



ProjectDox User Guide



Concurrent Electronic Plans Review



Upload Signed Permit Application, Plans & Documents Check Application Status Re-submit and Respond to Reviewers Comments

Download & Print Approved Plans

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Welcome to ProjectDox





Getting Started

The City of Miami strives to be a **Service City** every day by streamlining our internal processes; making it easier to register, pay, and receive city services. We have greatly enhanced our three online permitting systems – **iBuild**, **iPW**, and **OAS** -- to make city permit requests easier, faster, and available from your home or office computer at any time.

The City of Miami has selected Avolve Software's **ProjectDox** solution to complete our online permitting lifecycle. Now, you can complete the entire permitting process from anywhere, at anytime. ProjectDox is the country's market's leading Electronic Plan Review (ePlan) solution with over 150 jurisdictions utilizing ProjectDox to manage electronic plans routing, review, re-submissions, and approvals.

1. About ProjectDox

ProjectDox is a web-based electronic plan and document workflow solution that lets customers and government personnel initiate and complete the plan submission, review and approval process respectively online, rather than using a manual, paper-based process. Building, Planning, Zoning, Fire, Environmental, Resilience and Public Works, and other agencies can use ProjectDox for project-specific workflows to review projects in parallel rather than sequential.

Today, all permitting applications share information securely with ProjectDox to eliminate trips to the City Administration building, reduce time spent in line, cut printing costs, and reduce phone calls to inquire about application status.

2. Permitting Systems Application Routing Process

The City of Miami is committed to greater operational efficiencies and transparency at every stage of the permitting process. Permitting Applications begin in three systems – iBuild, iPW, or OAS – based on the type of permit requested from a specific department. After successful submission to the City of Miami, applications are created as projects within ProjectDox. You will receive a email notification, called an Invitation, to upload supporting documents and plans to that project's folders.

In an effort to streamline how we deliver permitting services, here's our basic application process:



3. ProjectDox User Guide

This guide explains how to access ProjectDox from any City of Miami permitting application, upload drawings, check status, review planner comments, re-submit revised forms, if necessary, and download approved documents and drawings. You are guided through each major ProjectDox tasks utilizing steps and pictures of the ProjectDox software.

The **ProjectDox Guide** contains seven (7) modules:

- Module I: Permitting Application Integration with ProjectDox
- 2. Module II: Submission Standards
- Module III: ProjectDox Access from Permitting Applications
- 4. Module IV: Navigating ProjectDox
- 5. Module V: Applicant Upload Task
- Module VI: Prescreen Corrections, Graphical Markups & Re-Submission
- 7. Module VIII: Downloading Approved Documents and Plans

4. ProjectDox User Guide Audience

This guide is intended for individuals who have a working knowledge of the City of Miami's online permitting application process.

5. ProjectDox Video Tutorials

The Department of Resilience and Public Works offers a series of short videos (5 minutes or less) to explain all major tasks available within iPW. All videos follow the guide contents, so feel free to read the guide, then watch a quick video to see iPW in action. Please visit the **City of Miami's Technology eLearning Hub** on YouTube or Vimeo. Click the links listed below or search for OAS on YouTube or Vimeo. You can also find links to training content within OAS after you have successfully logged into OAS.

• Youtube:

http://bit.ly/miamielearning

• Vimeo:

http://bit.ly/miamielearning2

6. ProjectDox Technical Support & Permitting Process Support

Technical Support

Please email ProjectDox **technical questions** or issues to the ePlan Technical Support team:

Email: eplantechsupport@miamigov.com

Permitting Process Support

We have three departments available to assist you with permitting process questions:

Building Department

Please call or email the Building Department with permitting process questions or issues:

- Telephone
 (305) 416 1100
- Email: eplanbuilding@miamigov.com

Department of Resilience and Public Works

Please call or email the Department of Resilience and Public Works with permitting process questions or issues:

- Telephone
 (305) 416 1200
- Email eplanrpw@miamigov.com

Department of Planning & Office of Zoning

Please call or email the Department of Planning & Office of Zoning with **permitting process** questions or issues:

Planning Department, 3rd Floor	Office of Zoning, 2 nd Floor
 Phone: (305) 416-1400 	 Phone: (305) 416-1495
• Email: eplanpz@miamigov.com	Email: eplanpz@miamigov.com

7. Learning More About iBuild, iPW, and OAS

If you are already a user of one or more of the City of Miami's permitting applications and would like a detailed User Guide, navigate to the **Help** button inside of each application. Typically, the Help feature will be located at the top of every application page.

8. Watch Permitting Videos: iBuild, iPW, and OAS

Please visit the **City of Miami's Technology eLearning Hub** on YouTube or Vimeo. Click the links listed below or search for iBuild, iPW, or OAS on YouTube or Vimeo. You can also find links to training content within each after you have successfully logged into OAS.

- YouTube: http://bit.ly/miamielearning
- Vimeo: http://bit.ly/miamielearning2

Integration with ProjectDox





Module I: Permitting Application Integration with ProjectDox

The City of Miami has three permitting systems that are integrated with ProjectDox, a nationwide leader with over 150 jurisdictions utilizing the tool throughout North America. Within the City of Miami, each permitting system is owned by a specific department (e.g., Public Works, Building Department) responsible for a certain type of permitting. ProjectDox works in conjunction with the City of Miami's permitting applications to help **automate the plan review process**.



When a resident or business (e.g., architect, engineer, contractor, and owner) submits an application for a construction or non-construction permit requiring plans and other documents, ProjectDox sends the main point of contact an email to invite the applicant to a "project", where the applicant can upload and attach electronic plan files.

Next, review department personnel has access to the plans in ProjectDox, and uses ProjectDox workflow, collaboration and view/markup tools to complete the plans review process. A reviewer's required changes are noted on the files as a **changemark** or comments and then communicated to the applicant who makes the noted revisions to the original files and then resubmits (uploads) revised files back into ProjectDox. Applicants must use the same file name for all re-submitted files (revised files). ProjectDox keeps the files bundled together and adds a version number (e.g., v1, v2, v3); see the file submission standards in the next chapter.

The review cycle, also called a workflow, continues until all the regulatory requirements are satisfied and receives final approval for the plans and the permit. Finally, approved permit cards and drawings can be downloaded and printed without ever having to visit our city offices.

Pulling Permits: Building Department

For a Building Permit, the master permit holder or sub-contractor will be required to pull the permits and print the permit card before downloading the approved plans from the Approved folder in ProjectDox.

Pulling Permits: Resilience & Public Works and Planning & Zoning

For Department of Planning & Office of Zoning, along with the Department of Planning and Office of Zoning allows the applicant to retrieve both the permit card and/or final decision letter (e.g., staff analysis reports) from ProjectDox.

ProjectDox Frequently Used Terms

Term	Explanation
Changemark(s)	Graphic notations placed on a plan or document by City reviewers to indicate a required change to a plan or document.
Checklist	The checklist is completed by the applicant. It provides a list of required documentation to assist the applicant in completing the application package.
E-Form	An electronic version of a paper form; it provides the user interface to a workflow: communicating,
or Formlet	formatting, and validating information about a process. Most of your tasks will begin within the e-form.
Global Task List	Displays a list of workflow assignments across all projects for the logged-on user for that ProjectDox site.
Invitation	After an application is successfully submitted to the City of Miami, a corresponding project is created within ProjectDox. If you are added to the project as a participant, then you will receive an invitation

Term	Explanation	
	to the project in email containing a hyperlink to the project. If you are the submitter (or main point of contact)	
Markup	Comments or changes placed on a form (or plan) by City reviewers. A markup can be a graphic or a drawing (see Changemarks) placed on your plan to indicate a required change before the plan can move forward in the review process (workflow). A delay in addressing markups left by reviewers may delay your permit review.	
Project Specific Task List	Displays the workflow assignment(s) for the logged-on user for a specific project.	
Task	An assignment related to a workflow process within ProjectDox.	
Task List	A list of assignments.	
Viewer	Individual files and drawings are opened within a separate window on your screen called a ProjectDox Viewer. Disable your pop-up blockers if you experience difficulty. Also, ProjectDox Components must be installed for full functionality.	
Workflow	A sequential and repeatable pattern of business activity to move work from start to finish. In ProjectDox the workflow could be the steps involved in the intake of plans for commercial buildings.	

