

# ProjectDox Introduction for the Community

City of Gainesville, FL



# Introducing...

# ProjectDox<sup>®</sup>




# ProjectDox<sup>®</sup> is Project Centric

- ▶ It is a document management and ePlan review system
- ▶ It manages workflow and collaboration
  - Internal and customer facing
  - 3rd parties and external agencies
- ▶ It provides benefit throughout the entire project lifecycle
- ▶ It is the hub that allows communities to fully overcome the limits of silos


# What **ProjectDox®** Adds to Permitting Systems

- ▶ **VALUE to the customer/public**
- ▶ **File management (over 250 file types)**
  - Version control
  - Stamping, rendering, printing,
  - Security and permissions
  - Information access & performance tracking
  - Reporting. All files of all types within a project
  - Customer access to mark ups and comments
- ▶ **Third parties and external agencies**
  - Contractors and reviewing agencies
  - Role based security
  - Reviewer tools for non staff members.


# What the applicant wants to know...

- What is ProjectDox electronic plan review software?
  - Why use ProjectDox?
  - How does ProjectDox work? Is it secure?
  - How do I access ProjectDox – and will it work with my current PC, tablet, iPad, etc.?
- 

# ProjectDox

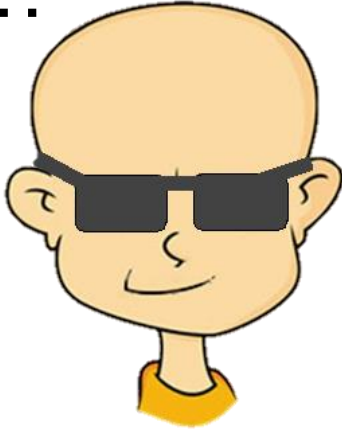
- Implemented in over 120 cities across the US and Canada
  - Web based collaboration and business process automation tool
  - Available 24 x 7 x 365
  - Manages submission and resubmission of plans and documents
  - Manages file versions and file history for the life of the project
  - Complete electronic trail of the plan review for all participants
- 

# Why ProjectDox?

- Submit documents from anywhere with internet access.
  - Reduce printing costs required for paper submission.
  - Save time submitting online and receiving email updates of resubmission requests.
  - Access your project status on the go from your laptop or mobile device.
  - Access approved and stamped plans sets online
- 

# Tell me more

How do  
I...



- Setup my computer to use ProjectDox?
- Submit my plans and documents?
- Check on the status of my project in ProjectDox?
- Receive my correction letter?
- Resubmit if corrections are required?
- Know when my project is approved?
- Obtain the approved files?



# City of Gainesville ProjectDox

Access the site using the link in emails received or navigate to:

