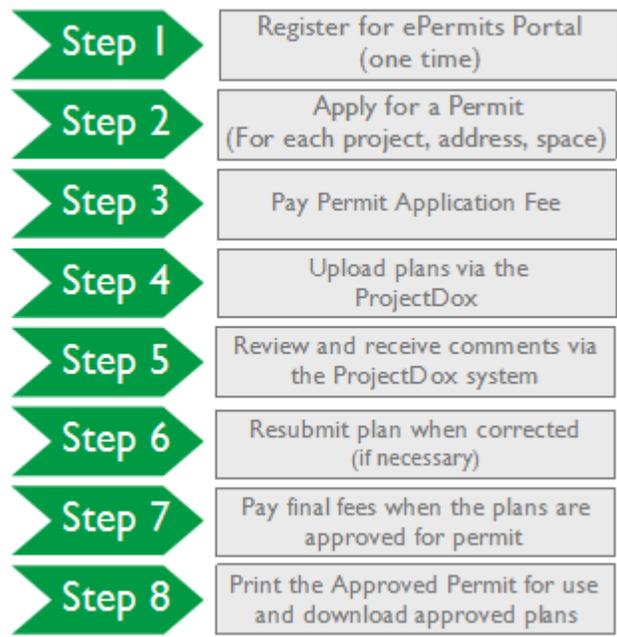


Overview

ELECTRONIC PLAN REVIEW

The purpose of this document is to provide general information on the process for registering with the City of Edina building permit application system called ePermits, and the electronic plan review system called ProjectDox.

PERMIT APPLICATION AND ELECTRONIC PLAN REVIEW PROCESS



Registration & Permit Application

ePERMITS PORTAL

Before a permit application can be submitted, you must have an account for the ePermits system.

| | |
|--|--|
| REGISTER FOR AN EPERMITS ACCOUNT (one time only) | <p>NOTE: If you are a contractor new to Edina, please call 952-826-0372 to have your business entered in to the database prior to registering.</p> <ol style="list-style-type: none">1. Visit: ePermits2.LOGIS.org2. Click on Edina3. Click the Account link on the right hand side of the screen.4. Fill in the appropriate information. **It is imperative that the email address is entered correctly.**5. Click Create Account. |
|--|--|

INITIATING A PERMIT APPLICATION

NOTE: The maximum allowed amount that can be charged on a credit card for the ePermits portal or in person payment for any permit fee is \$20,000.00. If you know that your Permit Application fee will exceed this, please fill out an electronic application form on the City of Edina's website [here](#) and visit the issuing department to pay the fee. You may still charge up to \$20,000 at a time at the issuing department or pay the balance by cash or check.

APPLYING FOR A PERMIT

1. Once logged in to ePermits, click on Apply for Permit.
2. Depending on the account type chosen at registration, you will see a list of permit types that can be applied for. Choose the appropriate permit from the list.
3. The requirements for submittal of the application will either appear directly on the screen for your review or you will be given a link to view for larger requirement sets.
4. After you have reviewed the requirements for submittal, you will need to read and accept the declaration at the bottom of the page.
5. After accepting the declaration, you will be on the Address page. Please enter in the address of the property you are applying for.
6. Once the address has been entered, click Next and the address of the property will be validated. If an error comes up, please verify the address that was entered and try again.
7. On the Applicant page, please enter in your information. This is the information that will be on the Permit Application and will continue in to ProjectDox should plan review be required. ****It is imperative that the email address is entered correctly.****Click Next when done.
8. Select the Work Sub Type for the permit that is being applied for and click Next.
9. Enter in the Valuation for the permit. This will calculate the Permit Application Fee. Click Next after entering the valuation.
10. The Fees page will now show the total Permit Application fees as defined for the permit being applied for. (be sure to read the note above this table)
11. To pay the fee online, click Add To Cart.
12. You may now click on the yellow Check out with PayPal button or click Continue Shopping if you have more permits to apply for so that all fees can be paid at once.
13. If you clicked the button to pay online, enter in the credit card information and click Continue.
14. You will then be asked to enter additional information such as the security number and the name on the card. Click Authorize this Transaction.
15. An Order Summary will be displayed. Print or save this page as a PDF for your records. An email receipt will be sent to the address used for the permit application.
16. If plan review is required you will also be receiving an invitation to ProjectDox to upload plans and documents.

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.



Hello [Applicant],

Welcome to the City of Edina's electronic plan review process. This Project invitation has been sent to you in response to your building permit application. An EPR (Electronic Plan Review) has been created to allow you to electronically upload your drawings, documents for permit plan review.