10.Permitting Application Process Overview

	Typical Steps	Important Notes & Activities
1.	You complete the request for application through iBuild/iPW/OAS.	Contractor & Utility Companies must register in- person with the City of Miami.
2.	You pay an upfront fee at the time of request, if applicable.	 Use the Pay Now link in each application or click the link on the payment email notification.
3.	You will receive an email with instructions on how to upload your digital drawings and documents.	Project Docs sends you an email which as your "invitation" to work in your project.
4.	All the drawings and documents that are to be submitted shall be required to follow City of Miami naming convention standards	See the <u>Naming Convention</u> section in this guide. https://bit.ly/3upRfCX
5.	All the drawings and documents must be digitally signed and/or sealed as required by the City of Miami	 Get your digital certificate. Visit our certificate site to learn how through IdenTrust or GlobalSign. https://bit.ly/3dDVEMu
6.	City of Miami Staff will be notified when you complete this task and will conduct a pre-screening of your request to determine if your request can be accepted.	

	Typical Steps	Important Notes & Activities
7.	You may receive a Resubmission task that will outline deficiencies in your request and what you need to do to meet the submission standards and resubmit.	
8.	Once Pre-screen is approved, we will begin processing your application.	
9.	Plan reviewing disciplines will be assigned for reviews to be done concurrently.	
10.	At the end of the review cycle your will receive a Resubmission task if there are deficiencies in your application or you will receive notification that your plans have been approved.	
11.	Once you will receive an email with a link to file containing stamped drawings and documents as well as PDFs of your permit card or special permit certificate(s) or letter of approval.	

Submission Standards





Once you have made your initial request and paid the upfront fee, if applicable, you will receive two emails. The first email is invitation to the project. The second email will be regarding applicant upload task to upload your plans and documents so that we may Prescreen your request. The drawings and documents that you upload must meet our submission standards.

1. Required File Standards

- 1. Drawing Files each drawing sheet shall be uploaded as separate file.
- 2. Document Files Each document shall be uploaded as a separate file. Multiple pages are permissible for document files.
- Only vector PDF files drawn to scale will be accepted for drawings. Please submit searchable PDF files for calculations, reports and other supporting documentation (nondrawing files).
 - **Note**: When generating vector PDFs, all drawing and any resubmitted need to be oriented in <u>LANDSCAPE</u> orientation.
- 4. When submitting vector-based PDF, you will need to provide us with a layer naming convention so that we can manipulate the view to speed our review time.

Note: We recommend that the layers are turned on when submitting drawings. See Naming Conventions for layers.

2. File Naming Standards – Building Plans (Residential & Commercial)

File names for drawings submitted through ePlan Review (ProjectDox) should include the required Discipline Designator code, followed by the discipline set document number. File names for both drawings and documents **shall remain the same for all submittals**. Please <u>do not</u> version files when uploading resubmitted files.

- **Discipline Designator (Required)** First character(s) in the file name represents the discipline area followed by file number of the discipline sett, ex. A-1 Elevation plans.
- **Discipline Set File Number(Required)** This will be a numeric digit corresponding to the sequential number of this file as it relates to each discipline set. Ex. If you are submitting two files for Electrical plans, the correct code would be E-1 for the first file, E-2 for the second file.

Document Naming Conventions

DOCUMENTS				
DISCIPLINE DESIGNATOR	EXPLANATION			
DOC-0	INDEX OF DOCUMENTS BUILDING, FIRE, PLANNING & ZONING			
PZD-0	INDEX OF DOCUMENTS FOR PLANNING & ZONING; SPECIAL PERMITS			
BLD-	AFFIDAVITS / ELEVATION CERTIFICATE			
ERD-	ENVIRONMENTAL RESOURCES DOCUMENTS			
ETR-	ENGINEERING CALCULATIONS / TEST REPORTS			
HEP-	HISTORIC PRESERVATION / ARBORIST REPORTS			
MDC-	ALL MIAMI-DADE COUNTY REPORTS			
NOA-	NOA PRODUCT APPROVAL			
PAP-	PERMIT APPLICATION			
PHD-	PHASE PERMIT DOCUMENTS			
PHO-	PHOTOS / RENDERINGS			
PPD-	PRIVATE PROVIDER DOCUMENTS			
PZD-	PLANNING & ZONING DOCUMENTS			
RPF-	ROOF PERMIT FORMS			
RPW-	RESILENCE & PUBLIC WORKS DOCUMENTS			
40-	40 YEAR REPORTS (40-S STRUCTURAL / 40-E ELECTRICAL / 40-C COVER)			



Examples:

- PPD-01.pdf Private Provider Drawing 1
- PPD-02.pdf Private Provider drawing 2
- DOC-0.pdf drawing Index for Building Permit
- RPF-01.pdf Roof Permit Forms drawing 1
- MDC-02.pdf Miami Dade County drawing 2
- RPW-01.pdf Resilience & Public Works drawing 1

Drawing Naming Convention

DRAWING8				
DISCIPLINE DESIGNATOR	EXPLANATION			
A-0	INDEX OF DRAWINGS BUILDING, FIRE, PLANNING & ZONING			
C-0	INDEX OF DRAWINGS FOR RESILENCE & PUBLIC WORKS			
A-	ARCHITECTURAL			
CG-	CIVIL - GAS			
CS-	CIVIL - SITE WORK (GRADING, PAVING, DRAINAGE, SIDEWALKS/DRIVEWAY APPROACHES, PAVEMENT MARKINGS, ETC.)			
CTPL-	TELECOMMUNICATION, POWER, LIGHTING/PHOTOMETRICS, ELECTRICAL, CABINETS, VAULTS, ETC.			
cws-	WATER, SEWER, IRRIGATION, FIRE, CHILLED WATER			
C-	CIVIL - ALL OTHER CIVIL DRAWINGS: SOIL BORINGS, MONITORING WELLS, SIGNS, TRAFFIC SIGNALIZATION, ETC.			
D-	DEMOLITION			
E-	ELECTRICAL			
FA-	FIRE ALARMS			
FP-	FIRE PROTECTION			
FS-	FIRE SPRINKLERS			
G-	GENERAL			
IR-	IRRIGATION			
L-	LANDSCAPE			
LS-	LIFE SAFETY			
M-	MECHANICAL			
MF-	MECHANICAL FUEL PIPE			
OD-	OTHER DISCIPLINES (STAGE DESIGN AND OTHER SPECIALTY DISCIPLINES)			
P-	PLUMBING			
R-	RESOURCES			
S-	STRUCTURAL			
T-	TELECOMMUNICATIONS / LOW VOLTAGE			
V-	SURVEY			
X-	CONTRACTOR /SHOP DRAWINGS Document Version: August 2020			



Examples:

- A-0.pdf Drawings Index for Building, Fire, Planning & Zoning
- CS-01.pdf Civil Gas drawing 1
- CS-02.pdf Civil Gas drawing 2
- D-01.pdf Demolition drawing 1
- D-02.pdf Private Provider drawing 1
- FS-01.pdf Fire Sprinklers drawing 1
- FS-02.pdf Fire Sprinklers drawing 2
- RPD-01.pdf Roof Permit Forms drawing 1
- MDC-02.pdf Miami Dade County drawing 2
- RPW-01.pdf Resilience & Public Works drawing 1

Naming Conventions: The City of Miami has established specific file naming conventions. Your application may be returned for correction and re-submittal if the proper naming conventions are not followed.

