

Municipality of Anchorage

ProjectDox v9.2 Applicant User Guide



Last updated May 10, 2021

ProjectDox is a tool that allows building plans to be submitted via the web reducing plan review/permitting time and associated costs.

Please read this guide prior to using ProjectDox. In addition to this guide, please refer to the instructions provided in the electronic forms (eforms) you receive with each task for further assistance.

While using this guide, pay particular attention to portions highlighted in yellow.

Common Mistakes

The most common mistakes made by applicants resulting in rejection of submittals:

- Drawings are loaded as a single pdf file. Each drawing must be a single file.
- Drawing files are incorrectly named. The file name should be the sheet number and nothing more. For example: sheet A-1 would be file A-1.pdf. Do not include the project name, etc.
- Plans are loaded in the Documents file and/or documents are loaded in the Plans file.
- Updated/revised plans are loaded with a new file name. When loading a revised plan, use the same file name as the version currently loaded in eplans. Eplans tracks the versions.
- No clear space is provided for the MOA approval stamp.

Don't forget to complete your task! Once you have uploaded plans, documents, responses to comments, etc., you must complete the eform (Applicant Upload Task) in order to send a task back to us. We will not know that you are done until you complete this task. The task will be an underlined statement such as Applicant Upload Task. You can locate the task by clicking the "Tasks" tab in the upper left of the Home screen.

Applying for a Permit

1. Submit a completed permit application to Development Services. Applications can be found on the Development Services website: <http://www.muni.org/Departments/OCPD/development-services/permits-inspections/Pages/forms.aspx>
2. Email the application to permitcounter@muni.org. A permit tech will enter the application into the permit tracking software known as Infor and you will be issued a permit number. The permit tech will coordinate payment of fees, issuance of the permit and address other questions you may have.

3. First time users will receive a setup password invitation and will need to setup a password in eplans (ProjectDox). Instructions are included in the invitation.
4. You will receive an Applicant Upload Task allowing you to load plans and documents into eplans (ProjectDox). Please follow the directions provided with the task and contained in this guide.
5. Prior to loading plans and documents, please review the standards for drawing and document file naming, municipal stamp location, acceptable file formats, etc. in this guide.

Submitting Change Orders and Deferred Submittals

1. Submit a completed Change Order/Deferred Submittal application to Development Services. Applications can be found on the Development Services website:
<http://www.muni.org/Departments/OCPD/development-services/permits-inspections/Pages/forms.aspx>
2. Email the application to permitcounter@anchorageak.gov. A permit tech will enter the application into the permit tracking software known as Infor and you will be issued a number starting with "X". The permit tech will coordinate payment of fees, issuance of the change order or deferred submittal and address other questions you may have.
3. You will receive an Applicant Upload Task allowing you to load plans and documents into eplans. Please follow the directions provided with the task and contained in this guide. Drawing and document standards are the same as those for permits.

Login to ProjectDox

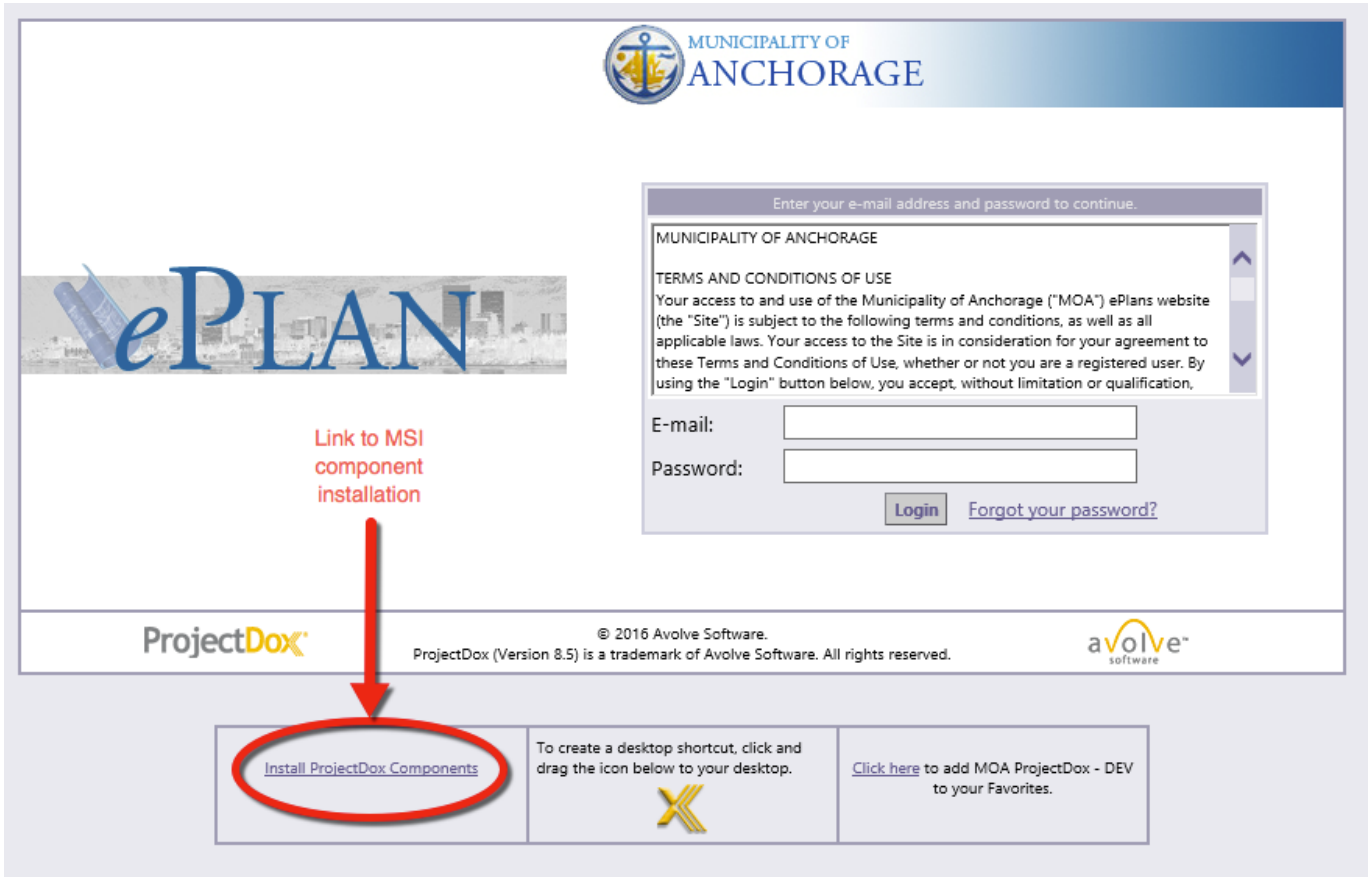
ProjectDox Review Invitation

When your application is processed by the permit counter and input into the permit tracking system, a ProjectDox 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.

New Users

1. If you do not receive an invitation, check your junk mail.
2. Prior to logging into the ProjectDox, 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. 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.
 - If you are using Internet Explorer as your browser - 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. Other browsers do not require this install.

3. To sign in, enter your e-mail address and temporary password and click the Login button, as shown below:



4. Set up your account. Enter your new password and reconfirm, and enter your 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 ProjectDox 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 ProjectDox, the **Home** screen will display. You can toggle between **Tasks** and **Projects** using the buttons on the upper left. Any projects for which you have access will display in Projects screen. Outstanding tasks that require your action are displayed in the Tasks screen. Note that each column on the Projects and Tasks screens has a search/sort function. Select the specific Task that corresponds to the plans you will be uploading and follow the instructions.
2. Click the “Plans” folder to upload plan drawings. Click the “Documents” folder to upload supporting project documents. **Please review [Standards for Plans and Supporting Documents](#) (below) before you start loading plans and documents.**
3. Click the “Upload Files” button. You can select individual files by clicking on the “Browse” button, or you can install the Microsoft Silverlight control (if not already installed on your computer) that will allow you to select multiple files or drag-and-drop files into the window. 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.

4. When all files you wish to upload are listed in the window, click the “Upload” button and the files will be uploaded to ProjectDox. Click the “Complete Upload Process” button to close out of the file upload complete dialog box.
5. **Once you are done uploading plans, you must complete the eform (underlined Applicant Upload Task).** This sends the milestone back to us so we can do the prescreen review.
6. Congratulations! You have successfully finished submitting your plans electronically. Please logout after your session is complete. A notification has been sent to the Review Coordinator 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 60 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.

Standards for Plans and Supporting Documents

Drawing Files!

1. Drawing Files:
 - **Each drawing must be loaded as an individual PDF in the Plans folder. Do not combine drawings into a single PDF file and then load.** Do not load drawings in the Documents folder.
 - **The drawings must be loaded as full-size drawings (Example: 36x22 or 34x22, etc).** Do not upload ½ size drawings and 8.5x11 sketches. The MOA approval stamp is sized for full size plans. Check your settings when printing/saving to PDF to make sure you are not creating ½ size drawings.
 - **Each drawing must be loaded in the correct orientation,** meaning the text must be horizontal when viewed on a computer screen.
 - **Drawings and design information embedded in calculations: Any design information that is embedded in a calculation package and is necessary for the construction and inspection of a project must be placed on a drawing and loaded in the Plans file.**
2. Supporting Document Files: All other files that are required as part of the application that are not drawing files (i.e. Structural calculations, geotechnical reports, etc.) must be loaded in the Documents folder. Unlike plans documents do not need to be loaded page by page. Each distinct document should be loaded as an individual file.

File Naming Standards!

Since one must be able to search through drawing files in eplans just as they would when doing a paper review, **the drawing filename must match the sheet number.** Additionally, filenames should include a first character for the discipline followed by a sheet number. **The drawing name should only include a discipline character and sheet number as required below. Do not include the project name or any other text in the drawing name.**

- **Discipline** – First characters represent the discipline area, example “A” for Architectural, “S” for Structural, etc. Ensure that all plans, including the associated details, are submitted under the correct discipline characters.
- **Sheet Number** – Use the drawing number. If the drawings have a category number, separate the category number from the sheet number with a decimal or a space.

Drawing Type	Discipline		
Architectural	A		
Interior Design	ID or A		
Structural	S		
Plumbing	P or M		
Electrical	E		
Smoke Control	SC		
Mechanical	M		
Landscape	L		
Civil	C		
Life Safety	LS or A or G		
Survey	V		
Fire Protection	FP		

MOA Approval Stamp Location!

The city’s electronic stamp will be located in the top right corner of all drawings, offset to allow for the title block. Please leave the following clear space to allow for the stamp:

- o Dimensions: 5” width x 2” height, offset 3” from the right, 0.5” from the top

File Type Standards

Supporting files may only be PDF format. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-drawing files).

Only vector PDF files will be accepted for drawings.

AutoCAD software is commonly used to create drawing files. 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, or plumbing/gas, confirm that only the trade lines are dark by changing the background to grayscale prior to saving as a vector PDF file.



Prescreen

Prescreen is a cursory review of your uploaded files in preparation for formal review. This will be performed by a Review Coordinator (Permit Technician). 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 detailing corrections and including instructions on how to resubmit. If you have met all submittal requirements, your application will move to be formally reviewed.

Returned for Corrections

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

1. Click the link in the e-mail to login to ProjectDox and click on the Prescreen Corrections task under Tasks. This will launch the corrections eform.
2. Review the Prescreening Comments to identify which requirements were noted as missing or require correction.
3. Upload the missing and/or corrected drawings and documents (see the “Uploading Your Files” section for instructions). Note you will not be able to delete drawings and documents. If something needs to be deleted, email the Review Coordinator using the “Discuss” tab.
4. Enter a response to each comment in the box provided.
5. When done, 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 city will be notified that the files have been completed or corrected and will continue with the Prescreening process.

Prescreen Approved

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

Monitoring the Status of Your Project

Note that you will not receive a notification of review status until all reviews are complete, at which time the Applicant will receive an email notification and can then respond to comments via the Resubmit Task (see Review Comments and Plan Resubmit below). You can however use the **Status, Review and Reports** tabs in the upper left of your screen to monitor the status of your project at any time. The **WorkFlow Routing Slip** report is very useful in troubleshooting and determining the status of the project. It chronologically lists all tasks performed by all users, including the dates/times. This is the first report we use to troubleshoot a project.

There are two types of plan review comments:

- **Changemarks** – These are comments on drawings and documents. Changemarks can be viewed under the **Reviews** tab, in the review comments report, in the Applicant Resubmit Task eform, **or they can be viewed directly on the drawing or document.** If there is a red pencil symbol next to a drawing or document file (Under the Files Tab), there is a comment on that specific drawing or document. To view the comment, click on the symbol and follow the instructions. Changemarks can be viewed immediately after they have been created.
- **Comments and Library Comments** – These are comments that are not specific to a particular drawing. Comments can be viewed under the **Reviews** tab, in the Applicant Resubmit Task eform and the review comments report.

Applicants and View Only Privileges

In order to avoid chaos, we recommend there be only one *Applicant* performing *Tasks* such as uploading drawings and completing eforms. **Others who need access to the project can be granted View Only access.** On larger and/or more complicated projects we recommend providing view only access to members of the design team so they can see/review comments specific to their discipline directly on the drawings, under the **Reviews** tab and in the reports. These designers can then communicate directly with the reviewers via the **Discuss** tab, email or phone making for effective/efficient resolution of the comments.

Communicating with Reviewers and Review Coordinators

The Discuss tab (upper left in the project screen) is an effective means of communicating directly with reviewers and review coordinators, as groups or individuals. For instance, if you want to know when a specific review will be completed, you should email the specific review group or individual reviewer rather than the review coordinators. Just click the **Discuss** tab and then click “Add Topic”. Enter a title, select “Email Correspondence” from the category and enter your comment text. Select “Save and Prepare Email” to send the email. There is no need to use “Manage Participants”, unless you want to exclude people from seeing the discussion.

Review Comments and Plan Resubmit

Requested Corrections

If corrections are requested following a review cycle of your drawings, follow the steps below:

1. You will receive an e-mail notification.
2. Click the link in your e-mail to access ProjectDox and login.
3. Locate the Applicant Resubmit Task under the Tasks tab. Clicking on the task opens the eform while clicking on the project number enters the project.

Once the task is accepted and the eform is opened, the steps below must be performed to complete the “Applicant Resubmit Task”.

- 1) Review Changemarks and Comments and enter a response in the space provided.
- 2) Note the option to do an Excel export for distribution to design disciplines.
- 3) Update and Upload Plan and/or Document Files.
- 4) Verify and Complete all Checkboxes.
- 5) Click the “Resubmit Complete” button to complete the submission.

(1) Update and Upload Plan Files

After reviewing the Changemarks and Comments, update the files as required to adjudicate all review comments. The Upload dialog is identical to the initial upload. Once the files have been updated to address all comments, you need to enter a description / short summary of the changes made in the “Applicant Comments” field on the “Applicant Resubmit” eform.

IMPORTANT: Please retain exact drawing/detail locations on re-submitted plan sheets. This allows for a speedy review of the re-submitted plan sheets using the overlay function.

When uploading revised plans, use the same file name as the original drawing. The software tracks versions. The file will display a version number, V2 for example, when the correction is uploaded with the SAME FILE

NAME as the original file name. If you attempt to load a drawing that is identical to the current version, the software will not allow the upload. If a drawing fails to load, this is likely the case.

(2) Verify and Complete Checkboxes 1, 2, and 3

Checkboxes 1 and 2 are confirmation that you have read and corrected the issues, while checkbox 3 is confirmation you have uploaded all new and/or corrected files. Make sure you have completed these steps, then mark the checkboxes appropriately.

(3) Click the “Resubmit Complete” button to complete the submission

Once all changes have been made, all updated files have been uploaded, all comments captured, and all checkboxes confirmed and checked, then click the “Resubmit Complete” button to complete this step and to continue the review process.

Approval

When the plan review is approved by all reviewers, you will be notified by email. The email will include instructions on how to download and print your files.

Note! Approval of the plans does not mean the permit has been issued. A permit tech still needs to issue the permit(s). Also, fees may still need to be paid and a contractor may need to be named. Please contact the permit counter by emailing permitcounter@anchorageak.gov or calling 343-8211 for assistance completing the permit issuance process.

Print Approved Plans

After an approval is issued, the plans will be electronically stamped by the City. These files will then need to be printed and in place at the job site. At least one set of full size plans having a minimum text height of 3/32 inch must be retained on the job site for inspections.