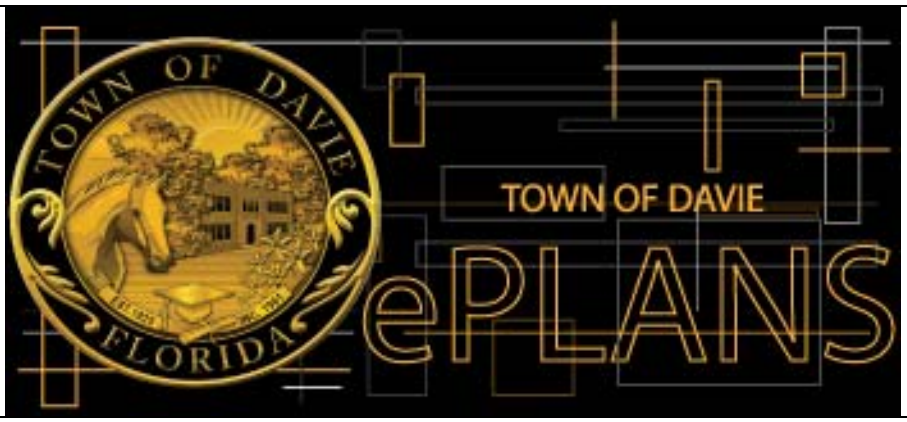
| | |
|---|---|
|  | Electronic Plan Review is a web-based solution that will allow building plans to be submitted electronically, improve the plan review cycle, reduce costs associated with obtaining residential and commercial construction permits, as well as support green initiatives. |

| | |
|---|---|
| | Applicant User Guide<br><br>In addition to this user manual, please refer to the instructions provided in the electronic forms (eForms) for further assistance. |

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# Electronic Plan Submission

Please complete the following prior to getting started:

1. Make application at the Town's Building, Planning & Zoning or Engineering departments located in the Town Hall buildings at 6591 Orange Drive, where you will be given an permit/project number and fees can be paid.
2. Review the standards for how to name your drawing and documents files, border spacing, file formats accept, etc. (See Standards section in this guide.)

## Standards

Standards allow for easy identification of drawing by naming convention, vector file types in order to facilitate the most efficient review, color coding of comments for visual identification of departments and so on.

### Required Files

1. Drawing Files – all required drawings as well as an index page following Town standards for submission (along with other information required by the Town's checklist).
2. Supporting Document Files – all other files that are required as part of the application submission that are not drawing files (ie. Easement letter, certifications, etc.)

## File Naming Standards

Filenames for drawings submitted through ePlans Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

- **Discipline** – First characters represent the discipline area, example "ARCH" for Architectural, "STRUCT" for Structural, etc. Ensure that all plans, including the associated details, are submitted under the correct discipline characters to use.
- **Sheet Number** – Must be a 3 digit number with leading zeros. Note: if decimals are needed, place decimal after the 3rd digit, ex. P001.99

| Drawing Type | Discipline | Sheet Number | Example File Names |
|---|---|---|---|
| Architectural | ARCH | 000-999 | ARCH-010 |
| Interior Design | INTDS | 000-999 | INTDS-009 |
| Structural – All Structural and related plans including details | STRUCT | 000-999 | STRUCT-002 |
| Plumbing | PLUMB | 000-999 | PLUMB-099 |
| Electrical | ELEC | 000-999 | ELEC-001 |
| Mechanical | MECH | 000-999 | MECH-101 |
| Landscape | LAND | 000-999 | LAND-011 |
| Civil | CIVIL | 000-999 | CIVIL-005 |
| Survey | SURVEY | 000-999 | SURVEY-788 |
| Site Plan | SITE | 000-999 | SITE-456 |
| Shoring | SHOR | 000-999 | SHOR-022 |
| Fire Protection | FIRE | 000-999 | FIRE-799 |
| Energy | ENER | 000-999 | ENER-012 |

## Border Standards

All Drawing Files

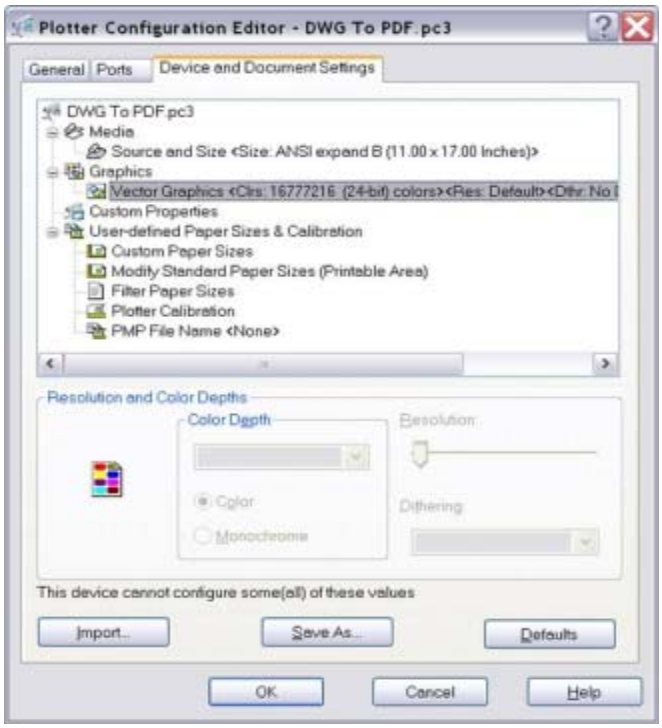
- The top right corner of all drawings must be reserved for the Town of Davie electronic stamp. Please leave the top right corner completely blank on all drawings (with exception of the border).
    - Dimensions: 3" width x 5" height

## File Type Standards

Supporting files may be in the following formats: Microsoft Word, Excel, Powerpoint or PDF. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-drawing files).

Only DWG, DWF, DGN, DXF or vector PDF files will be accepted for drawings. AutoCAD software is commonly used to create drawing files. If PDF is the preferred file type, it is recommended that drawings created in AutoCAD are converted to Vector PDF by using the Autodesk Vector Graphic Converter "DWG to PDF.pc3 plotter driver."

If drawings are electrical, mechanical, plumbing/gas, etc, confirm that only the trade lines are dark by changing the background to grayscale prior to saving as a vector PDF file.




## Folder Structure

- All documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the "Documents" folder for each project.
- All drawings should be uploaded to the "Drawings" folder for each project.

## Markup Name and Color Standards

- Standard markup names and colors will be used for each reviewing department for easy identification. A markup can have one or more "changemarks." Changemarks are created to quickly identify a markup and associated comments.
- Corrected files should always be re-submitted with the **SAME FILE NAME** as the original submittal.

| MARKUP NAME | MARKUP COLOR |
|---|---|
| Fire Department | Red |
| Landscape | Dark Green |
| Building Department | Pink |
| Mechanical | Light Blue |
| Plumbing | Orange |
| Structural | Purple |
| Electrical | Light Green |
| Development Review (Planning & Zoning) | Yellow |
| Engineering | Dark Blue |
| Utilities | Light Blue |
| Public Works | Brown |
| Police Department | Brown |
| CRA | Brown |
| Parks & Recreation | Brown |
| Housing | Brown |
| Waste Management | Brown |
| Water Control District | Brown |

# Login to ProjectDox

## ePlans Review Invitation

When your application is processed at the counter and input into the New World Systems permitting system, an ePlans Review invitation will be sent to your e-mail address. The e-mail will contain your login information and information about your project, including a link to the project.

ePLANS TOWN OF DAVIE

**Permit Plan Review Invitation**

**Hello TF01 Florence:**

Welcome to the Town of Davie ProjectDox system. This project invitation has been sent to you in response to your permit request. A project has been created to allow you to electronically upload your drawings and supporting documents for plan review. To access your new project, follow the instructions below:

**Please be sure to upload all your drawings and documents in the same session as the review process will start briefly after your initial upload.

1. Click the Project Access link below
2. Enter your User Login and Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" to upload your main project drawings or "Documents" folder to upload any supporting documents
5. Click the "Upload Files" button and follow the instructions to upload your drawings and/or documents
6. Your application has now been submitted for review

The Town of Davie will accept the following file types.
**Drawings**: .DWG, .DGN, .DWF, .DXF, .PDF
**Supporting Documents**:
.PDF, .DOC, .DOCX, .XLS, .XLSX, .PPT, .PPS, .PPTX, .TIF, .TIFF, .JPG, .PNG, .IMG, .BMP

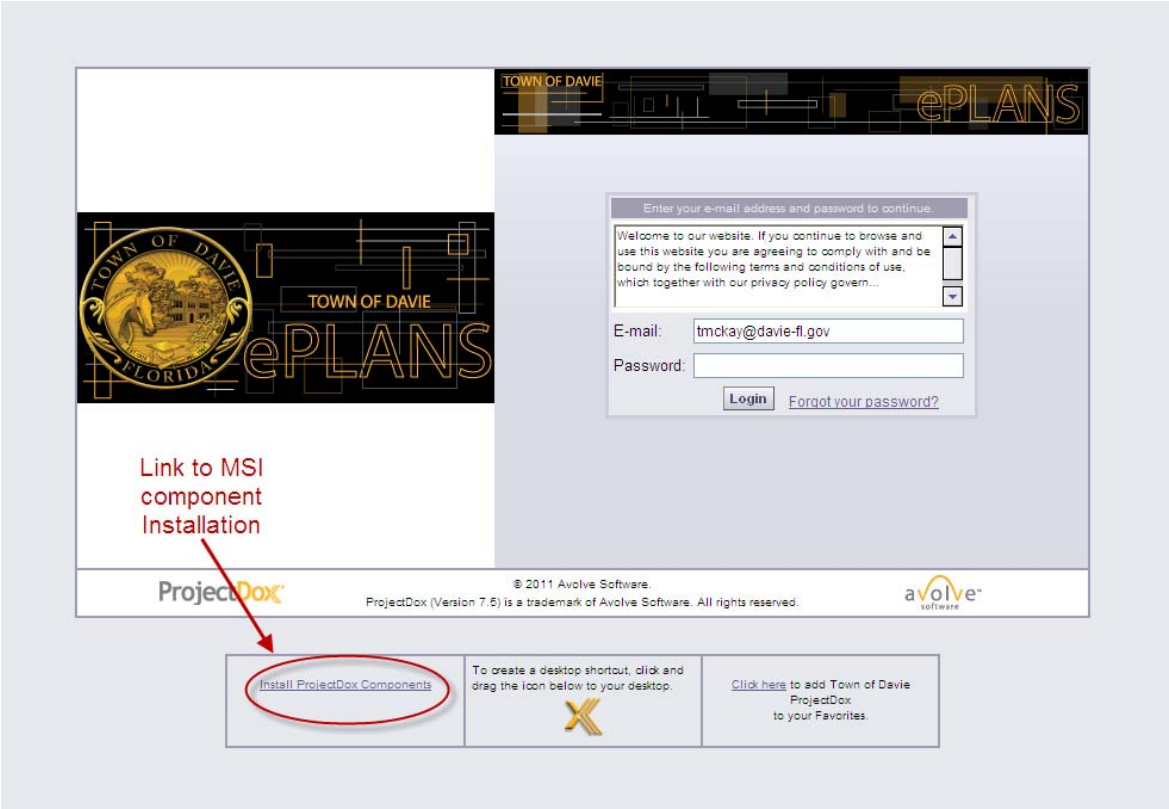
| | |
|---|---|
| User Login: | tf01@avolvesoftware.com |
| | |
| Project Permit #: | **2011-00000030** |
| Plan Check Coordinator: | **Tyson Florence** |
| Plan Check Coordinator's Email: | tflorence@avolvesoftware.com |
| | |
| Project Access Link | |

