Architectural Demolition-Sections-pg. 01.

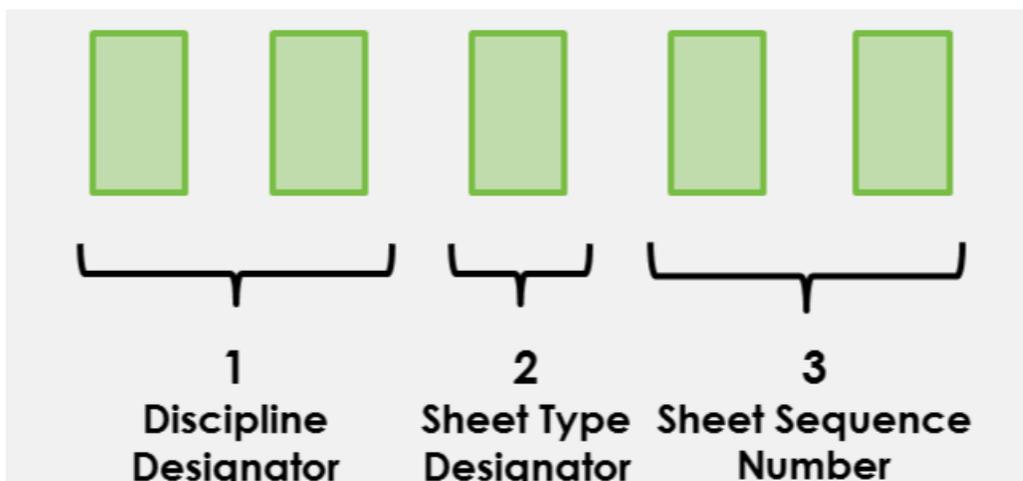


Figure 27 – CAD Standard Naming Convention

The various layer names are optional, but follow the same National Standards if used.
See the examples below:

P-DOMW-EQPM-MCUT-01: Plumbing-Domestic water systems-Equipment-Material
cut view-Discipline- pg01
CG-ESMT-SSWR-N-11: Civil Grading-Easements-Sanitary sewer- NEW-
Discipline- pg 11

All drawings must meet the following standards:

- Single plan sheet per file (exception is cover page and notes)
- File name as outlined above
- File must be .pdf with white background
- File names must not exceed 70 characters in length
- Units and scale must be properly set (and included on every drawing sheet)
- Professional of record electronic stamp must be on every drawing (if not for reference)

Border Standards

A 3" X 3" area must be reserved at the **lower right** corner of **ALL** drawings for the **APPROVAL STAMP**. Please leave the lower right corner completely blank on all drawings (with exception of the border). This applies to all sheet sizes.

Sample Cover Page TOC Index

| <u>SHEET INDEX</u> | <u>Plan set page number</u> |
|---------------------------|------------------------------------|
| Cover Sheet | 1 |
| Legend | 2 |
| Notes | 3 |

ARCHITECTURAL

A-1-02 = Architectural Plans - Sheet 02
AS-0-01= Architectural Site- General- Sheet 01

PLUMBING

PD-0-01 = Plumbing Demolition – General –Sheet 01

COMPLETING YOUR TASK

If you have the responsibility for determining when a task is complete, you can click the 'Upload Complete' button at the bottom of the eform after you have checked any confirmation boxes.

Adding Team Members and Reassigning a task

If you are not the responsible party or you need to add other team members so they can upload their part of the project, you can do so using the middle part of the eform.

Additional people I want to add to the project

First Name:

Last Name:

Email Address:

[Invite](#)

REASSIGN APPLICANTS Return To Group

Figure 28 – Reassigning task

To invite others just type their name and email address and click the invite link. If you need to reassign the task to the person responsible for task completion, select their name from the pull down list and click the ‘Reassign Applicants’ button. The task will then disappear from your task list and reappear on theirs’. Everyone invited to the project will still have the ability to upload files until the task is completed by the responsible party

Checklist items

When you get your updates requested task there are a few things you need to look for. The first is the presence of checklist items. The quickest way to find them is to look at the top eform tabs.

