ProjectDox Guide

Questions: Contact the City of Eden Prairie Planning Division at 952-949-8485

ProjectDox website: https://planreview.edenprairie.org/ProjectDox/index.aspx

Process Overview

The purpose of this document is to provide general information on the steps to use ProjectDox for the City of Eden Prairie electronic plan submission and review. This process replaces the paper-based review of all Planning applications (with the exception of sign permits) and allows all parties participating in the process to review, enter comments and exchange ideas in a secure digital environment.

This guide has been prepared by City staff as a basic reference. Descriptions and screen shot images are included to assist you in submitting and completing tasks using ProjectDox. This document offers a foundation for learning the process but may not outline every detail. Rather, it serves as a point of reference as applications are being submitted and reviewed.

The Six Steps

Step 1 Submit application form to Planning staff via email

Step 2 After receiving the email, create your account and upload submittal materials

Step 3 Review City comments and make corrections

Step 4 Resubmit files and respond to comments

Step 5 Incorporate feedback from Planning Commission and City Council

Step 6 Download and print your approved plans

Step 1: Submit Application Form

1.1 Visit the City of Eden Prairie Planning webpage to view all the required materials to ensure a complete application package will be submitted. Pay special attention to the electronic file naming standards and DRC handbook. These standards help the City review your application package more efficiently.

1.2 Contact the Planning department at 952-949-8485 to determine which type of application form you'll need to submit.

1.3 Ensure payments for application package are paid prior to submitting application materials. Payments can be made by mailing a check to:

City of Eden Prairie
Attn: Planning
8080 Mitchell Rd
Eden Prairie, MN 55344

1.4 Using guidance provided by the Planning department, choose the appropriate application form, fill in all information requested, and email completed application form to planning@edenprairie.org. The application form needs to be submitted via email prior to submitting application submittal materials in ProjectDox.

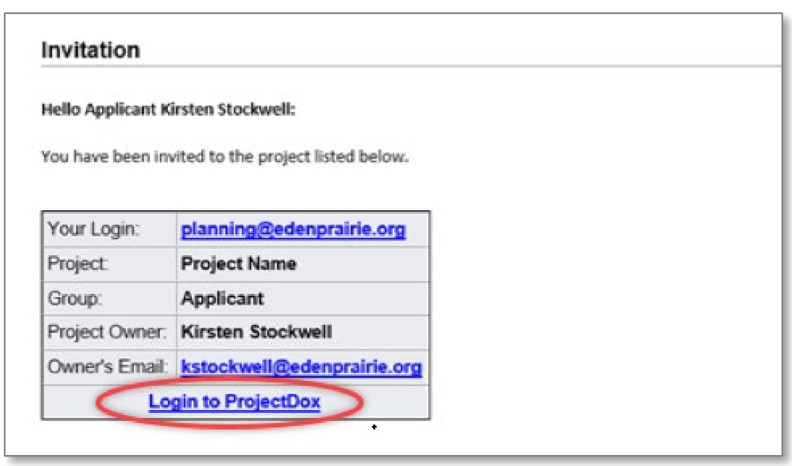
Please note: The contact information listed on the application form under "Applicant" will be used in ProjectDox as the main point of contact but will have the opportunity to add Applicant Associates once the project has been created in ProjectDox.

Step 2: Create Account & Upload Files

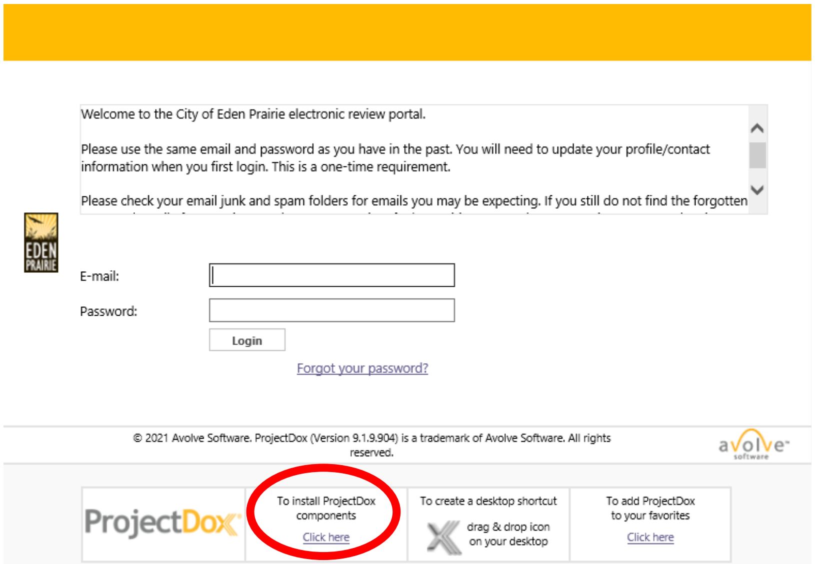
After your application form has been received via email, your project will be created by Planning staff in ProjectDox and you will receive an email invitation, autogenerated from ProjectDox, to create your account (new users only) and a separate task email instructing you to upload files.
Follow the steps in the email to log into ProjectDox or create an account. All new users will receive a temporary password in the invitation email.

How To Log In

2.1.1 From the invitation email, click "Login to ProjectDox". This will open a web browser and take you to the login screen. It is highly recommended to use Internet Explorer.
NOTE: Make sure your pop-up blocker is turned off and ProjectDox has been made a trusted site. For security purposes, you will be timed out after 60 minutes of inactivity in ProjectDox.



2.1.2 The login page has a MSI (Microsoft Silent Install) component required to install all necessary ProjectDox ActiveX controls. This installation will only need to be done once. Click "Install ProjectDox Components" at the bottom of the screen to install this to your computer.



2.1.3 Your username is your email address. For new users, see the email invitation for your temporary password. For existing users, enter your password and click "login". **The password is case sensitive.**

2.1.4 Next you will be taken to your User Profile. You will need to: reset your password, create a security question and answer, and enter additional information about yourself.

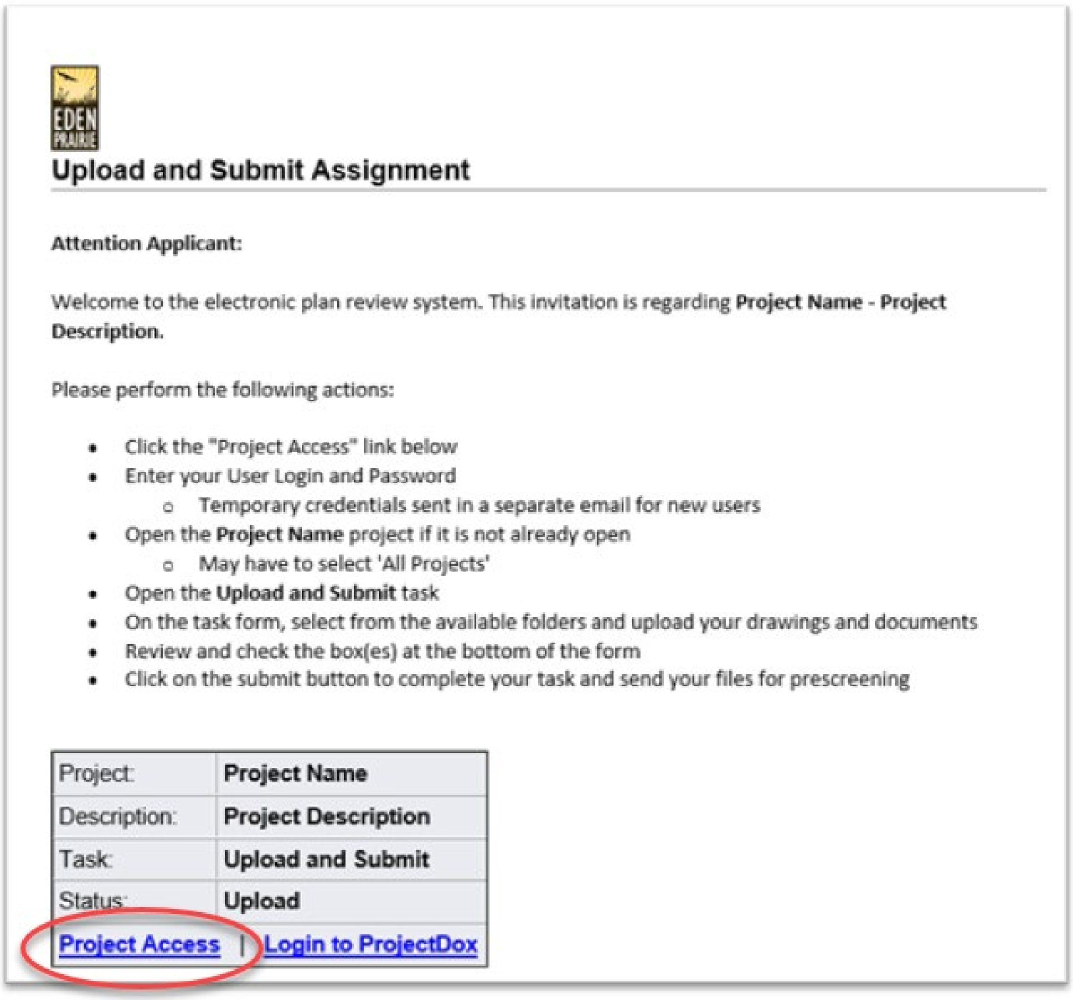
2.1.5 Fill in all information fields and click **"save"**.

Homepage/Dashboard

Tasks PF (ProjectFlow) are either assigned to you as an individual or to a group that you are a member of. You may reduce the number of columns, move columns in a different order and sort columns. Any overdue tasks will be placed at the top of the list and turn red.

Uploading Files

The first task you will be assigned as the applicant is to "Upload and Submit". The applicant is notified via autogenerated email that they have been invited into the project. Click "Project Access" in the email – or if you are already logged into ProjectDox follow the steps below. If the project does not automatically open, you may need to select "all projects" through the button in the upper right-hand corner. You may enter the project through the Tasks PF tab or the Project tab.