For technical issues, please contact Tamecka McKay at (954) 797-1070 or help_desk@davie-fl.gov.

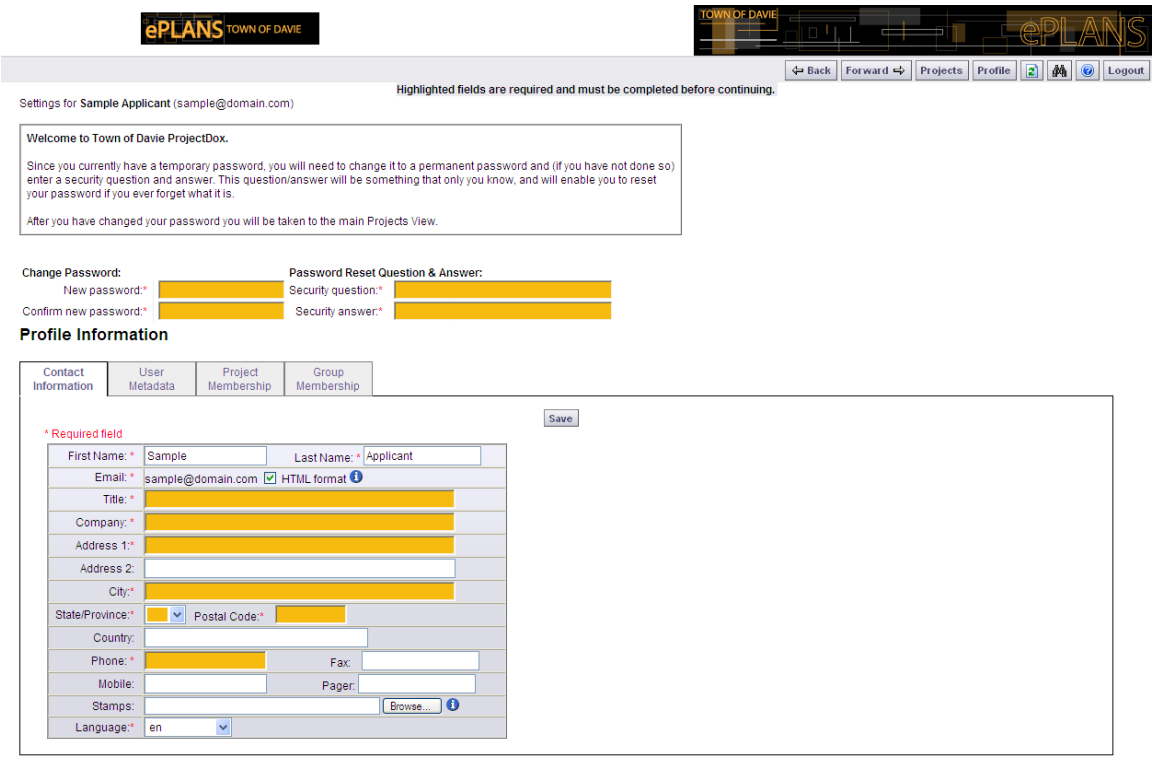
**Please do not reply to this email.**

## New Users

1. Prior to logging into the ePlans (ProjectDox) application, the following actions must be completed:
   - If your computer has pop-up blockers installed, you will need to disable pop-up blocking for the ProjectDox web address (https://projectdox.davie-fl.gov/projectdox). The indicator that this has not been done will occur when you type in your login and password, then hit the Login button and the page immediately disappears. It is not uncommon to have more than one pop-up blocker installed (Internet Explorer, Google Task Bar, etc). Once the ProjectDox site is allowed, you will be able to utilize the application.
   - The login page has a MSI (Microsoft Silent Install) component required to install all the necessary ProjectDox ActiveX controls. This installation will only need to be done once; if you utilize a different computer it will require another installation for each unique computer. The link to the component install is shown below.
2. To sign in, enter your e-mail address and temporary password (first time use) and click the Login button, as shown below:



3. Enter your new password and reconfirm the new password, personal account information. Yellow highlighted fields are required but a full Profile record is ideal, then click the Save button in the middle of the screen.

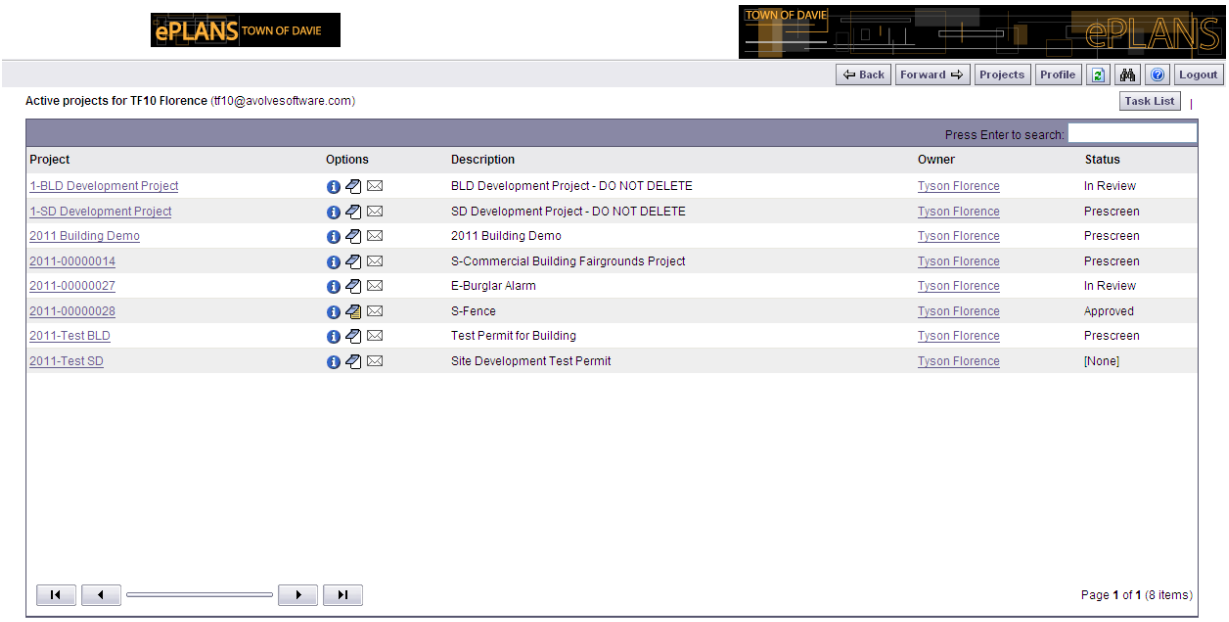



## Existing Users

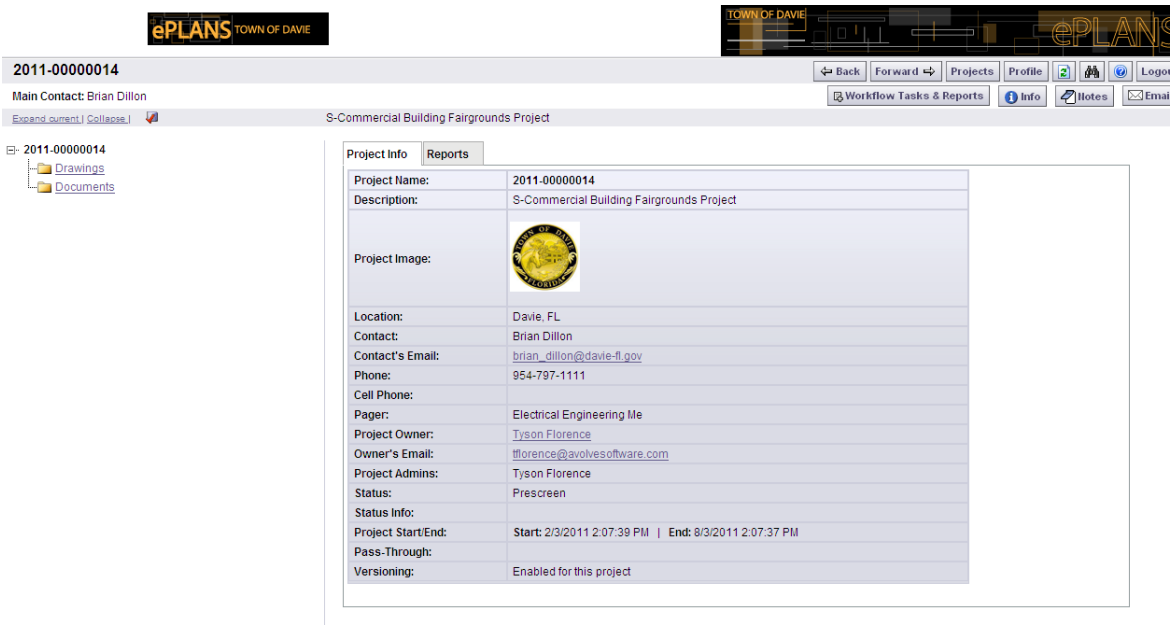
If you are a returning user, login to ePlans Review with your full e-mail address and password. If you have forgotten your password, click on the “Forgot Password” button so that it can be e-mailed to you. This will work only if you have logged in once and added a security question and answer.

