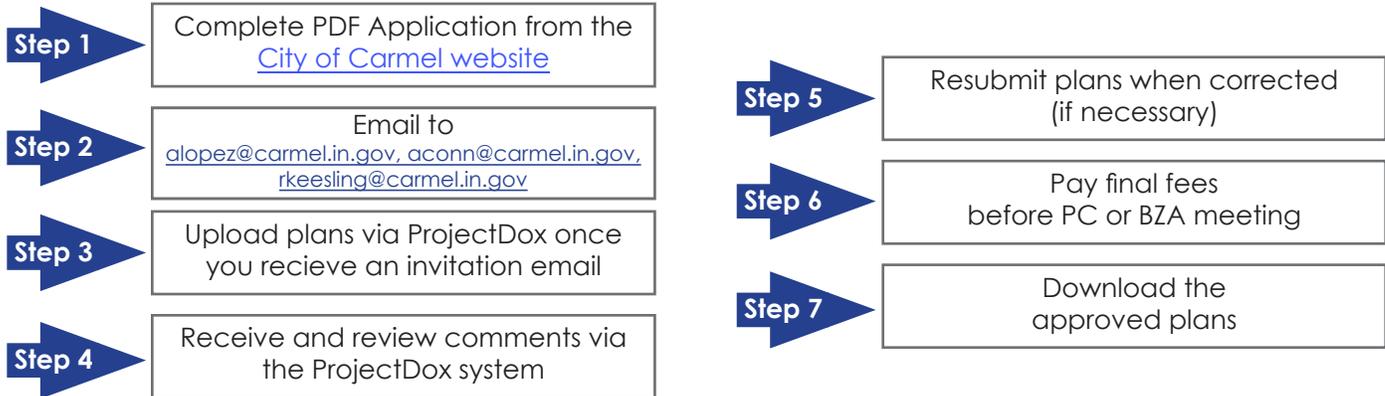


# ELECTRONIC PLAN REVIEW

## OVERVIEW

The purpose of this document is to provide general information on the process for registering with the City of Carmel's electronic plan review system called ProjectDox for Plan Commission (PC) or Board of Zoning Appeals (BZA) projects.

## Application and Electronic Plan Review Process



## APPLICATIONS

### STEP BY STEP

1. Visit: <http://www.carmel.in.gov/>
2. Hover over **Government** on the blue bar.
3. Click **Community Services (Planning/ Zoning & Building/ Code)** under **Departments and Services** on the right-hand side.
4. On the tab on the left click **Applications, Fees and Permits**.
5. Find the link to the appropriate application and fill out.
6. Send the application to [aconn@carmel.in.gov](mailto:aconn@carmel.in.gov), [alopez@carmel.in.gov](mailto:alopez@carmel.in.gov), and [rkeesling@carmel.in.gov](mailto:rkeesling@carmel.in.gov)

**\*\*It is imperative that the email address is entered correctly.\*\***



## NEW USER INVITATION

When your application has been submitted, an invitation email (see below) will be sent to the user to upload the plans. A temporary password will be included in the new user email.

### ProjectDox Applicant Upload Task Assignment

#### Attention Nathan Chavez:

Welcome to City of Carmel's Electronic Plan Review process. This invitation has been sent to you in response to your application. An EPR (Electronic Plan Review) has been created to allow you to upload your drawings and documents for processing.

To access your new Electronic Plan Review project, follow the instructions below:

1. Very Important! Please review the [link for EPR APPLICANT USER HELP] in its entirety before starting the process. Failure to follow the appropriate submittal guidelines may result in delay or rejection of your application!
2. Click the Project Access [link for ProjectDox EPR site]
3. Enter your Login (email address) and password
4. Click on the Project link on the "Active Projects" page
5. Click on the "Drawings" folder
6. Click the "Upload Files" button and follow the instructions to upload your plans and/or plats. Please ensure the use of the required file naming conventions (see [EPR APPLICANT USER HELP]).
7. Click the "Documents" Folder
8. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the use of the required files naming conventions (see [EPR APPLICANT USER HELP]).