Please review the naming conventions doc online for the most up-to-date standards:

• https://www.miamigov.com/files/sharedassets/public/eplan/eplanhelp/eplan-review-standard-naming-conventions.pdf

3. Plans Preparation

Before you begin uploading your supporting plans and drawings into **ProjectDox** take a moment to make sure that your plans are ready for a thorough review. Plans uploaded into ProjectDox without the proper layout may delay your permit review and result in a returned application.

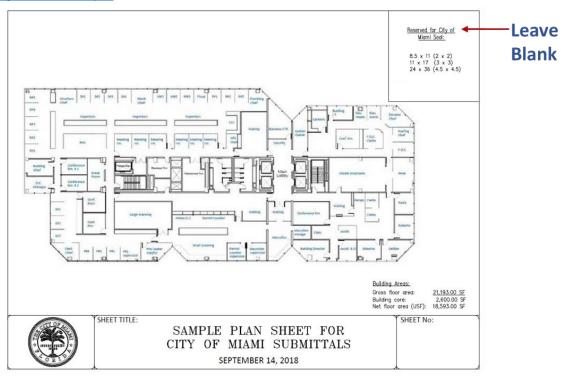
If your plans are approved, the Department of Resilience & Public Works personnel applies the **City of Miami** seal (or stamp) to the upper-right corner of each page within the plan. Please ensure that you leave the upper-right corner blank (empty), as shown in the below sample.

Blank space requirements by plan size:

• 8.5 x 11 plan requires a 2x2 blank (empty) area / 11 x 17 plan requires a 3x3 blank (empty) area 24 x 36 plan requires a 4.5 x 4.5 (empty) area

Naming Conventions: **Naming Conventions**: The City of Miami has established specific file naming conventions. Your application may be returned for correction and re-submittal if the proper naming conventions are not followed.

https://www.miamigov.com/files/sharedassets/public/eplan/eplanhelp/eplan-review-standard-naming-conventions.pdf



If you have questions prior to upload, please send an email to the specific department: Building Department: eplanbuilding@miamigov.com / Dept. of Resilience & Pubic Works: eplanpy@miamigov.com / Department of Planning & Office of Zoning: eplanpz@miamigov.com.

Accessing ProjectDox





Module III: ProjectDox Access from iBuild, iPW, and OAS

1. Recommended Internet Browser: ProjectDox

We suggest using Internet Explorer 11 or higher to ensure that ProjectDox operates as intended.

2. Install ProjectDox Components (Applicable to Only Internet Explorer)

ProjectDox is tightly integrated with all of the City's permitting systems, however it requires a separate log on (Username & Password), along with an installation of small components (add-on tools for your browser). You should install the ProjectDox components before logging in or creating your ProjectDox account.

 Only users within Internet Explorer will see the Install ProjectDox Components link. To review and install the components, go to the OAS main page: https://miami-fl-us.avolvecloud.com/ProjectDox.

3. Pop-Up Blocker

ProjectDox uses pop-up windows (browser windows with no toolbars). If you log in, but no ProjectDox window appears, or a warning is received, it is likely that a pop-up blocker is preventing the main project window from opening. You need to allow ALL pop-ups for ProjectDox. You can do this in one of two ways:

- 1. Disable pop-up blockers entirely, or
- 2. Configure blocker to allow pop-ups for specified OAS site. To learn more about configuring Internet Explorer, please refer to the official IE Help online: https://support.microsoft.com/en-us/help/17479/windows-internet-explorer-11-changesecurity-privacy-settings. IE Help is available from your browser, press **F1** on your keyboard. You can use the **Help** menu at the top of the browser to find pop-up blocker instructions.

4. Accessing ProjectDox

Access from iBuild, iPW, and OAS

You can access ProjectDox within any City of Miami permitting application system.

- 1. From iBuild, log in and click the ProjectDox link in the upper-right corner.
- 2. From iPW, log in and click the ProjectDox menu at the top of the screen.
- 3. From OAS, log in and click the **Mange My Existing Projects** button, almost in the center of the screen.

Access from iBuild

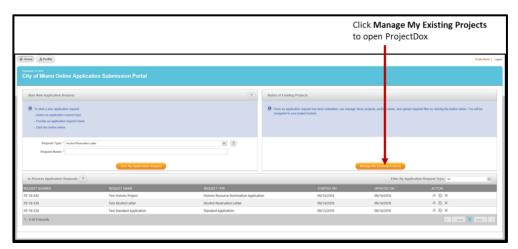
Step 1: In your IE browser to navigate to the iBuild site login page:

https://apps.miamigov.com/iBuildPortal



<u>Step 2:</u> Once you successfully log in to iBuild, click the **ProjectDox** icon (picture) at the top right of the screen to open a new window on your screen that displays the ProjectDox logon screen (same screen as OAS, Online Permitting Systems). If you have not logged in to ProjectDox (or OAS) before, click **Create an Account** and follow the instructions.

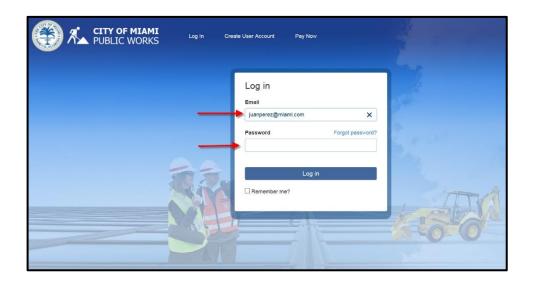
Step 3: Once you successfully log in to ProjectDox, click Manage My Existing Projects button to view your projects.



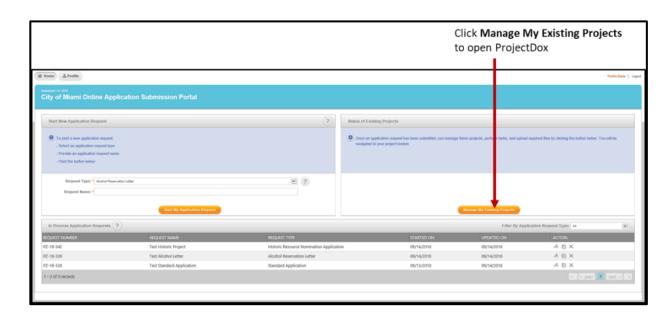
Access for iPW

Step 1: In your IE browser to navigate to the iPW site login page:

• https://apps.miamigov.com/publicworks



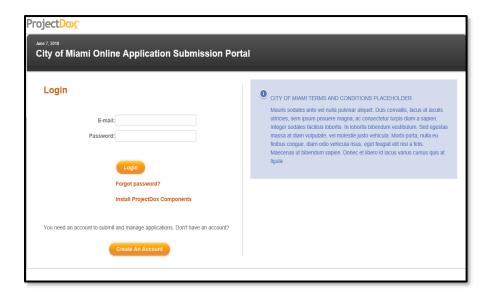
<u>Step 2:</u> Once you successfully log in to iPW, click **Manage My Existing Projects** button to open a new window on your screen that displays the ProjectDox logon screen (same screen as OAS, Online Permitting Systems). If you have not logged in to ProjectDox (or OAS) before, click **Create an Account** and follow the instructions.