## Uploading Files

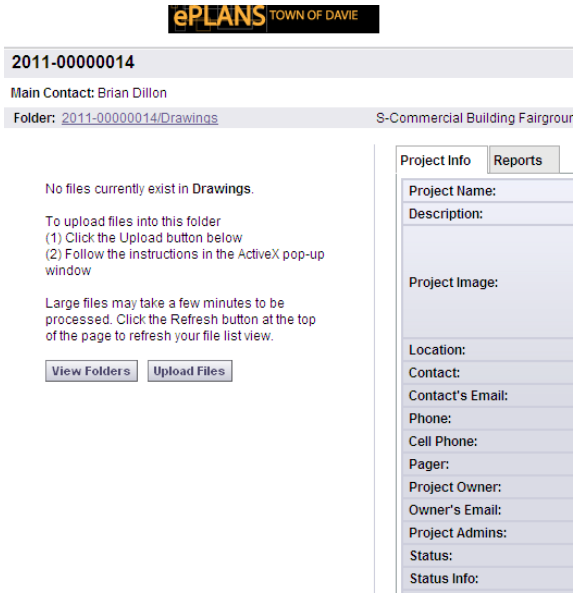
1. When you have successfully logged into ePlans (ProjectDox), the projects screen will display. Any projects for which you have access will display in the list. Any outstanding tasks that require your action are displayed in the My Task List area below the project list. Select the specific project that corresponds to the plans you will be uploading. The projects are listed in order by Project number, but can be sorted by clicking on any header field name.



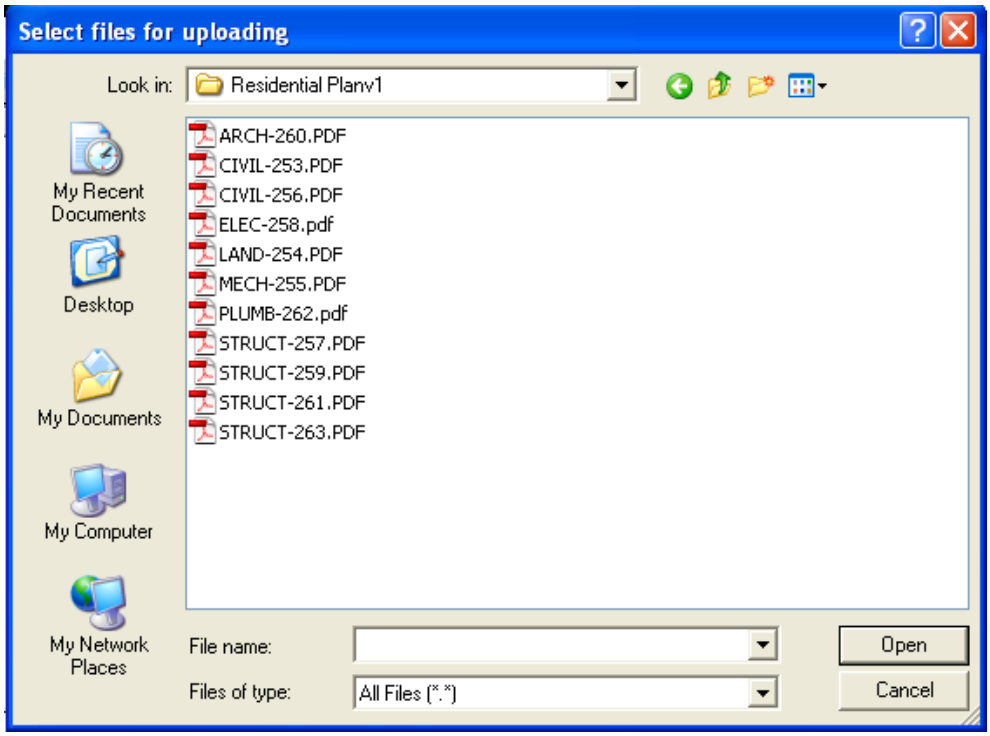

2. Click the “Drawings” folder to upload your plan drawings or “Documents” folder to upload supporting project documents.



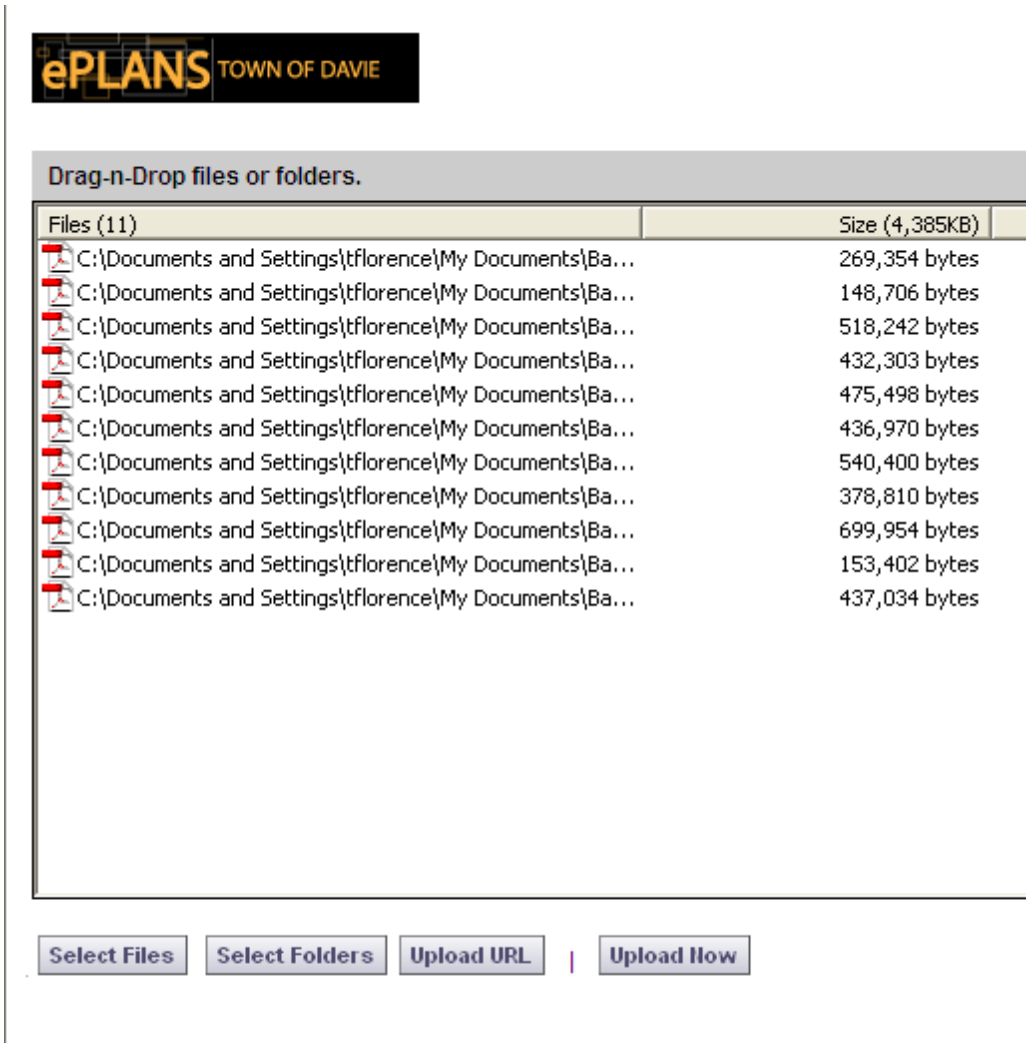
3. Upon entering the either folder, you will be presented with two buttons, View Folders and Upload Files.



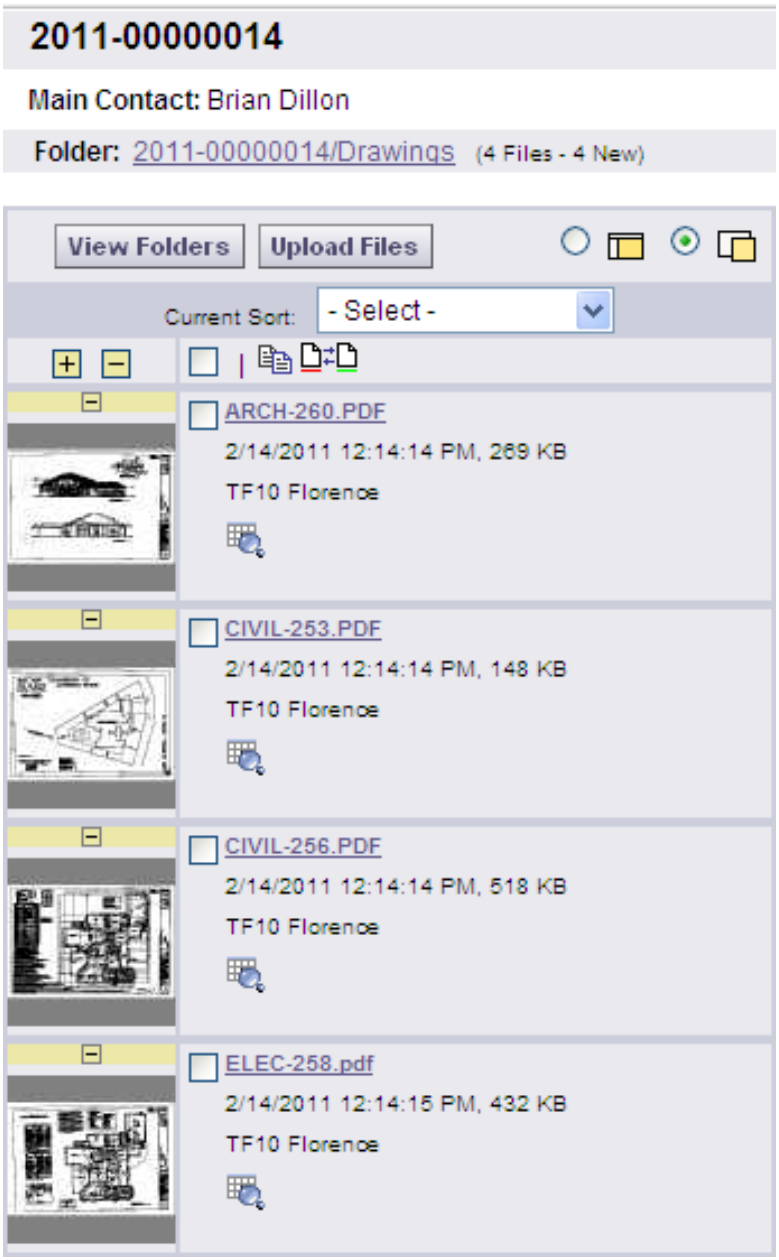

4. Click the "Upload Files" button. Select Files for Uploading will automatically display. Select the file location on your computer. Select or highlight files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the "Open" button. The files will then be copied to the upload window.



