



# DIVISION OF PLANNING EPLAN/PROJECTDOX QUICK GUIDE

## Introduction

### **Paperless. Convenient. Trackable.**

As of December 9, 2019, all planning and permit applications will be processed online using the citizens' access portal instead of paper applications.

The City of Dublin is launching a new program to improve the permit and plan application process. The program utilizes the Accela and ePlan/ProjectDox platforms, which makes it easy for businesses, contractors, and citizens to submit applications online and track their progress. This replaces the time-consuming mail-in or walk-in process for submitting applications.

To access the new Accela Citizens' Access Portal program please visit: <https://aca3.accela.com/dublinoh/default.aspx>

To access the new ePlan/ProjectDox program please visit: <https://dublin-oh-us.avolvecloud.com/ProjectDox/>

Below is a quick guide to show you how to set up your computer for ePlan/ProjectDox and how to successfully operate the ePlan/ProjectDox program for Planning submissions and review. For additional help please contact the Planning Division at 614-410-4600.

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# Computer Setup for ePlan/ProjectDox

After you have completed your online application through Accela Citizens' Access Portal, which can be found here: <https://aca3.accela.com/dublinoh/default.aspx> you will receive an automated email from ePlan. Prior to logging into ePlan for the first time, please see the following information:

**Step 1:** ePlan Version 9.1 is compatible with all browsers such as Internet Explorer 11, Edge, Chrome, Firefox, and Safari. However, we recommend using Internet Explorer. You will need to install ProjectDox Components. Please click on 'To Install ProjectDox Components' button under the log in area. This installation will only need to be done once. If you use another computer it will require another installation for each computer.

Electronic Plan Review

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.]

**City of Dublin**  
OHIO, USA

E-mail:

Password:

Login

[Forgot your password?](#)

**Click on install ProjectDox Components prior to logging in for the first time**

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**ProjectDox**

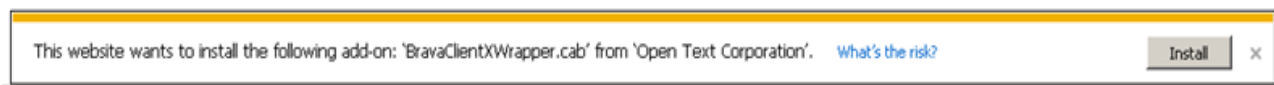
To install ProjectDox components  
[Click here](#)

To create a desktop shortcut  
drag & drop icon on your desktop

To add ProjectDox to your favorites  
[Click here](#)

**Step 2:** If your computer has pop-up blockers installed, you will need to disable the pop-up blocker for the ePlan/ProjectDox review. IT is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google, Task Bar, etc.). Once the ePlan/ProjectDox site is allowed, you will be able to utilize the application.

**Step 3:** If you receive a request to install BravaXWrapperClient.cab, please install.



# Submitting a Planning Application

After you have completed your online application through Accela Citizens' Access Portal, which can be accessed here: <https://aca3.accela.com/dublinoh/default.aspx> you will receive an automated email from ePlan/ProjectDox. You can enter ePlan/ProjectDox directly from the email. **The person listed as the applicant on the Accela Citizen's Access Portal application will receive the email and task with upload rights. There can only be one applicant. You will be able to add additional people as applicant view only in ePlan/ProjectDox, they have all rights except uploading.**

**Step 1 – Login and Finding your Project:** After you have logged in to ePlan/ProjectDox, you will see the following screen. You will find your tasks under the Tasks (PF) tab. You can also access all tasks from the 'All Tasks,' button in the top right of the window.

The screenshot shows the 'Electronic Plan Review' interface for the City of Dublin. At the top, there are navigation tabs for 'Tasks (PF)', 'tasks (PF)', and 'Projects'. A red arrow points to the 'Tasks (PF)' tab. In the top right corner, there are buttons for 'All Tasks', 'Profile', and 'Logout'. Another red arrow points to the 'All Tasks' button. Below the navigation is a table with columns: TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT TYPE, STATUS, PRIORITY, DUE DATE, CREATED, DESCRIPTION, and STATUS. The table contains several rows of task data, including 'Applicant Upload Task' for various projects like 19-052MPR, 19-60ADMA, 19-061FDP, 19-063MPR, 19-001ADMA, 19-002ADMA, 19-069Z-PDP, 19-003ADMA, 19-004ADMA, and 19-082ARB-MPR. The 'DUE DATE' column is highlighted in red for several rows. At the bottom left, it says '1 - 10 of 10 records'.