NOTE: If this is your first time using the [ProjectDox](#) application, disable your pop-up blocker. In you are an Internet Explorer user, on the login page, click on the "**Install ProjectDox Components**" link; this will install the Active X components on your computer which are necessary for the application to function properly.

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 permit!
2. Click the project access link [planreview.edinamn.gov](#)
3. Enter your login(email address) and temporary password provided in this email
4. Set up your permanent login account for secured access to the system
5. Click on the Project link on the "Active Projects" page
6. Click the "Drawings" Folder.
7. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [\[EPR APPLICANT USER HELP\]](#)).
8. Click the "Documents" Folder.
9. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions (see [\[EPR APPLICANT USER HELP\]](#)).

SAMPLE INVITE EMAIL

TO COMPLETE YOUR SUBMISSION TO THE CITY YOU MUST PERFORM THE BELOW STEPS

10. Once all plans/documents have been uploaded to the appropriate folder(s) while inside the project click on the "Workflow Portals" button.
11. Click the "[ApplicantUpload](#)" link under the task column.
12. Click "OK" to accept the task.
13. An electronic form will display. Click on the "Submission Complete- Notify the City of Edina" button to complete the submission of your plans and documents to the City of Somewhere.

Supported file types: DWG, DWF, DGN, PDF, Tiff, JPEG, DOC, DOCX etc.

| | |
|--|--|
| User Login: | Joe.customer@somewhere.com |
| Temporary Password | BFGH56R |
| Project Permit Number: | 2015-0000101 |
| Review Coordinator: | Judy Coordinator |
| Review Coordinator Email: | Judy.Coordiantor@somewhere.gov |
| Project Permit Access Link | |

If you have any problems or questions, call 952-826-0372 or email planreview@EdinaMN.gov and we are happy to assist you.

Browser settings for new users:

Internet Explorer

URL: PlanReview.EdinaMN.gov

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

Google Chrome

URL: PlanReview.EdinaMN.gov

Add URL to allow pop ups

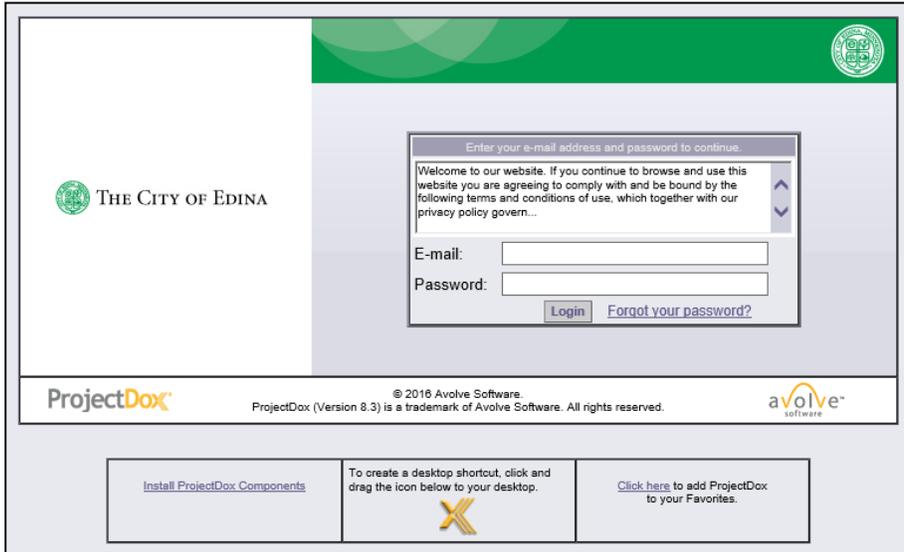
Mozilla Firefox

URL: PlanReview.EdinaMN.gov

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 Edina's ProjectDox URL:

PlanReview.EdinaMN.gov

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

Change Password: New password:* Confirm new password:*

Password Reset Question & Answer: Security question:* 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 |
|-------------------------|-------------------------------|---|----------------------|
| 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"/> | 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 | | |