5. Click the “Upload Now” button and the files will be copied to the upload window. Click the “Close” button to close out of the file upload complete dialog box.



6. Once the files are uploaded to the folder, the folder list is replaced by thumbnail images of each file contained in the folder. Next to each thumbnail, the file name, author, date uploaded, file size, and History icon displays.



7. Congratulations! You have successfully finished part one of submitting your plans electronically. Please logout after your session is complete. A notification has been sent to the Permit Clerks to start the prescreening process to determine if the submittal requirements have been met.

### Security Timeout

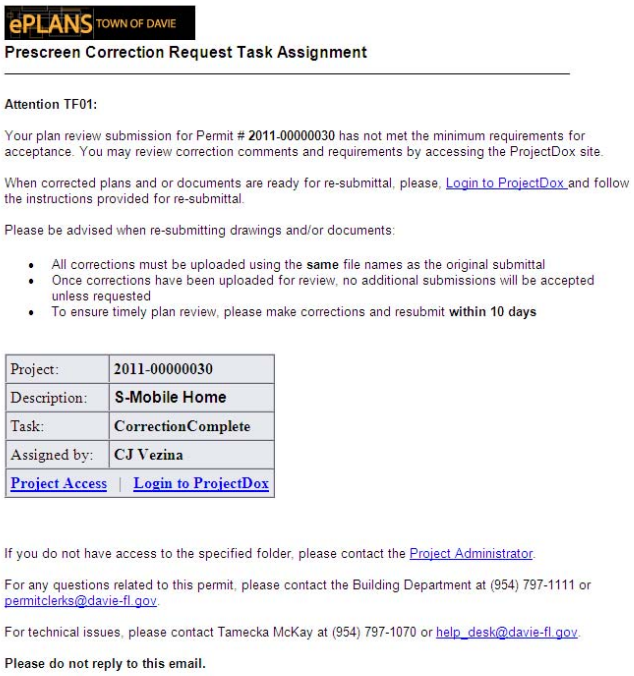
Due to security and resource concerns, the system will automatically sign you out after 90 minutes of inactivity. When you are ready to resume working with the system, click any button on the screen. The system automatically loads the login page for you. You can also close the web browser window and reload the login page manually in a new browser window.

## Prescreening

Prescreening is a cursory review of your uploaded documents in preparation for formal review. This may be performed by the Permit Clerks for most types of permits/projects. Allow a minimum of 48 business hours 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 Rejection" e-mail with instructions on the changes requested and how to resubmit. If you have met all submittal requirements, your application will move to be formally reviewed.

### Rejected

If your submittal requirements were not complete, you will receive an e-mail notification that prescreening has been rejected.



ePLANS TOWN OF DAVIE

**Prescreen Correction Request Task Assignment**

**Attention TF01:**

Your plan review submission for Permit # **2011-00000030** has not met the minimum requirements for acceptance. 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 drawings 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
- To ensure timely plan review, please make corrections and resubmit **within 10 days**

| | |
|---|---|
| Project: | **2011-00000030** |
| Description: | **S-Mobile Home** |
| Task: | **CorrectionComplete** |
| Assigned by: | **CJ Vezina** |
| **Project Access** \| | **Login to ProjectDox** |

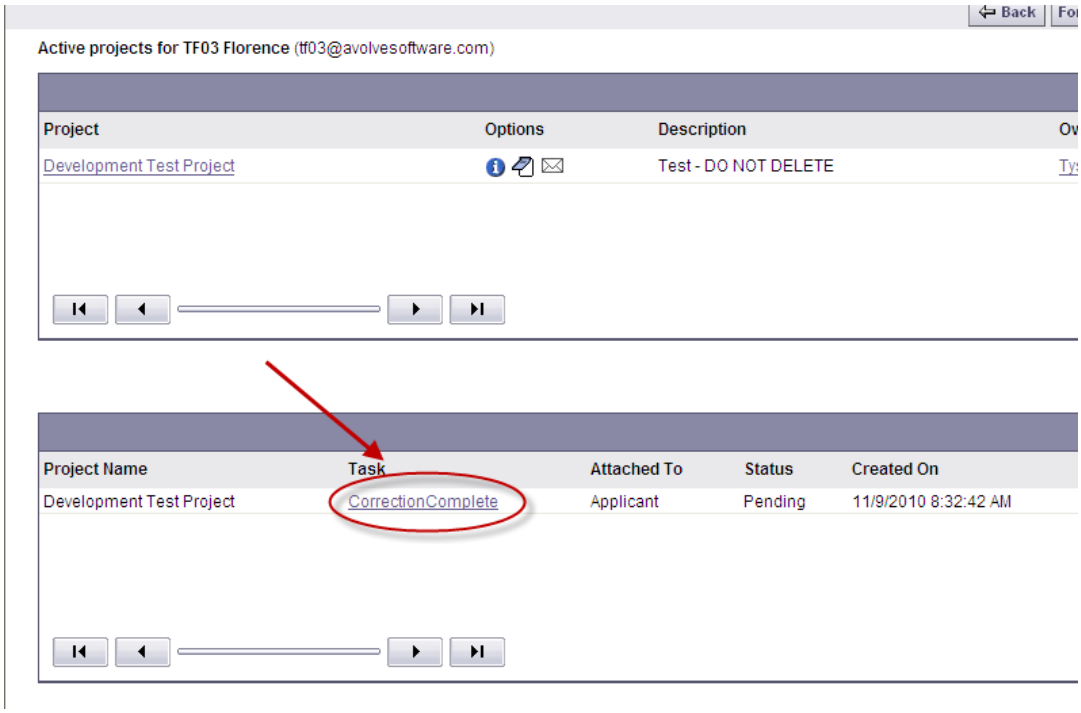
If you do not have access to the specified folder, please contact the Project Administrator.

For any questions related to this permit, please contact the Building Department at (954) 797-1111 or permitclerks@davie-fl.gov.

For technical issues, please contact Tamecka McKay at (954) 797-1070 or help_desk@davie-fl.gov.

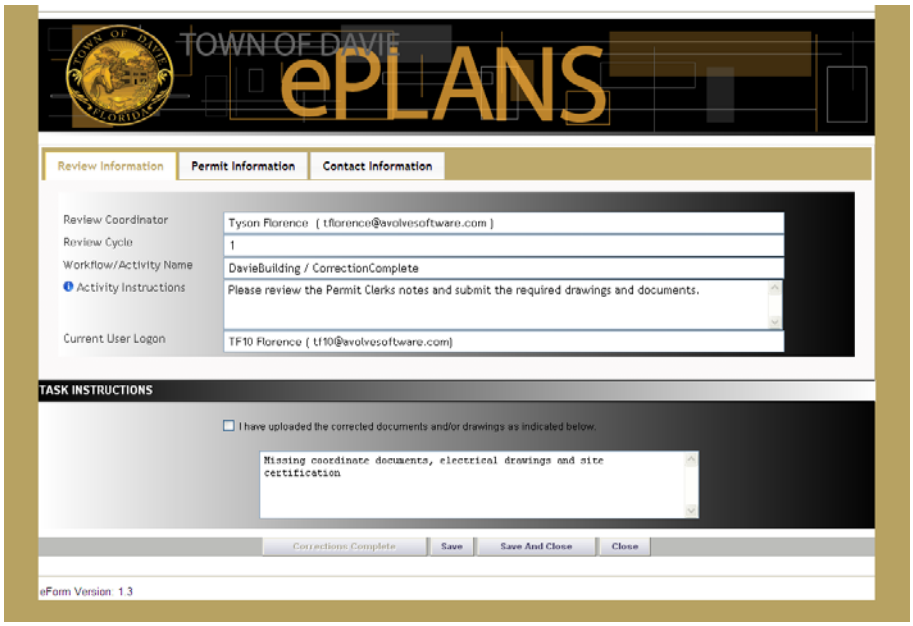
**Please do not reply to this email.**

1. Click the link in the e-mail to access the Prescreening information. Login to ePlans (ProjectDox). The Prescreening corrections task will appear at the bottom of the Projects screen. Click on the CorrectionComplete task. This will launch one Internet Explorer screen with the corrections form and another screen with the Drawings and Document folders you saw in the original upload request.

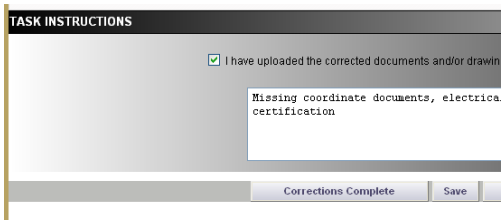



2. Review the Permit Clerk's comments to identify which requirements were noted as missing.
3. After you have identified the missing or corrected drawings and/or documents to upload, login to ProjectDox (if not already logged in) and enter the project.
4. Upload the missing and/or corrected drawings and documents (see the "Uploading Your Files" section for instructions).

5. Click back to the eForm with your task assignment as shown below.




6. When the eForm opens, place a checkmark in the "I have uploaded the corrected…" and the Corrections Complete button will display for you to click to complete your task. Upon completion, the Town will be notified that the files have been completed or corrected and will continue with the Prescreening process.