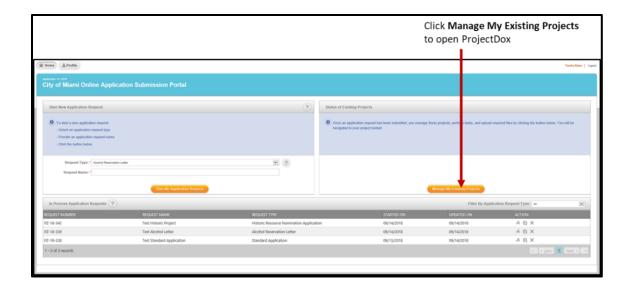
Access from OAS:

Step 1: In your IE browser to navigate to the OAS site login page:

• https://miami-fl-us.avolvecloud.com/ProjectDox



<u>Step 2:</u> Once you successfully log in to OAS, click **Manage My Existing Projects** button to open a new window on your screen that displays the ProjectDox logon screen (same screen as OAS, Online Permitting Systems). If you have not logged in to ProjectDox (or OAS) before, click **Create an Account** and follow the instructions.



Understanding ProjectDox Tasks

Each project (permit application) will have TASKs to be completed by STAFF or YOU (as the applicant). Below is formal list of Tasks that you will see in the system or in some of project reports.

	Workflow TASK	Role	Assignment	Description
1	Applicant Submission and Fee Payment	Applicant	n/a	Applicant applies online and pays upfront fees online
2	Applicant Upload	Applicant	n/a	Applicant to upload drawings / documents
3	Prescreen Review	Permitting Coordinator	First in Group	Staff perform prescreen (application acceptance)
4	Prescreen Corrections	Applicant	n/a	Applicant to respond to prescreen corrections (if any)
5	Prescreen Review	Permitting Coordinator	First in Group	Approve prescreen (application acceptance)
6	Assign Reviewers	Permitting Coordinator	First in Group	Permitting Coordinator assigns reviewers as needed for the application.
8	Department Review	Plan Reviewer	First in Group	Review submission; add changemarks, markups, and checklist items.
9	Review QA	Permitting Coordinator	First in Group	Staff completes the review completing task and sends back the project to applicant if there are any corrections
10	Applicant Corrections	Applicant	n/a	Applicant to respond to review corrections (if any)
11	Resubmit Received	Permitting Coordinator	First in Group	Review submission and recirculate for next review cycle.
12	Department Review	Plan Reviewer	First in Group	Review submission; add changemarks, markups, and checklist items.
13	Review QA	Permitting Coordinator	First in Group	Proceed to Approval
14	Batch Stamp	Permitting Coordinator	First in Group	Batch stamp drawings and documents
15	Finalization Review	Individual Plans Reviewer	n/a	Update permit details and/or completes staff analysis or final decision letter, if applicable
16	Permit Issuance	Applicant	n/a	Applicant pulls permit online (iBuild Only)
17	Permit Issuance	Plans Reviewer	n/a	Plans Reviewer uploads permit card / report to ProjectDox (applicable for Resilience and Public Works, Planning and Zoning)
18	Email Notification of issuance	Applicant	n/a	Applicant receives email notification of permit issuance and instructions to download APPROVED plans and documents.

Navigating ProjectDox

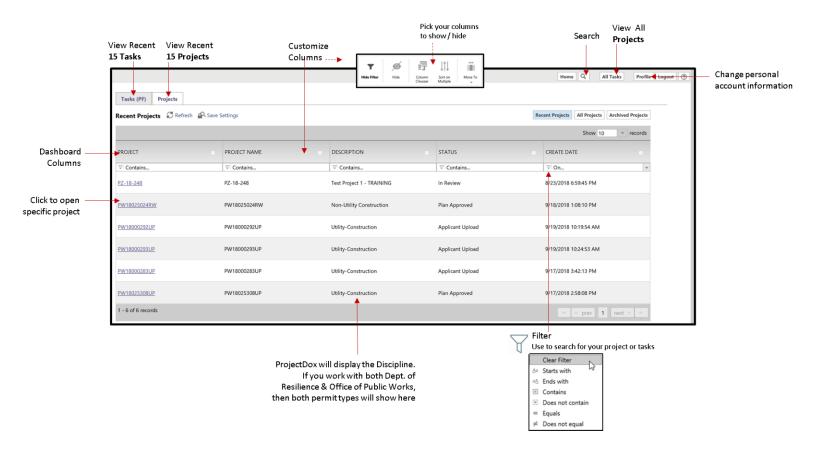




Module IV: Navigating ProjectDox

The ProjectDox Main (Home) page displays after successfully logging into a City of Miami permitting application and following the ProjectDox link shown in the specific system. You can also log in directly to ProjectDox, navigate to https://miami-fl-us.avolvecloud.com/ProjectDox.

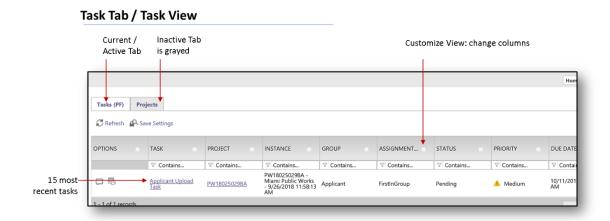
The ProjectDox main page displays two main Tabs: Tasks and Projects along with navigational features at the top right of the page.



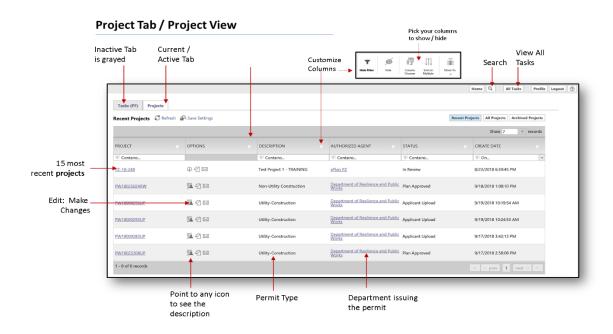
1. ProjectDox Tabs

ProjectDox main page displays two tabs: Projects and Tasks. The default tab shown will be Recent Tasks.

1. The **Tasks** tab displays the 15 most recent tasks. Shows information about work that you will need to perform to continue the permit application review process.



2. The **Projects** tab displays information about the 15 most recent projects. The first column contains a list of project names, and each name is a link to the page for that project.



2. Finding My Projects

Clicking on the link for a project will open the project's detailed information on your screen. A project contains two core items: folders and files.

• Folders:

Similar to the familiar structure in various operating systems, a folder may contain individual files and sub-folders.

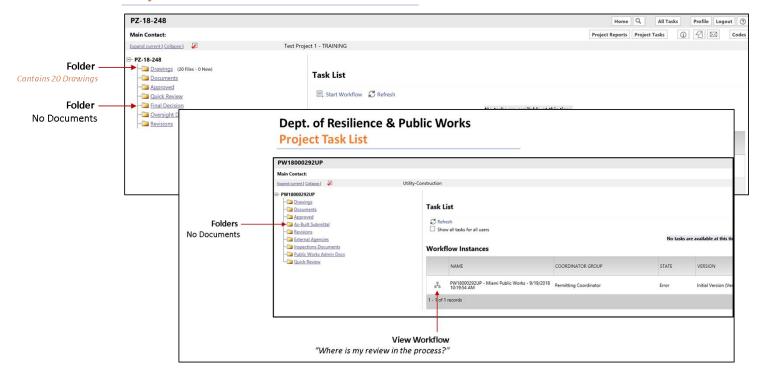
- Depending on where you are in the review process (workflow), you will be granted access to certain folders (e.g., Approved, Revision).
- Depending on the type of application, the folder structure may differ. For example,
 Planning applications may have an Oversight Boards folder, while Building may have an As Built folder, and Public Works may have External Agencies).