[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information | Contact Information | Resources | Checklist Report (2) | Routing Slip

| Cycle | ID | Group | Comment Text | Status | Updated | Update |
|-------|-----------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|---------------------|-----------------------|
| 3 | SITE Plan-AECW7 | Flood Plain Review | Compliance with Sec 25-4-199 of the Land Development Code is required prior to release. Streetlight fees are paid to Austin Energy, address check to City of Austin. Fee is \$375 per residential lot for subdivisions powered by underground electric lines. \$250 per residential lot if overhead electric lines are installed. # lots x \$375 / lot = \$000 Contact this reviewer when you are ready to submit payment for exchange of receipt. | NotMet | Christopher Summers | 1/19/2017 11:40:56 AM |
| 3 | SITE Plan-AECW4 | Flood Plain Review | This property is located in the Network. Contact Rudy Vela at 512-505-7650 regarding underground electric service. If a transformer vault is required, show it in the size and location to which he agrees. | NotMet | Christopher Summers | 1/19/2017 11:40:56 AM |

[Export to Excel](#)

Figure 29 – Checklist tab

These may or may not be also noted in the comment summary. The second place to find them is the View Checklist under each comment summary.

DEPARTMENT REVIEW - Review Cycle: 3

| CYCLE | DEPARTMENT | REVIEWED BY | STATUS & NOTES |
|-------------------------------------|------------|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | 3 | FLOOD PLAIN REVIEW | <p>CHRISTOPHER SUMMERS CHRISTOPHER.SUMMERS@AUSTINTEXAS.GOV</p> <p>REJECTED</p> <p>see changemarks and checklist</p> <p>VIEW CHECKLIST</p> <p><input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE</p> |

Figure 30 – Opening Checklist

This is where you can respond directly to each item individually. On the next cycle, the reviewer will examine your response and determine whether it meets the requested corrections or not.

| ELECTED CORRECTIONS | | | | | | | |
|---------------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|--------------------------------------------------------------------|---------------------|-----------------------|--------|
| CATEGORY1 | CATEGORY3 | COMMENT | RESPONSE | STATUS | UPDATED BY | STATUS UPDATED | REMOVE |
| SITE Plan | | Compliance with Sec 25-4-199 of the Land Development Code is required prior to release. Streetlight fees are paid to Austin Energy, address check to City of Austin. Fee is \$375 per residential lot for subdivisions powered by underground electric lines, \$250 per residential lot if overhead electric lines are installed. # lots x \$375 / lot = \$000 Contact this reviewer when you are ready to submit | | <input type="radio"/> Met <input checked="" type="radio"/> Not Met | Christopher Summers | 1/19/2017 11:40:56 AM | |

Figure 31 – Checklist Response

You can also respond directly to each of the change marks from each reviewer.

| Status | File | Cycle | Department | File | Markup | Description | Details | Applicant Response |
|--------|------|-------|--------------------|--------------------|--------|-------------|-----------------------------------|--------------------|
| No | | 3 | Flood Plain Review | SF-FLOR-SHEA-2.pdf | DSF | Tree 1 | These cedars need to be PINE TREE | |
| No | | 3 | Flood Plain Review | SF-FLOR-SHEA-2.pdf | wer | BLDG_ELEC 1 | These must be GFI outlets | |

Figure 32 – Changemark response

When you have responded to all the Reviewer comments, checklist items and uploaded all the requested revisions, you can check each of those boxes at the bottom of your eform and your 'Complete' button will become active.

IMPORTANT: Please ensure all team members have finished uploading their parts of the project. After you click the 'Complete' button, your team will not be able to upload any more files until the next review cycle.

Task Instructions

I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as "**Met**" or "**Not Met**". If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.

I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.

I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

Complete
Complete Later

Figure 33 - Task Completion

VERSIONING AND FILE HISTORY

View File History

The File History icon links to a window that displays a file's details, versioning, and other history through three tabs (Main, History, and Workflow).