### Approved

If your submittal is approved, it will immediately move into the formal review process

## Change Notification and Plan Resubmit

### Review Requested Corrections

If corrections are requested following the formal review cycle(s) of your drawings, follow the steps below:

1. You will receive an e-mail notification from the Application Coordinator requesting revised documents.

ePLANS TOWN OF DAVIE

**Applicant Resubmit Request Task Assignment**

**Attention TF10:**

Your plan review submission for Permit # **2011-00000028** has been reviewed and at this time requires corrections. You may review correction comments, checklist items and requirements and drawing markups 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 drawings 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
- To ensure timely plan review, please make corrections and resubmit **within 10 days**

| | |
|---|---|
| Project: | **2011-00000028** |
| Description | **S-Fence** |
| Task: | **ApplicantResubmit** |
| Assigned by: | **Penny Santiago** |
| **Project Access** \| **Login to ProjectDox** | |

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

For any questions related to this permit, please contact the Building Department at (954) 797-1111 or permitclerks@davie-fl.gov.

For technical issues, please contact Tamecka McKay at (954) 797-1070 or help_desk@davie-fl.gov.

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

2. Click the link in your e-mail to access the corrections requested in ProjectDox.
3. Login to ProjectDox. The Plan Resubmit task will display at the bottom of the main page with your Plan Review number in the name (ie. *2011-00000014*).

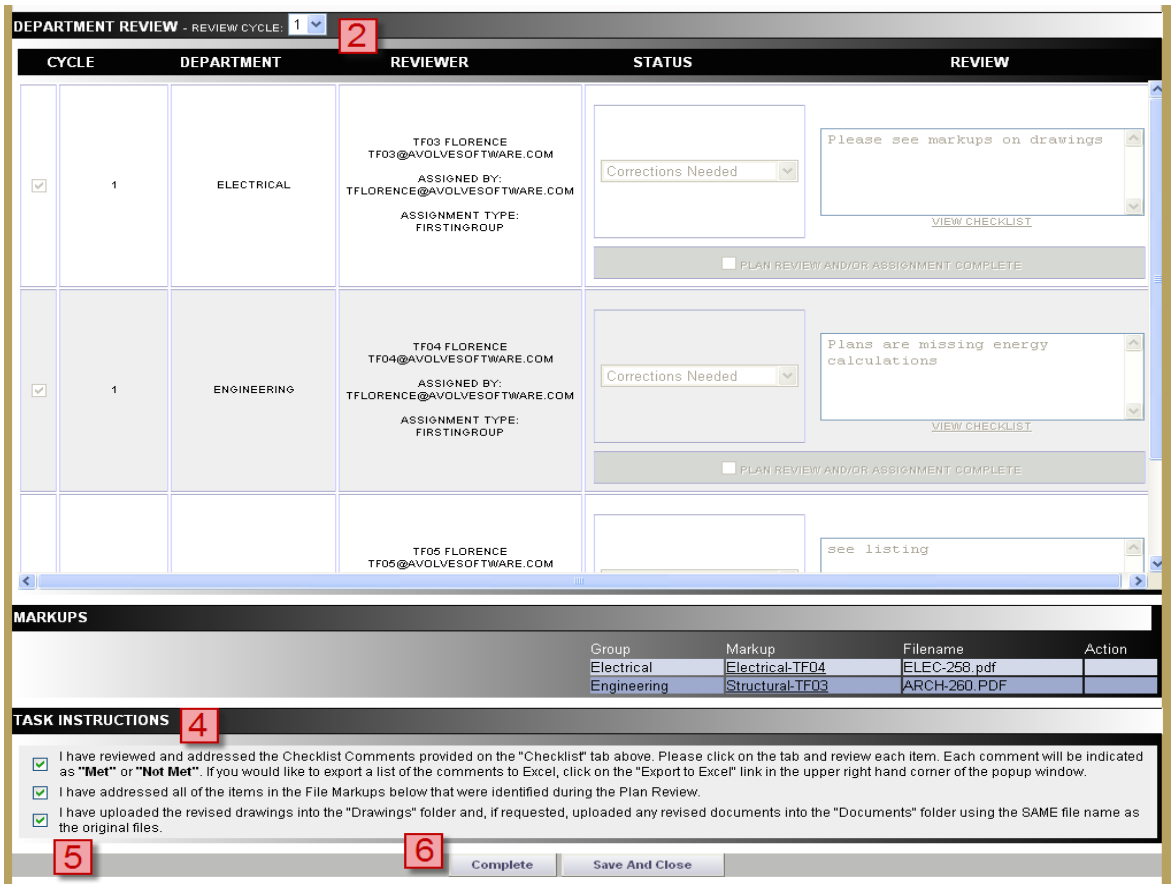
| Project Name | Task | Attached To | Status | Created ( |
|---|---|---|---|---|
| Development Test Project | ApplicantResubmit | Applicant | Pending | 11/9/201( |

4. The eForm and drawing markups provide a complete correction package from all reviewing departments:

Review Information | Permit Information | Contact Information | Checklist Items 1

| Cycle | ID | Group | Comment Text | Status | Updated By | Update Date |
|---|---|---|---|---|---|---|
| 1 | BLD1.01 | Mechanical | Complete duct layout show: specific details | Met | TF05 Florence | 2/14/2011 12:45:00 PM |
| 1 | BLD1.02 | Mechanical | Complete duct layout show: duct sizes | NotMet | TF05 Florence | 2/14/2011 12:45:00 PM |
| 1 | BLD1.06 | Mechanical | Complete duct layout show: Routing and location of ducts and duct insulation | Met | TF05 Florence | 2/14/2011 12:46:00 PM |
| 1 | BLD1.09 | Mechanical | Heating, ventilation, Air Conditioning and Refrigeration equipment, boilers and appliance show: Equipment manufacturer | NotMet | TF05 Florence | 2/14/2011 12:45:00 PM |

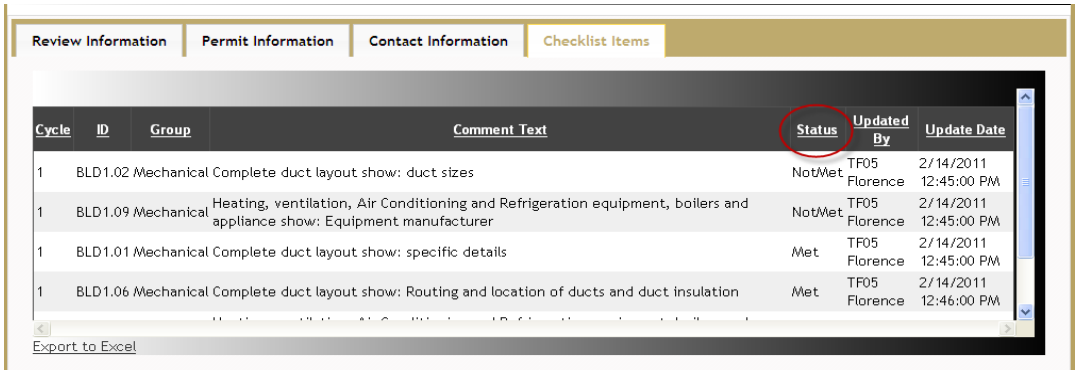
Export to Excel




1) Consolidated department checklist
2) Review cycle & department review information
3) Review Markups (Drawings & Documents Folders from Project screen)
4) Checkboxes 1 and 2 are confirmation that you have read and corrected the issues
5) Checkbox 3 is confirmation you have uploaded all new and/or corrected files
6) Resubmit Complete button

### (1) Consolidated department checklist

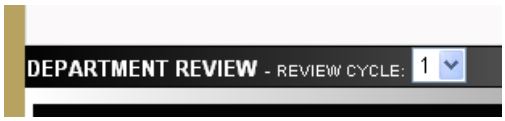
One or more departments may use the Checklist feature in the eForm. A consolidated list of all feedback not related to a red line are available for the applicant's review. You can sort to find the "Not Met" items by clicking on the "Status" column. All checklist items will be reviewed again in the subsequent cycle(s).




You can view the comments by Met, Not Met, by department, or by all comments all departments, all cycles.

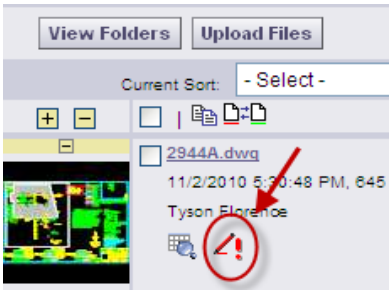
### (2) Review Cycle

The Review Cycle dropdown allows the user to review any review cycle information. The Review cycle also displays in the first column of the Department Review table.