<https://gainesville-fl-us.avolvecloud.com/ProjectDox/>

# Computer Software Requirements

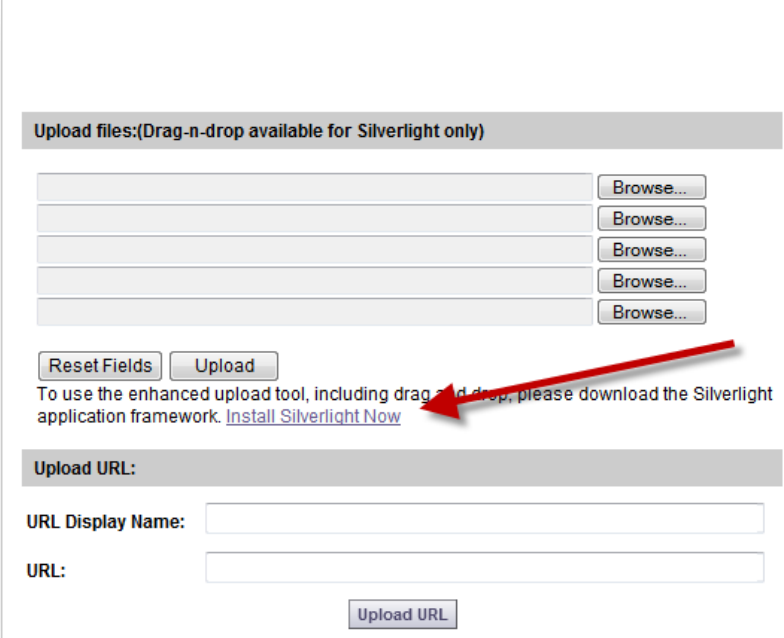


# Computer Software Requirements

- Disable pop-up blocker

## Using Internet Explorer:

1. Add the ProjectDox site URL to your trusted sites in IE.
2. If using IE 10 or greater enable Compatibility Mode.
3. Install the ProjectDox Components.



Upload files:(Drag-n-drop available for Silverlight only)

<input type="text"/>	<input data-bbox="1696 426 1798 448" type="button" value="Browse..."/>
<input type="text"/>	<input data-bbox="1696 459 1798 481" type="button" value="Browse..."/>
<input type="text"/>	<input data-bbox="1696 492 1798 514" type="button" value="Browse..."/>
<input type="text"/>	<input data-bbox="1696 525 1798 547" type="button" value="Browse..."/>
<input type="text"/>	<input data-bbox="1696 558 1798 579" type="button" value="Browse..."/>

To use the enhanced upload tool, including drag and drop, please download the Silverlight application framework. [Install Silverlight Now](#)

Upload URL:

URL Display Name:

URL:

A red arrow points from the text "Install Silverlight Now" to the "Upload URL" button.

# Initial Plan Submission



**Hello Michelle Farnsworth:**

Welcome to the City of Gainesville's electronic plan review process. In response to your recent permit application, an ePlan Review account has been created to allow you to upload your documents for review.

**First Time User?**

If this is your first time using the ProjectDox application, disable any pop-up blockers before continuing to the site. If you are accessing the application via Internet Explorer, be sure to install the required ActiveX components before attempting login by selecting the "Install ProjectDox Components" link toward the bottom left of the login screen.

To access your new permit project, follow this instructions below:

For more instructions visit [\[link for APPLICANT USER HELP needed\]](#)

1. Click the Project Permit Access link below
2. Enter your User Login (email address) and Password Provided
3. Find and select the link to your project in the Active Projects List
4. Click on the "Drawings" folder
5. Click "Upload Files" and follow the prompts to upload your drawings. Supported file types are DWG, DWF, DGN, PDF, Tiff, JPEG, DOC, and DOCX. All files must adhere to the required naming conventions listed [\[here\]](#) (see APPLICANT USER HELP - link needed)

The following steps are crucial to completing your plan submittal.

6. When all plans and documents have been uploaded to the appropriate folders, select "Workflow Portals" in the upper right task bar.
7. Select "ApplicantUpload" in the task column and click "OK" to accept the task. This will display an electronic form. Click "Upload Complete - Notify Jurisdiction" to complete your plan submission to the City of Gainesville.

User Login:	<a href="mailto:farnsworthmm@gru.com">farnsworthmm@gru.com</a>
Project Permit #:	AD-16-00123
Plan Check Coordinator:	Gael Baughman
Plan Check Coordinator's Email:	<a href="mailto:gbaughman@avolvesoftware.com">gbaughman@avolvesoftware.com</a>
<a href="#">Project Permit Access Link</a>	

For questions or concerns, please contact the City of Gainesville [via email](#) or by phone at 352-334-5023.

# Email Notifications



## Applicant Upload Task Assignment

**Attention Michelle:**

You have been assigned a task on Project: **Gainesville County Plans Template**

Please [Login to ProjectDox](#) to begin your task.

Project:	<b>Gainesville County Plans Template</b>
Task:	<b>Applicant Upload</b>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

# Login & Profile



Enter your e-mail address and password to continue.

Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use.  
CITY OF GAINESVILLE TERMS AND CONDITIONS OF USE  
Your access to and use of the [jurisdiction] Electronic Plans Review (EPR) website

E-mail:

Password:

[Forgot your password?](#)

Change Password:

New password:



Confirm new password:

Password Reset Question & Answer:

Security question:

Security answer:

## Profile Information

Contact Information	User Metadata	Project Membership	Group Membership
<input type="button" value="Save"/>			
<b>* Required field</b>			
First Name: *	<input type="text" value="Eplan"/>	Last Name: *	<input type="text" value="Reviewer02"/>
Email: *	<input type="text" value="nt02@avolvesoftware.com"/> <input checked="" type="checkbox"/> HTML format 		
Title: *	<input type="text"/>		
Company: *	<input type="text"/>		
Address 1: *	<input type="text"/>		
Address 2:	<input type="text"/>		
City: *	<input type="text"/>		
State/Province: *	<input type="text"/>	Postal Code: *	<input type="text"/>
Phone: *	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/> 		
Language: *	<input type="text" value="en"/>		

# ProjectDox Home Page



[Back](#) [Forward](#) [Projects](#) [Site-Wide Reports](#) [Profile](#) [2](#) [People](#) [Help](#) [Logout](#) | [Admin](#)

## Active Projects List

[Site-Wide Tasks](#) | [Create Project](#) | [View Archived Projects](#)

15 recently entered project(s) out of 21 for Michelle Farnsworth (farnsworthmm@gru.com)

[Recent Projects](#)

[All Projects](#)

Press Enter To Search:

Project	Options	Description	Owner	Status	Create date
<a href="#">Markup Training 1</a>	<a href="#">Info</a> <a href="#">Print</a> <a href="#">Email</a> <a href="#">Share</a>	Markup Training 1	<a href="#">Gael Baughman</a>	Applicant Corrections	9/18/2016 1:28:11 PM
<a href="#">AD-16-00027</a>	<a href="#">Info</a> <a href="#">Print</a> <a href="#">Email</a> <a href="#">Share</a>	Minor Subdivision	<a href="#">Building Review</a>	In Review	9/13/2016 5:24:39 PM

## ProjectFlow Task List

[Refresh](#)

	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TY	STATUS	PRIORITY	DUE DATE	CREATED
<a href="#">Info</a> <a href="#">Print</a>	<a href="#">Info Needed Review Task</a>	Chop Sticks	Chop Sticks - Gainesville County Plans Template - 8/22/2016 1:45:10 PM	GRU New Services Department	FirstInGroup	Pending	<a href="#">High</a>	8/23/2016 3:12:25 PM	8/22/2016 3:12:25 PM
<a href="#">Info</a> <a href="#">Print</a>	<a href="#">Additional Info Needed</a>	Sigma Kapa Sorority (Planning)	Sigma Kapa Sorority (Planning) - Gainesville Planr - 8/25/2016 8:49:53 AM	Planning Coordinator	FirstInGroup	Pending	<a href="#">High</a>	8/26/2016 11:45:03 AM	8/25/2016 11:45:03 AM

# Submit Plans and Documents



AD-16-00123

[Back](#)

[Forward](#)

[Projects](#)

[Site-Wide Reports](#)

[Profile](#)

[Logout](#)

[Adm](#)

Main Contact: Applicant Name

[Project Reports](#)

[Workflow Portals](#)

[Info](#)

[Notes](#)

[Email](#)

[E](#)

[Expand current](#) | [Collapse](#) |

Minor Development Plan

AD-16-00123

[Drawings](#) (8 Files - 14 New)

[Documents](#) (1 Files - 1 New)

[Board Review](#)

[Approved](#) (7 Files - 7 New)

Project Info

Reports

Project Name: AD-16-00123

Description: Minor Development Plan

Project Image: No image exists

Map Config Name:

Location: 123 Main St

Contact: Applicant Name

Contact's Email: [gbaughman@avolvesoftware.com](mailto:gbaughman@avolvesoftware.com)

Phone:

Cell Phone:

Project Name:

Project Owner: [Gael Baughman](#)

Owner's Email: [gbaughman@avolvesoftware.com](mailto:gbaughman@avolvesoftware.com)

Project Admins: Administrator Temp,Gael Baughman,Michelle Farnsworth,Lila Stewart,Planning Review

Status: Approved

Work Description:

Project Start/End: Start: 9/22/2016 9:01:47 AM | End:



# Uploading Documents

AD-16-00123



## Access the Folder

Drawings folder is for plans, drawings, etc

Documents folder is for supporting documentation

## Click the Upload Files Button

No files currently exist in **Index**.