**Step 2 – Upload Documents/Drawings:** Create electronic documents and drawings files to upload. **Upload the drawings to scale in their correct viewing orientation, and as separate PDFs in the same order as your drawing index. Please remember items uploaded to the 'Documents,' folder may be multiple page PDFs, items uploaded to the 'Drawings,' folder must be individual PDFs labeled using the naming convention mentioned below.**

- **Drawing Naming Conventions**

- 1) Three digit prefix: 001, 002, 003, etc. in order of your drawing index
- 2) Underscore
- 3) Number of drawing (use all caps)
- 4) Underscore
- 5) Drawing title (use all caps)
- 6) List the drawings in the same order as your drawing index. Please see the example below:

```
001_G0.1_COVER_SHEET
002_A1.1_SITE_PLAN
003_A1.2_ELEVATIONS
004_A1.3_GRADING_PLAN
```



After you have named your documents (can be multiple pages) and drawings (must be individual PDFs) you can upload from your task:

## APPLICANT UPLOAD

Review Information | PermitInformationFormlet (Accela) | ContactsInformationFormlet (Accela)

Project Name: 19-084INF  
Project Description: Test for eForm  
Coordinator: eplan dublin  
Workflow/Activity Name: Planning ProjectFlow\_Accela/Applicant Upload  
Current User Login: Michael Kettler (accelaplan@gmail.com)

**You can upload your documents and drawings directly from this form. Click on the documents or drawings older and it will open up so you can upload.**

Task Instructions  
Select appropriate destination folder then select files to upload to selected folder. Repeat until all required submission files are uploaded. TO START REVIEW PROCESS: Please select "Upload Complete - Notify Jurisdiction" enabled by first selecting checkbox "Upload Task Complete" (bottom of page)

Project: 19-084INF

Select destination folder for files:

- 19-084INF
  - Drawings
  - Documents
  - Approved Drawings
  - Approved Documents
  - Application Documents
  - Boards and Commissions Folder

**Drawings must be INDIVIDUAL PDFs**  
**Documents can be multiple page PDFs**

**'Add Group Members,' is where you can add anyone you would like to be able to view the project. You can add multiple users.**

Add Group Members

First Name	Last Name	Email	Invite to Group
<input type="text"/>	<input type="text"/>	<input type="text"/>	Invite to Group ApplicantViewOnly ▾

Remove Group Members

Remove from Group	User
Remove from Group ApplicantViewOnly ▾	User ▾

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

[Upload Complete - Notify City of Dublin](#) [Save For Later](#)

After you click on the documents or drawings folder when you are ready to upload:

## APPLICANT UPLOAD

Review Information | PermitInformationFormlet (Accela) | ContactsInformationFormlet (Accela)

Project Name: 19-083FDP  
Project Description: ePlan/ProjectDox Test  
Coordinator: eplan dublin  
Workflow/Activity Name: Planning ProjectFlow\_Accela/Applicant Upload  
Current User Login: Michael Kettler (accelaplan@gmail.com)

Task Instructions  
Select appropriate destination folder then select files to upload to selected folder. Repeat until all required submission files are uploaded. TO START REVIEW PROCESS: Please select "Upload Complete - Notify Jurisdiction" enabled by first selecting checkbox "Upload Task Complete" (bottom of page)

Project: 19-083FDP

Select your files to upload to folder:

19-083FDP/Drawings

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

[Upload Complete - Notify City of Dublin](#) [Save For Later](#)

**When you click on the drawings or documents folder you will see this and can upload**

**After you are finished uploading put a check in the box and the gray tab below will change to 'Upload Complete – Notify City of Dublin.' Click on the 'Upload Complete – Notify City of Dublin.'**