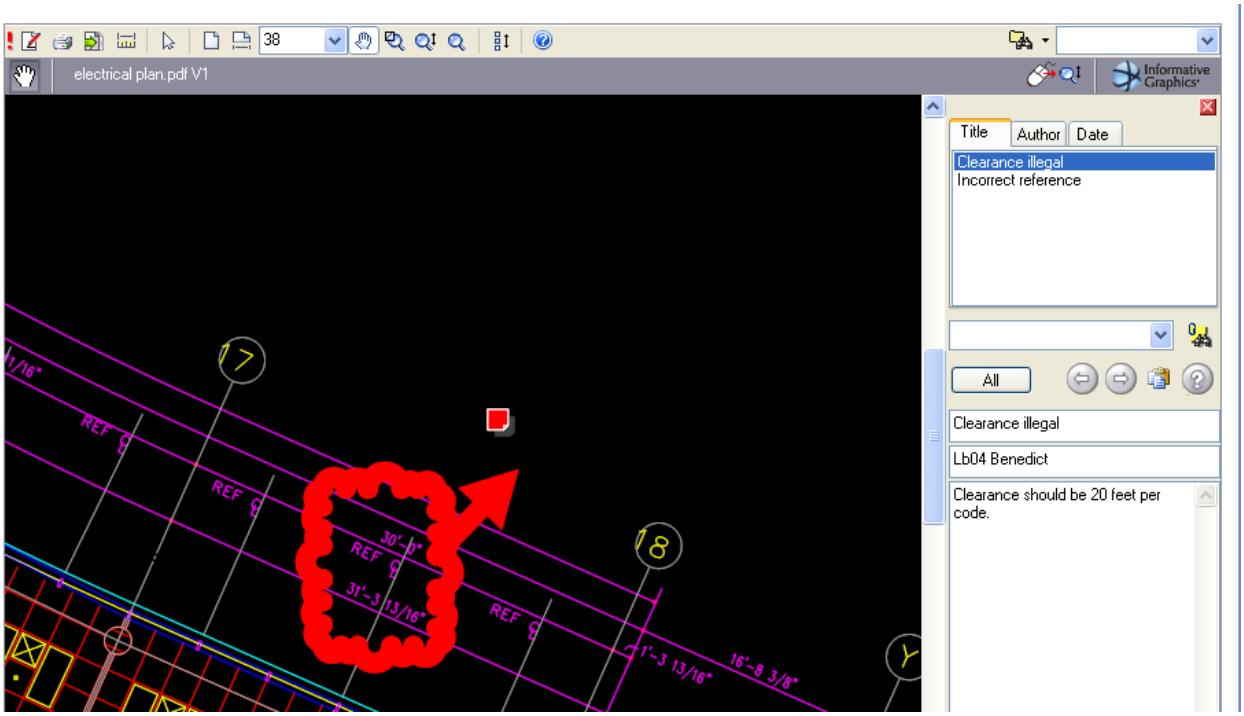

### (3) Review Markups (click icon to access markups)

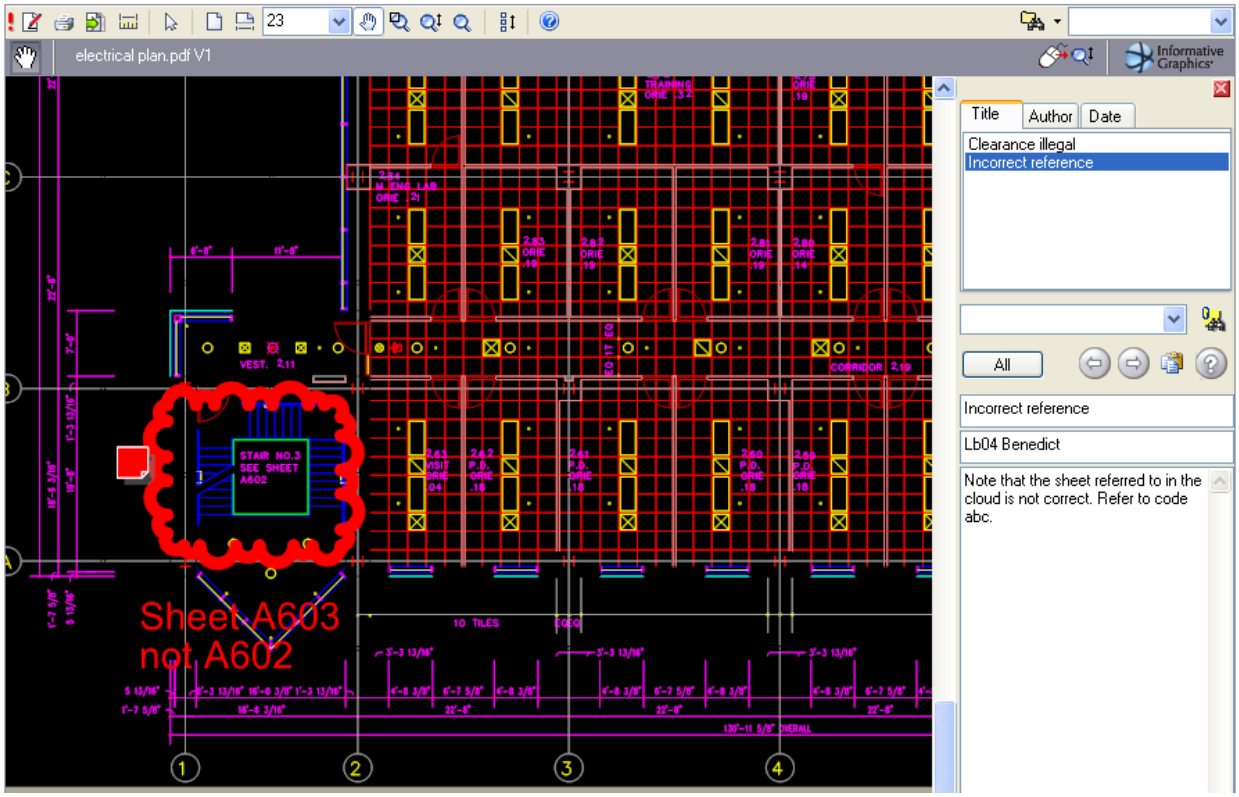
To view a plan markup, click on the icon next to the drawing as shown here




.

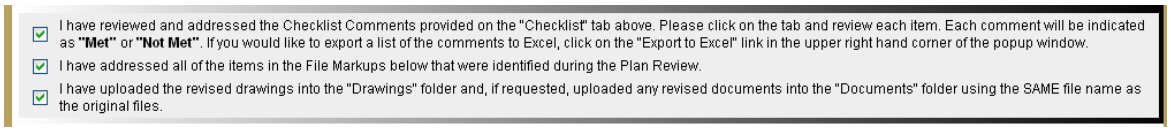
All changemarks will display in the right hand pane and as you review, click on each changemark and you will zoom directly into the red line from the reviewer.


38
electrical plan.pdf V1
Informative Graphics
Title
Author
Date
Clearance illegal
Incorrect reference
All
Clearance illegal
Lb04 Benedict
Clearance should be 20 feet per code.
17
18
REF ℄
REF ℄
REF ℄
30'-6"
31'-3 13/16"
21'-3 13/16"
16'-8 3/8"


23
electrical plan.pdf V1
Informative Graphics
Title
Author
Date
Clearance illegal
Incorrect reference
All
Incorrect reference
Lb04 Benedict
Note that the sheet referred to in the cloud is not correct. Refer to code abc.
VEST. 211
STAIR NO.3
SEE SHEET
A602
CORRIDOR 219
10 TILES
Sheet A603
not A602
1
2
3
4

### (4) Checkbox 1, 2 & 3

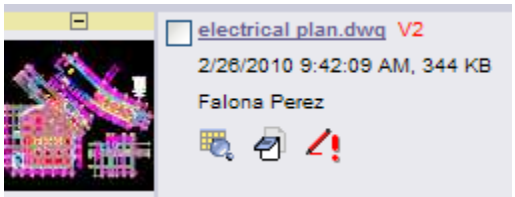
Checkbox 1 asks for confirmation that the checklist and the comments in the eForm have been reviewed. Checkbox 2 asks for confirmation that you have reviewed all the markup comments (red lines) attached to the drawings. Checkbox 3 confirms that you have uploaded revised drawings and/or documents using the SAME FILE NAMES.




### (5) Upload Files

Checkbox 3 asks for confirmation that you have corrected the plans and/or documents per the reviewer's request and that you have uploaded them into the appropriate folder. The Upload dialog is identical to your initial upload.

The file will display the version number, V2 for example, because the correction was uploaded with the SAME FILE NAME as the original file name.




### (6) Resubmit Complete

When you are ready to complete the task and exit the form, click the "Complete" button.

## Approval

When the plan review is approved by all reviewers, you will be notified by email.

## Print Approved Plans

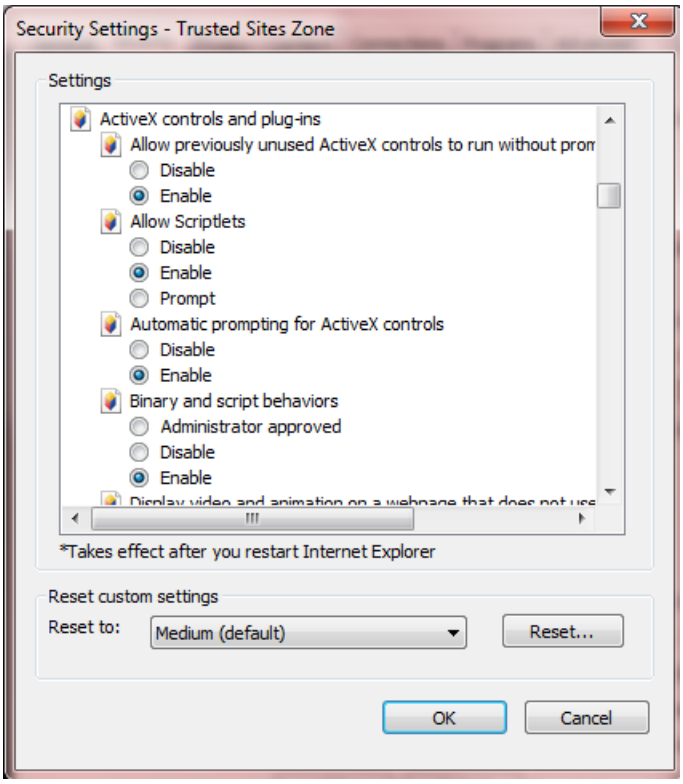
After an approval has been issued the plans will be electronically stamped by the Town. You will then receive an e-mail indicating that your application is ready and instructions on how to download and print your files.

