

Plan Submittal

NEW USER INVITATION

When the permit application has been submitted and application fee paid, an invitation (see above) will be sent to the user to upload the plans. A temporary password will be included in the new user email.



Permit Project Plan Check Invitation

Hello Katy Huan:

Welcome to the permit project electronic plan check system. This project invitation has been sent to you in response to your construction permit request. A permit project has been created to allow you to electronically upload your CAD drawings for permit plan check review. To access your new permit project, follow this instructions below:

1. Click the Project Access link below
2. Enter your User Login and Temporary Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" folder
5. Click the "Upload Files" button and follow the instructions to upload your CAD drawings
6. Your drawings have now been submitted for plan check review

SAMPLE INVITE EMAIL

CAD Drawing files supported are: .DWG, .DGN, .DWF, .DXF, .PDF, .TIFF, .PLT

User Login:	permits@cityoframsey.com
Project Permit #:	RA035508
Plan Check Coordinator:	NoReply CityOfRamsey
Plan Check Coordinator's Email:	noreply@cityoframsey.com
Project Permit Access Link	

Contact the Plan Check Coordinator if you have questions regarding this project. Please do not reply to this email.

Browser settings for new users:

Internet Explorer

URL: PlanReview.CityOfRamsey.com

- Add URL to Compatibility Mode
- Add URL to Trusted Sites
- Add URL to allow pop ups
- Install ProjectDox Components from PlanReview.CityOfRamsey.com login screen

Google Chrome

URL: PlanReview.CityOfRamsey.com

Add URL to allow pop ups

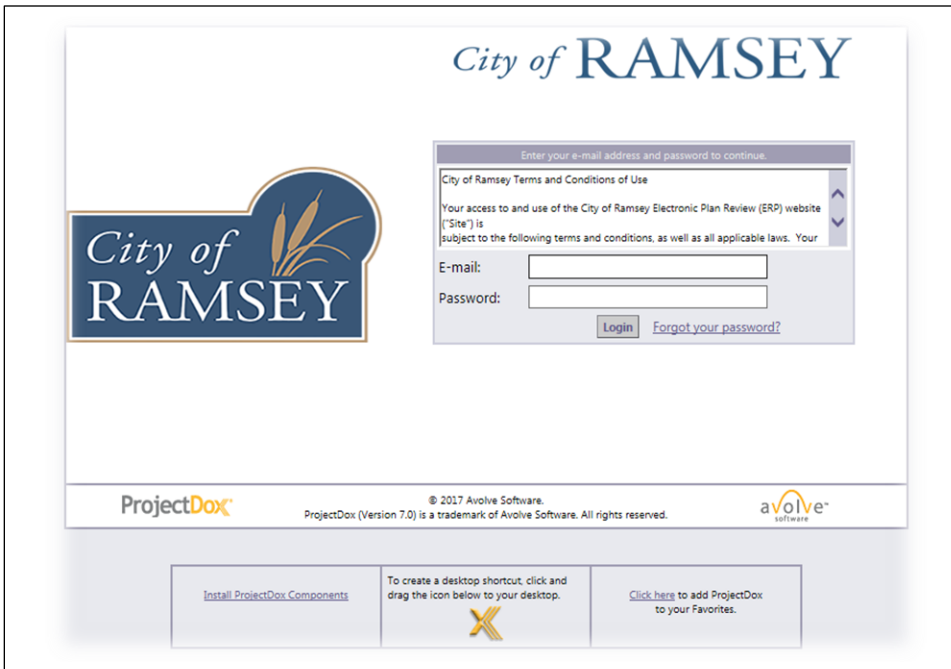
Mozilla Firefox

URL:

Add URL to allow pop ups

Plan Submittal

LOGGING IN & CREATING USER PROFILE



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 Ramsey's ProjectDox URL:

PlanReview.CityOfRamsey.com

Type or paste the temporary password into the Password Field and click **Login**. The password is case sensitive.