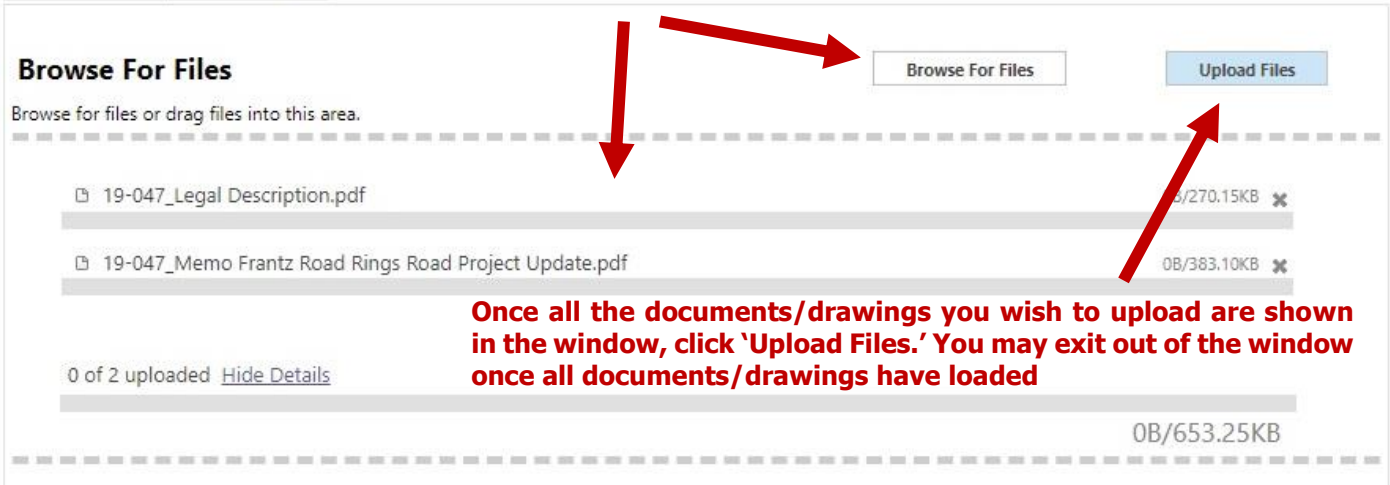


Folder: 19-083FDP\Drawings

Upload Files

Upload URL

**You may upload drawings and/or documents by either dragging them into the below window or clicking 'Browse For Files'**



**Browse For Files**  
Browse for files or drag files into this area.

19-047\_Legal Description.pdf 3/270.15KB x

19-047\_Memo Frantz Road Rings Road Project Update.pdf 0B/383.10KB x

0 of 2 uploaded [Hide Details](#)

0B/653.25KB

**Once all the documents/drawings you wish to upload are shown in the window, click 'Upload Files.' You may exit out of the window once all documents/drawings have loaded**

The Planning Division will check your plans for completeness within the next couple of business days and let you know if we need any additional information. You will receive an email stating your plans are accepted and you have been assigned a case manager or if the completeness review is rejected you will receive an email with what outstanding items are required prior to deeming the application complete. Please always remember to use ePlan/ProjectDox email to contact your case manager and case review staff. It keeps a log of emails so we prefer you send through ePlan instead of regular email.

**Step 3 – Prescreen Corrections:** If your prescreen review is rejected, you will receive a task. Please see the prescreen review checklist in the 'Application Documents,' folder for required revisions and/or additional information required for review.

## PRESCREEN CORRECTIONS

Review Information	PermitInformationFormlet (Accela)	ContactsInformationFormlet (Accela)
--------------------	-----------------------------------	-------------------------------------

**Upload the additional information or revised drawings to the documents and drawings folder. If you upload revised drawings, please keep the name identical to the previous drawing name. ePlan will give it a version number.**

Project Name: 19-085INF  
Project Description: Test for eForm  
Coordinator: eplan dublin  
Workflow/Activity Name: Planning ProjectFlow\_Accela/Prescreen Corrections  
Current User Login: Michael Kettler (accelaplan@gmail.com)

### Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Return to Jurisdiction) button.