To upload files into this folder

- (1) Click the Upload button below
- (2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.

View Folders

Upload Files

# Browse and Select



Upload Files

Upload URL

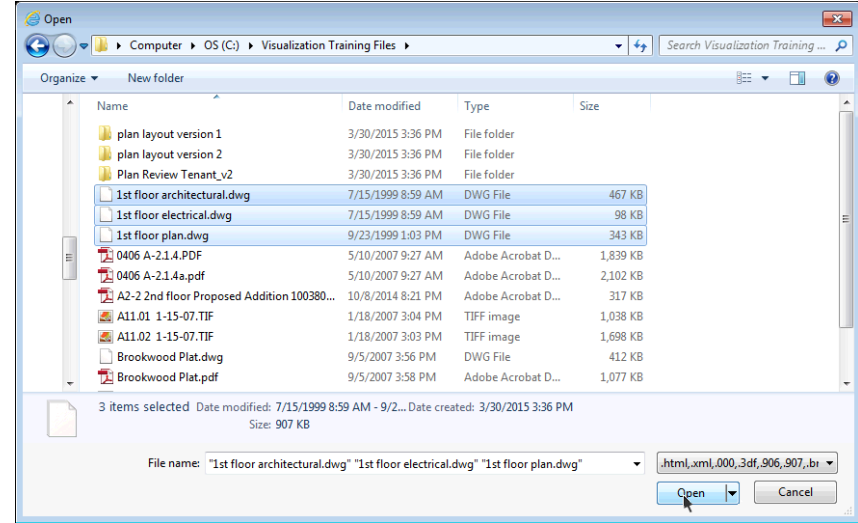
## Browse For Files

Browse for files or drag files into this area.

Browse For Files

Upload Files

[Close Window](#)



# Complete Upload to Folder

**Upload files:**

**Selected Files:**

1st floor architectural.dwg	466.86 KB	×
1st floor electrical.dwg	97.83 KB	×
1st floor plan.dwg	342.33 KB	×