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

Active Projects List

Back Forward Projects Profile Logout

11 recently entered project(s) out of 11 for EPRApp Test (EPRAppTest@edinamn.gov) Recent Projects All Projects Press Enter To Search:

| Project | Options | Description | Owner | Status | Create date |
|----------|---------|--|--------------------------------|------------------|----------------------|
| ED144906 | | Sign Wall | EPlan HelpDesk | Permit Issued | 1/6/2016 11:05:15 AM |
| ED144888 | | Building Deck,Addn,Porch,Shed (434) | EPlan HelpDesk | Applicant Upload | 1/5/2016 10:50:10 AM |
| ED144889 | | Building City Owned (325or437) | EPlan HelpDesk | In Review | 1/5/2016 10:50:10 AM |
| ED144894 | | Fire Fire Alarm & Alternative Fire Suppression | EPlan HelpDesk | Pending Fees | 1/5/2016 1:40:13 PM |
| ED144886 | | Building Deck,Addn,Porch,Shed (434) | EPlan HelpDesk | In Review | 1/5/2016 10:40:11 AM |
| ED144881 | | Building Restaurant (327or437) | EPlan HelpDesk | In Review | 1/5/2016 9:45:10 AM |
| ED144879 | | Building Single Family Detached (101or434) | EPlan HelpDesk | Pending Fees | 1/5/2016 9:20:13 AM |
| ED144871 | | Building Single Family Detached (101or434) | EPlan HelpDesk | Stamping | 1/4/2016 2:50:56 PM |
| ED144860 | | Building Retail Store (327or437) | EPlan HelpDesk | Permit Issued | 1/4/2016 1:35:56 PM |
| ED144856 | | Building Deck,Addn,Porch,Shed (434) | EPlan HelpDesk | Permit Issued | 1/4/2016 11:50:57 AM |
| ED144850 | | Building City Owned (325or437) | EPlan HelpDesk | Permit Issued | 1/4/2016 11:00:56 AM |

Page 1 of 1 (11 items)

Active Task List

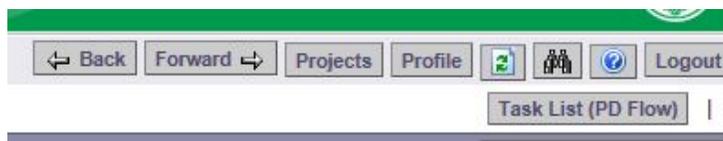
| Project Name | Task | Attached To | Status | Created On | Updated On | Updated By |
|--------------|---------------------------------|-------------|---------|----------------------|----------------------|------------|
| ED144894 | PayFinalFees | Applicant | Pending | 1/5/2016 2:20:40 PM | 1/5/2016 2:20:40 PM | |
| ED144888 | ApplicantUpload | Applicant | Pending | 1/5/2016 10:50:14 AM | 1/5/2016 10:50:14 AM | |
| ED144879 | PayFinalFees | Applicant | Pending | 1/5/2016 10:19:19 AM | 1/5/2016 10:19:19 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



- 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

REQUIRED FILES

- Prerequisite check list must be included with the application

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 Edina 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"

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



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.



Attention EPRApp:

Your plan review submission for Project: **ED150090** 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: | ED150090 |
| Description: | Building City Owned (325or437) |
| Task: | ApplicantResubmit |
| Assigned by: | EPlan HelpDesk |
| Login to ProjectDox | |

**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 **CorrectionComplete** 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 REVIEW CORRECTIONS

CHANGEMARKS - Review Cycle: **1** ▼

Filter Changemarks by Keyword: [SI](#)

[Click Here to Load Changemarks...](#)

[Click Here to Publish Changemarks to PDF...](#)

| Resolved | Status | File | Cycle | Department | File | Markup | Description |
|--|--------|---|-------|----------------------|-----------|--------------------------------------|---|
| Yes No | No |  | 1 | Building Residential | S.002.pdf | Residential Reviewer | Verify proper insulation and fire wall rating |
| Yes No | No |  | 1 | Building Residential | S.002.pdf | Residential Reviewer | Specify footing specs |

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, check list comments, free 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 Edina approval stamp and assigns final permit fees. You will receive a Pay Final Fees email.

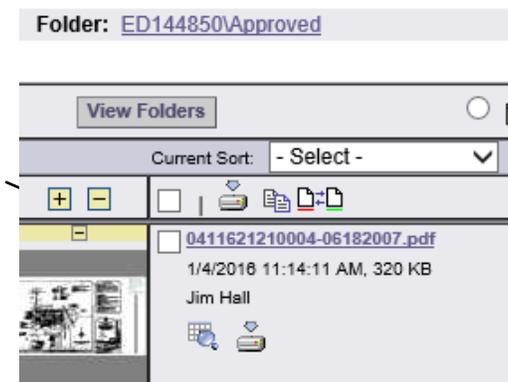
To pay final fees, login to ProjectDox and accept the Pay Final Fees task. You will then be given the option to pay online via ePermits or Pay In Person at the issuing department. Either way, in order to keep the project moving toward permit issuance, you will need to choose one or the other as this completes the Pay Final Fees task. Once this is done and 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

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.

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