### Sample Invite Email

#### TO COMPLETE YOUR SUBMISSION TO CITY OF CARMEL YOU MUST PERFORM THE BELOW STEPS

9. Once all plans/documents have been uploaded to the appropriate folder(s) click on the "Workflow Portals" button.
10. Click the "Applicant Upload" link under the task column. The Due Date for this task is **4/13/2017 3:00:34 PM**.
11. Click **"OK"** to accept the task.
12. An electronic form will display. Click on the **"Upload Complete - Notify City of Carmel"** button to complete the submission of your plans and documents.

Supported file types: DWG, PDF, JPEG, DOC, DOCX, DXF

Login:	<a href="mailto:Joe.Doe@somewhere.com">Joe.Doe@somewhere.com</a>
Temporary Password:	BHGP57NC
Project:	PZ12120026 PP
Group:	Applicant
Project Owner:	Jane Doe
Owner's Email:	<a href="mailto:Jane.Doe@here.com">Jane.Doe@here.com</a>
Login to ProjectDox	

If you have any problems or questions, or do not have access to the specified folder, please contact the [Project Administrator](#).

Please do not reply to this email.



## LOGGING IN & CREATING USER 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, which together with our privacy policy govern...

[add'l text, etc.]

E-mail:

Password:

[Forgot your password?](#)

ProjectDox © 2017 Avolve Software. ProjectDox (Version 8.6) is a trademark of Avolve Software. All rights reserved. avolve software

[Install ProjectDox Components](#)

To create a desktop shortcut, click and drag the icon below to your desktop.

[Click here to add ProjectDox to your Favorites.](#)

From the invitation, click on the link **Login to ProjectDox**. This will open a web browser and take you directly to the login screen. You can also open a web browser and type in the City of Carmel's ProjectDox URL:

<https://eprcrm.aspgov.com/projectdox/>

Type in your full email and then type or paste the temporary password provided into the Password Field and click **Login**. The password is case sensitive.

<b>Change Password:</b>	<b>Password Reset Question &amp; Answer:</b>
New password:* <input type="password"/>	Security question: * <input type="password"/>
Confirm new password:* <input type="password"/>	Security answer: * <input type="password"/>

### Profile Information

Contact Information	User Metadata	Project Membership	Group Membership
* Required field			
First Name: *	<input type="text" value="Nathan"/>	Last Name: *	<input type="text" value="Chavez"/>
Email: *	<input type="text" value="nchavez@carmel.in.gov"/>		
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" value="IN"/>	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"/>		

You will be taken to your User Profile, you will need to:

- Reset your password
- Create a security question and answer
- Enter some additional information about yourself

Fill in all of the required fields and click **Save**.

You can return to this screen at any time by clicking on the **Profile** button on the Main Toolbar

Logging into ProjectDox every time after, you will use the password that you entered in your User Profile page. After logging in, you will be taken to your home page. 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 the user has logged in at least once and no longer has a temporary password associated to their account.

## PROJECTDOX HOMEPAGE

The screenshot displays the ProjectDox homepage. At the top right, there is a navigation toolbar with buttons for Back, Forward, Projects, Profile, a search icon, and Logout. Below this is the 'Active Projects List' section, which shows a table with one project entry: PZ17010001 PP, Primary Plat Test, owned by Alexia Lopez, with a status of Applicant Upload and a create date of 4/10/2017 2:55:50 PM. Below the projects table is the 'ProjectFlow Task List' section, which shows a table with one task entry: Applicant Upload Task, assigned to the user, with a status of Pending and a due date of 4/13/2017 3:00:34 PM.

Project	Options	Description	Owner	Status	Create date
PZ17010001 PP		Primary Plat Test	Alexia Lopez	Applicant Upload	4/10/2017 2:55:50 PM

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED
Applicant Upload Task	PZ17010001 PP	Chavez Test for Handouts - Planning - 4/10/2017 2:55:50 PM	Applicant	FirstInGroup	Pending	Medium	4/13/2017 3:00:34 PM	4/10/2017 3:00:34 PM

After saving your profile information, you will be taken to the Home Page where your list of Active Projects will display. If you have a task assigned to you, it will appear in the ProjectFlow Task List below the projects table.