**Total**

0%

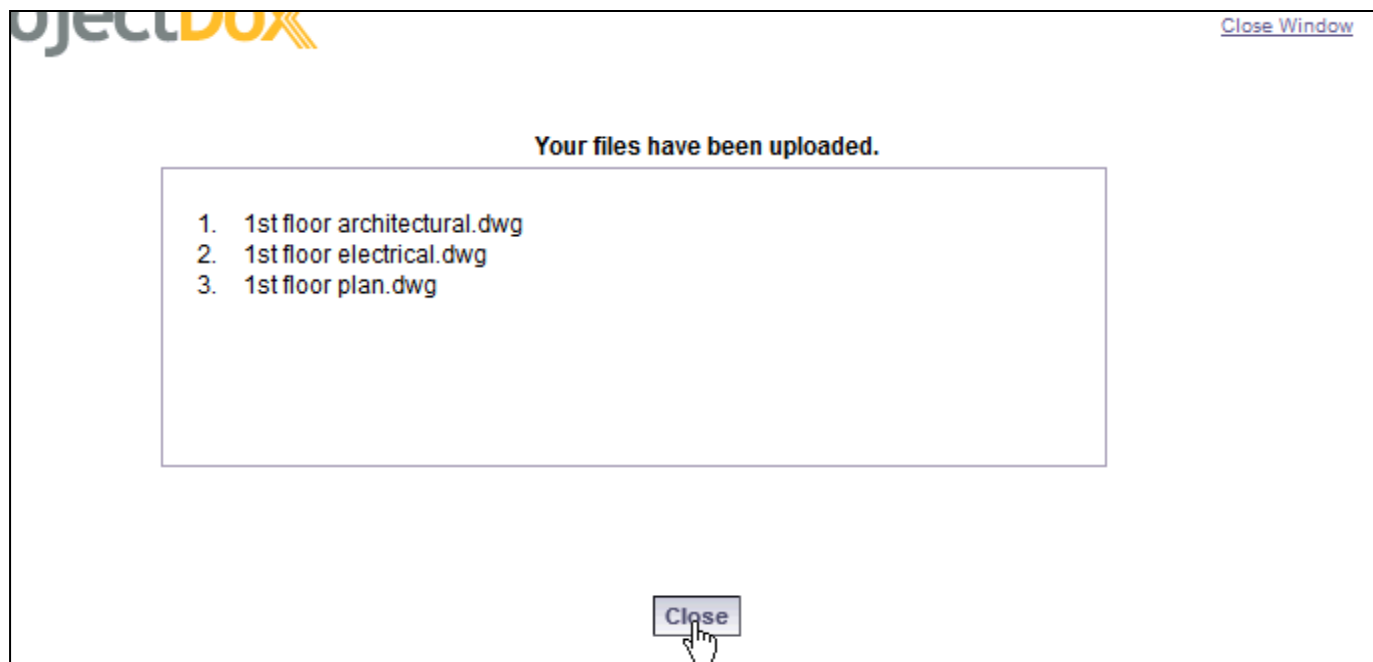
**907.3 KB**

Cancel

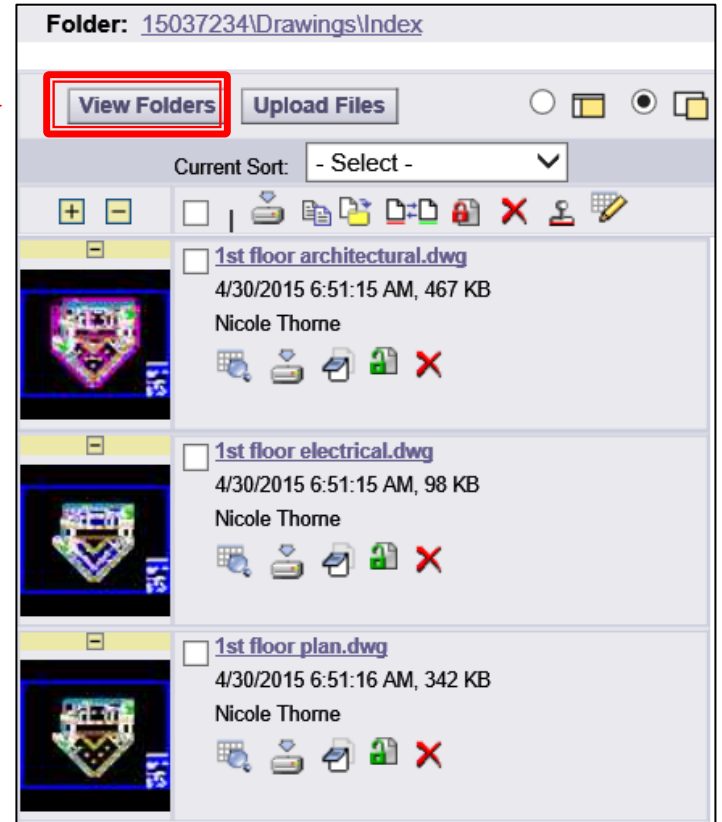
Upload

Add more files

# Upload Complete



# Navigate Between Folders



# Submission Standards

- Submit plan set as single files in any of the below formats:

DWG	DGN	DWF	PDF
-----	-----	-----	-----

- Landscape mode
- Submit documents as multi-page files in any of the below formats:

DOC	DOCX	PDF	
-----	------	-----	--


- Standard naming convention
- 

# Naming Convention Standards

Drawing Type	Discipline	Sheet No	Example File Names
Demo	D	000-999	D.000
Architectural	A	000-999	A.001
Landscape			
Structural	S	000-999	S.002
Electrical	E	000-999	E.004
Plumbing	P	000-999	P.005.99
HVAC (Mechanical)	M	000-999	M.003
Health	K	000-999	K.006
Civil	C	000-999	C.007
Storm Drainage			
Mitigation if applicable			
Health Equipment (Food Consumption)			
Electric Locks			
Fire Marshal	F		
Haz-Mat			
High Pile			
Standpipes	SP	000-999	SP.007
Alarm	FA	000-999	FA.008
LP Gas/Natural Gas			
Fire Suppression			
Sprinklers	FS	000-999	FS.009
Underground Fire Line	UF		

[https://www.nationalcadstandard.org/ncs5/pdfs/ncs5\\_uds1.pdf](https://www.nationalcadstandard.org/ncs5/pdfs/ncs5_uds1.pdf)

# Submission Standards

- ▶ Always complete the upload of plans and documents before completing the submission or resubmission task.
  - ▶ Versions of documents should always be submitted using the original file name they were submitted under.
- 



# Access Submission Task

238 W University Ave

Back Forward Projects Site-Wide Reports Profile Logout

Main Contact: Project Reports Workflow Portals Info Notes Email

Folder: 238 W University Ave\Drawings Apartments


View Folders Upload Files

Current Sort: - Select -

238 University 012516.pdf v2  
8/1/2016 9:34:45 AM, 1.2 MB  
Michelle Farnsworth

238 University Development Review Package 3rd Sub

Project Info	Reports
Project Name:	238 W University Ave
Description:	Apartments
Project Image:	No image exists
Map Config Name:	
Location:	
Contact:	
Contact's Email:	



# Open Applicant Upload Task

The screenshot displays a software interface with two main panels. The left panel is a file management window with buttons for 'View Folders' and 'Upload Files'. It shows a file named 'Aldi Gainesville Civil Drawings 10.6.15.pdf' with a thumbnail, upload/download icons, and a red 'X' icon. The right panel is titled 'ProjectFlow Task List' and includes a 'Refresh' button and a checkbox for 'Show all tasks for all users'. Below these is a table with columns: TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT, and STATUS. A single record is shown, with the 'TASK' column containing the text 'Applicant Upload Task', which is highlighted by a red box and a red arrow. The 'PROJECT' column contains '08-31-2016 03-50-PM - test permit project', the 'INSTANCE' column contains '08-31-2016 03-50-PM - test permit project', the 'GROUP' column contains 'Applicant', the 'ASSIGNMENT' column contains 'FirstInGr...', and the 'STATUS' column contains 'Pending'. The bottom of the right panel shows '1 - 1 of 1 records'.

**ProjectFlow Task List**

☐ Show all tasks for all users

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT	STATUS
<b>Applicant Upload Task</b>	08-31-2016 03-50-PM - test permit project	08-31-2016 03-50-PM - test permit project - Gainesville_I	Applicant	FirstInGr...	Pending

1 - 1 of 1 records

# Complete Submission



## APPLICANT UPLOAD

ProjectFlow  
BUILDING



avolve  
software

### Resources

[Alachua Property Appraiser](#) | [Citizen Access](#) | [GRU New Services](#) | [Utility Data Request](#) |

### Task Instructions

I have uploaded all required drawings and/or documents.

☒ I have uploaded all required drawings and/or documents.

Upload Complete - Notify Jurisdiction

Complete Later

# *APPLICANT UPLOAD DEMO*

# **PRESCREEN REVIEW**

# Prescreen Review

- ▶ Once the initial submission is complete the Prescreen Review of the submission is conducted.
- ▶ If the submission is rejected, a Prescreen Corrections notification will be sent.
- ▶ If the submission is approved, the City of Gainesville will begin the Plan Review process.