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Upload and Submit Assignment

Attention Applicant:

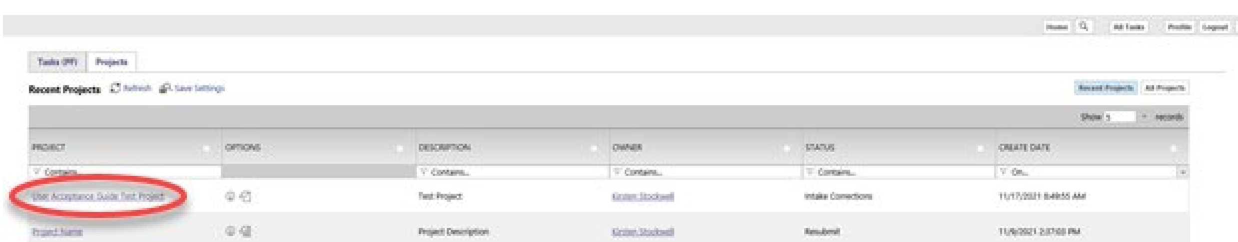
Welcome to the electronic plan review system. This invitation is regarding **Project Name - Project Description.**

Please perform the following actions:

- Click the "Project Access" link below
- Enter your User Login and Password
    - Temporary credentials sent in a separate email for new users
- Open the **Project Name** project if it is not already open
    - May have to select 'All Projects'
- Open the **Upload and Submit** task
- On the task form, select from the available folders and upload your drawings and documents
- Review and check the box(es) at the bottom of the form
- Click on the submit button to complete your task and send your files for prescreening

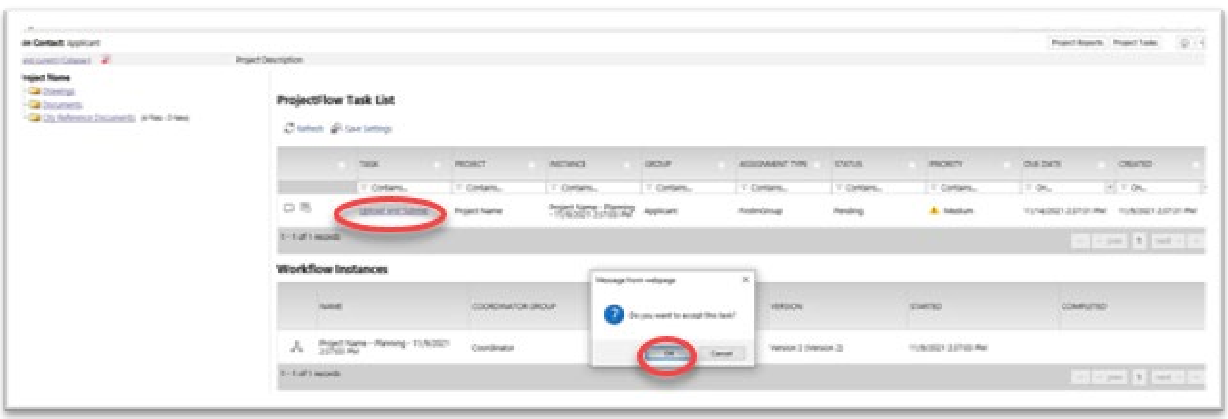
Project:	**Project Name**
Description:	**Project Description**
Task:	**Upload and Submit**
Status:	**Upload**
Project Access | Login to ProjectDox	

2.2.1 Select the project, click on the link under the Project column to begin the process.



2.2.2 Before accepting your task, review the “City Reference Documents” folder on the left side. We’ve created this convenient folder within ProjectDox for you to use as a reference. After reviewing these documents, you may proceed with accepting your task and uploading files.

2.2.3 Accept your task. Once you are in the project select the blue hyperlink to take you to your task. You will be prompted to accept with a pop-up message. Select “OK” to accept the task or select “cancel” to return to the Project and not accept the task.



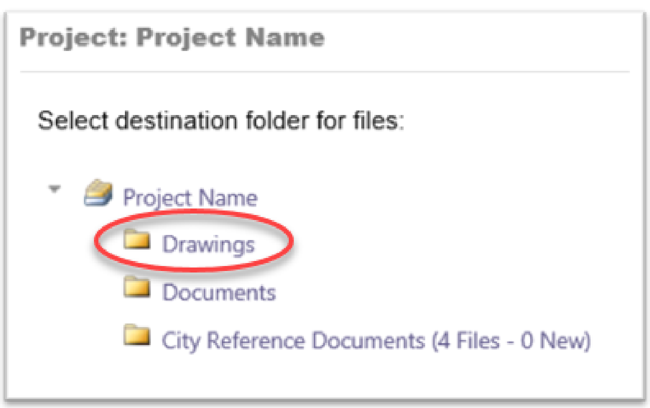
2.2.4 Once you have accepted your task, you will be brought to the Upload and Submit task window. Within this window you will have the ability to:

A. Review Information
In this tab you will be able to upload drawing sheets and documents.

B. Resources
Use this tab to navigate to the City of Eden Prairie Planning website for additional resources or refer to the Eden Prairie City Code.

C. Invite Others Invite associates by using this tab. It is suggested that you invite members of your team prior to uploading any files. Note: the people you invite will have the ability to upload files, but all submittal pieces will need to be submitted to the City at one time once you mark the task as completed.

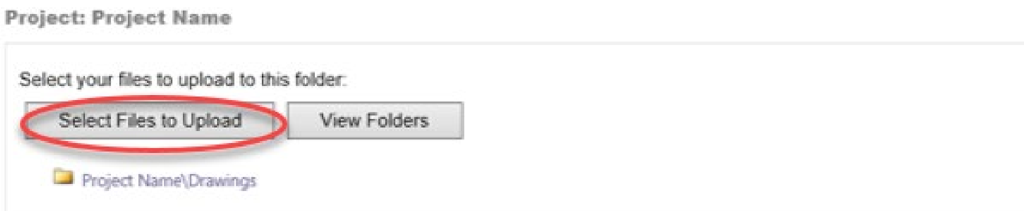
2.2.5 Upload into the **Drawings** folder by clicking on the name of the folder. (Please see the naming convention document prior to uploading any files). Only upload single page drawings - **do not submit full plan sets in this folder**.



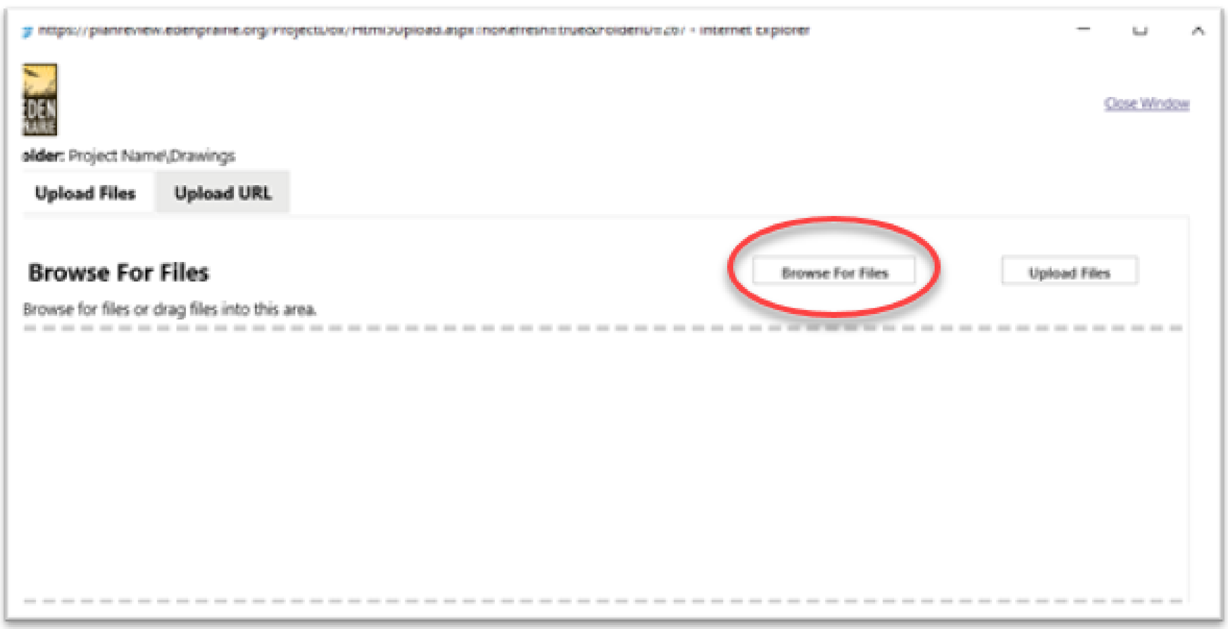
E-form Tips

- You can reopen the E-form at any time by opening the Project and clicking on the Task. Once you select "Submit" you will no longer have access to reopen this tab until a new task is assigned to you.
- The City Reference Document folder will be visible while in the E-form but you will not be able to view documents here. To view documents in this folder, return to the main project page and navigate to the folder as shown in number 2.2.2 of this section.

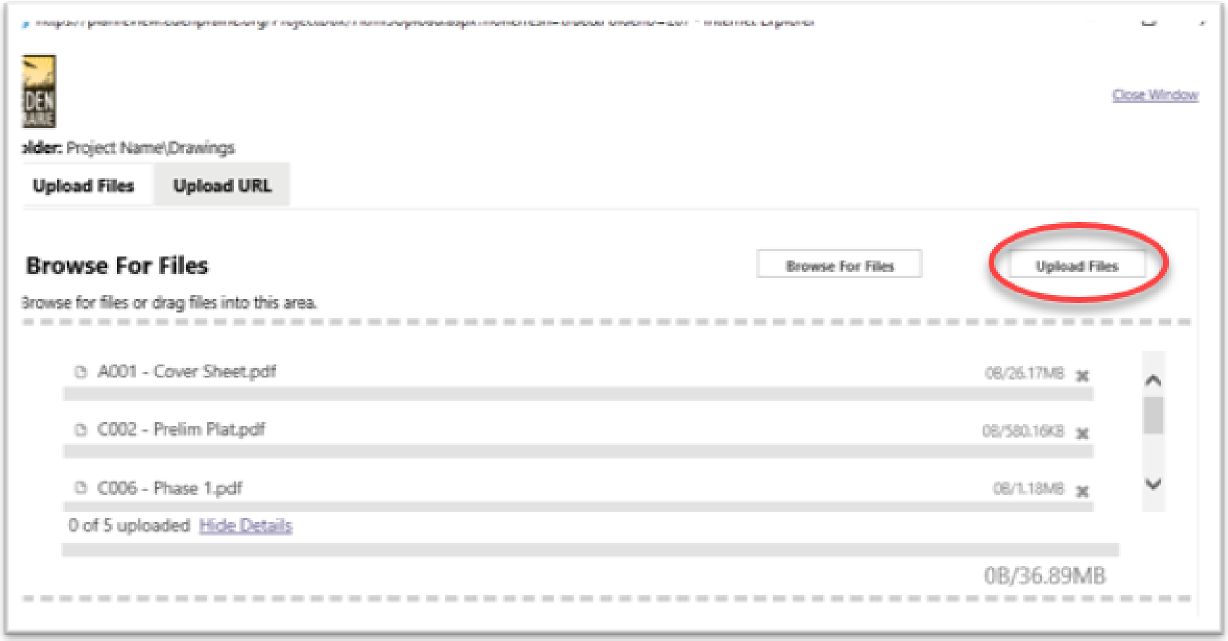
2.2.6 Once the destination folder is selected, click "Select Files to Upload".



2.2.7 The applicant may either drag and drop files from a folder or browse for files to access items on their computer. **Be sure the files have the correct name, consistent with our [naming convention](), and that drawings are in the correct orientation, prior to uploading them. Once they have been added to ProjectDox you will not have an opportunity to rename or rotate the files.**