• Files:

The drawings, documents, and other file types included in the project at the time of creation, or by addition by applicant.

Dept. of Planning & Office of Zoning

Project Task List



Using Filters to Locate Projects/Tasks

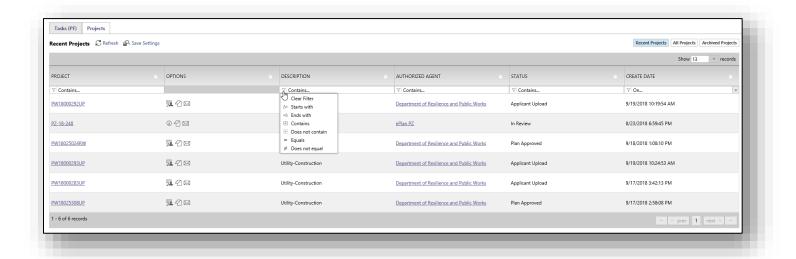
If your ProjectDox Dashboard contains multiple projects, it can be difficult to find information quickly. Filters can be used to **narrow** down the data in your worksheet, allowing you to view only the information you need. You can use filters to narrow what's shown on your screen by entering a few letters, numbers, or a complete phrase.

To use filters:

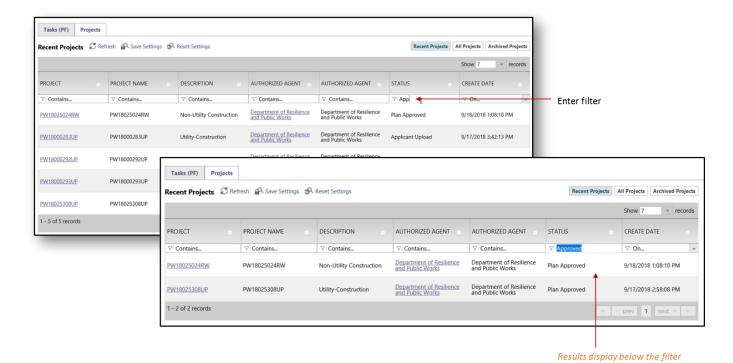
<u>Step 1</u>: From any column, click the **Filter** button (small funnel).

<u>Step 2</u>: The filter box displays, choose a filter type: **Starts with, Ends with, Contains, Does Not Contain, Equals,** or **Does Not Equal**.

Note: If you have a filter applied already and want to remove it, click **Clear Filter**.

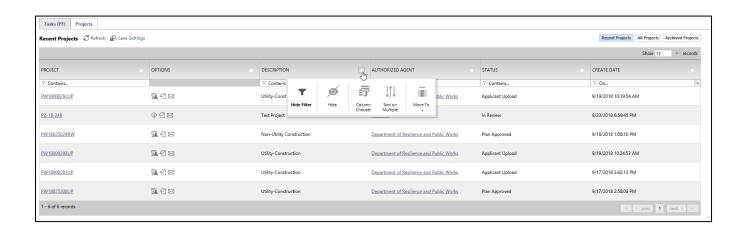


Step 3: Enter a few numbers, letters, or phrase into the search box and ProjectDox will begin to remove any items that do not match your desired filter. In the example below, we typed "App" for approved in the Status column.



Customizing My Dashboard (Tasks & Projects)

You can customize your dashboard to fit your preferences.



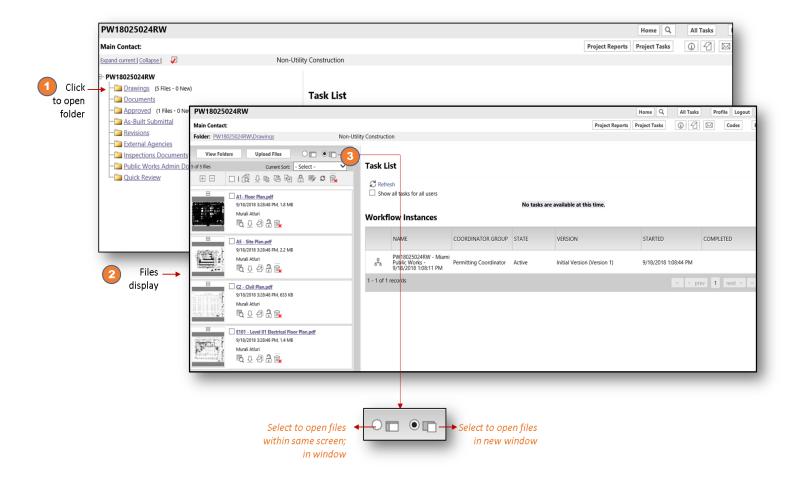
3. Working with Files

Files are stored in project folders. You can view, upload, and download files (documents and drawings). Staying organized can help the city's staff to review your application faster. Upload files into the appropriate folders (e.g., Drawings, Documents, Quick Reviews).

Viewing Files

You can view documents and files at any time, simply by clicking through the folders.

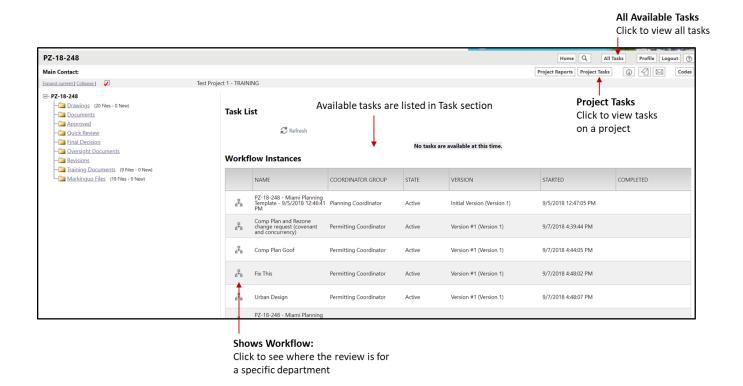
- Open your project and browse the available file folders.
 The available folders may change slightly as you go through the application review process.
- 2) From the list of files on the left side, click on the thumbnail or filename for the file you just uploaded.
- 3) A large view of the file will open in a separate window this is the Viewer tool.



Icons	Action (Point to any icon in the system to see the Icon's Name / Action)		
Ē	View File History (# of versions)		
4	Comments from City personnel or your organization attached to that specific file		
<u>P</u>	Number of markups found on the file. Remember, each department uses a specific color to denote their markup.		

4. Tasks/Workflow

- 1 When you log into ProjectDox, all your pending or accepted tasks display in the Global task list. This can be seen on the Tasks (PF) tab on your Home Screen.
- 2 You can view tasks related to a specific project, by clicking **Project Tasks** (from inside the project).