## HOMEPAGE TOOLBAR

This group of buttons provides your primary navigation functions.



Going from left to right the buttons are:

- The **Back** and **Forward** buttons function much like the back and forward buttons in Internet Explorer, taking you to the screen you previously or subsequently viewed.
- The **Projects** button will take you back to the home page where your list of active projects and tasks will display.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Reload** button will refresh the current page you are on.
- The **Search** button allows you to search for a project based on the key information entered into the Project Info Page, or it allows you to search for keywords within a project.
- The **Help** button takes you to the ProjectDox Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox.
- The **Logout** button signs you out of ProjectDox.
- The **Site-Wide Tasks** button shows any tasks requiring action from you for all projects in a separate page.

## PROJECT TOOLBAR

Recent Projects

All Projects

Press Enter To Search:

- The **Recent Projects** button will show the 15 most recently accessed projects with the most recent project accessed always displaying at the top.
- To view all projects in the system for your user click on the **All Projects** button.
- The Project Search Field feature is a partial word search and will provide results that contain the words entered into the Search Field for any of the columns listed: Project, Description, Owner, and Status.
- The Active Projects List provides you with basic information about every project to which you are assigned and is sorted by Project (Permit Number). You can sort your projects by name (or number), description, owner or status by clicking the header of each of the columns or you can access a project by clicking on the project link which will direct you to the project's main page.
- Hovering over a project name displays the date when the project was created.
- The Project List and the Task List are set to display a limited number of entries at a time. Use these buttons:  to move to the previous, next, first, or last page.



## FILE TYPES AND BORDERS

### REQUIRED FILES

- Application
- Site & architectural drawings

### FILE TYPE STANDARDS

- Only searchable PDF files are accepted for calculations, reports, and other supporting documentation (non-drawing files).
- Vector PDF, DWG, DGN, etc. files will be acceptable for drawings.
- **Please upload each drawing/sheet as its own file.**

### BORDER STANDARDS

- Reserve 4" W X 4" H area on the upper right corner of the drawing.
- The City of Carmel requires that plans be uploaded in an approved format, to scale, with output dimensions of the follow sheet sizes:
 

8 1/2" x 11"	11" x 17"
24" x 36"	30" x 42"
- Please make sure each drawing is oriented correctly, before uploading.

**NOTE: If these standards are not followed, your submittal will be returned for corrections during the prescreen process.**

### MARKUP NAME AND COLOR STANDARDS

Standard markup names and colors will be used by the City for each Department for easy identification. A markup can have more than one changemark. A changemark is created to quickly identify a markup and associated comments.

## FILE NAMING

Please name your files according to the discipline name and sheet number (ie: C100) and a general name for the type of drawing (ie: Site Plan, West Elevation, or Drainage Plan). When uploading a revised drawing, use the exact same name as the original drawing. ProjectDox will assign a version number to the drawing and keep track of different versions of the same drawing.

**NOTE: If this standard is not followed, the submitted file will appear as a NEW file, and not as a revision to an existing file.**

Discipline	Abbreviation	Sheet Number	Example File Names
Architectural	A	000.0	A100 West Elevation
Civil Engineering	C	000.0	C200 Primary Plat
Landscape Plan	L	000.0	L102 Landscpae Details

## STEP BY STEP

After you have successfully logged in to ProjectDox, the ProjectDox Homepage screen will display. Any projects for which you have access will display in the list. Any outstanding tasks that require your action are displayed in the ProjectFlow Task List area below the project list. Note: you may have to scroll down to see the ProjectFlow Task List.