## Prescreen Corrections Task Assignment

### Attention Michelle:

Your submission review for Project: **AD-16-00123** does not meet the requirements for the plan review submittal. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and or documents are ready for re-submittal, please, [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and or documents:

- **All corrections must be uploaded using the same file names as the original submittal**
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Project:	AD-16-00123
Task:	PrescreenCorrections
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

**Please do not reply to this email.**

# Prescreen Corrections

If corrections or additional information is requested, the applicant will receive an email notification and the ability to upload restored.

The applicant will receive a resubmission task called “Prescreen Corrections Task”.

The applicant will log into ProjectDox and open their task.



# Prescreen Corrections

If corrections or additional information is requested, the applicant will receive an email notification and the ability to upload restored.

The applicant will receive a resubmission task called “Prescreen Corrections Task”.

The applicant will log into ProjectDox and open their task.

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE
<a href="#">Prescreen Corrections Task</a>	Markup Training 1	Markup Training 1 - Gainesville County Plans Template - 9/18/2016 1:28:11 PM	Applicant	FirstInGroup



# Prescreen Corrections

The City may add Prescreen Checklist items for the Applicant to review. Applicant can make comments back to Checklist items.

Prescreen comments may also be added with additional information


The screenshot shows a web browser window with the URL <https://gainesville-fl-us-test.avolvecloud.net/ProjectDoxWebUI/User/WorkflowReview/WorkflowRevi>. The page title is "Workflow Review Checklist Item Manager". Below the title, there is a "Review Cycle:" dropdown menu set to "0". The main section is titled "Selected Checklist Items for Review Cycle #0". It features a table with columns: PERMIT TYPE, DEPARTMENT, COMMENT TYPE, CYCLE, COMMENT TEXT, APPLICANT RESPONSE, COORDINATOR COMMENTS, and STATUS. There are two rows of data. The first row shows a "Commercial Building Permit" from the "GRU New Services Department" with a "Submission Review" comment type. The second row shows a "Commercial Building Permit" from the "GRU New Services Department" with a "Submission Review" comment type. Both rows have a "0" in the CYCLE column. The COMMENT TEXT for the first row is "Include contact information, Owners name, project name, address and phase(s)". The COMMENT TEXT for the second row is "GRU GENERAL - Clear and legible plans on 24 x 36 sheets". The APPLICANT RESPONSE column for both rows contains the text "Applicant Response". The COORDINATOR COMMENTS column is empty. The STATUS column is partially visible on the right. At the bottom of the table, there is a "Show 5 records" dropdown. Below the table, there are navigation buttons: "Save", "Close", and "View Full Report".

PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS	STATUS
Commercial Building Permit	GRU New Services Department	Submission Review	0	Include contact information, Owners name, project name, address and phase(s)	Applicant Response		
Commercial Building Permit	GRU New Services Department	Submission Review	0	GRU GENERAL - Clear and legible plans on 24 x 36 sheets	Applicant Response		

*PREScreen*  
*CORRECTIONS DEMO*

# DEPARTMENT REVIEW

# Department Plan Review

- Once the Prescreen Review is approved, the City of Gainesville will perform a Department Plan Review of the submission.
  - ▶ The submission will be reviewed by departments within the City.
  - ▶ The submission may be sent back to the Applicant if additional information or corrections are required.
  - ▶ Once the Department Review is approved, the City of Gainesville will assess if additional information or if fees are outstanding.
- 

# APPLICANT RESUBMIT

# Applicant Resubmit

- ▶ If corrections are required, the Applicant will receive a task called Applicant Resubmit.
- ▶ A notification email will be sent.



## Resubmit Task Assignment

Attention Michelle:

Your plan review submittals for Project: **Markup Training 1** has been reviewed and corrections have been requested. You may review the comments and drawing markups by accessing the ProjectDox site.

When corrected plans and or documents are ready for re-submittal, please, [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and or documents:


- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested

Project:	Markup Training 1
Task:	Applicant Resubmit>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

Please do not reply to this email.