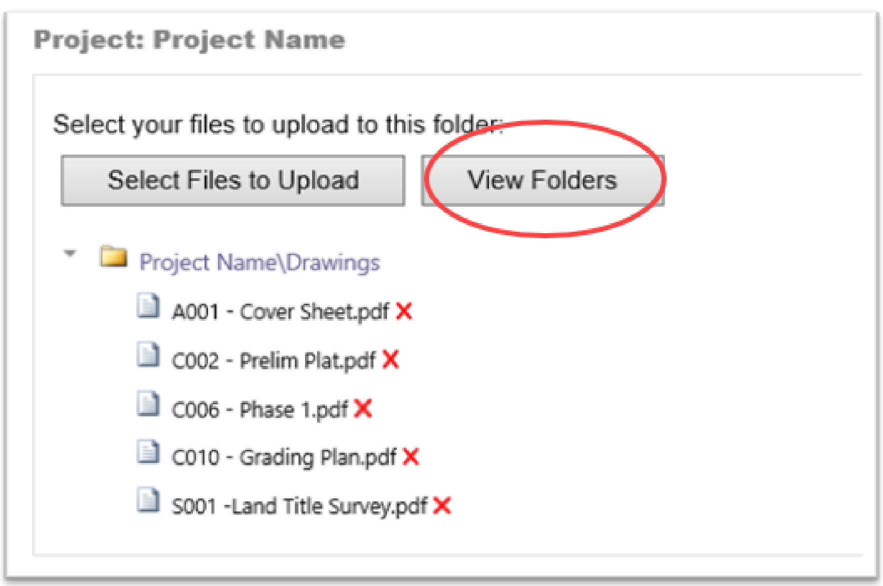


2.2.8 Once the files are shown, click “Upload Files”.

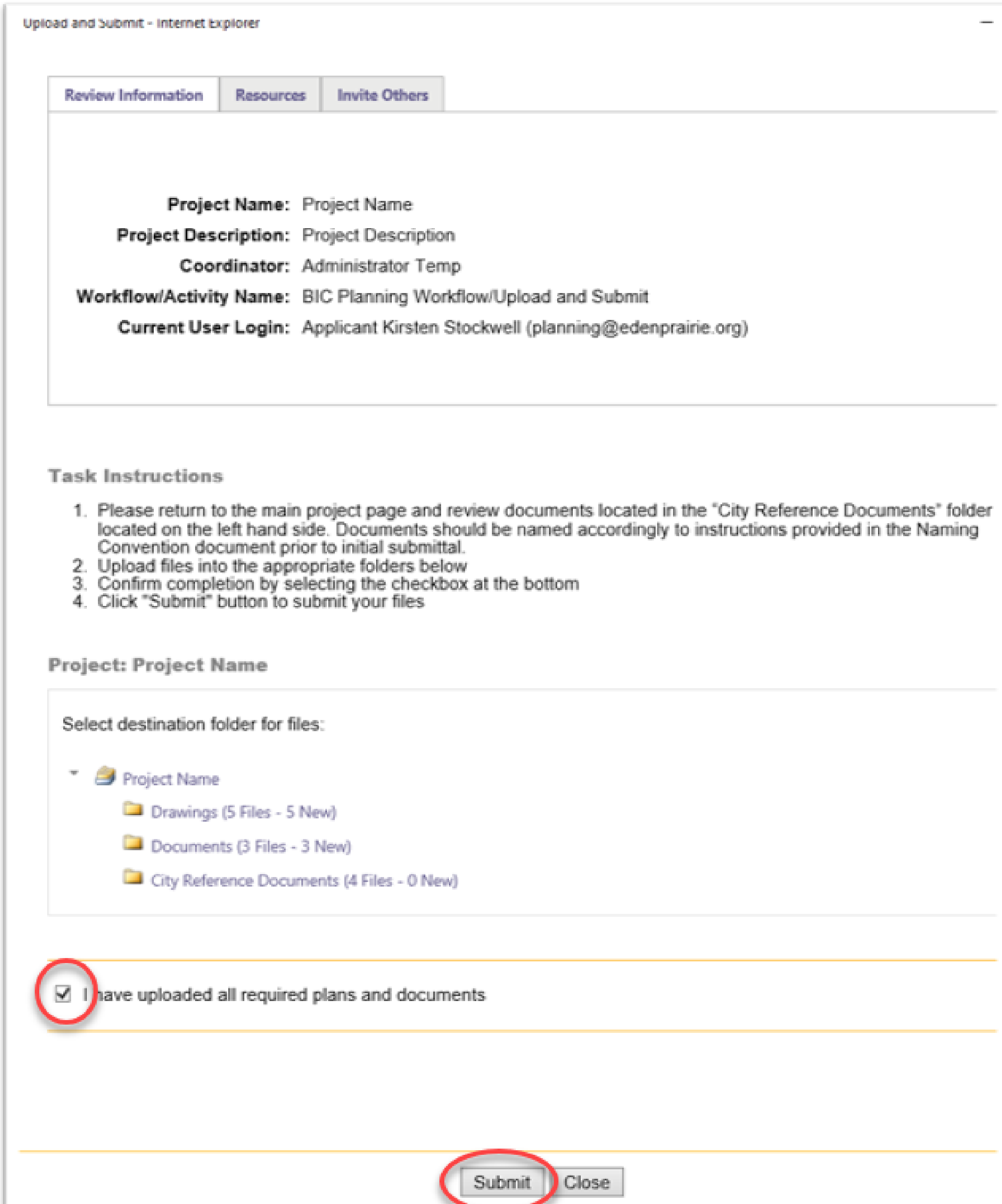


2.2.9 The applicant should see all the uploaded files in the E-Form. They may delete files at this time by clicking the X.

2.2.10 Click “View Folders” and upload into the **Documents** folder by repeating steps 2.2.5 through 2.2.9. This is where you will submit any non-drawing files that are required such as the application form, deposit agreement, stormwater management reports, etc.



2.2.11 Next check the box “I have uploaded all required plans and documents” and click “Submit”. **Note:** the “Submit” button will remain greyed out until you have checked the box indicating you have uploaded all required plans and documents.



2.2.12 The applicant will now receive an email stating that the upload was successful.

Upload and Submit was Completed

Attention Applicant:

Your files have been received for: **Project Name**

1. A001 - Cover Sheet.pdf
2. C002 - Prelim Plat.pdf
3. C006 - Phase 1.pdf
4. C010 - Grading Plan.pdf
5. S001 -Land Title Survey.pdf
6. Deposit Agreement.pdf
7. Project Narrative.pdf
8. Request and Fees.pdf

Please do not reply to this email.

The City staff review process will begin shortly after plans and documents have been submitted. Upon receipt of application materials, the City has 15 business days to respond to the applicant. The response will address completeness of the application package, substantive review comments and potential scheduling of public review. The 15-day review period begins again with each new submittal or resubmittal.

Step 3: Review Comments & Make Corrections

After you have uploaded all required files, City staff will begin to review them. Prescreening is a cursory review of your uploaded files in preparation for formal review.

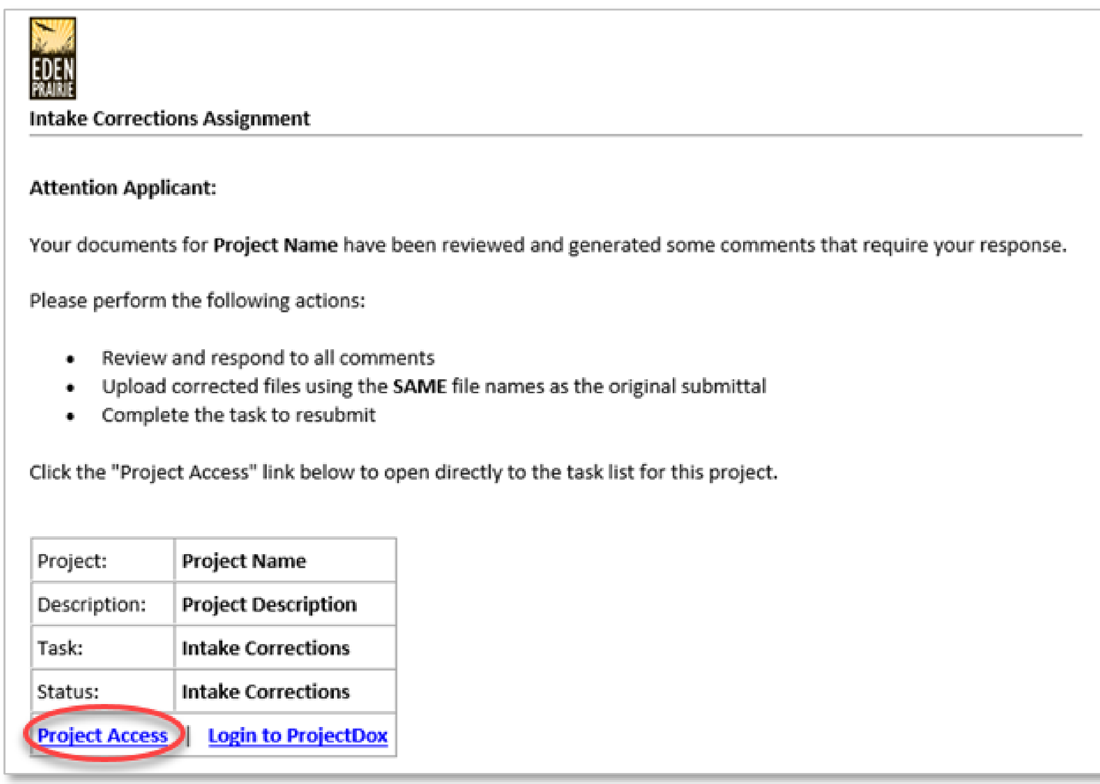
Intake Corrections

The Applicant will receive the task and E-form for a Pre-Screen resubmit ***only*** if there are deficiencies or errors in the initial upload into ProjectDox. (If you do not receive this task, skip this step, and move straight to Step 4.) The Applicant should accept this task and respond immediately to the checklist items and comments prepared by the Pre-Screen coordinator in order for the project to be routed to the Project Planner for department review. The Applicant may receive this task during the Pre-Screen review for several reasons, including but not limited to:

- Failure to use naming convention
- Files not in correct orientation (Example: file was uploaded upside down)
- Missing application form (the application form needs to be uploaded even though it was previously emailed)
- Missing signatures on the application form
- Missing title commitment
- Missing deposit agreement
- Missing legal description

To address intake corrections:

3.1 Click “Project Access” in the email received (be sure to open in Internet Explorer). By clicking “Project Access” in the email you should be taken directly to the project. If it does not automatically open, you may need to select “all projects” in the upper right-hand corner. You can enter the project through the Tasks PF tab, or the Project tab. Select the project by clicking on the blue hyperlink under the Project column to begin your review.



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Intake Corrections Assignment

Attention Applicant:

Your documents for **Project Name** have been reviewed and generated some comments that require your response.

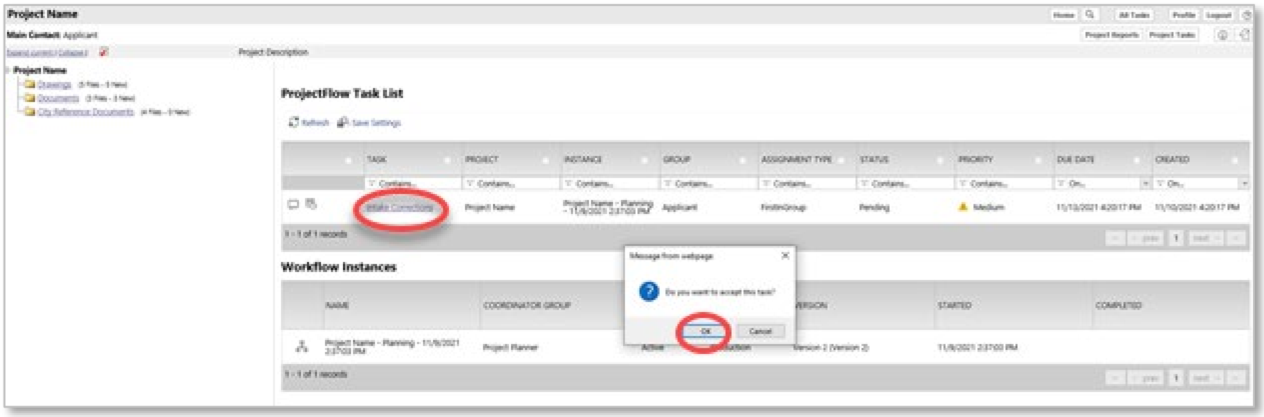
Please perform the following actions:

- Review and respond to all comments
- Upload corrected files using the **SAME** file names as the original submittal
- Complete the task to resubmit