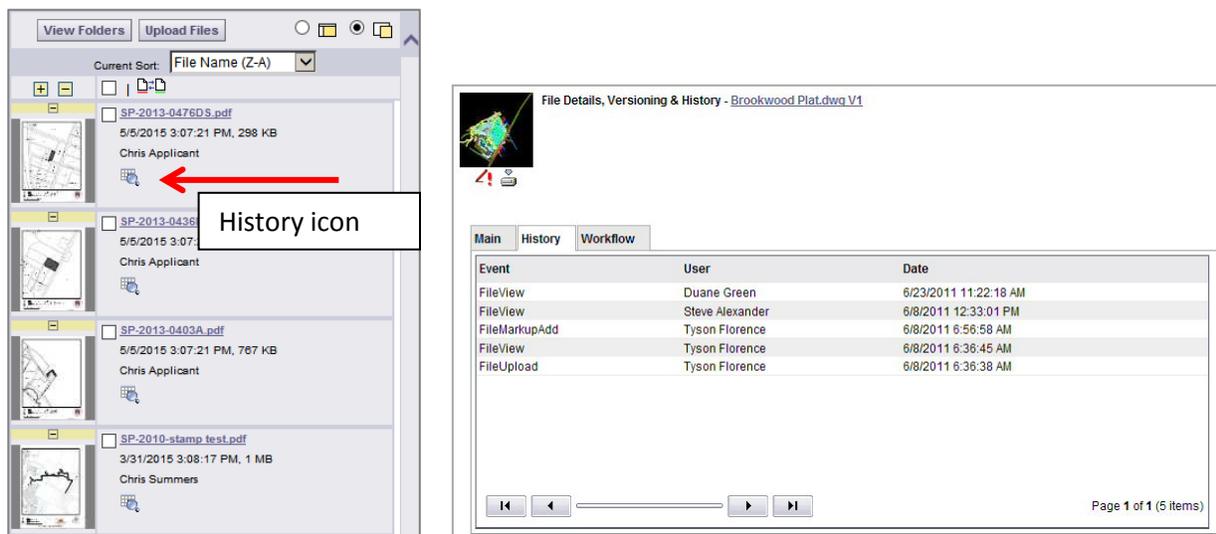


Figure 34 - File History

To view a file's history:

1. Click the history icon next to the thumbnail in the folder view.
2. The Main, History, and Workflow tabs show information about the selected file.
3. To view the file history of a specific version, if more than one version is available, click on the version number from the Go to Version selections.
4. The Main tab lists the file's details, which are editable by administrators only.

5. The History tab lists activity history for the file. Information for each event (such as viewed, downloaded, markup, etc.), includes the name of the user who performed the action, and the date and time it occurred.
6. To open the file in the Viewer, click the thumbnail image contained in the upper left corner of the View History screen (or click the file name link in the Main or History tab). If markups are associated with the file, the markups present icon  will display above the thumbnail image. You can also download the file to your system if the download icon  is present.

NOTES:

Events such as copying, moving, versioning, and batch stamping can result in a file's history being split between the earlier and later copies or versions of the file.

Versioning for project files that are uploaded to the project using the same file name are identified by ePlan Review. These files will show highlighted in blue and identified as a version candidate.

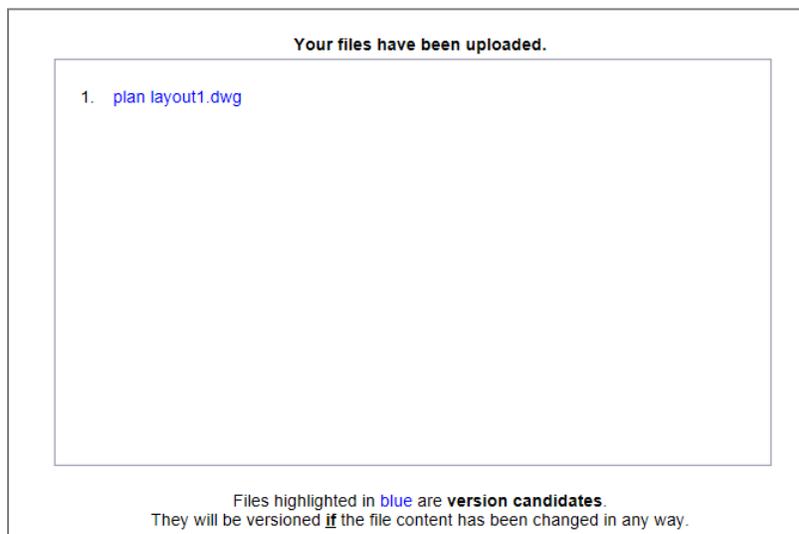


Figure 35 - Successful Version Upload

Project Dox will do a checksum of the file to see if anything within the file has changed. If changes in the file are identified, the file is incremented to its next version showing a V2 after the file name in the file view of the folder.