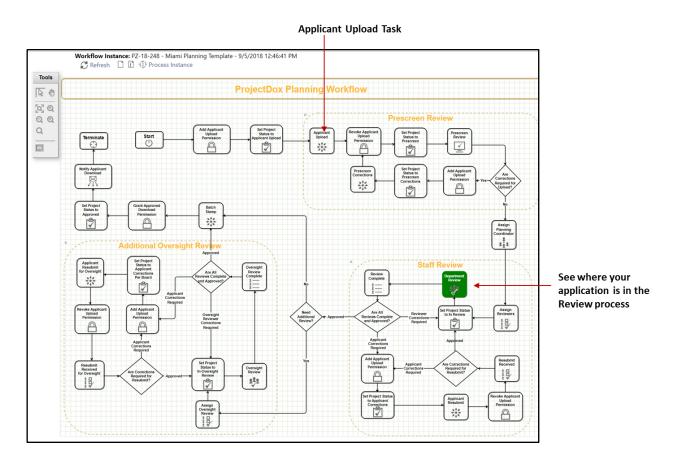
Applicant Upload Task





Module V: Applicant Upload Task

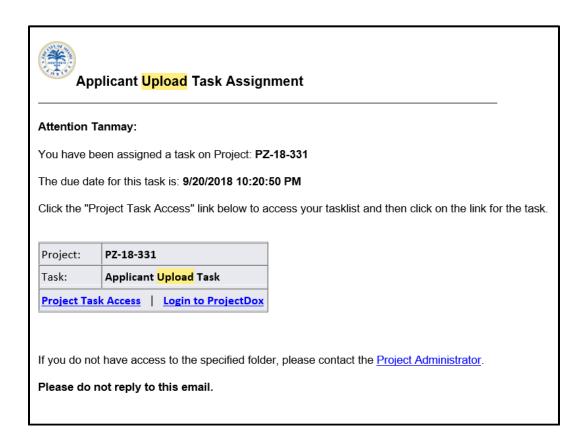
To allow staff to complete the prescreening (acceptance) of your application, you will need to upload your drawings and documents. Once you have paid the upfront fee(s), you may receive two emails. The first email will be a **Welcome to Portal** notification. All first-time system users will receive this notification. For returning users, you will receive an email to complete the **Applicant Upload** task.



The pre-screening of your application request cannot begin until you have uploaded your drawings and documents and have completed the Applicant Upload task.

1. Email Invitation

Step 1: Applicant will receive an email invitation that will provide instructions and a link to the project within ProjectDox.

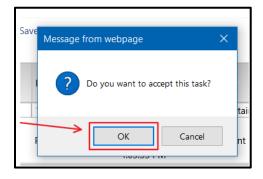


<u>Step 2:</u> The Applicant will locate the project they want to submit the drawings and documents for by searching on either their Project tab or Task tab.

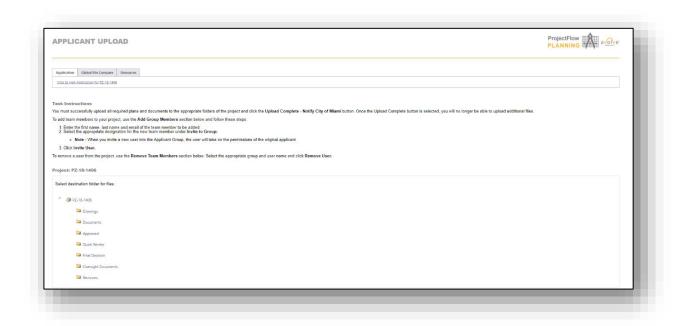
Step 3: To accept a task in ProjectDox, click on the link for the task (not for the project) in the task list. If you do select the Project link, select the Project Tasks button to get to the project task list.



Step 4: In the resulting dialog box, confirm you are accepting the task by clicking **OK**.



Step 5: The electronic form (eform) will open in a new window.



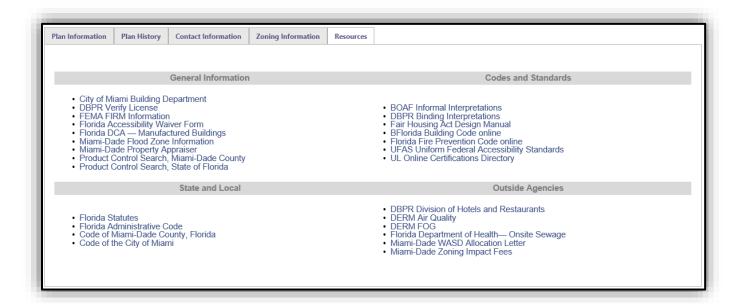
2. Using eForms

When you accept a task, the workflow will display an eForm (remember, an eForm is the way for you to interface with the workflow). Depending on the task, the eForm will have different information and functionality that is associated with that task.

eForm Tabs

Building Department Tabs will appear as:

- Plan Information information from iBuild related to the application
- o Plan History information from iBuild
- Contact Information Contact information from iBuild
- o Zoning Information Zoning information from iBuild, and
- o Resources helpful links.



Planning Department and Office of Zoning tabs will appear as:

- o Application Information view -only version of the submitted applications, and
- o Resources helpful links.

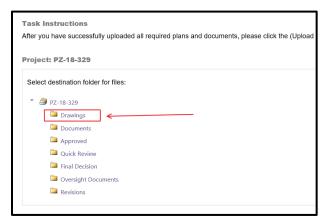
Department of Resilience and Public Works tabs will appear as:

- Application Information summary of the permit request
- o Contact Information Contact information from iBuild
- Streets to Close summary of requested work closure location
- Data Measurements work related details (e.g., quantity of items to be installed or linear feet of roadway impacted by work), and
- Resources helpful links.

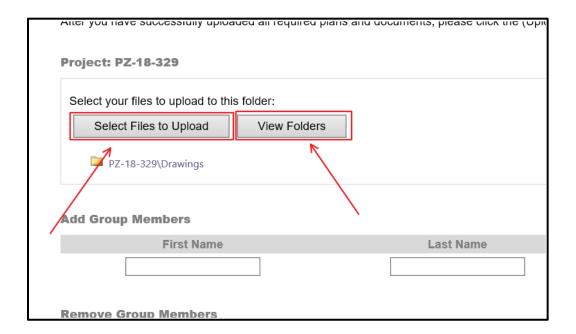
To upload into folders:

<u>Step 1:</u> In the Task instruction section, select **Drawings** folder to upload the plans and/or any other relevant drawings associated with the application.

Note: Depending on the application, your drawings and/or documents may be required to be digitally signed and sealed. To verify, see Building Documents (hyperlink) or Department of Resilience and Public Works (hyperlink).

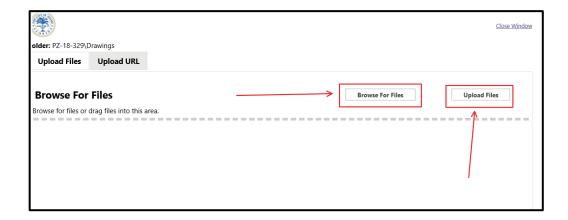


<u>Step 2:</u> Click on **Select Files to Upload** to open a window that will assist in uploading files. Click **View Folders** to view all folders.



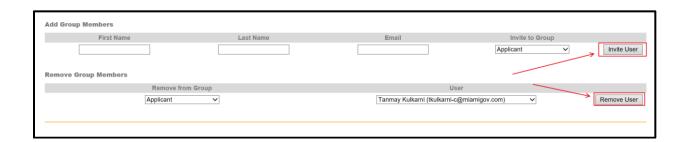
<u>Step 3:</u> To browse the files to upload, click **Browse for Files**. Select appropriate files from the folder to upload. Select **Upload Files** to complete the upload.

Note: You may drag selected files, up to 100 separate documents at once for a single upload (If your plan set has 1000 sheets, select 100 sheets each time (10 times) to upload).