View/Edit Checklist Items (0)

Project: 19-085INF

Select destination folder for files:

- 19-085INF
  - Drawings (2 Files - 2 New)
  - Documents (3 Files - 3 New)
  - Approved Drawings
  - Approved Documents
  - Application Documents (1 Files - 1 New)
  - Boards and Commissions Folder

**Please upload a response letter to the documents folder detailing your response to the requested information.**

**A checklist detailing the missing information/documents can be found in the 'Application Documents,' folder.**

### Discussion Comments

Add Comment

DISCUSSION COMMENT	PARTICIPANT
The Planning Application submission requires Architectural Elevations. Please upload elevation drawings with your submittal.	Michael Kettler

- 1 of 1 records

I have uploaded the corrected documents and/or drawings as indicated above.

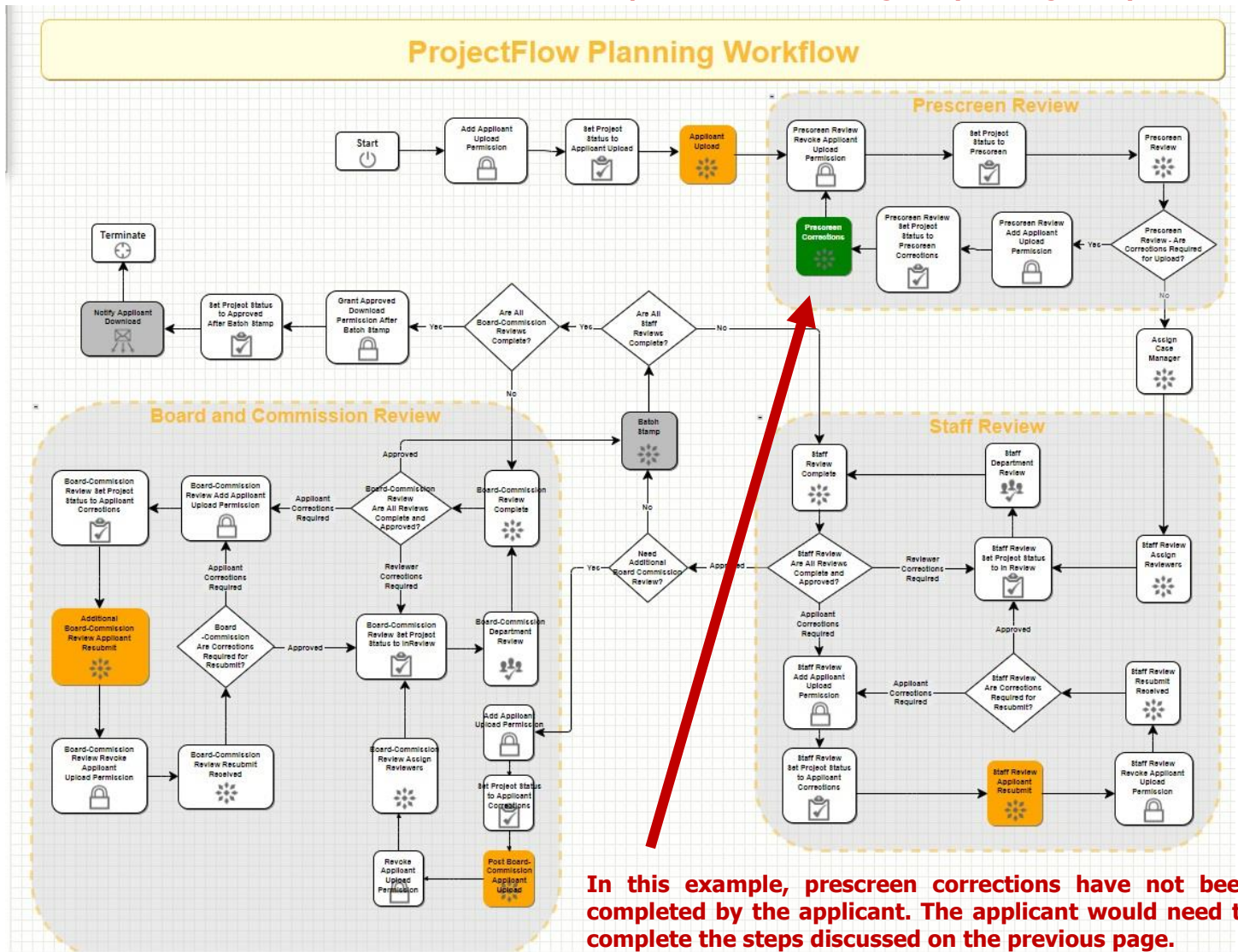
Return to City of Dublin Close

**A detailed explanation of what is missing and what is needed can be found in the 'Discussion Comments,' section and will be added as a checklist item.**



At any time in the review process you can check where your plans are in the process by clicking the workflow button in the project window. The current workflow task will always be highlighted green:

**If you would like to check where the application is in the workflow open the workflow designer by clicking this symbol.**



**In this example, prescreen corrections have not been completed by the applicant. The applicant would need to complete the steps discussed on the previous page.**

**Step 4 – Prescreen Accepted – Case Manager Assigned:** Once the prescreen review is accepted you will receive an email through ePlan/ProjectDox Team Mail from your case manager like the example shown below. This email notifies you of your case manager and lets you know that staff has begun reviewing your application. Please always remember to use ePlan/ProjectDox email to contact your case manager and case review staff. It keeps a log of emails so we prefer you send through ePlan instead of regular email.

Prescreen Review Accepted - Case Manager Assigned inbox x



Review Services <reviewservices@dublin.oh.us>  
to me ▾

8:39 AM (33 minutes ago) ☆ ↶ ⋮



ProjectDox - Team Mail

Project:	19-08SINF
Author:	Michael Kettler
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

Your prescreen review has been accepted. I will be your case manager through the process.

Should you have any questions or concerns please direct them towards your case manager. The project is currently under review, your case manager will let you know if a comment letter will be delayed or is not necessary for your submittal. Please always remember to use ePlan/ProjectDox email to contact your case manager and case review staff. It keeps a log of emails so we prefer you send through ePlan instead of regular email.