If multiple versions exist for the file, the File History icon will turn yellow and there will be additional features (Figure 36):

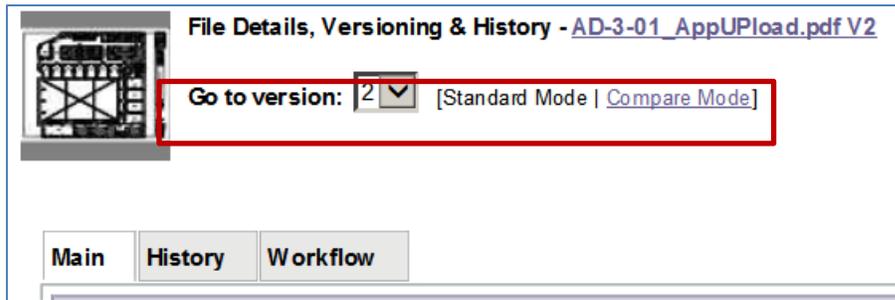


Figure 36 - File History– Versioned File

The **Go to version** dropdown allows you to select a version of the file (by default, the most recent version is selected). The tabbed areas will display only the information for the selected version.

Compare File Versions

File History is also used to access the file comparison feature for versioned files:

1. In the File History dialog, click **Compare Mode** to view thumbnails for all versions of the file.

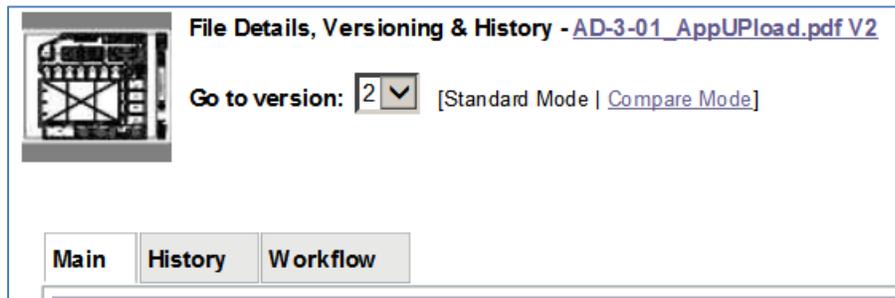


Figure 37 - File History– Compare Files

2. Click to select the check boxes for the two versions you would like to compare; then click **Compare** to view the two files in Compare mode in the Viewer:



Figure 38 - Compare File versions

FILE VIEWING FEATURES

Sort Files

When viewing the file list (thumbnails) for a folder, you can quickly sort the order of files by criteria offered in the **Current Sort** drop down list.

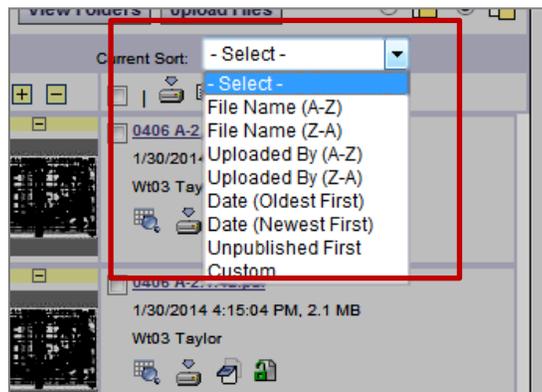


Figure 39 - File Sort Drop Down

From the dropdown, you can select to sort the list by: File name – ascending (default) or descending; Uploaded by – ascending or descending; Date uploaded – Oldest First or Newest First; Unpublished First; and Custom. The Custom sort setup is beyond the scope of this handbook, but information is available in the online help. 

This sort order is a temporary view, and affects only the currently viewed folder. Once you leave a folder, the order will revert back to the default file order.

Compare Two Files in Same Folder

You can select two files listed in a folder and open them for comparison.

1. Select the two files and click the **Compare** button .
2. The Viewer launches in Compare mode, with side-by-side as the default view.
 - The sort order in effect for the folder when you selected the two files will determine their position in the Viewer – the higher file in the list will display to the left
 - The files can be compared in the following modes: overlay, overlay differences, side-by-side, added or deleted information only, and others
 - In overlay view, elements unique to the left file display in red, those unique to the right file display in green. Unchanged areas display in gray (Figure 40)