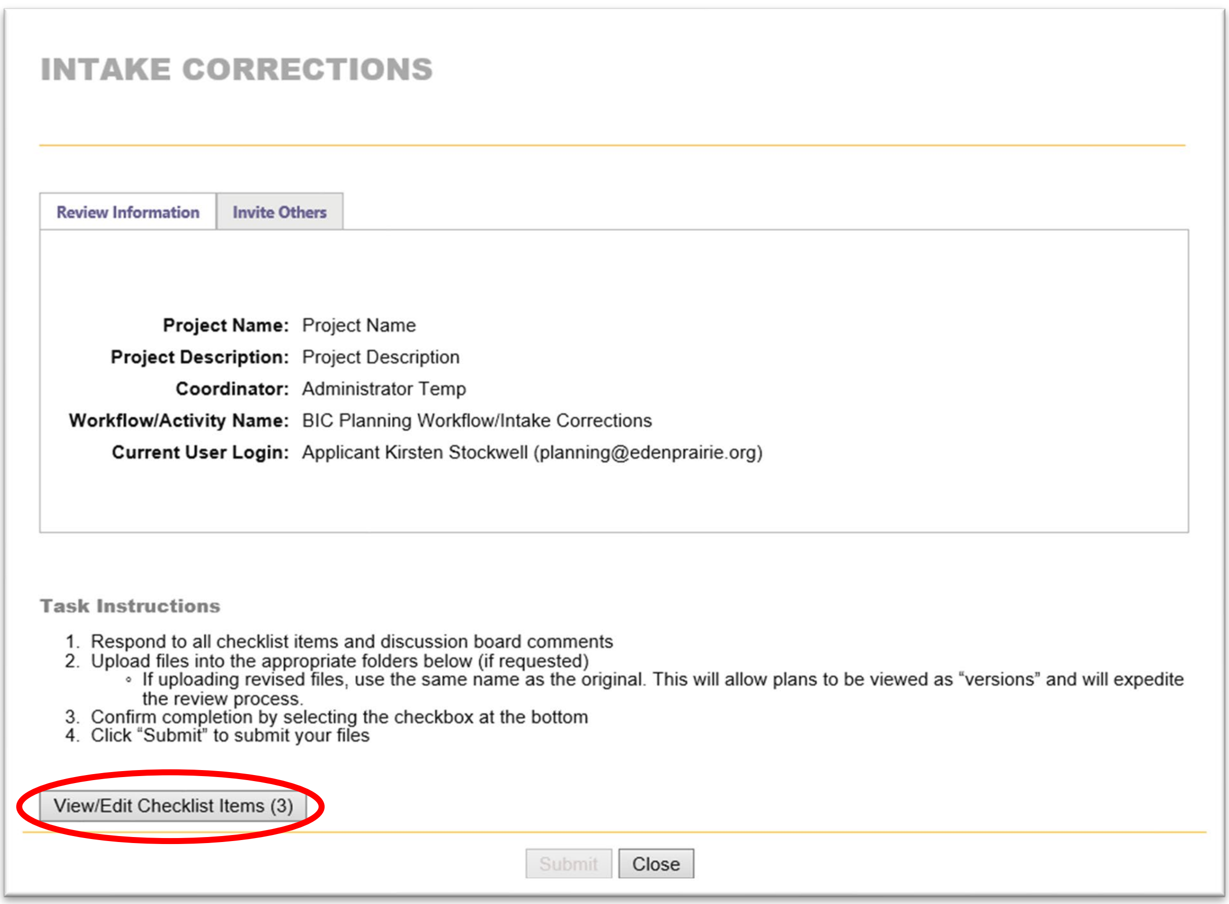
Click the "Project Access" link below to open directly to the task list for this project.

Project:	**Project Name**
Description:	**Project Description**
Task:	**Intake Corrections**
Status:	**Intake Corrections**
Project Access |	Login to ProjectDox

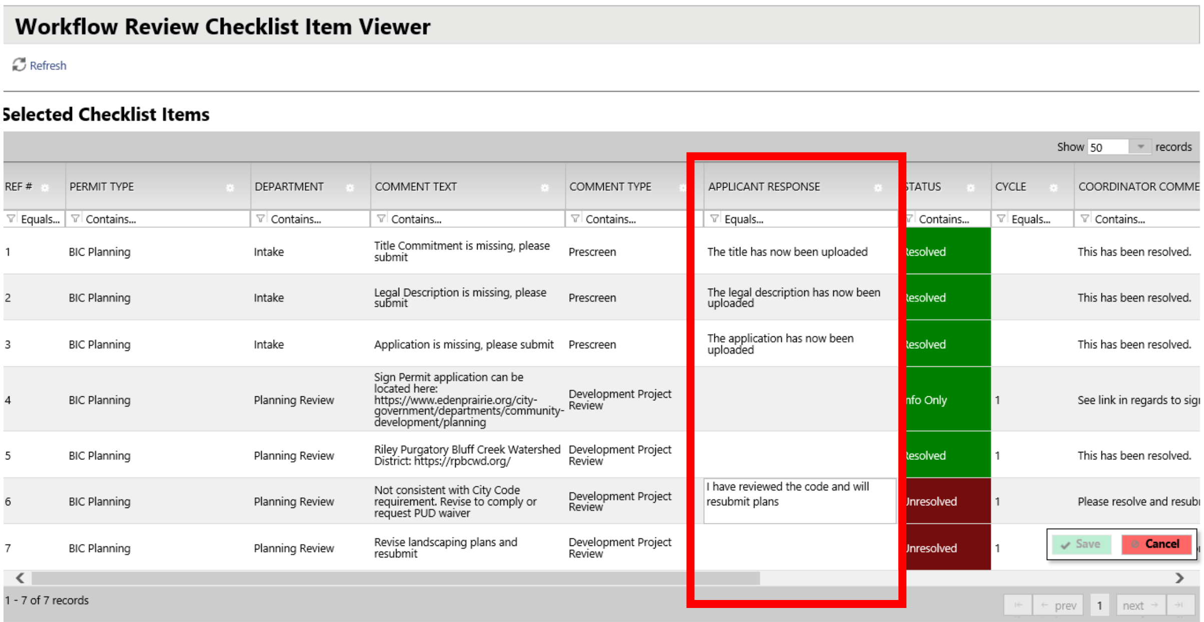
3.2 Navigate to the project and accept the task by clicking the blue hyperlink and selecting "OK" on the pop-up message.



3.3 Review the checklist items by clicking on View/Edit checklist items.



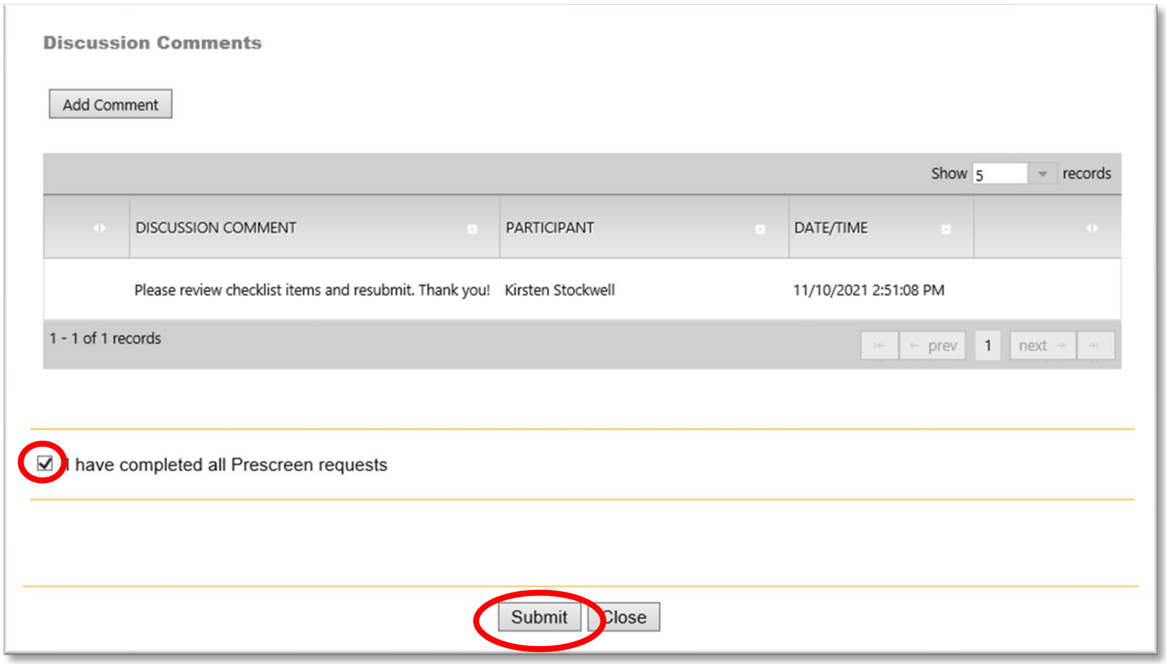
3.4 A new window will open for the Workflow Reviewer Checklist Item Viewer. The Applicant is required to respond to each of the checklist items. This checklist is a summary of incomplete/missing items. Some of these items may be easily resolved (e.g., uploading a title commitment), while others may require larger changes. You may close this window and address changes but all items in this checklist must have a response prior to resubmittal. Once the checklist items have been responded to, click **Save** next to each comment.



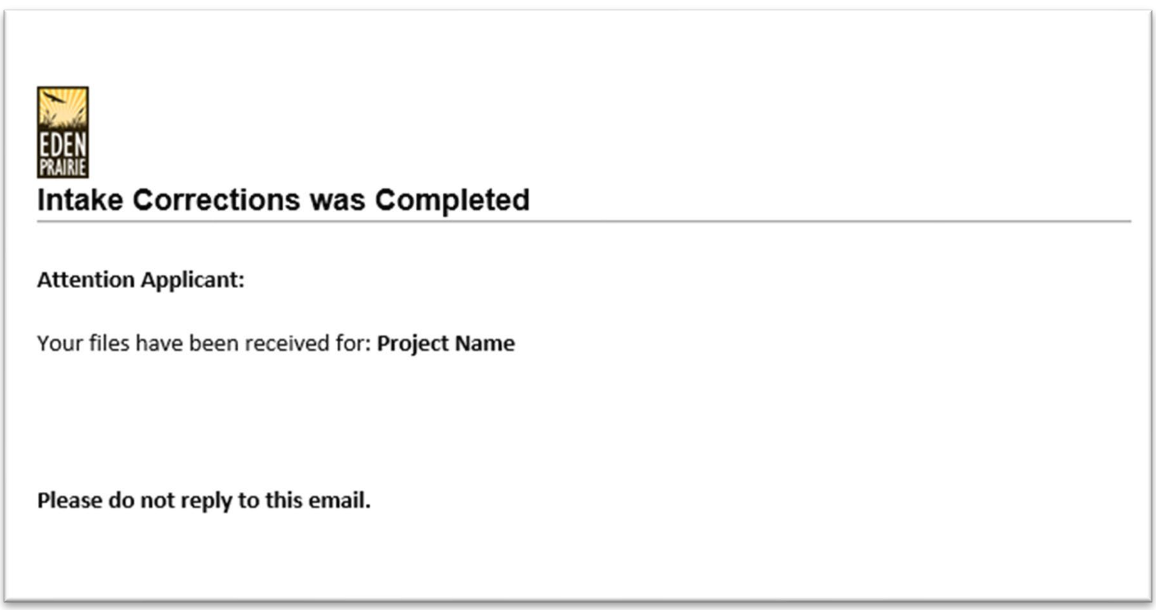
3.5 In addition to saving each comment, you must also save the form, as a whole, by clicking "submit" at the bottom of the page. Close the Workflow Review Checklist Item Viewer and return to the E-form.

3.6 If you are asked to upload new files, you'll need to upload them into the appropriate folders following the directions in 2.2.5 through 2.2.9. **Note: if you are asked to reupload the same document due to incorrect orientation, please ensure it is uploaded with the exact same name.**

3.7 The Applicant will make a comment to the Pre-Screen Coordinator. Then check the box "I have completed all prescreen requests" and click "submit".