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

[Login to ProjectDox](#)

↶ Reply    ↷ Forward





**Step 5 – Staff Review – Revisions Required:** If your application is in staff review and revisions are required prior to your application moving forward to its public hearing you will receive an email and 'Applicant Resubmit,' task to upload revised or additional drawings and information. You will find a comment letter in the application documents folder and/or changemark comments on the drawings/documents. Please keep revised drawing names identical to what is already in the drawings folder. ePlan will assign it a version number.

This section will show you how to read review changemark comments on documents/drawings, how to respond to those changemark comments, and how to upload your revisions:

**19-085INF**  
Main Contact:  
Folder: 19-085INF\Drawings Test for eForm

**ProjectFlow Task List**

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT ...	STATUS
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
<a href="#">Applicant Resubmit Task - Staff Review</a>	19-085INF	19-085INF - Accela Planning Template - 12/11/2019 7:18:54 AM	Applicant	FirstInGroup	Pending

1 - 1 of 1 records

**Workflow Instances**

NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE	VERSION
19-085INF - Accela Planning Template - 12/11/2019 7:18:54 AM	Case Manager	Active	Production	Initial Versi

1 - 1 of 1 records

To view the changemark comments, find the drawing with the changemark comments shown by the red exclamation point and click on the red exclamation point.

**Markups attached to 003\_E2\_SITE\_PLAN.pdf**

Delete	View	Markup Name	Author	Date		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PLANNING COMMENT 1	Michael Kettler	12/11/2019 10:01:54 AM		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ENGINEERING COMMENT 1	Michael Kettler	12/11/2019 10:04:33 AM		

[View](#) [Clear All](#) [Select All for View](#)

Check the box for each comment and click the 'View' button.



Review Redact Measure Publish

PROP BUILDING  
FF=899.75

Thomas, Marian D TR  
PID: 273-005382

Prop Dumpster

Prop Water Service

Prop Sanitary Service

Prop HC Signs

Prop StormTech

Prop Parking Blocks

Prop Curb Ramps

Prop Curb Ramp with Detectable Warning

RINGS ROAD

ENGINEERING COMMENT  
PLANNING COMMENT

Michael Bettler  
12/11/15 10:04 AM  
Action: For Discussion

This is a sample Engineering comment. Please provide additional information.

0 replies

003\_E2\_SITE\_PLAN.pdf V1

1/1

Action For Discussion

The markups and changemarks are shown on the drawing. There is a complete list of the comments on the right-side bar. In this case there is a Planning and Engineering Comment.



The screenshot displays a software interface for reviewing a technical drawing. The drawing is a site plan for a road project, showing various utility lines and features. Key elements include:

- Utility Lines:** Solid lines for 'STM' (Sanitary Main) and 'SAN' (Sanitary Sewer), and dashed lines for 'OHE' (Overhead Electric) and 'WS' (Water Service).
- Proposed Features:** 'Prop Curb Ramps', 'Prop Stm', and 'Prop Curb Ramp with Detectable Warning'.
- Dimensions and Elevation:** Various numerical values such as 899.02, 899.25, 899.84, 900.12, 900.50, 900.60, 900.04, 900.23, and a vertical dimension of 22' (Typ).
- Annotations:** 'Ex 21" Sar' and 'Rim='.
- Red Post-it Note:** A red square with a white border is placed on the drawing, with a red arrow pointing to it from the caption below.
- Comment Panel:** On the right side, a panel titled 'ENGINEERING COMMENT' and 'PLANNING COMMENT' is visible. It shows a comment by 'Michael Kettler' dated '12/11/19, 10:04 AM' with the text: 'This is a sample Engineering comment. Please provide additional information.' Below the comment, it says '0 replies'. A red arrow points from the caption to the comment panel.
- Software Interface:** At the top, there are menu options: 'Review', 'Redact', 'Measure', and 'Publish'. At the bottom, there is a file name '003\_E2\_SITE\_PLAN.pdf V1' and navigation controls.

**When you click on the post-it symbol on the drawing/document or click the comments on the right-side bar, it will zoom in and show the comment.**



**Task Instructions**

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

[View/Edit Changemark Items \(2\)](#)

**To reply to the changemark comments please click 'View/Edit Changemark Items,' in your task eForm. There is a column for Applicant Comments please reply in this box.**

Project: 19-085INF

Select destination folder for files:

- 19-085INF
  - Drawings (3 Files - 3 New)
  - Documents (3 Files - 3 New)
  - Approved Drawings
  - Approved Documents
  - Application Documents (2 Files - 2 New)
  - Boards and Commissions Folder

**A comment letter written by your case manager will be provided in the 'Application Documents,' folder. This comment letter summarizes all the changemark comments.**

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Engineering	Michael Kettler mkettler@dublin.oh.us	Revisions Required	<input type="text"/>	<input type="text"/>
Planning	Michael Kettler mkettler@dublin.oh.us	Revisions Required	<input type="text"/>	<input type="text"/>

**Please upload a response letter to the documents file detailing your response to the requested revised/additional information. Upload the requested additional information or revised drawings to the documents and drawings folders. If you upload a revised drawing, please keep the name identical to the previous drawing name. ePlan will give it a version number.**

**Task Instructions**

- I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.
- I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.
- I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

[Resubmit Complete](#) [Save For Later](#)

**After you are finished uploading and ready for review, please put a check in all three boxes and click on the 'Resubmit Complete,' button. We will not be notified you have uploaded and the workflow cannot continue unless you complete these two steps.**

Once your application is ready for a public hearing your case manager will notify you using 'Team Email.' For applications that need to go to a second public hearing you will receive a 'Post Board/Commission – Applicant Upload' task. Please contact your case manager through 'Team Email,' to see if any corrections are needed prior to submitting for your second public hearing. If any corrects are needed from the first public hearing please make those corrections and upload the new documents to the documents/drawings folders. If no corrections are needed prior to your second public hearing, complete your task without uploading any new documents to initiate staff review. **The second round of staff review and the application cannot move forward until you finish your 'Post Board/Commission – Applicant Upload' task.**