Tm:07/19/13

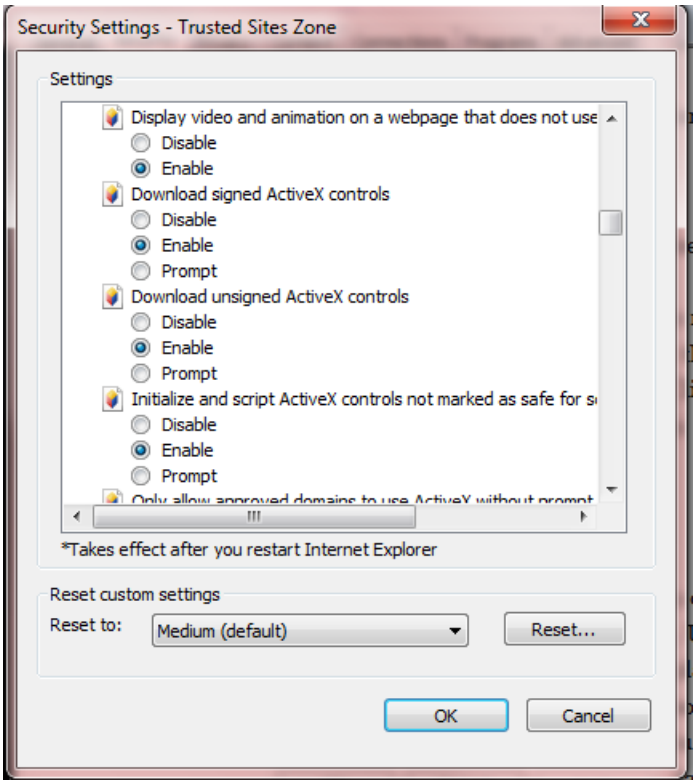
# <u>If Unable To Upload Files to ProjectDox</u>

Please check the following:

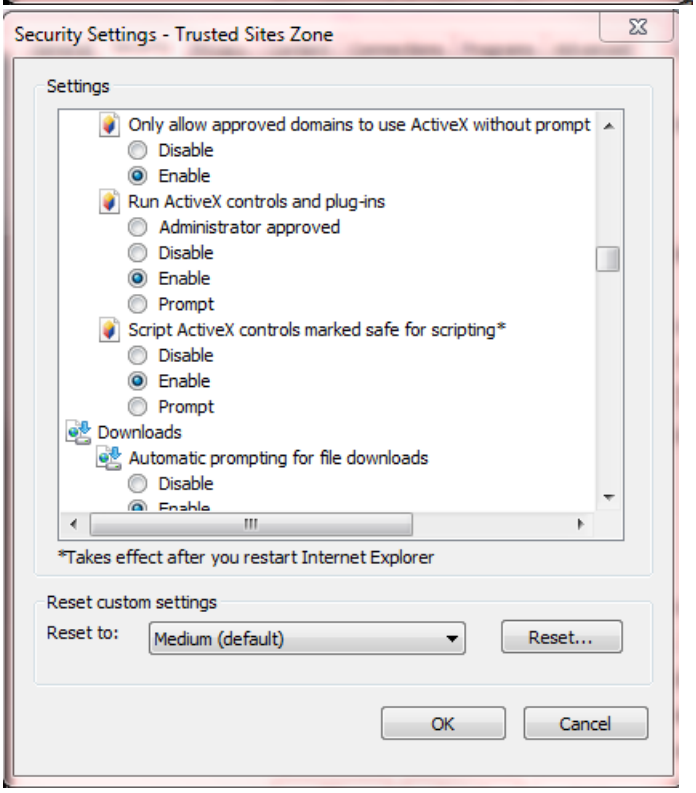
1. Using **IE 8 through 10** ☐
2. Install **ProjectDox components** (link on log in page) ☐
3. **Pop-up Blocker** Turned off ☐
4. **Projectdox.davie-fl.gov** added to trusted sites ☐
5. Uncheck "**Enabled Protected Mode**" (for trusted sites) ☐
6. Check **Active X Control** settings (IE>Tools>IEOptions>Security> TrustedSites>CustomLevel) ☐

a. 

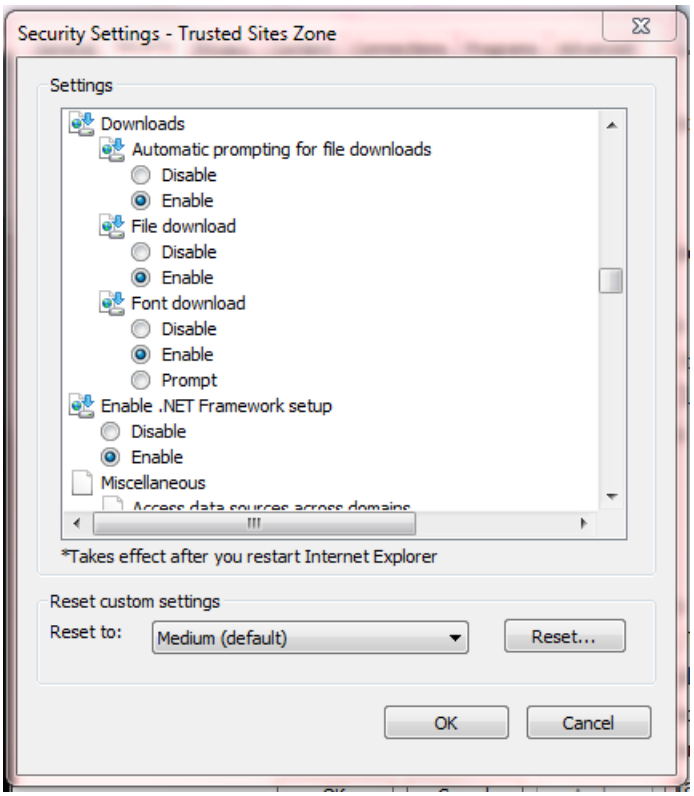
b.


Security Settings - Trusted Sites Zone
Settings
Display video and animation on a webpage that does not use
Disable
Enable
Download signed ActiveX controls
Disable
Enable
Prompt
Download unsigned ActiveX controls
Disable
Enable
Prompt
Initialize and script ActiveX controls not marked as safe for s
Disable
Enable
Prompt
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

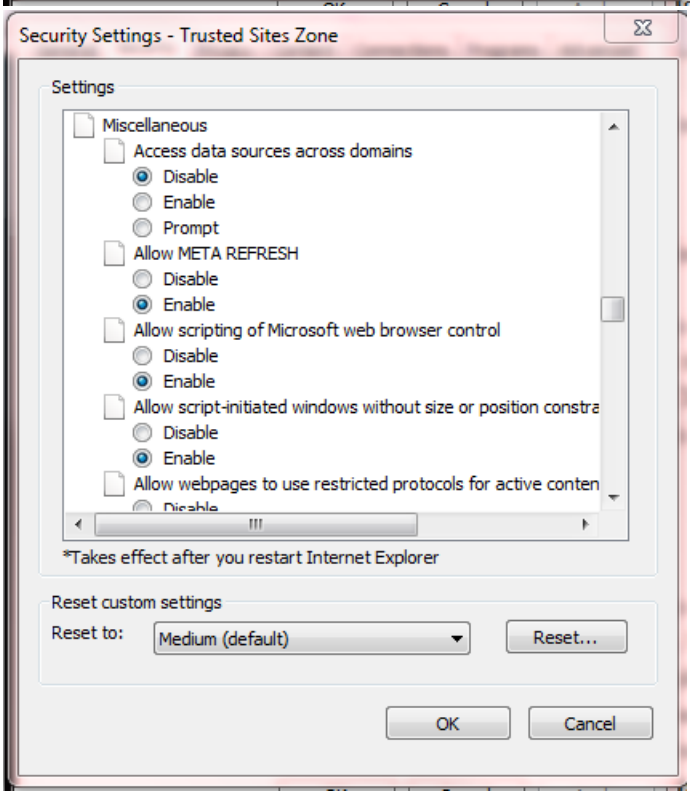
c.


Security Settings - Trusted Sites Zone
Settings
Only allow approved domains to use ActiveX without prompt
Disable
Enable
Run ActiveX controls and plug-ins
Administrator approved
Disable
Enable
Prompt
Script ActiveX controls marked safe for scripting*
Disable
Enable
Prompt
Downloads
Automatic prompting for file downloads
Disable
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

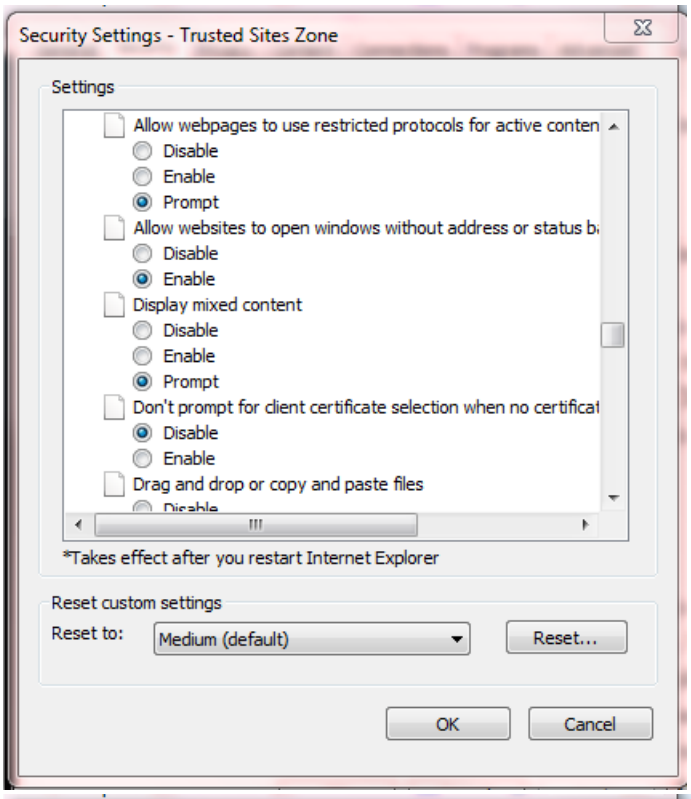
d.


Security Settings - Trusted Sites Zone
Settings
Downloads
Automatic prompting for file downloads
Disable
Enable
File download
Disable
Enable
Font download
Disable
Enable
Prompt
Enable .NET Framework setup
Disable
Enable
Miscellaneous
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

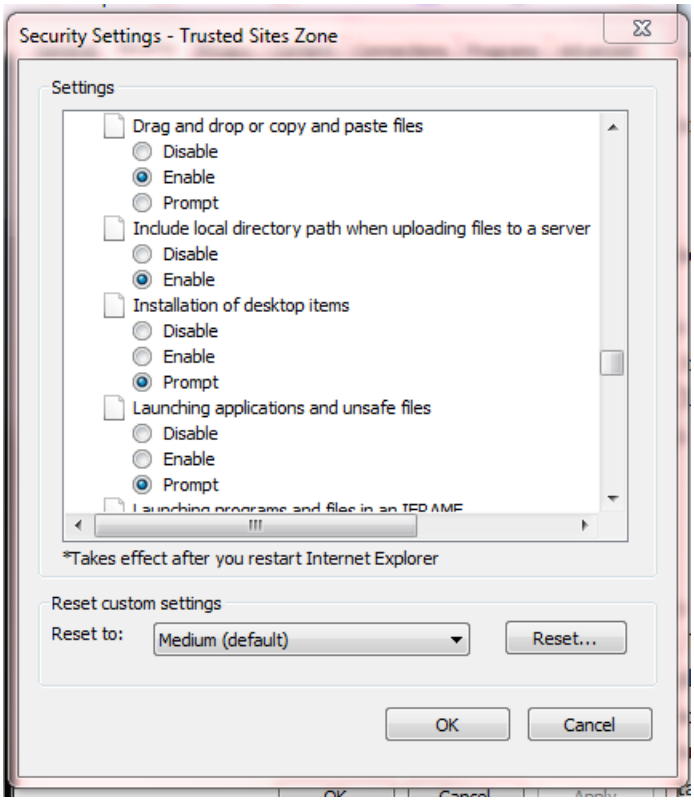
e.

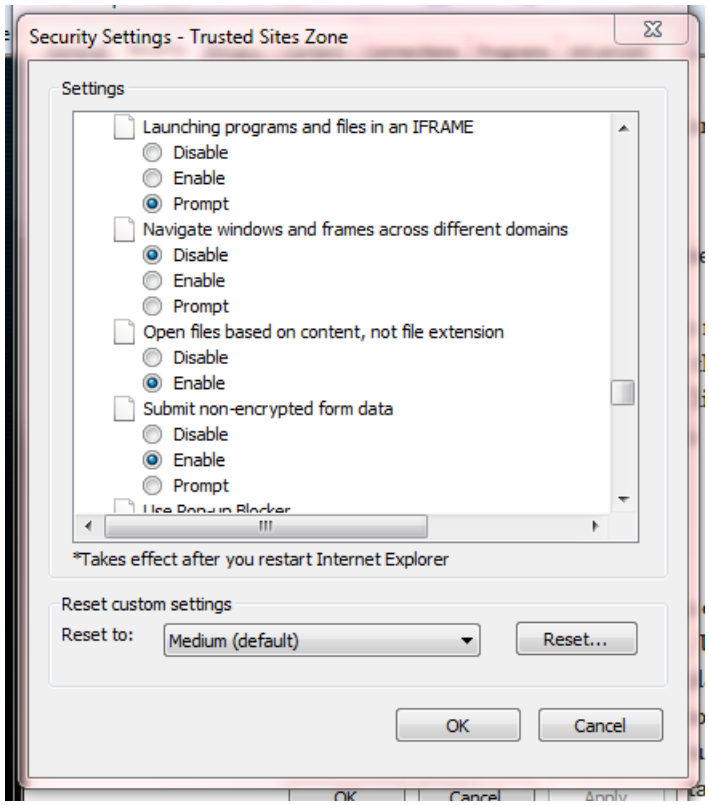

Security Settings - Trusted Sites Zone
Settings
Miscellaneous
Access data sources across domains
Disable
Enable
Prompt
Allow META REFRESH
Disable
Enable
Allow scripting of Microsoft web browser control
Disable
Enable
Allow script-initiated windows without size or position constra
Disable
Enable
Allow webpages to use restricted protocols for active conten
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

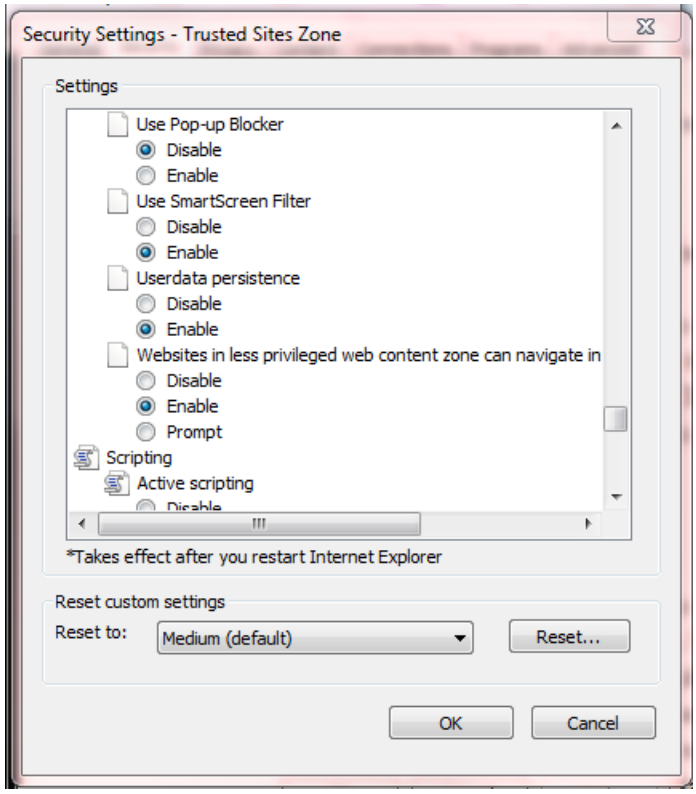
f.

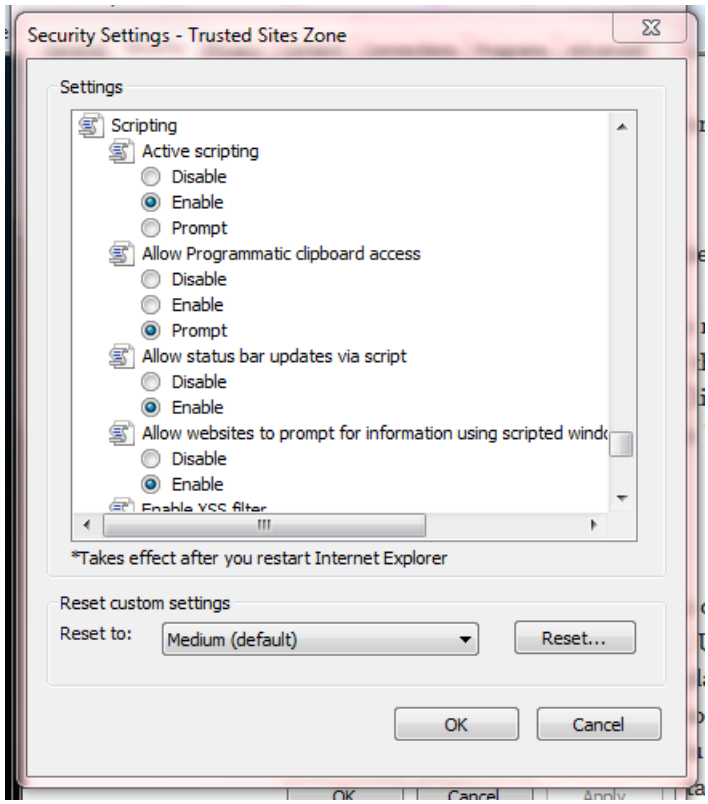

Security Settings - Trusted Sites Zone
Settings
Allow webpages to use restricted protocols for active conten
Disable
Enable
Prompt
Allow websites to open windows without address or status b
Disable
Enable
Display mixed content
Disable
Enable
Prompt
Don't prompt for client certificate selection when no certificat
Disable
Enable
Drag and drop or copy and paste files
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

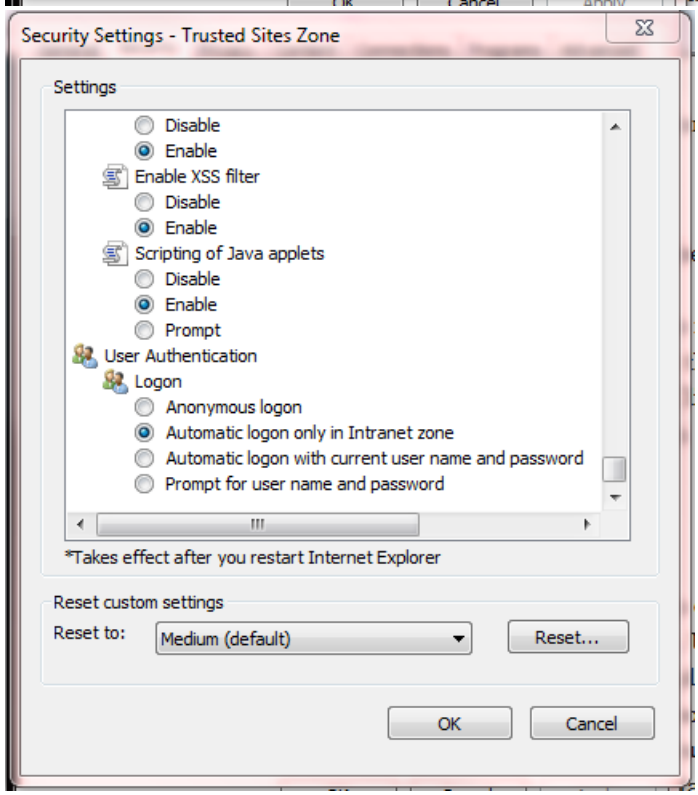
g.


Security Settings - Trusted Sites Zone
Settings
Drag and drop or copy and paste files
Disable
Enable
Prompt
Include local directory path when uploading files to a server
Disable
Enable
Installation of desktop items
Disable
Enable
Prompt
Launching applications and unsafe files
Disable
Enable
Prompt
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

h. 
Security Settings - Trusted Sites Zone
Settings
Launching programs and files in an IFRAME
Disable
Enable
Prompt
Navigate windows and frames across different domains
Disable
Enable
Prompt
Open files based on content, not file extension
Disable
Enable
Submit non-encrypted form data
Disable
Enable
Prompt
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

i. 
Security Settings - Trusted Sites Zone
Settings
Use Pop-up Blocker
Disable
Enable
Use SmartScreen Filter
Disable
Enable
Userdata persistence
Disable
Enable
Websites in less privileged web content zone can navigate in
Disable
Enable
Prompt
Scripting
Active scripting
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

j. 


k. 


7. Contact the Town of Davie Help Desk with any questions at help_desk@davie-fl.gov or 954-797-1070.