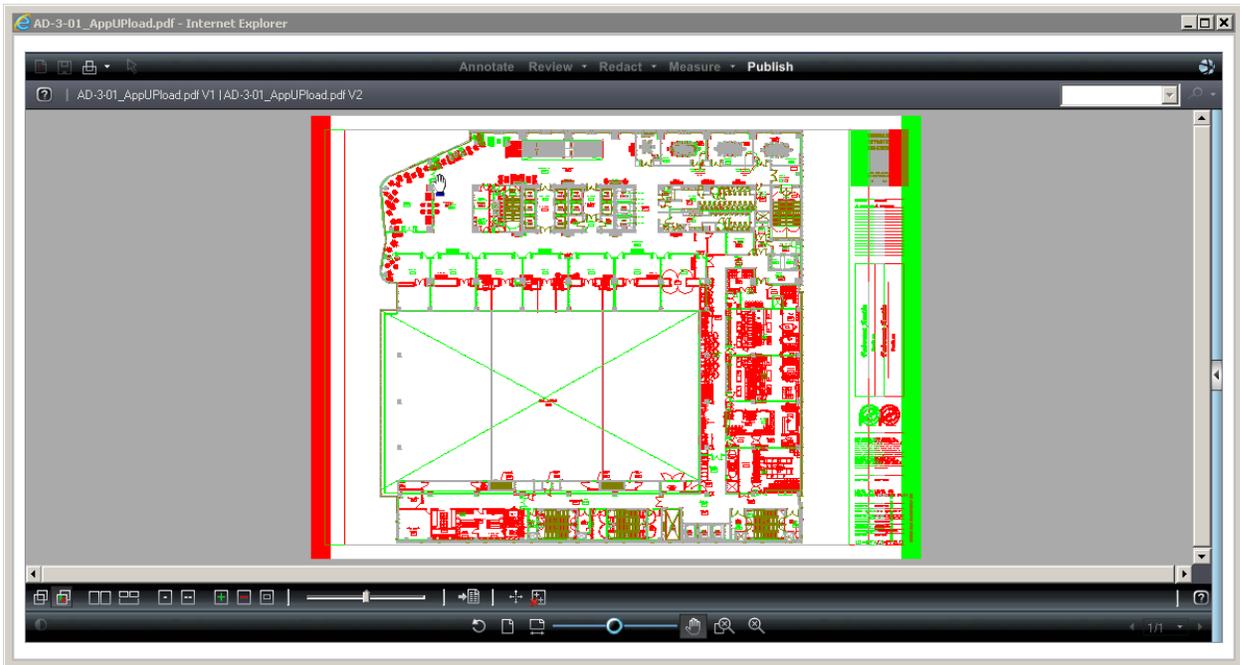


Figure 40 Overlay -Compare

- See the Viewer online help file for additional information about the compare file and the compare alignment tools

File Markups Icon

The highlighted area in Figure 41 is a Markups icon.

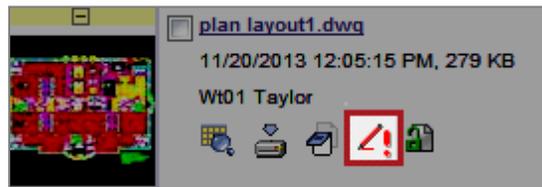


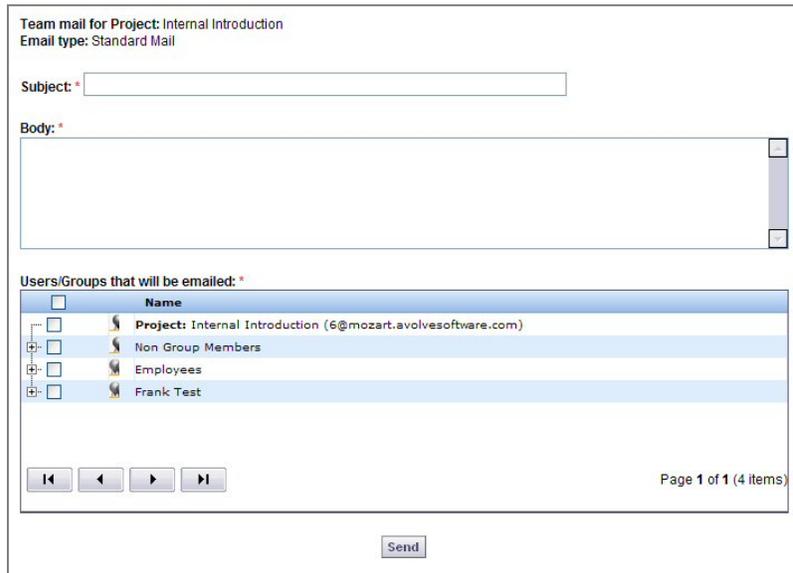
Figure 41 - Markups Icon

The presence of this icon means that there **are** change marks (annotations) associated with the file. For more information about change marks, see the Viewer help.