3.8 The Applicant will receive an email confirming files have been received.

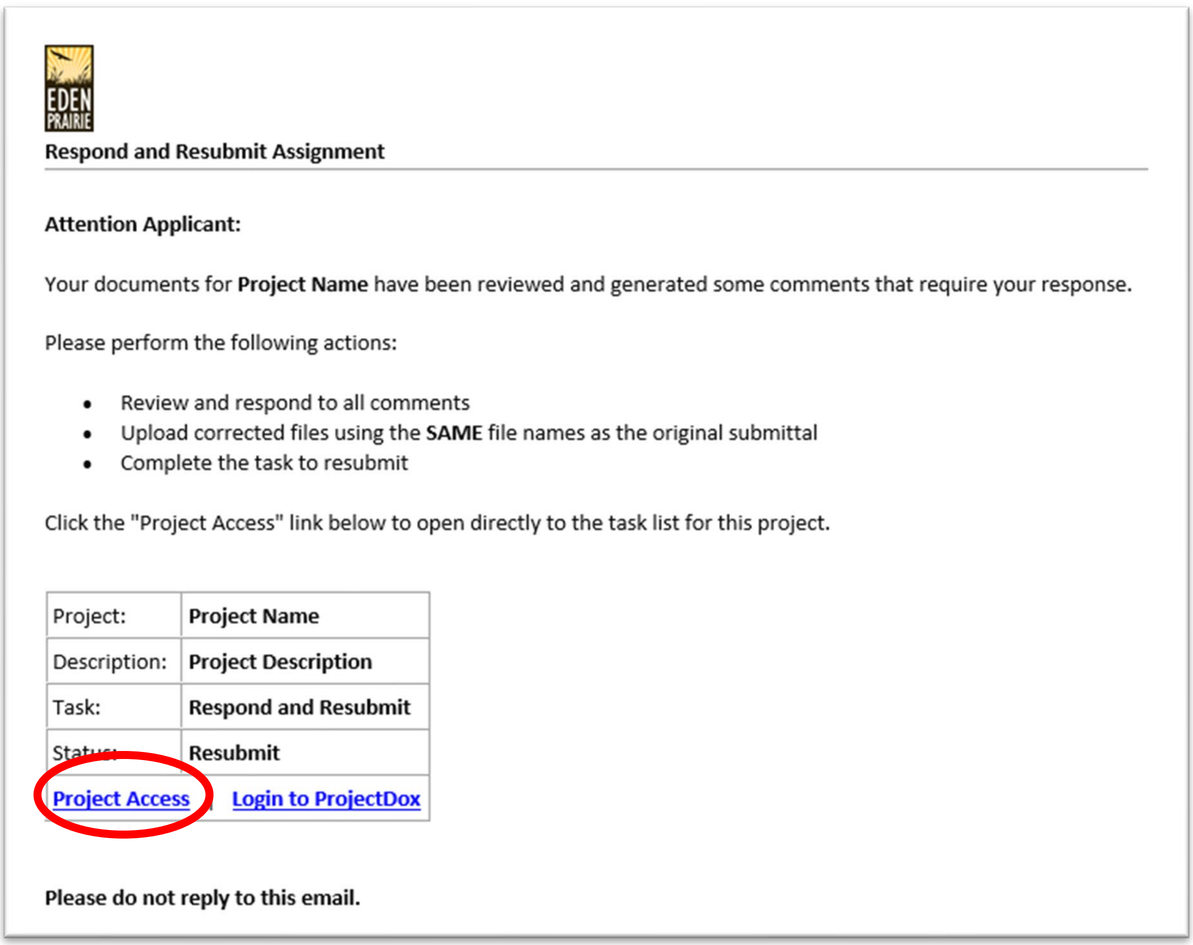


Once the prescreening/intake corrections task is determined to be complete, the project will be routed to City Staff for review.

Step 4: Respond and Resubmit Task

The Applicant will receive the Respond and Resubmit task if at least one Reviewer has requested more information or has comments regarding the project. (If you do not receive this task, go straight to Step 5.) The Applicant will view changemark items, checklist items, discussion boards and comments during this task. Additional versions of drawings or plans may be required.

4.1 Click “Project Access” in the email received. Open the project. If it does not automatically open, you may need to select “all projects”. You can enter the project through the Tasks PF tab, or the Project tab. Select the project by clicking on the link under the Project column to being your review.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Respond and Resubmit Assignment

Attention Applicant:

Your documents for **Project Name** have been reviewed and generated some comments that require your response.

Please perform the following actions:

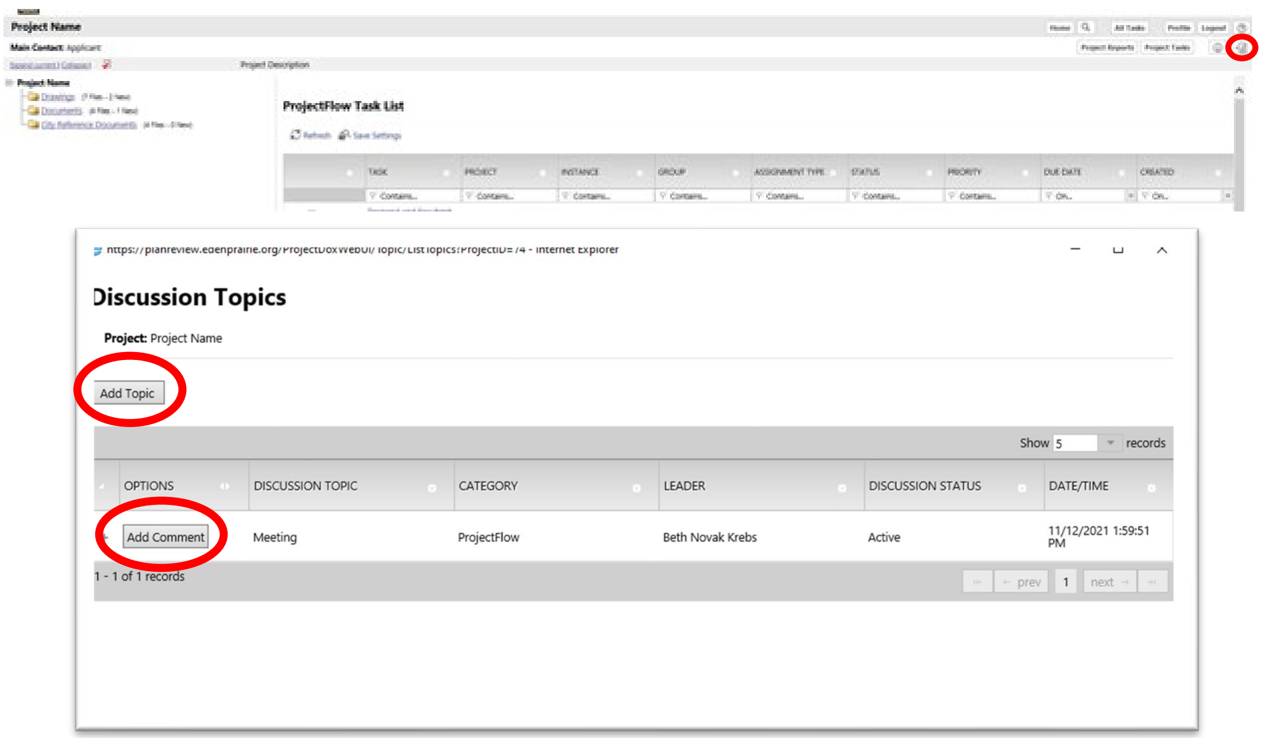
- Review and respond to all comments
- Upload corrected files using the **SAME** file names as the original submittal
- Complete the task to resubmit

Click the "Project Access" link below to open directly to the task list for this project.

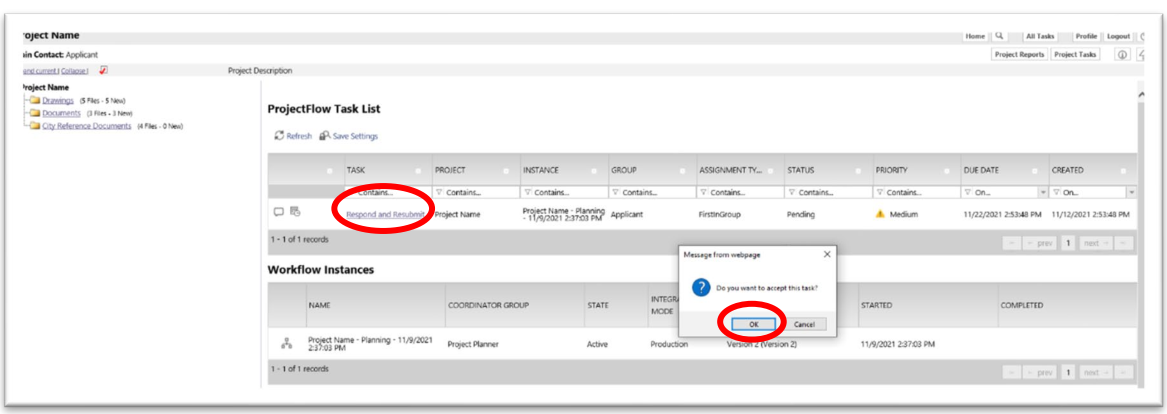
Project:	**Project Name**
Description:	**Project Description**
Task:	**Respond and Resubmit**
Status:	**Resubmit**
Project Access	Login to ProjectDox

Please do not reply to this email.

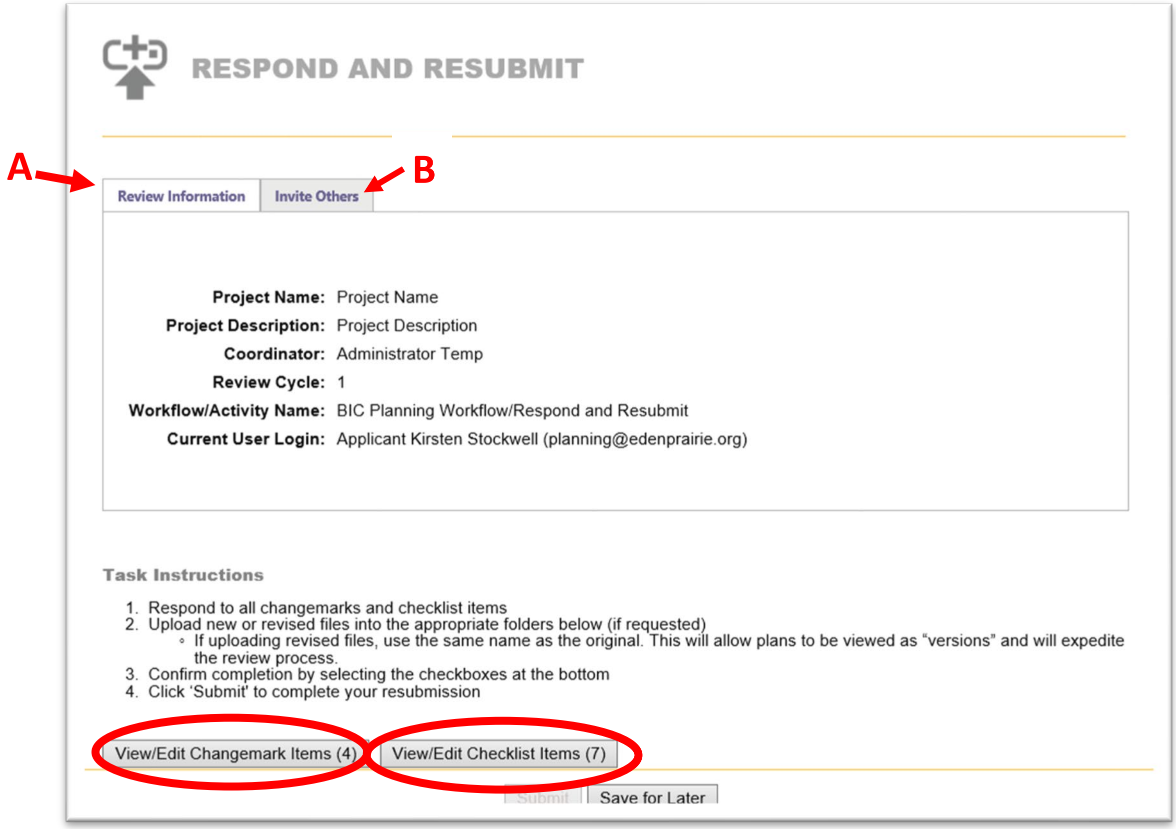
4.2 Once you are on the project page, click the discussion board on the right side and respond to any discussions (if needed). After clicking the discussion board, you will be brought to a discussion topics pop up window. Within the discussion board window, you may comment on current open discussions or add your own topic, then click the x in the top left corner to close the window. You may return to the discussion board at any time during the project, even if you do not have a task. The discussion board is used to communicate with the Project Planner and City staff regarding the project.