### ProjectFlow Task List

Refresh

	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED
	<a href="#">Applicant Upload Task</a>	PZ17010001 PP	PZ17010001 PP - Planning - 7/21/2017 11:59:46 AM	Applicant	FirstInGroup	Accepted	Medium	7/24/2017 12:01:47 PM	7/21/2017 12:01:47 PM

1 - 1 of 1 records

1

From the ProjectFlow Task List area click on the Docket Number for which there is an "Applicant Upload" task. This will open that Project's main screen. Click on the **Workflow Portals** button (top right). The Applicant Upload task will display. Click on the task name and a dialog box displays, "Do you want to accept this task?" Select **OK** to accept responsibility for completing the task. The eForm window will appear.

From this window you can complete the uploads for required documents or press the **complete later** button, which will then exit out the window. It is important that you upload ALL documents needed before clicking notify the City of Carmel.

## APPLICANT UPLOAD



Review Information Global File Compare

**Project Name:** PZ17010001 PP  
**Project Description:** Primary Plat Test  
**Coordinator:** Alexia Lopez  
**Review Cycle:** 0  
**Workflow/Activity Name:** Planning Workflow/Applicant Upload  
**Current User Login:** Nathan Chavez (nchavez@carmel.in.gov)

## E-Form Window

### Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Upload Complete) button.

I have uploaded all required drawings and/or documents.

# HOW TO UPLOAD PLANS

1. Back on the Project page select the Drawings or Documents folder depending on the file you are uploading.
2. Click on the plus signs to expand the folders and access the other folders (ie: Site Drawings, Drainage, Applications, Correspondence).  [Drawings](#)  
[Documents](#)
3. Click the **Upload Files** button (next to View Folders). Note: You may need to press the **Refresh** button if you do not see the button.
4. The Upload Files dialog will appear.
5. Click the **Browse...** button.
6. In the resulting dialog box, navigate to and select the file to upload. Note: a file name is limited to 70 characters.
7. Click **Open** to add the file.
8. You'll be taken back to the Uploader dialog box. Click **Upload** to upload the files to the folder.
9. Once the files are uploaded to the folder(s), thumbnail images of all the files will be visible. Under each thumbnail, you can see the file name, upload date and time, file size information, and name of the user who uploaded that file.
10. When finished with uploading, go back to the eForm window.
11. At the bottom of the page, there is an Upload Complete – Notify Jurisdiction. This will complete the Applicant Upload task.



# REVIEW OF PLANS

## PRESCREEN REVIEW PROCESS

The Prescreen Review step is used to review the uploaded documentation in the project prior to assigning the review to the departments. City staff will review the uploaded files. When no additional information or corrections are required from you, the submittal is ready to be routed to the departments for the formal review process. Once the prescreen review is approved, specific departments that need to be included in the review are assigned.

If items are missing, or corrections are required from you before formal review can begin, a **Prescreen Rejected** email will be sent to you with instructions on how to resubmit to fix the issues. City staff will provide information about the submittal issues, and can also attach supporting documents for you to review.

### Attention Nathan:

Your plan review submission for Project: **PZ17010001 PP**, has been reviewed and corrections have been requested. 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
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	<b>PZ17010001 PP</b>
Description:	<b>Primary Plat Test</b>
Task:	<b>Applicant Resubmit</b>
<a href="#">Project Access</a>	<a href="#">Login to ProjectDox</a>

**Sample Review  
Corrections Email**

If you do not have access to the specified folder, please contact the [Project Administrator](#).

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



## PREScreen CORRECTIONS REQUIRED

If you receive a prescreen rejected email with the submittal issues and requests for more information and/or correction of information prior to the departments being assigned, please follow these steps to complete this task:

1. Select the **Login to ProjectDox** link in the email to login to ProjectDox.
2. Select the **Correction Complete** link for the appropriate project from the Task List on the main project page or from within the project. This can also be accessed via the global tasklists.
3. A dialog box displays, Do you want to accept this task?. Select OK to accept responsibility for completing the task.
4. Review the comments (if provided) in the text box and the items in the checklist by selecting either the **View Intake Checklist** link or the **Checklist Report** tab. Both display the number of items included in the checklist.
5. Revisions of documents should be uploaded using the same name as the original file to allow for automated versioning of the file to occur.
6. Select the check box to indicate corrected items/documents have been uploaded. You can also add comments. This action enables the **Corrections Complete** button to become enabled.
7. Select the **Corrections Complete** button.
8. Select **OK** to the dialog message, completing this task will finish your participation in this step and cannot be undone. Continue?
  - a. Select **Cancel** to return to the eForm.
  - b. Select the **OK** button to complete the task which will perform the following:
    - i. eForm closes.
    - ii. Task removed from Applicant's task list.
    - iii. Email notification sent to the Permit Intake Technician to perform the prescreen review again.
9. Planning Intake Technician reviews the corrections. When no additional information is required from you, the Planning Intake Technician approves the prescreen review. If more corrections are required, the correction complete step will be repeated.