TEAM MAIL

Team Mail is a convenient way to send email to project members.

1. You can access Team Mail from several places in ePlan Review:
 - On the Active Projects List, in the Option button group, click the Team Mail icon  for the desired project
 - On the Project page, click the  Mail button in upper right hand corner
2. The Team Mail screen appears. (Figure 42)



Team mail for Project: Internal Introduction
Email type: Standard Mail

Subject: *

Body: *

Users/Groups that will be emailed: *

| <input type="checkbox"/> | Name |
|--------------------------|----------------------------------------------------------------|
| <input type="checkbox"/> | Project: Internal Introduction (6@m Mozart.avolvesoftware.com) |
| <input type="checkbox"/> | Non Group Members |
| <input type="checkbox"/> | Employees |
| <input type="checkbox"/> | Frank Test |

Page 1 of 1 (4 items)

Send

Figure 42 - Team Mail Screen

3. The interface for selecting recipients is the same as the one for Show-Hide Member List in a project. You can select the recipients in several ways:

- Figure 43 shows how to to select (or clear selection) all members
- You can expand and click to select or clear individual check boxes for Team Members or Project Groups as recipients

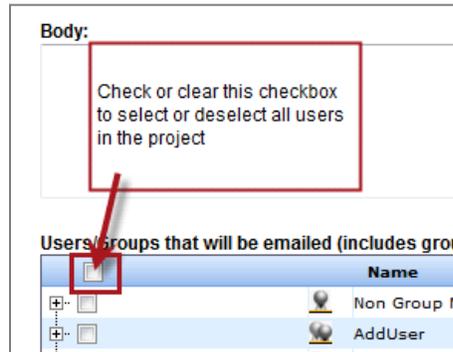


Figure 43 - Select All Project Members Box

4. Enter a message: subject and body.
5. Click **Send** to send your message.

Project Reports

Each report has a tool bar that allows additional features such as page navigation, keyword search, parameter entry, such as date range to narrow the results of the report, and the ability to export data into an alternate format.

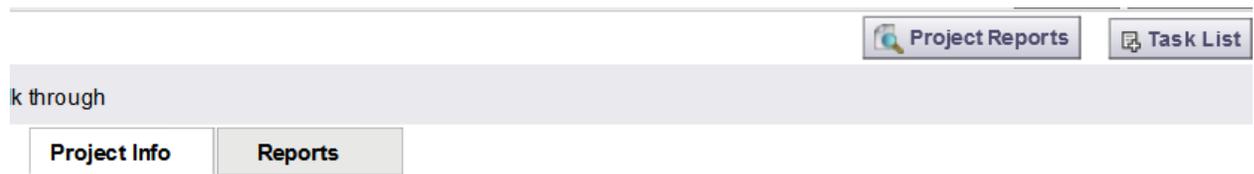


Figure 44 - Report links

To export report data into another format for viewing outside of the Project Dox application in the viewing tool bar select the format from the “Select a format” dropdown. There are several options available including XML, CSV, TIFF, PDF Web Archive and Excel, but Avolve recommends exporting the data to Excel for better quality and capability to sort and manipulate the data. (Figure 45)

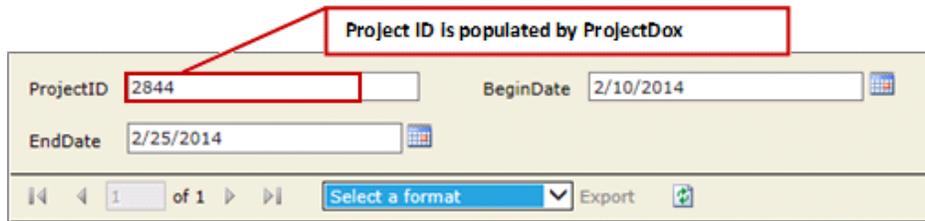


Figure 45 - Select a Format

1. From the Available Reports list, click the Report icon  to view the information in Report Viewer. The sample below is the first link, *Current Project – All Files Report*.
2. From the Export Options dropdown of the report viewer, you can choose to export the data to XML, CSV, PDF, HTML, XLS, TIFF, Word format. (Figure 46)