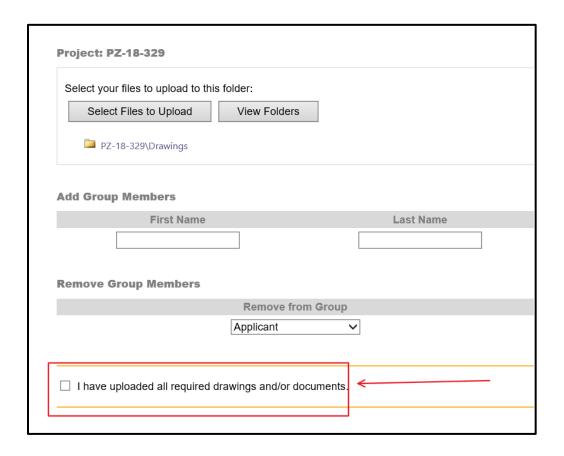


<u>Step 4:</u> To invite additional group members, enter First Name, Last Name and Email of the member, select appropriate group to invite, and click **Invite User** to invite a user to the Project (E.g. Architect, Engineer Professional)

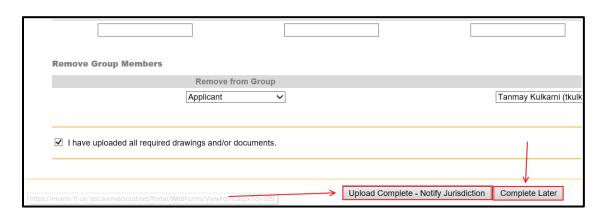
• To Remove user from the group, select appropriate group and user and click **Remove User.**



<u>Step 5:</u> Select "I have uploaded all required drawings and/or documents" checkbox to confirm the completeness.



<u>Step 6:</u> Click **Upload Complete – Notify Jurisdiction** to complete the task. Click **Complete Later** to save for later.



Corrections & Re-Submit





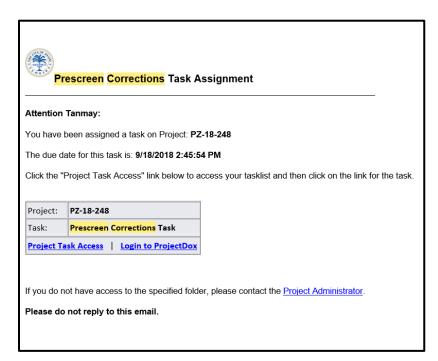
Module VI: Prescreen Corrections & Re-Submit

Prescreening is a cursory review of your uploaded drawings and documents to ensure that you have met the submission standards and that your submission is complete. Allow a minimum of two (2) business days after you have uploaded your documents for the Prescreening process to take place.

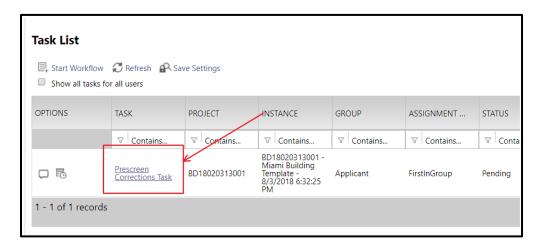
If there are questions or missing items from your submittal, you will receive a "Prescreening Corrections Request" e-mail with instructions and comments on the required corrections for acceptance.

1. Prescreen Corrections

<u>Step 1:</u> If there are items that need to be addressed for the application to be accepted, you will receive an email with subject of "Prescreen Correction Tasks". This email will instruct you to login to view the outstanding items before prescreen can be approved.



<u>Step 2:</u> Once you login and click the **Manage My Existing Project** button to navigate to ProjectDox, you will see your Dashboard (tasks/projects). Locate your project number and select the Prescreen Correction Task.



<u>Step3:</u> This task to resubmit corrected or missing items. This step allows the *Applicant* to receive review comments provided by the review group(s). The Applicant will review the provided changemarks, checklist items, and general notes to make corrections prior to resubmission.



2. Viewing Graphical Markups

Outstanding issues or deficiencies can either be in the form of Checklist items and Changemarks.

Changemarks are the graphical deficiencies associated with an individual plan sheet. Changemarks are a type of markup that needs to resolved before your plan can be approved.

You can view markups (changemarks) at any time.

There are (2) ways that you can view markups (changemarks):

- 1. Using the Markup Icon, or
- 2. using the Formlet, also called eForm.

3. Understanding Markup Name and Color Standards

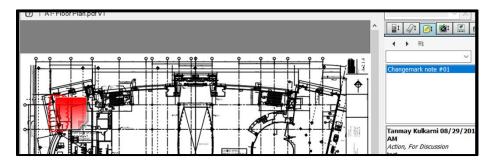
Standard markup names and colors will be used for each reviewing department for easy identification. An edited file markup can have one or more changemarks. Changemarks are created to quickly identify a markup and associated comments.

Note: The Changemark naming standard will be:

 Reviewer First Name, Reviewer Last Name, Discipline, and Date of Markup For example: Maria Gonzalez, Fire, 10-28-2018

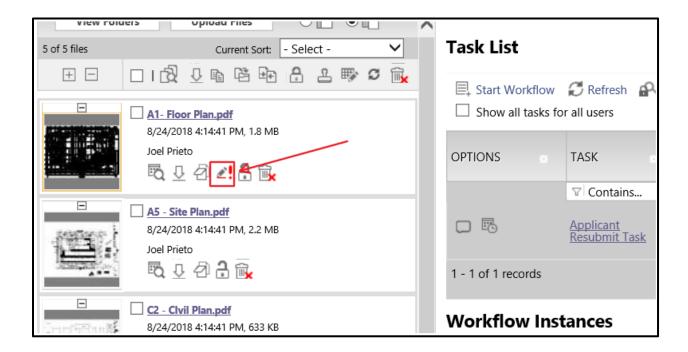
The following table describes the changemark color assigned to a specific discipline.

Markup Name	Change Markup Title	Markup Color
Asset Management	AM	YELLOW
Building Disciplines	BL	BLUE
Fire	F	RED
Planning Disciplines	PN	GREEN
Zoning Disciplines	Z	ORANGE
Public Works Disciplines	RD	PURPLE

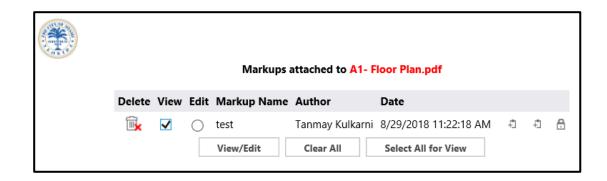


4. Option 1: Using Markup Icon

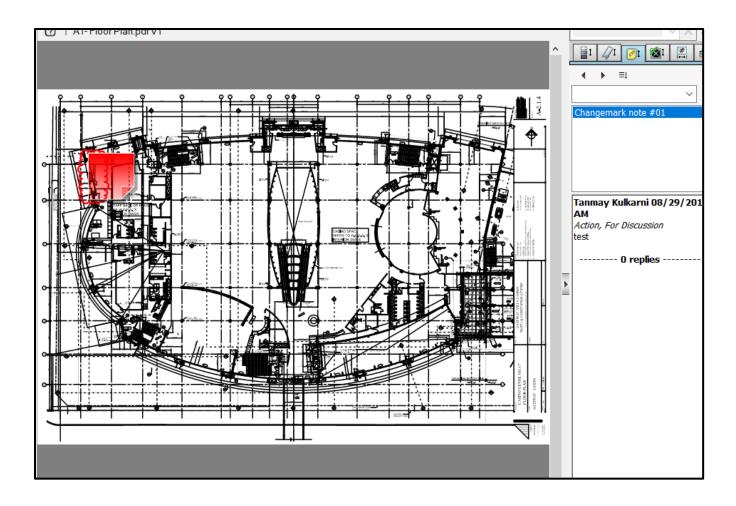
<u>Step 1:</u> From the Drawings folder, click on the **Markup** icons, the icon will only appear if there are markup layers on the drawing or document.



<u>Step 2:</u> Clicking on the Markup icon will display a list of all the markups on that drawing or document. Select the View check box, then on the View/Edit button.