## UPLOADING REVIEW CORRECTIONS

If **Corrections Required** was selected during Department Review, you will receive an email notification of the resubmit task assigned to you and a task will be added to your task list.

Follow these steps to complete the task:

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit Task** link from the Task List shown under the column heading of Task.
3. This can be done from the global or project specific task lists.
4. A dialog box displays, *Do you want to accept this task?*. Select **OK** to accept responsibility for completing the task.
5. Review the following:
  - a. Comments provided by the plan reviewers and provide responses as required.
  - b. View Checklist Items on the Checklist button and provide responses in the Applicant Response column.
  - c. View markups in the Changemark button and provide responses in the Applicant Response column.
6. Make required corrections and upload the revised files to the same folders as before using the same name as the original file.
7. In the Task Instructions section, select the check boxes to indicate the items have been completed. Selection of all 3 boxes enables the **Review Complete** button.
8. Select the **Review Complete** button.  
Click **OK** to the dialog message to complete the task, and close the eForm  
Click **Cancel** to remain on the current view.

An email notification will be sent to the Review Coordinator. They will confirm that plans have been uploaded and the proper departments are selected for assignment for the next review cycle.

If any one of the departments rejects the review, **Applicant Resubmit** step will be repeated until all the departments approve.



## APPROVAL OR CORRECTIONS REQUIRED

Each department performs the review and adds a status, check list comments, free form comments and/or markups to the drawings. Each department can approve or reject their review.

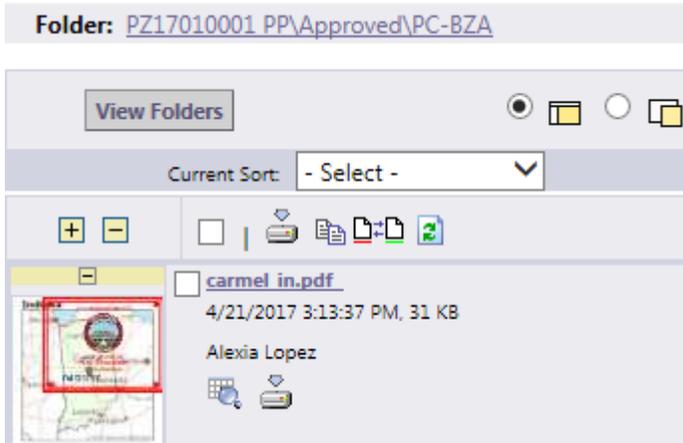
After all the assigned departments from the Department Review step have completed their task, the review coordinator informs you whether the plan review is approved or if corrections are required.

If all reviews have been approved, the review coordinator applies the final City of Carmel Plan Commission or Board of Zoning Appeals approval stamp. If your plans require Engineering Department approval, then the plans will be stamped by the Engineering Department once they have approved your plans.

If at least one reviewer has selected "Corrections Required", you will receive an email notification of the resubmit task. If the task is not accepted, reminder emails will be sent.

## APPROVED PLAN SET

After final payment is made, you will receive an email indicating that your application has been paid in full and that you may access your approved drawings and documents in the Approved folder.



To download the entire folder, select the box at the top of the thumbnails.

Uncheck any pages that you do not want to download.

When your selection is complete, click on the download icon.

You may download one file at a time or all at once. If a group of files are larger than 10MB in size, it will automatically download all files in a .ZIP file.



Thank you!

Please contact the Planning & Zoning Office for questions.

(317)-571-2417