Change Password:
 New password: * Security question: *
 Confirm new password: * Security answer: *
Password must not contain special characters, must contain at least one digit and one alphabetic character

Profile Information

Contact Information	User Metadata	Project Membership	Group Membership
<input type="button" value="Save"/>			
* Required field			
First Name: *	Jesse	Last Name: *	Meyer-Ruud
Email: *	JMeyerRuud@EdinaMN.gov		<input checked="" type="checkbox"/> HTML format i
Title:			
Company:			
Address 1:			
Address 2:			
City:			
State/Province:	<input type="text" value="v"/>	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"/> i		
Language: *	en	<input type="text"/>	

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 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.

Navigation Basics

PROJECTDOX HOME PAGE

Project	Options	Description	Owner	Status	Create date
RA035492		7550 Sunwood Dr Nw - Building ePermit - Chimney	NoReply_CityOfRamsey	Approved	8/11/2017 9:10:19 AM
RA035508		7550 Sunwood Dr Nw - Building ePermit - Chimney	NoReply_CityOfRamsey	Applicant Upload	8/14/2017 9:50:31 AM

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED
Applicant Upload Task	RA035508	RA035508 - Ramsey Building Template - 8/14/2017 9:50:32 AM	Applicant	FirstInGroup	Pending	Medium	8/21/2017 9:50:33 AM	8/14/2017 9:50:33 AM

ProjectFlow Task List

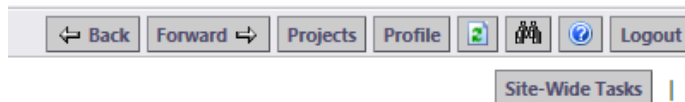
TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED
Applicant Upload Task	RA035508	RA035508 - Ramsey Building Template - 8/14/2017 9:50:32 AM	Applicant	FirstInGroup	Pending	Medium	8/21/2017 9:50:33 AM	8/14/2017 9:50:33 AM

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

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.

HOME PAGE 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 logs you out of ProjectDox.
- The **Task List** button shows any tasks requiring action from you for all projects in a separate page.


Navigation Basics

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.

Standards

FILE TYPES AND BORDERS

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.

BORDER STANDARDS

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

8 1/2" x 11" 11" x 17"
24" x 36" 30" x 42"

MARKUP NAME AND COLOR STANDARDS

Standard markup names and colors will be used for each reviewing discipline 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

Plan file names and sort order **must** match the sheet index. ProjectDox sorts numeric then alpha. File names for drawings submitted for electronic plan review should include the discipline character, followed by the three-digit sheet number. If decimals are needed in the sheet number place it after the third digit.

Ex. S.001.00

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

Drawing Type	Discipline	Sheet No.	Example
Alarm	FA	000-999	FA.008
Architectural	A	000-999	A.100
Civil	C	000-999	C.007
Demo	D	000-999	D.000
Electrical	E	000-999	E.004
Equipment	Q	000-999	
Fire Protection	F	000-999	
General	G	000-999	
Geotechnical	B	000-999	
Haz-Mat	H	000-999	
HVAC (Mechanical)	M	000-999	M.003
Interior	I	000-999	I.009
Landscape	L	000-999	
Plumbing	P	000-999	P.005.99
Sprinklers	FS	000-999	FS.009
Structural	S	000-999	S.002
Survey	V	000-999	
Telecommunications	T	000-999	K.006

Applicant Upload

STEP BY STEP

After you have successfully logged in to ProjectDox, the projects 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 Active Task List area below the project list.

From the Active Task List area click on the Permit Number/Project for which there is an Applicant Upload task. This will open that Permit/Project's main screen. Click on the **Workflow Portals** button. 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.

Click here to refresh your file list view

View Folders

Upload Files

Upload files:

Select files to upload

Browse

Upload URL:

URL Display Name:

URL:

Upload URL

1. Back on the Project page; select the Drawings or Documents folder depending on the file you are uploading.
2. 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.
3. The Upload Files dialog will appear.
4. Click the **Browse...** button.
5. In the resulting dialog box, navigate to and select the file to upload. Note: a file name is limited to 70 characters.
6. Click Open to add the file.
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 folder.
8. 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 filename, upload date and time, file size information, and name of the user who uploaded that file.
9. When finished with uploading, go back to the eForm window.
10. 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.



Applicant Resubmit Task Assignment

Attention Katy:

Your plan review submission for Project: **RA035492** 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 avoid your Permit Application from expiring.

Project:	RA035492
Task:	Applicant Resubmit
Assigned by:	[StarterLocalizedName]
Project Access Login to ePlans	

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.

Follow these steps below to complete this task.

- 1) Select the **Login to ProjectDox** link in the email to log in 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 task lists.
- 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:
 - eForm closes.
 - Task removed from Applicant's task list.
 - Email notification sent to the Permit Technician Group to perform the prescreen review again.
- 9) Permit Technician reviews the corrections. When no additional information is required from you, the Permit Technician approves the prescreen review. If more corrections are required, correction complete step will be repeated.

UPLOADING REVIEWCORRECTIONS

Workflow Review Changemark Viewer

Refresh Review Cycle: All Group: All Show: 5

STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME	MARKUP NAME	CHANGEMARK SUBJECT	CHANGEMARK DETAILS	CHANGEMARK DATE UPDATED
Unresolved		Building	1	Katy Hauan	Alpine Woods C1.pdf	KH	Changemark - Cul-d-Sac	The radius of the cul-d-sac is off by 10 degrees.	8/11/2017 10:22 AM
Unresolved		Building	1	Katy Hauan	Alpine Woods C1.pdf	KH	Changemark - Wetland	No planting in this area, it is protected.	8/11/2017 10:22 AM

1 - 2 of 2 records

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

Follow these steps to complete the task:

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit** 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:
 - Comments provided by the plan reviewers and provide responses as required.
 - View Checklist Items on the Checklist tab
 - Markups provided in the Changemark Section
6. Make required corrections and upload the revised files to the same folders as before using the same naming convention 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, 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, checklist comments, ~~fee~~ form comment and/or markup 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 Ramsey approval stamp and assigns final permit fees. You will receive an **Approved Plans Ready for Download Notification** email.



Approved Plans Ready for Download Notification

Attention Katy:

Congratulations! Your plan review submission for project RA035508 has been approved. Please [login to Epermits](#) to make final payment and download your permit.

Once payment is submitted you may then download your approved plans. To do this, please [login to ProjectDox](#) and download your plans from the Approved folder.

Project:	RA035508
Task:	Notify Applicant Download
Project Access Login to ProjectDox	

If you do not have access to the specified folder, please contact the [Project Administrator](#) or call 763-433-9850.

Please do not reply to this email.

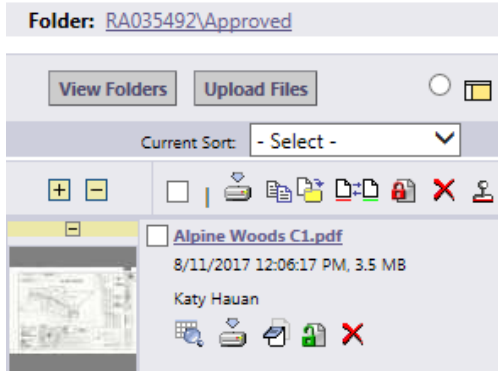
To make a final payment, use the hyperlink on the Notification email, or login to ePermits and click on **Pay for Approved Plan Review Permit**. Once fees are paid, the permit will be issued. If paying via ePermits, a PDF of the permit card and required inspections can be downloaded and printed. If paying in person at the issuing department, you will be given a paper copy of the permit card and required inspections.

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.

Print

APPROVED PLAN SET

Once payment is submitted you may then download your approved plans. To do this, please [login to ProjectDox](#) and download your plans from 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.

Please provide a scale set of approved plans on the jobsite.