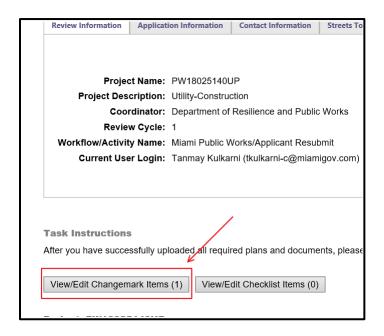


Step 3: You can view the changemarks in the specific drawing and then would address how you are going to resolve the deficiency.

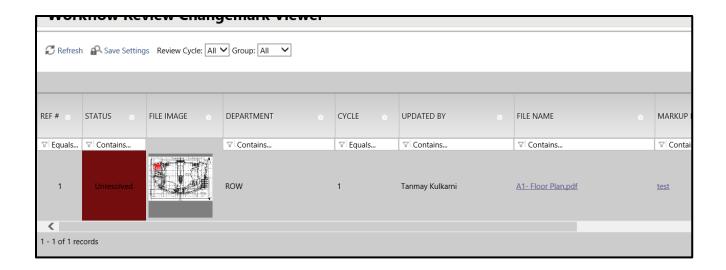


5. Option 2 – Using Formlet (eForm)

<u>Step 1:</u> Open task formlet to view/complete the task and click on **View/Edit Changemarks Items** button.



Step 2: Click **View/Edit Changemarks Items** to open the list of changemarks.



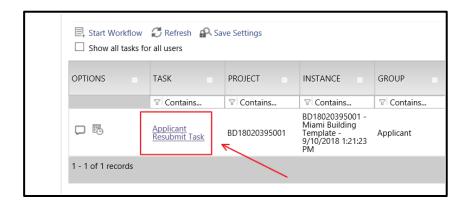
Step 3: Click on appropriate **Markup Name** to view the markup.



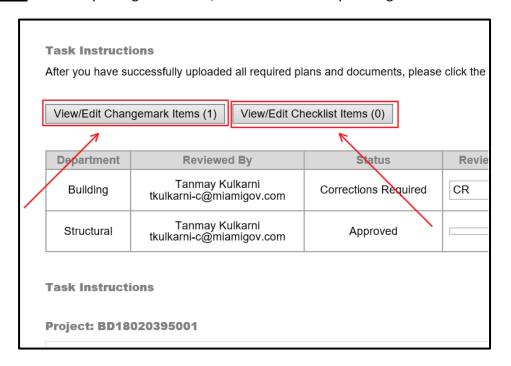
6. Applicant Resubmit Task

Once we have completed our review by all required review groups, you may receive an Applicant Resubmit task to address by responding to any deficiencies. If there are no deficiencies, your application will proceed to approval

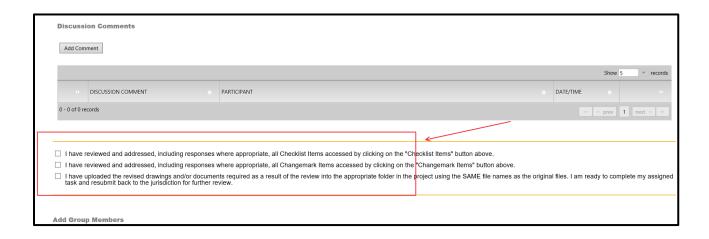
Step 1: Navigate to your project, and select the Applicant Resubmit Task link in the Project Task List.



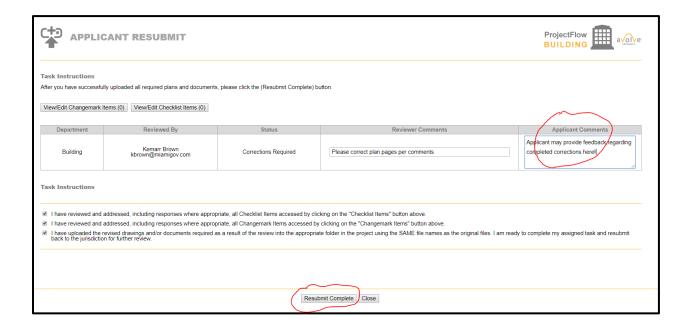
Step 2: Review any changemarks and/or checklist items by clicking on the associated buttons.



Step 3: Select each checkbox under the Task Instructions to acknowledge the completion of tasks.



Step 4: Select the **Resubmit Complete** button.



Download Approvals





Step 1: This step is to notify the Applicant that the stamped plans are available for download from the approved folder.



Approved Plans Ready for Download Notification

Attention Kemarr:

Congratulations, your approved plans are ready for download for Project Miami Building Sandbox.

In order to download your approved plans <u>Login to ProjectDox</u> and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

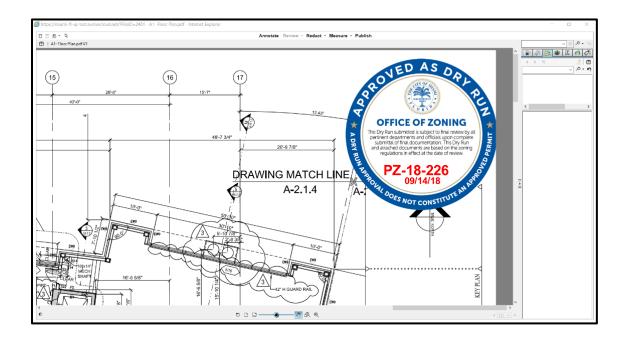
Project:	Miami Building Sandbox
Task:	Notify Applicant Download
Assigned by:	Kemarr Brown
Project Access Login to ProjectDox	

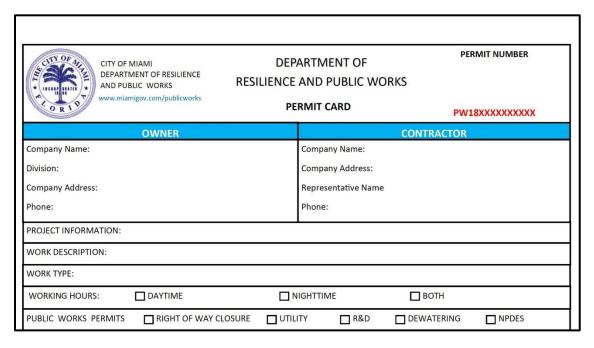
If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

<u>Step 2:</u> Click on **Project Access** button and login to ProjectDox to access and download appropriate approved drawings/documents.

All approved drawings and document will have City of Miami Official Department stamp. Below are examples of stamped plans and permit cards from permitting departments.





Below is an example of Staff Analysis report conducted by Department of Planning & Office of Zoning.



ANALYSIS FOR EXCEPTION

APPLICANT: Romagna Mia Realties, LLC FILE ID: 3849

PROJECT ADDRESS: 2744, 2780, 2810 and 2828 West Flagler Street

NET OFFICE: Coral Way COMMISION DISTRICT: 4

Prepared by: Derrick Cook, Planner II

A. GENERAL INFORMATION:

REQUEST: Pursuant to Article 5, Section 5.6.1(i) and Article 7, Section 7.1.2.6 of Ordinance 13114, as amended, the applicant is requesting an **Exception** to allow an increase in maximum lot size for Uses that serve the Neighborhood.

ProjectDox Support





Please email ProjectDox technical questions or issues to the ePlan Technical Support team:

- Email: eplantechsupport@miamigov.com
- To learn more about the City of Miami's permitting systems: iBuild, iPW, and OAS, please visit our City of Miami eLearning Hub <u>Document Downloads</u> to view and download the most recent guides, checklists, and file naming conventions: https://drive.google.com/drive/folders/10VVJyjnBHKE9kP--YiSl15IHUsqROF0z?usp=sharing.