# Applicant Resubmit


- ▶ The Applicant can:
    - Respond directly to plan reviewer comments
    - Review Changemarks on submitted plans
  - ▶ The Applicant will upload corrected plans, using the same file name as the original
  - ▶ The next review cycle will begin.
  - ▶ Review cycles will repeat until all reviews are approved.
- 

# Reviewer Changemarks

The image displays two overlapping web browser windows. The left window, titled "Workflow Review Changemark Viewer", shows a table with one record for a drawing named "1st floor architectural.dwg". The right window, titled "1st floor architectural.dwg - Internet Explorer", shows the drawing itself with a yellow cloud-shaped mark highlighting a specific area. A comment box on the right of the drawing window shows a comment from Gael Baughman dated 07/25/2016 at 12:34 PM, referring to building code XXX for corrections.

**Workflow Review Changemark Viewer**

Refresh Review Cycle: All Group: All

RESOLVED?	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME
<input type="checkbox"/>		Building Plan Examiners	1	Gael Baughman	<a href="#">1st floor architectural.dwg</a>

1 - 1 of 1 records

Save and Close Close View Full Report

**1st floor architectural.dwg - Internet Explorer**

[https://gainesville-fl-us-test.avolvecloud.net/ProjectDox/ActiveXViewer.aspx?FileID=279&MarkupID=86](#)

Annotate Review Redact Measure Publish

1st floor architectural.dwg V1

Building Code XXX

Gael Baughman 07/25/2016 12:34 PM  
Refer to building Code XXX for corrections

----- 0 replies -----


Add Reply



# *APPLICANT RESUBMIT DEMO*

# ADDITIONAL INFORMATION

# Additional Information

- ▶ Once the Department Review is approved, the City of Gainesville will perform a final Administrative Review of the submission.
  - ▶ The submission may be sent back to the Applicant if additional information is required.
  - ▶ Once the Additional Information is approved, the City of Gainesville will electronically stamp the Approved plans.
- 

# PLAN REVIEW APPROVAL

# Approved Plans Notification



**Approved Plans Ready for Download**

## Notification

---

**Attention Michelle:**

Congratulations, your approved plans are ready for download for Project AD-16-00123.

In order to download your approved plans [Login to ProjectDox](#) and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

Project:	AD-16-00123
Task:	Notify Applicant Download
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you do not have access to the specified folder, please contact the City of Gainesville at 352-334-5023.

Please do not reply to this email.

Main Contact:

Folder: 15037248\Approved

REMODEL COMMERCIAL OFFICE BUILDING

Project Info

Reports

Project Name:

Description:

Project Image:

Map Config Name:

County:

Block No:

Contact's Email:

Phone:

Block No:

Lot No:

Project Owner:

Owner's Email:

Project Admins:

Status:

Classification Status:

Project Start/End:

Pass-Through:

Versioning:

# Download Plans

15037248

Main Contact:

Folder: 15037248\Approved

REMODEL COMMERCIAL OFFICE BUILDING

View Folders

Current Sort: - Select -

5/12/2015 9:38:11 AM, 671 KB

Nicole Thorne

5/12/2015 9:38:14 AM, 692 KB

Nicole Thorne

5/12/2015 9:38:17 AM, 542 KB

Nicole Thorne

5/12/2015 9:38:20 AM, 653 KB

Nicole Thorne

5/12/2015 9:38:22 AM, 361 KB

Nicole Thorne

5/12/2015 9:38:25 AM, 651 KB

Nicole Thorne

5/12/2015 9:38:27 AM, 520 KB

Nicole Thorne

Files retrieved from: 15037248\Approved

Your files are ready to be downloaded. All selected files have been compiled into a single ZIP file for your convenience.

Download Zip File (10.7 MB) Delete Zip File

After your download has completed successfully, please delete the zip file from the server, for the protection of your intellectual property.

Internet Explorer

What do you want to do with  
Approved\_4552254.zip?

Size: 10.7 MB  
From: testprojectdox.houstonelectronicplanreview.org

Open

The file won't be saved automatically.

Save

Save as

Cancel

# *APPROVAL DOWNLOAD DEMO*

Q & A