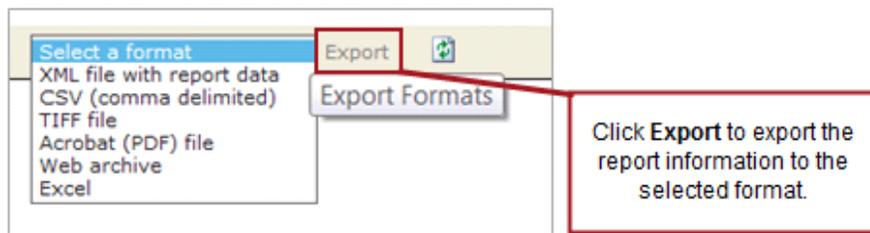


Figure 46 – Export Data

3. Click the **Export** link to export the report into the selected format and click the **Save** button to save it to a location of your choice.

SEARCHING PROJECT DOX

NOTE:

Searches will only be performed in the projects, folders, markups, and topics and notes for which you have access permission.

The Home page has a simple search text box as shown in Figure 47



Figure 47 - Search options

To use the simple search, type the word or phrase you want to match and press Enter. This will search the Project Names and Project Descriptions and return the list of matches.

Project Dox also has a more comprehensive and powerful Search tool. The Search tool makes it easier to find information, especially in large sites with many users, projects, and topics. The search engine has the ability to search for objects in the database and return all matches in

various fields and properties, markup text, topics and notes, file, folder, project names, addresses, and more. All versions of a file can be searched.

The Search tool is available in the upper right hand corner.

To use the Search tool:

1. Click the Search Tool button.
 - If selected from the home page the Scope to Search area will only display the radio button to search All Projects. This allows a search of all projects you have access to
 - If selected from within a project the Scope of Search will display the ability to search This Project and All Projects

The screenshot shows a search dialog with two tabs: 'File Search' and 'Address/Location Search'. The 'File Search' tab is selected. Below the tabs, there is a search input field with the placeholder text 'type search text here' and a 'Search' button. Below the input field, there is a section for 'Wildcard Characters' explaining that '*' can be used for multiple characters and '?' for a single character. Below that, there are radio buttons for 'Find results: any of the words' (selected) and 'exact phrase'. Below that, there is a section for 'Include entities in search' with links for 'Check All' and 'Clear All', and several checkboxes: 'File contents', 'Markup contents', 'Topics/Notes', 'File names', 'Markup names', 'Folder names', 'Incoming email contents', and 'Include file metadata in search'. At the bottom, there is a 'Scope to Search:' section with radio buttons for 'This Project' (selected) and 'All Projects'.

Figure 48 - Search Dialog

2. Type the string you want to search for:
 - Search allows full, exact, and partial word searches. To search a full word, select '**any of the words**' and enter the word, and the search engine will return all results where that word is found in its entirety. To search exact terms, select the "**exact phrase**" check box and type in the exact term you want matched. To search for partial words and phrases, use wildcard characters * or ?.
 - If you are searching with '**any of the words**', and enter "wind road," you will only get results with the whole word "wind" or the whole word "road." The search will not find "winding roads" because the whole words "wind" or "road" do not exist in either of those terms in their entirety. If you wanted to return the result "windy roadside," you would use wildcards such as "wind* road*". The words DO NOT need to be next to or near each other, just contained in their entirety somewhere in the item being searched. If you don't want to search for the entire word, use a partial search with a wildcard * or ?
 - If you search with 'exact phrase' selected, the words must be in the exact order and be an exact match. For example, if you search for "Admin User," the results will contain "admin user," but not "admin users." There is no need to add double quotes to each end of the search terms

- Search is NOT case sensitive
 - Wildcards characters do not work when using “**exact phrase**”; they should only be used with the “**any of the words**” option
3. Select the desired items from the **Include entities in search** area. Project Dox will search all the selected entities. You must select at least one entity for results.
 4. In the **Scope to Search** area, select your desired scope. When searching at the File level, your scope can be as narrow as searching a single folder or as wide as searching all projects contained in a Project Dox site.
 5. Click  (or press Enter). The results will display in the View Search Results window with the keyword or phrase highlighted. Term hit highlighting is supported in Project Dox so that when you perform a search, all files where this word or phrase exists will display. When you click on a file, you are quickly taken to the page where the first occurrence of the item exists (zoomed and highlighted).

You can use the **Address/Location Search** tab to quickly locate address information from the Project Information screens. The results appear on the bottom portion of the tab once you enter the criteria and click **Search**: