

WINTER HAVEN
The Chain of Lakes City

City of Winter Haven
Planning and Building Divisions
Electronic Plan Submission Guidelines

Welcome to the City of Winter Haven’s new Electronic Plans Submission and Review process! We are proud to introduce this powerful web-based collaboration and automated workflow tool to the City of Winter Haven Site Plan review process. The rich built-in capabilities of the ProjectDox software, in addition to our custom designed modifications, will allow for secure collaboration and markup of plans. At the same time, it will streamline the review process and improve communications and review accuracy. This new tool will create efficiencies and significantly reduce the amount of paper, printing, and storage costs, as well as the travel to submit plans.

Planning and Building Divisions Administration	
David Dickey, Community Development Director, 863-291-5600	
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Thanks for joining us in this that will fundamentally change the way the department conducts business – moving from a paper-based process to a paperless process. Site plans and architectural plans will be submitted and reviewed electronically, and communication will be enhanced through a digital workflow process. The software is called ProjectDox and it will provide better and faster plan reviews by enabling enhanced communication among City departments and between our customers. At the same time, it will generate much less paper and enhance access via the web. There are three (3) main parts of the system: 1) e-forms, 2) workflow, and 3) electronic review. E-forms (electronic forms) are web-based application forms. Applicants will need to fill out the paper site plan application and submit the application along with the fee to the Planning Division at 451 Third Street, NW, Winter Haven, Florida 33881. The Building Division will also require that the paper application be submitted to the Building Division, 490 Third Street, NW, Winter Haven, Florida 33881. Over time, these will all be converted to e-forms. A main advantage of e-forms is that the data is captured directly on the city's web site, so "re-entering" the data is not necessary.

The second part of the system – workflow – is a pre-designed communication system that automatically sends e-mails to the appropriate staff at the appropriate time during the plans review process. Participants in the workflow are notified of their task, given the opportunity to work on it, and then "check-off" that it's been completed. The process then moves forward based on built-in rules. It is a dynamic system allowing staff to work on the same project at the same time. The various stages of all projects will be at reviewers' fingertips allowing them to determine the current status of the project and any associated deadlines.

The third part of the system – electronic review – is perhaps the most valuable. Rather than delivering 8 copies of a multi-sheet site development plan to the City, applicants will just upload the plans through the Internet from their workplaces. Plans can then be reviewed on the computer screen at the same time. Review comments can be written directly on the electronic plan and the applicant can then review final comments by just logging into the system. Subsequent plan submittals can then be uploaded based upon any comments received. Versions of the plan can be automatically compared as the software will highlight any differences. This will result in better and more efficient reviews.

Since the system is web-based, anyone with log-in rights can participate and there is no need for special software loaded on each machine. The Planning Division has a central computer station that can be utilized by the public to see plans, reports, and staff comments. All documents associated with the plan, such as traffic studies and street lighting plans, will also be uploaded and viewable as part of the plan submission.

This and other training materials will undergo multiple revisions as we journey through the processes; your suggestions for improvement are always welcome and your patience with our process is appreciated.

Primary ProjectDox Definitions and Glossary

Application: the first form completed by a plan applicant, available on the City's website. Once filled out, the appropriate fee and application shall be brought to the Planning Division and/or Building Division, the "process" is launched and the workflow begins.

Brava Viewer: This electronic "viewer" application operates within ProjectDox; it allows staff to view and markup CAD files, word documents, estimates, JPEGS and many other files which may be uploaded. This application provides layers on top of the original files on which marks and drawings may be placed. Please note that since this is a viewer, edits cannot be made to the original drawings and documents. Most of the work during the review process will take place in the Brava Viewer. All city staff as well as the applicant will utilize the Brava viewer during the review process.

Checklist: After the application is reviewed by the Intake Coordinator and all fees are collected, the project is created, which then invites the applicant to upload all electronic plans, associated reports and documents.

Dynamic e-form: Many e-forms are dynamic or 'intelligent'. A dynamic e-form will activate or deactivate different sections within the form based on the answers of key questions. A dynamic e-form eliminates the need to review portions of a form that are not applicable to a specific case.

E-form: Formerly paper, e-forms are Web-based electronic forms used throughout the plans review process and include, but are not limited to, applications, checklists, transmittal, approval, and procedural forms.

Task: Applicants and review staff alike will receive tasks (usually accompanied with a notification email) when the ProjectDox workflow reaches points when action is required by that particular participant. Tasks include, but are not limited to, filling out forms and checklists, verifying information, uploading documents, and reviewing documents.

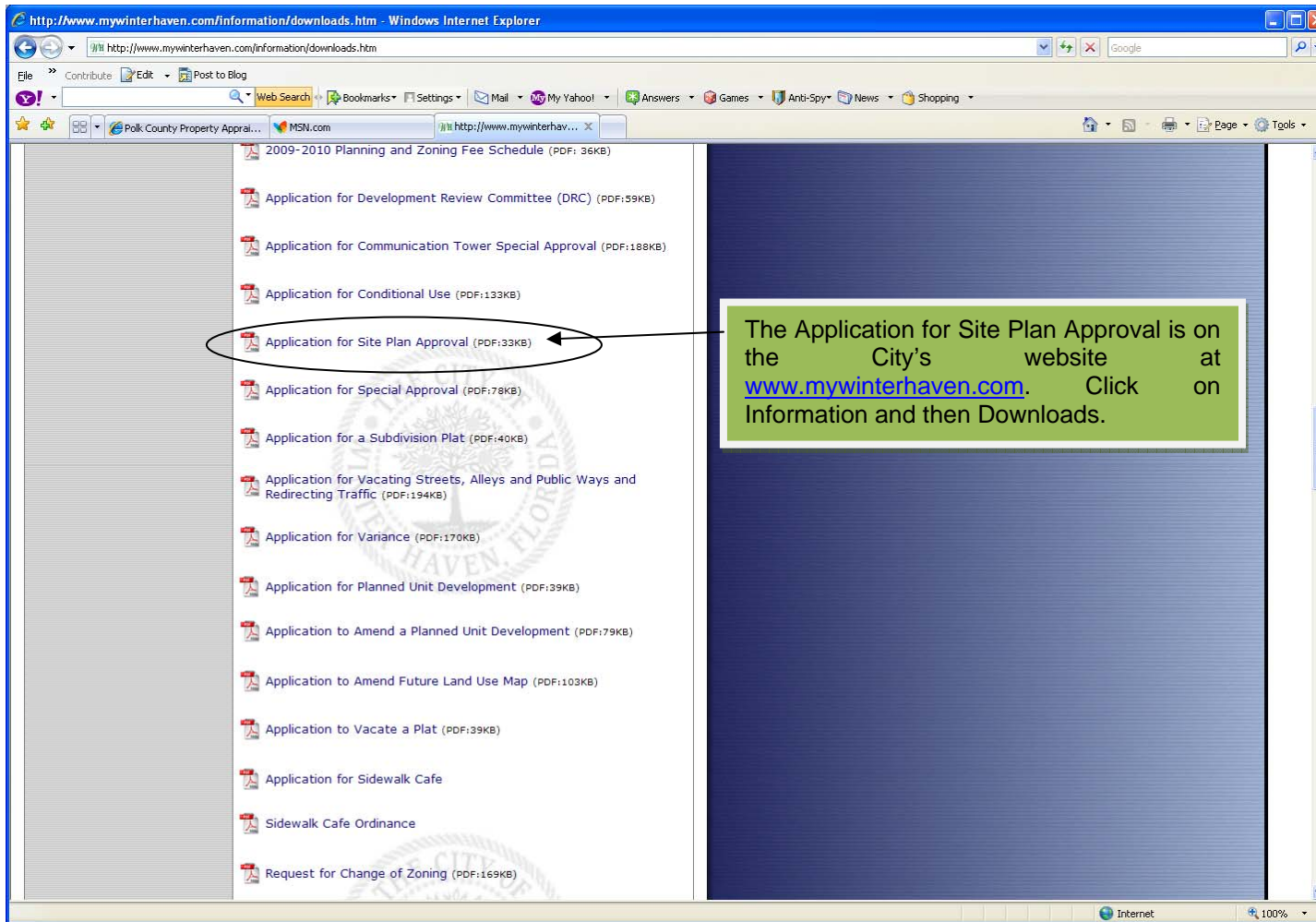
Workflow: The process which any project must go through from initial application request to approval and original signature. Within the main workflow, there are smaller workflows for each component in the process (intake, review, developer's agreements, planning board, originals, etc...).

STAFF DESCRIPTIONS / PROJECT NAMES:

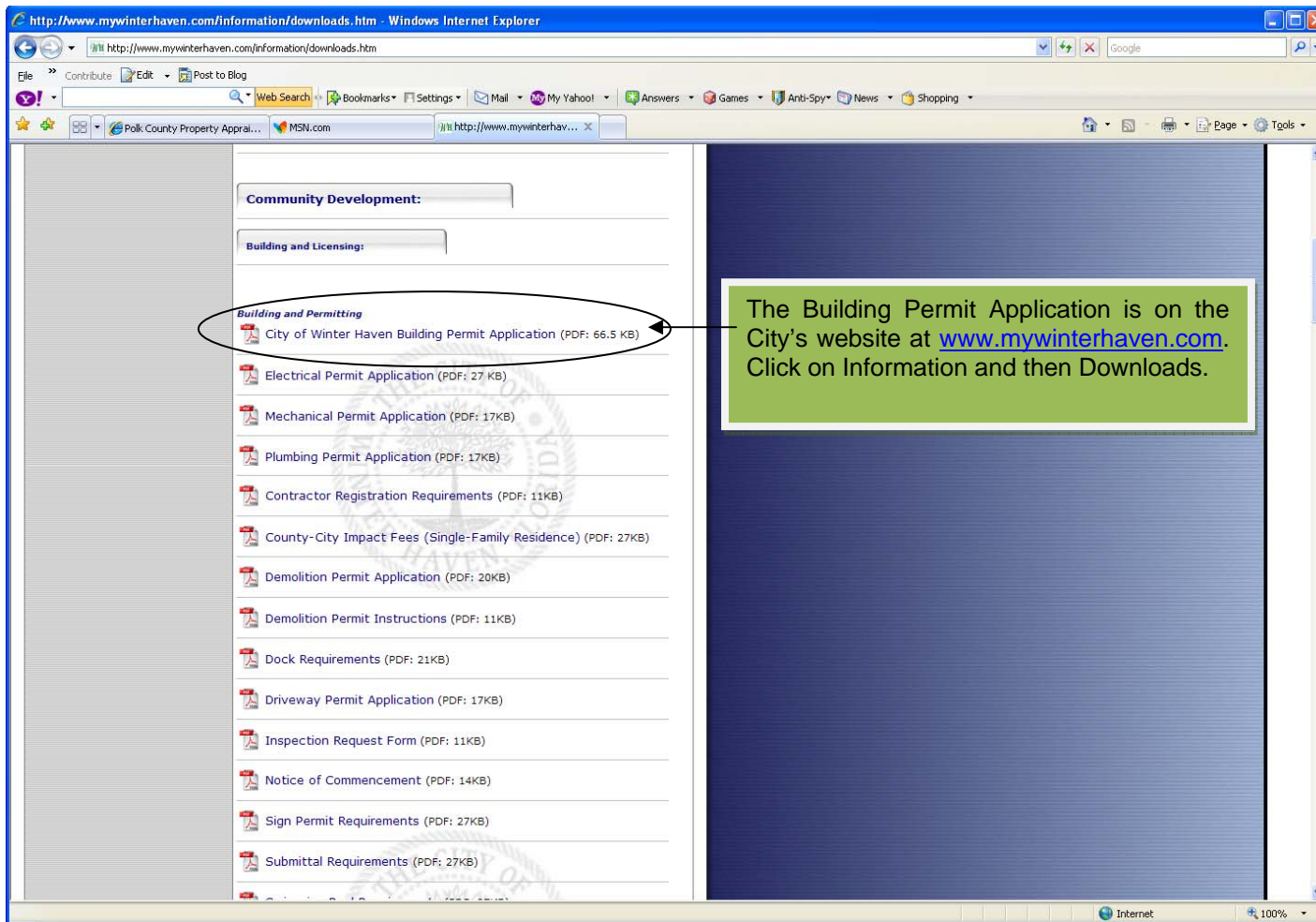
Intake Coordinator: The Intake Coordinator manages the entire intake process, working as a “middle-person” between the applicant and City Staff.

Administrators: The chief of an agency or division or their designee, capable of final approval on behalf of that division or agency.

ProjectDox Project Administrator: This role serves as project administrator for each ProjectDox project. All Help requests are coordinated and resolved by this role, and all project “re-sets” or “re-routes” are conducted.




Submit this application, along with the appropriate fee, to the City of Winter Haven, Planning Division, 451 Third Street, NW, Winter Haven, Florida 33881. If you have any questions, please contact Planning at 863-291-5600.



Submit this application, along with the appropriate fee, to the City of Winter Haven, Building Division, 490 Third Street, NW, Winter Haven, Florida 33881. If you have any questions, please contact Building at 863-291-5695.

Upon receipt of the application, the intake coordinator(s) will set up the project and an email will be sent to the applicant:

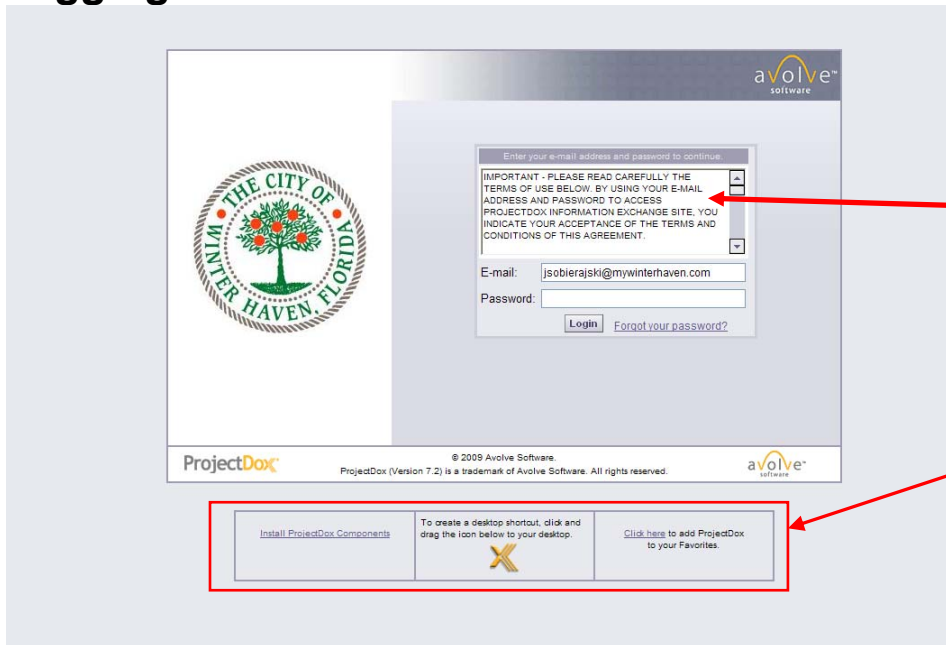
 The City of Winter Haven ePlan Submission Invitation	
<p>Hello Jeanne Sobierajski,</p> <p>Welcome to The City of Winter Haven 's electronic plan review system. You have been invited to Project: Test in response to your project request. This invitation will allow you to electronically upload your drawings for eplan review. To access your new project, follow the instructions below.</p>	
User Login:	jsobierajski@mywinterhaven.com
Project Number:	Test
ePlan Coordinator:	Jeanne Sobierajski
ePlan Coordinator's Email:	jsobierajski@mywinterhaven.com
Project Access Link	
Instructions <ol style="list-style-type: none"> 1. Click the Project Access link below 2. Enter your User Login and Temporary Password 3. Click on the Project link on the "My Projects" page 4. Click on the "Drawings" folder 5. Click the "Upload Files" button and follow the instructions to upload your drawings 6. Your drawings have now been submitted for eplan review 	Resources <ul style="list-style-type: none"> • ProjectDox User Guide • Electronic Signatures • Professionals' Electronic Data Delivery System (PEDDS) • Board of Architecture and Interior Design • Florida Board of Professional Engineers • Avolve Software • City of Winter Haven
<p>Florida Statutes and Florida Administrative Code require Architects and Engineers to sign and seal documents and plans submitted for public records. There are specific provisions for electronic signatures within the Rules and Regulations. Architects and Engineers are responsible to meet the rules.</p>	

This email is an invitation to the project. The email will contain your new project login information, including:

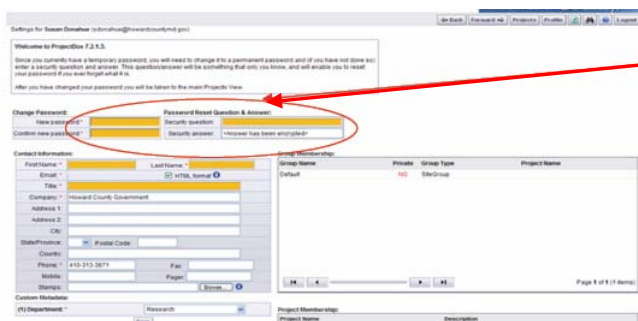
- A temporary password;
- Assigned a Project Number;
- Project Access Link

Click on/select the Project Access Link to go to the ProjectDox LOGIN page.

Logging In:



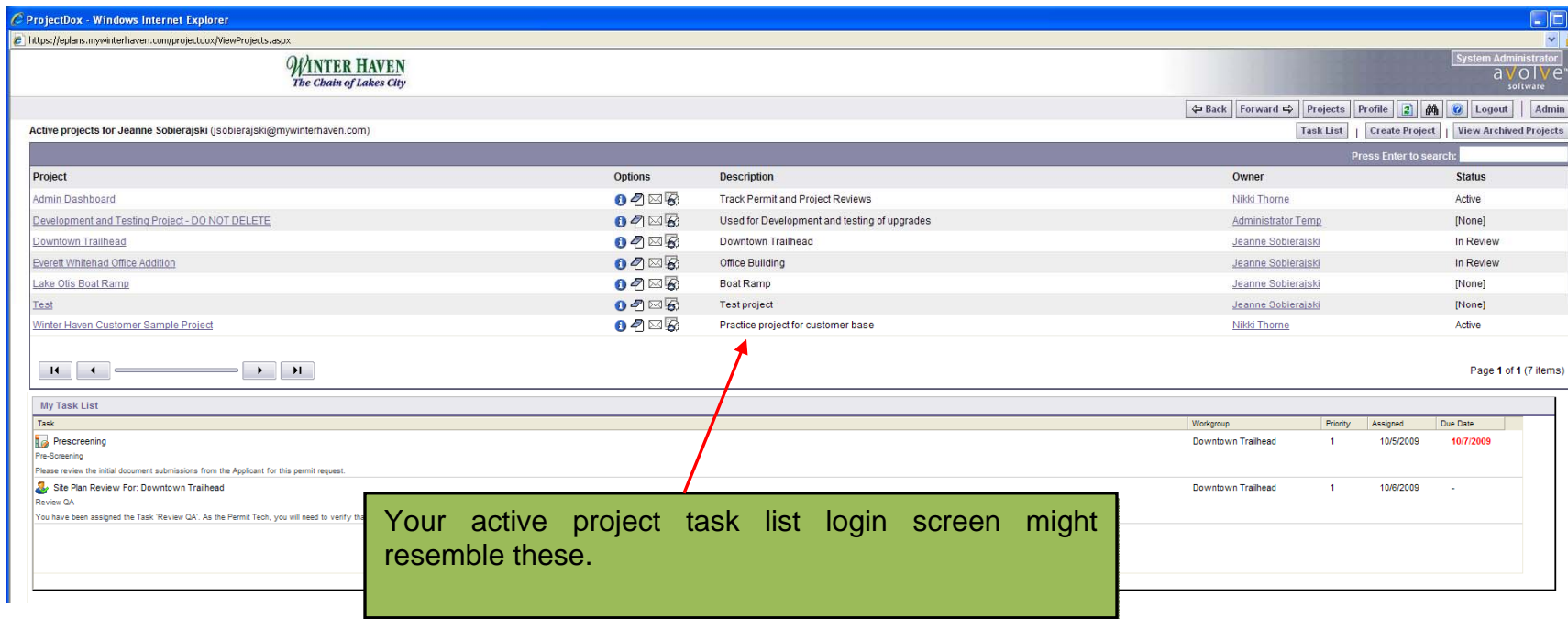
1. If this is your first project or first login, there are a number of items that you should note –
 - Please take a moment to read the “terms and conditions of use” information.
 - In order to login, you will need to disable Popup Blocker.
2. Also please take a moment to install all of the program ActiveX components which are necessary to fully use the ProjectDox application. Adding a link to ProjectDox to your browsers ‘FAVORITES’ folder or to your desktop is easily accomplished via this page.



3. Lastly, use your email as your login name and your temporary password to enter the site and begin to customize your user information (change password, provide additional contact details, etc.)
- Passwords are encrypted and you provide a security question, along with ‘a hint’, in the event you forget your password.

Uploading Your Files:

- When you have successfully logged into ProjectDox, the projects screen will display. Any projects for which you have access will display in this 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.



ProjectDox - Windows Internet Explorer
 https://eplans.mywinterhaven.com/projectdox/ViewProjects.aspx

System Administrator
 avolve software



Active projects for Jeanne Sobierajski (jsobierajski@mywinterhaven.com)

Task List | Create Project | View Archived Projects

Project	Options	Description	Owner	Status
Admin Dashboard	🔍 📧 🗑️	Track Permit and Project Reviews	Nikki Thorne	Active
Development and Testing Project - DO NOT DELETE	🔍 📧 🗑️	Used for Development and testing of upgrades	Administrator Temp	[None]
Downtown Trailhead	🔍 📧 🗑️	Downtown Trailhead	Jeanne Sobierajski	In Review
Everett Whitehead Office Addition	🔍 📧 🗑️	Office Building	Jeanne Sobierajski	In Review
Lake Otis Boat Ramp	🔍 📧 🗑️	Boat Ramp	Jeanne Sobierajski	[None]
Test	🔍 📧 🗑️	Test project	Jeanne Sobierajski	[None]
Winter Haven Customer Sample Project	🔍 📧 🗑️	Practice project for customer base	Nikki Thorne	Active

Page 1 of 1 (7 items)

My Task List

Task	Workgroup	Priority	Assigned	Due Date
 Prescreening Pre-Screening Please review the initial document submissions from the Applicant for this permit request.	Downtown Trailhead	1	10/5/2009	10/7/2009
 Site Plan Review For: Downtown Trailhead Review QA You have been assigned the Task 'Review QA'. As the Permit Tech, you will need to verify the	Downtown Trailhead	1	10/6/2009	-

Your active project task list login screen might resemble these.

- Click the Drawings folder to upload your plan drawings or Documents folder to upload other project documents. Follow the prompts for uploading your plans and documents.

The screenshot shows the ProjectDox interface for the 'Lake Otis Boat Ramp' project. On the left, a tree view shows folders: Drawings, Documents, Approved, Permits, and Incoming. A red circle highlights the 'Drawings' folder, with a red arrow pointing to a green instruction box. The main area displays project details:

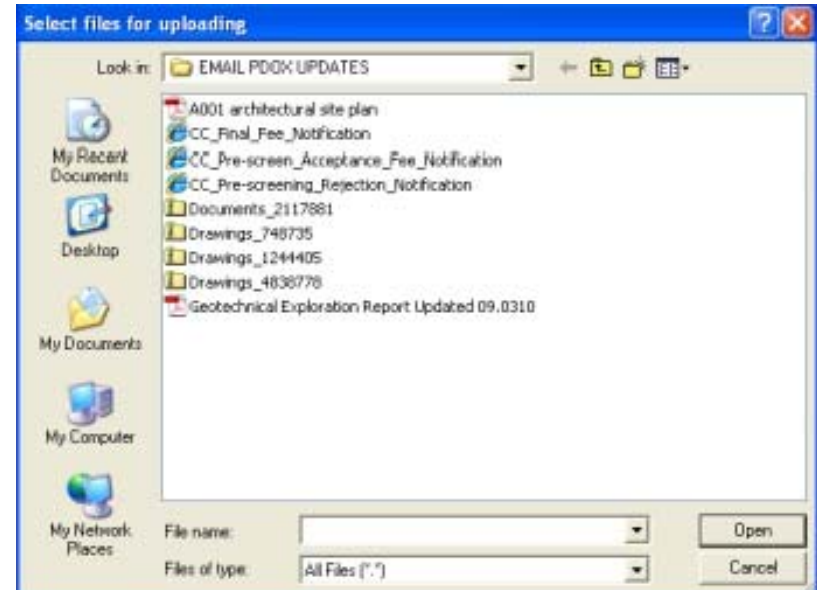
Project Name:	Lake Otis Boat Ramp
Description:	Boat Ramp
Project Image:	No image exists
Location:	Lake Otis Drive SW
Contact:	Fran McCrystal - David Carter Engineering
Contact's Email:	Fran@carter-eng.com
Phone:	863-294-6965
Cell Phone:	
Pager:	
Project Owner:	Jeanne Sobierajski
Owner's Email:	jsobierajski@mywinterhaven.com
Project Admins:	Jeanne Sobierajski, Sean Byers
Status:	
Parcel Number:	
Project Start/End:	Start: 10/8/2009 4:46 PM End:
Pass-Through:	.avi, .htm, .html, .mov, .wmv
Incoming Files:	Fax: Email: 31@eplans.mywinterhaven.com
Versioning:	Enabled for this project

To upload your documents to the project, click on the appropriate project, click on the appropriate folder and click on the upload files button.

This screenshot shows the 'Drawings' folder selected in the ProjectDox interface. The folder is currently empty. A red circle highlights the 'Upload Files' button at the bottom of the folder view, with a red arrow pointing from the instruction box above. The project details table is identical to the previous screenshot:

Project Name:	Lake Otis Boat Ramp
Description:	Boat Ramp
Project Image:	No image exists
Location:	Lake Otis Drive SW
Contact:	Fran McCrystal - David Carter Engineering
Contact's Email:	Fran@carter-eng.com
Phone:	863-294-6965
Cell Phone:	
Pager:	
Project Owner:	Jeanne Sobierajski
Owner's Email:	jsobierajski@mywinterhaven.com
Project Admins:	Jeanne Sobierajski, Sean Byers
Status:	
Parcel Number:	
Project Start/End:	Start: 10/8/2009 4:46 PM End:
Pass-Through:	.avi, .htm, .html, .mov, .wmv
Incoming Files:	Fax: Email: 31@eplans.mywinterhaven.com
Versioning:	Enabled for this project

3. Click the Upload Files button.
4. Click the Select Files button and browse to the location of the plans and documents to be uploaded.
5. Select the file location on your computer. Select or highlight the 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.



6. Click the Upload Now button. The files will be copied to the upload window. Click on the Close button to close out of the "file upload complete" dialog box.
7. Once your files are uploaded to the folder(s), the folder list is replaced by thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons display.
8. 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 Intake Coordinator to start prescreening to determine if submittal requirements have been met.

Prescreening:

After you have uploaded your files, the Intake Coordinator, will start the prescreening process. If there are questions or missing items from your submittal, you will receive a “Prescreening Rejection” email. If you have met all submittal requirements, you will receive a “Prescreening Approval” email with instructions on your next step.

The screenshot shows a web browser window titled "Prescreening Review" with the Winter Haven logo and contact information for Planning Division. The form is divided into several sections: "Construction Information" with fields for Project File Number, Project Address, Application Number, Application Type, Submittal File Name(s), Submittal File Description, Parcel Identification #, Location, Use of Property, Planned Stage of Property, Zoning of Property, Proposed Building Date, and a checkbox for "Is this a re-submittal?"; "Applicant Information" with fields for Name, Phone #, Cell #, Fax #, and Email; "Contractor Information" with fields for Name, Phone #, Cell #, Fax #, and Email; "Property Owner Information" with fields for Name, Phone #, Cell #, Fax #, and Email; and a "Checklist" section with a "Comments" field and a "Save to Log Comment" button.

Prescreening has been rejected

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

1. Click the link in your email. Log in to ProjectDox. The Prescreening corrections request e-form will open.
2. The comment section will indicate what is missing.
3. After you have identified the missing drawings, open the project.
4. Upload the missing documents.
5. Click on the Task List button in the project view and select the “Prescreening Corrections” tasks in the My Task List section.



6. Once the form opens, select “I have uploaded correct documents and/or drawings” box and click the Complete button.
7. Add your comments and click OK to complete the task.



Prescreening Has Been Approved

If your submittal is approved, you will receive an email notification that prescreening has been approved.

Change Notification and Plan Resubmit

Review Requested Corrections

If corrections are requested for your drawings, follow the steps below:

1. You will receive an email notification from the Review Coordinator requesting corrected/revised documents.
2. Click the link in your email to access the corrections requested in ProjectDox.
3. Login to ProjectDox.
4. Review the markups.
5. Correct the plan drawing(s) as requested.

Upload Corrections

1. Login to ProjectDox to upload corrected drawing(s).
2. Upload drawing(s). Corrected files should always be re-submitted with the **SAME FILE NAME** as the original submittal.
3. Check if a new version number is created when you upload. If no new version number is created, confirm the file actually changed. If there were no changes to the file, a new version will not be created.
4. When your corrected drawing(s) has/have been successfully uploaded, go to your Task List and click on the appropriate task. Check the box indicating that the corrected files have been uploaded.
5. Click complete task.

Approval

When the plan review is approved by all reviewers, you will be notified that all comments have been addressed and all regulatory agency permits should be submitted to the City, so plans can be stamped approved.

Once all permits have been received, the applicant will need to contact the Technical Services Division at 863-291-5850 to schedule a pre-construction meeting. Once the pre-construction meeting is set, plans will be stamped.

Print Approved Plans

After the pre-construction meeting has been set, you will receive an email indicating that the site plan has been approved. There will be instructions for how to print and download your files. Two (2) sets of plans will need to be printed from the Approved folder for the City of Winter Haven records and for the contractor to have on site at all times. Additional sets maybe submitted at this time. Bring these plans to the City of Winter Haven Planning Division, 451 Third Street, NW, Winter Haven, Florida 33881.