4.3 Next, accept the task by selecting the blue hyperlink and clicking "OK" on the pop-up message.



4.4 After accepting the task, you will be brought to the "Respond and Resubmit" pop up task window. Within this window, you will have the ability to:

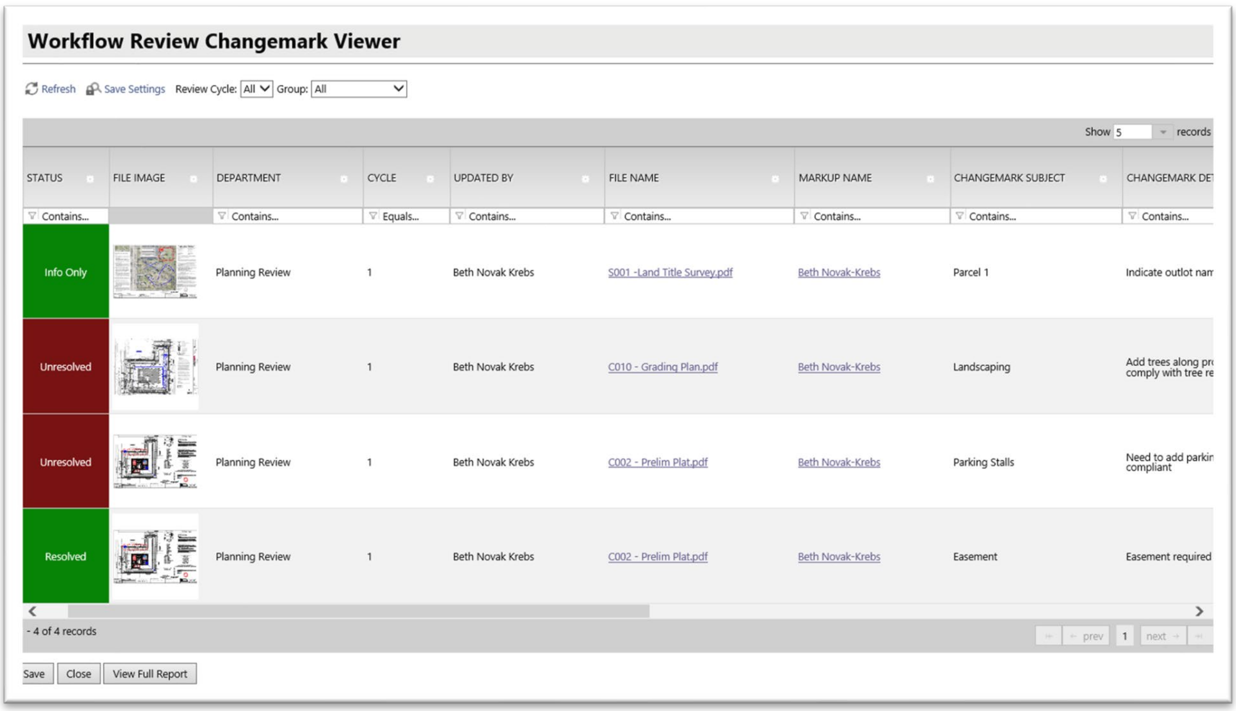


A. Review Information
Here you will be able to upload files, View/Edit Changemark Items, View/Edit Checklist Items, and make Applicant comments.

B. Invite Others
Invite your associates to join your team by using this tab. It is suggested that you invite other members of your team prior to uploading any files. **Note**: If you invite other members of your team, they will have the ability to files but all submittal pieces will need to be sent to the City at one time by completing the task once all files have been uploaded to ProjectDox.

E-form Tip
You may reopen the E-form at any time by opening the Project and clicking on the Task. Once you select "Submit", you will no longer have access to reopen this tab until a new task is assigned to you.

4.5 The Applicant should review the changemark and checklist items before proceeding on to this task. A new window will open for the Workflow Review Changemark Viewer and Checklist items when you click on each button, respectively. The applicant is required to respond to **each** of the Changemark items and **each** of the Checklist Items. After opening each window to identify needs, you may "Close" the window until you have resolved all items, then return to this page and respond to each item prior to resubmitting. At the top in the middle, you have the option to filter by "all" review cycles and "all" groups or make specific selections if you choose.



Workflow Review Changemark Viewer

Refresh Save Settings Review Cycle: All Group: All

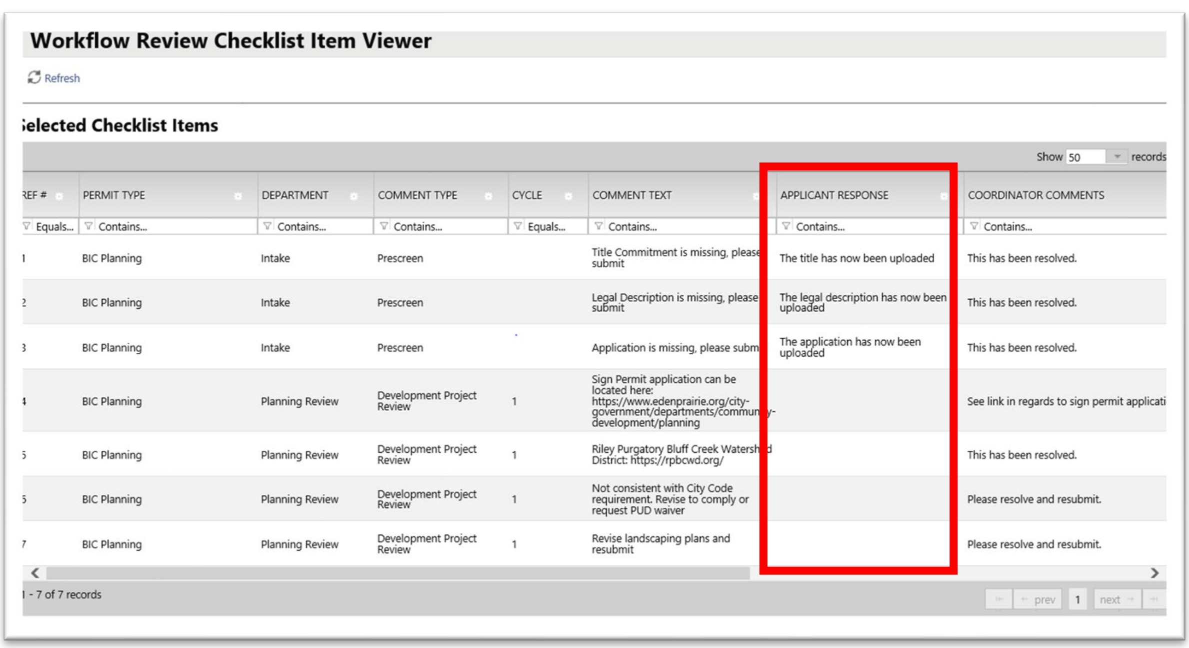
Show 5 records

STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME	MARKUP NAME	CHANGEMARK SUBJECT	CHANGEMARK DE
Contains...		Contains...	Equals...	Contains...	Contains...	Contains...	Contains...	Contains...
Info Only		Planning Review	1	Beth Novak Krebs	S001 -Land Title Survey.pdf	Beth Novak-Krebs	Parcel 1	Indicate outlot nam
Unresolved		Planning Review	1	Beth Novak Krebs	C010 - Grading Plan.pdf	Beth Novak-Krebs	Landscaping	Add trees along pr comply with tree re
Unresolved		Planning Review	1	Beth Novak Krebs	C002 - Prelim Plat.pdf	Beth Novak-Krebs	Parking Stalls	Need to add parkin compliant
Resolved		Planning Review	1	Beth Novak Krebs	C002 - Prelim Plat.pdf	Beth Novak-Krebs	Easement	Easement required

- 4 of 4 records

prev 1 next

Save Close View Full Report



Workflow Review Checklist Item Viewer

Refresh

Selected Checklist Items

Show 50 records

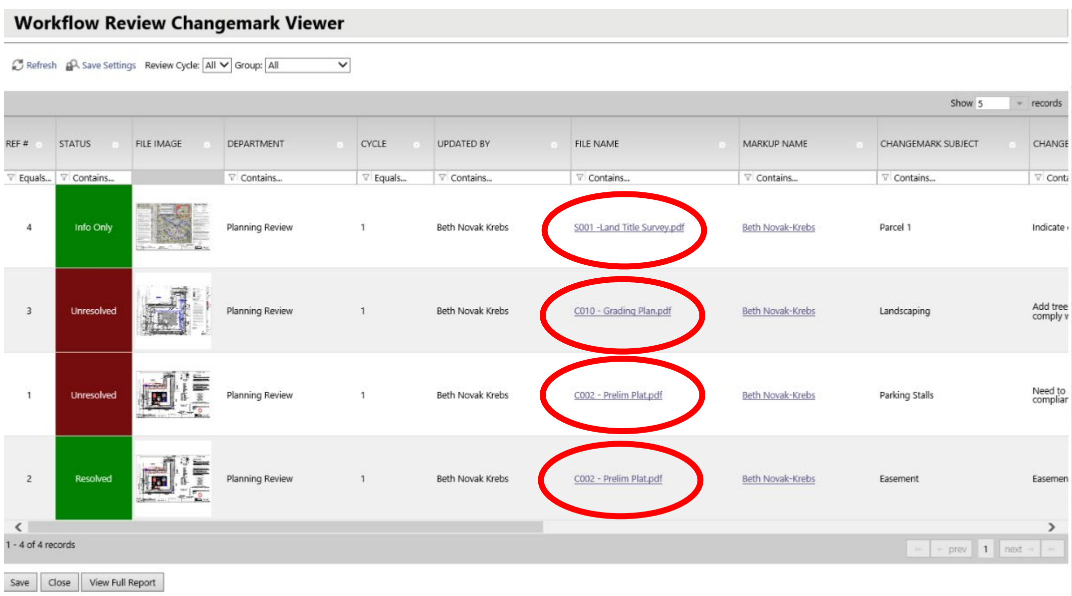
REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS
Equals...	Contains...	Contains...	Contains...	Equals...	Contains...	Contains...	Contains...
1	BIC Planning	Intake	Prescreen		Title Commitment is missing, please submit	The title has now been uploaded	This has been resolved.
2	BIC Planning	Intake	Prescreen		Legal Description is missing, please submit	The legal description has now been uploaded	This has been resolved.
3	BIC Planning	Intake	Prescreen		Application is missing, please subm	The application has now been uploaded	This has been resolved.
4	BIC Planning	Planning Review	Development Project Review	1	Sign Permit application can be located here: https://www.edenprairie.org/city-government/departments/community-development/planning		See link in regards to sign permit applicati
5	BIC Planning	Planning Review	Development Project Review	1	Riley Purgatory Bluff Creek Watershed District: https://rpbcwd.org/		This has been resolved.
6	BIC Planning	Planning Review	Development Project Review	1	Not consistent with City Code requirement. Revise to comply or request PUD waiver		Please resolve and resubmit.
7	BIC Planning	Planning Review	Development Project Review	1	Revise landscaping plans and resubmit		Please resolve and resubmit.

1 - 7 of 7 records

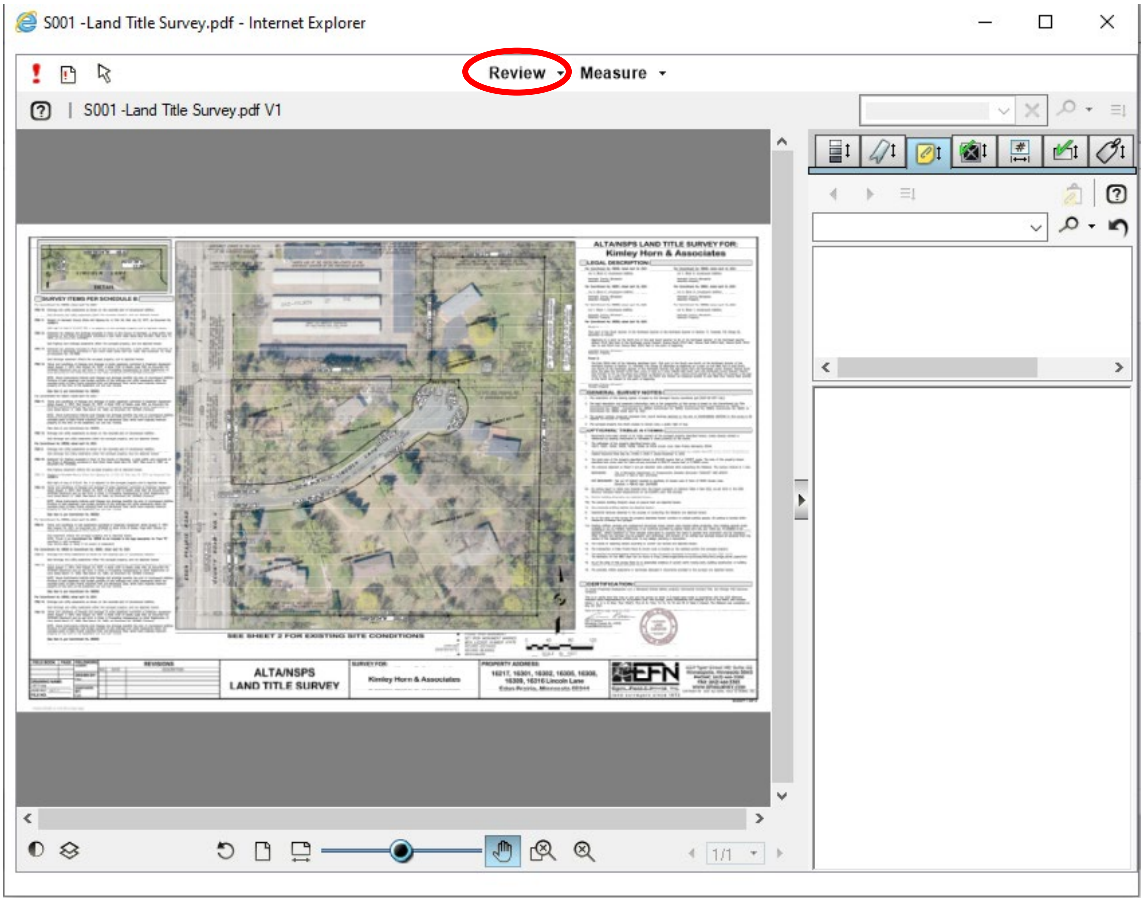
prev 1 next

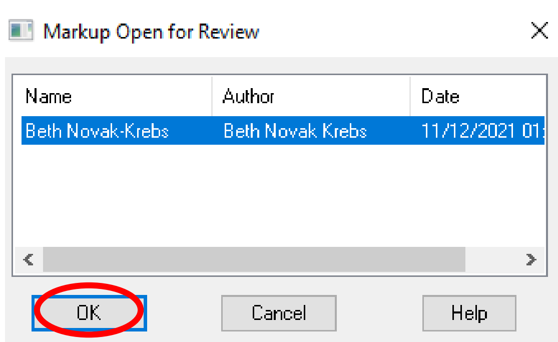
4.6 Within the checklist items window, click in the box next to each line item in the "Applicant Response" box and type responses. Once you've responded to the checklist items, click  next to each comment. In addition to saving each comment you must also save the form, as a whole, by clicking "save" at the bottom of the page. Close the Workflow Review Checklist Item Viewer and return to the E-form.

4.7 Within the changemark items window, scroll over to see reviewer and coordinator comments for each changemark. To review changemarks on files, click on the blue hyperlink next to each item in the "file name" column. This will open a new pop-up window for that file.



4.8 Next, click on “review” in the top middle to show all changemarks for this file.

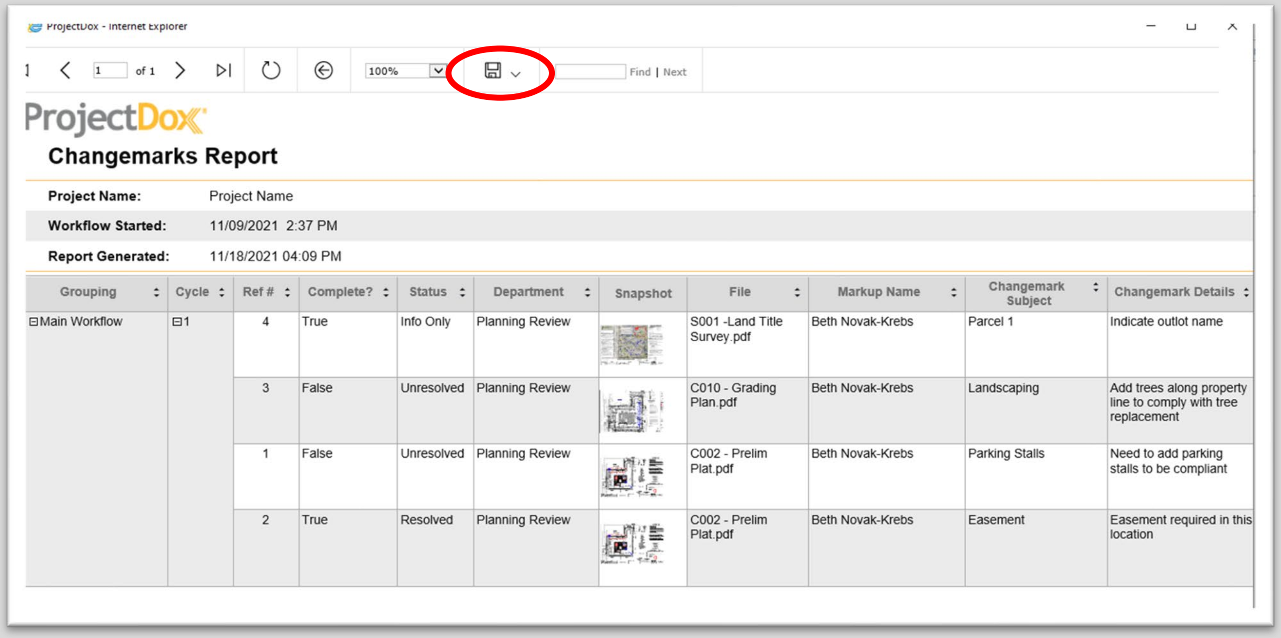




4.9 After reviewing all comments, simply close the review window by clicking the X in the top right corner. You will then be returned to the changemark pop up window where you will respond to all changemark items in the “applicant response” column. Once the changemark items have been responded to, click **Save** next to each comment. In addition to saving each comment, you must also save the form, as a whole, by clicking “save” at the bottom of the page. Close the Workflow Review Changemark Item Viewer and return to the E-form.

Helpful Hint

Within the changemark and checklist windows you have the option to "View Full Report". By clicking this button, you will be brought to a new pop-up window. Here, you can save the full report by selecting the save button and selecting which format you would like to save the comments in. Simply click the close button in the top left corner when you are finished reviewing the report.



ProjectDox - Internet Explorer

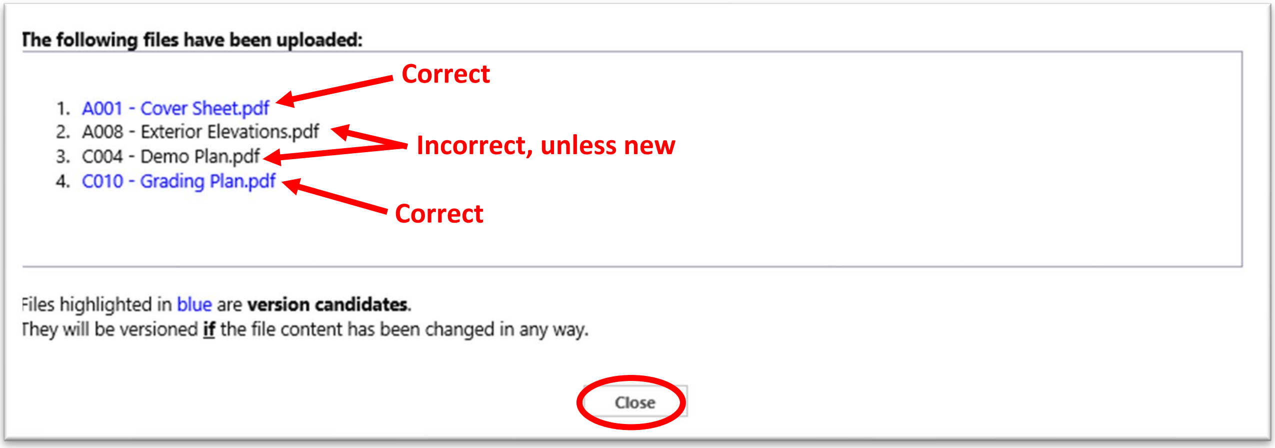
ProjectDox

Changemarks Report

Project Name:	Project Name
Workflow Started:	11/09/2021 2:37 PM
Report Generated:	11/18/2021 04:09 PM

Grouping	Cycle	Ref #	Complete?	Status	Department	Snapshot	File	Markup Name	Changemark Subject	Changemark Details
⊟Main Workflow	⊟1	4	True	Info Only	Planning Review		S001 -Land Title Survey.pdf	Beth Novak-Krebs	Parcel 1	Indicate outlot name
		3	False	Unresolved	Planning Review		C010 - Grading Plan.pdf	Beth Novak-Krebs	Landscaping	Add trees along property line to comply with tree replacement
		1	False	Unresolved	Planning Review		C002 - Prelim Plat.pdf	Beth Novak-Krebs	Parking Stalls	Need to add parking stalls to be compliant
		2	True	Resolved	Planning Review		C002 - Prelim Plat.pdf	Beth Novak-Krebs	Easement	Easement required in this location

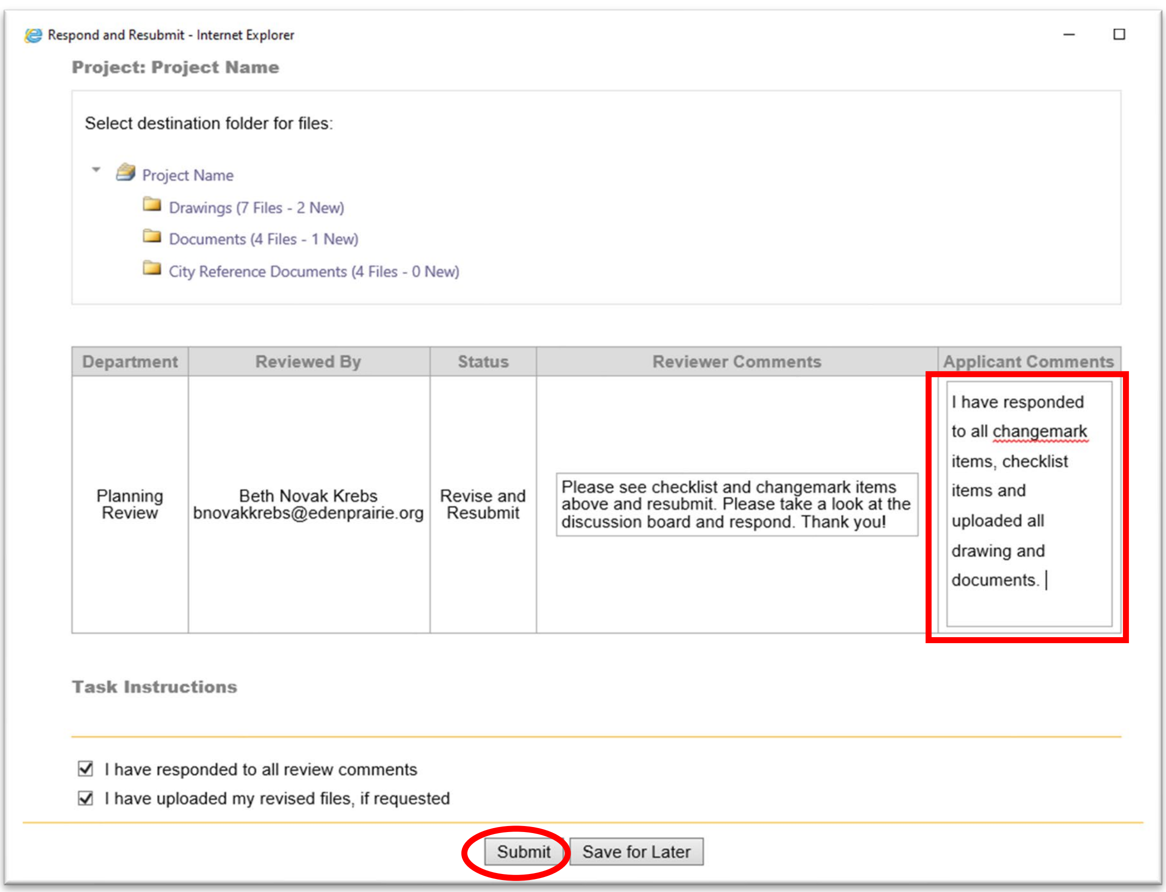
4.10 Return to the "Respond and Resubmit" task window to upload files, if required. Upload into the **Drawings** folder by clicking on the name of the destination folder. (Refer to 2.2.5 for instructions on uploading Drawings and be sure to reference the naming convention document). In this folder you will upload all single page drawings related to your application. Do not submit full plan sets in this folder. **When uploading a revised drawing, the file name MUST be uploaded with the EXACT same name as the original drawing or document. ProjectDox will recognize this file as a "version" of the original document and will allow reviewers to easily locate revisions. This file naming practice will make review time more efficient.**



Note: As shown in screen shot above, blue files are versioned files and are correctly uploaded. Any files shown in black have not been versioned and are uploaded incorrectly (unless it's the first time the files are being uploaded).

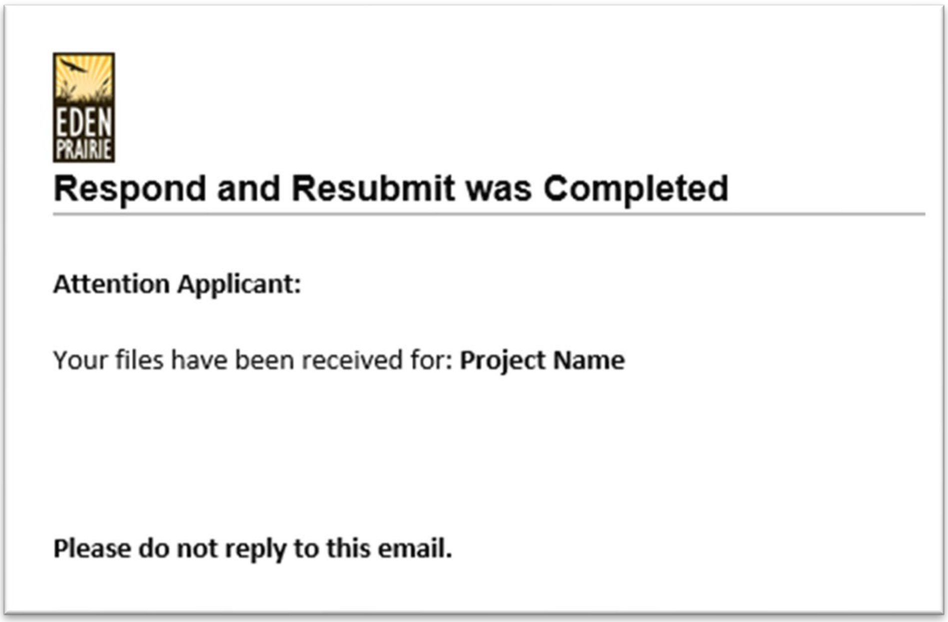
4.11 Repeat step 4.12 for the **Documents** folder, if required.

4.12 Last, respond to **each** reviewer's comment by typing in the "Applicant Comment" box.



4.13 Select checkboxes for “I have responded to all review comments” and “I have uploaded my revised files, if requested”. Once these boxes have been selected, you will be able to click “Submit” to complete your task.

4.14 You will receive a confirmation email.



Respond and Resubmit was Completed

Attention Applicant:

Your files have been received for: **Project Name**

Please do not reply to this email.

Once you have completed your task, City staff will begin a review of the submission. If further submittals are required, Step 4 should be repeated until the Project is considered a complete application package by the City. **Note**: Step 4 may need to be repeated multiple times.

Step 5: Incorporating Feedback

Once City Staff determines your application package is complete, some application packages move into a public review period. If either the Planning Commission or City Council direct the applicant to make changes to the plans, follow directions for Step 5. If plans have been approved by both the Planning Commission and City Council, with no changes needed, you may proceed to Step 6.

5.1 Click “Project Access” in the email received (open in Internet Explorer). This should take you straight to the project. If it does not automatically open, you may need to select “all projects” in the upper right-hand corner. You may enter the project through the Tasks PF tab, or the Project tab. Select the project by clicking on the link under the Project column to begin your review.

Public Meeting Respond and Resubmit Assignment

Attention Applicant:

Your documents for **Project Name** have been reviewed and generated some comments that require your response.

Please perform the following actions:

- Review and respond to all comments
- Upload corrected files using the **SAME** file names as the original submittal
- Complete the task to resubmit

Click the "Project Access" link below to open directly to the task list for this project.

Project:	**Project Name**
Description:	**Project Description**
Task:	**Public Meeting Respond and Resubmit**
Status:	**Public Meeting Resubmit**
Project Access | Login to ProjectDox	

Please do not reply to this email.

5.2 Follow the instructions in Step 4 to address any comments from public meetings.

5.3 A confirmation email will be sent once the task is completed.

Public Meeting Respond and Resubmit was Completed

Attention Applicant:

Your files have been received for: **Project Name**

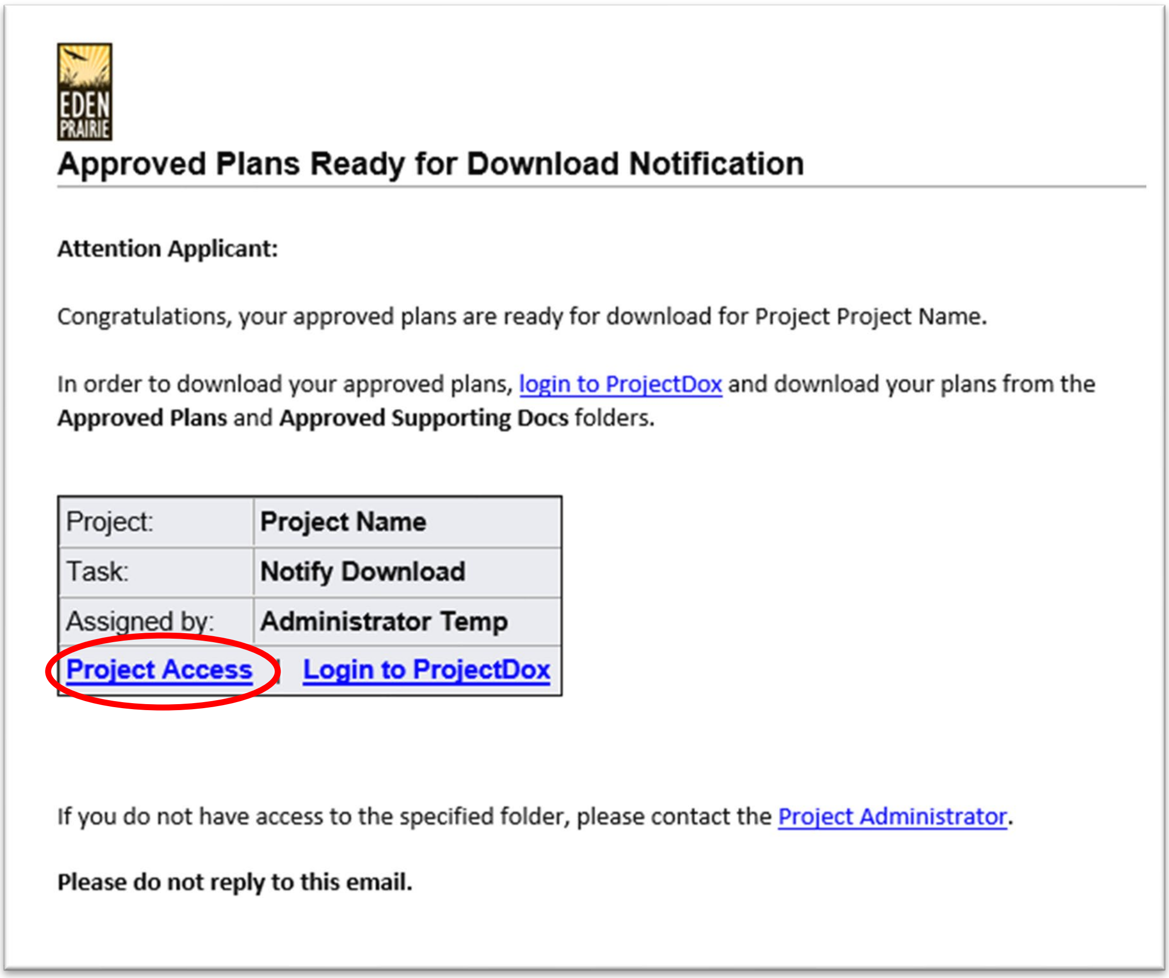
Please do not reply to this email.

After this task has been submitted City staff will review and ensure it complies with requests made by Planning Commission and City Council. **Note:** this step may need to be repeated until plans are considered complete.

Step 6: Download & Print Your Plans

Congratulations! Your plans have been approved by the City of Eden Prairie. After an approval has been issued the plans will be electronically stamped. You will receive an email indicating that your plans have been approved. You may then download and/or print your approved, stamped plans.

6.1 Log in to ProjectDox and navigate to the project page.



EDEN PRAIRIE

Approved Plans Ready for Download Notification

Attention Applicant:

Congratulations, your approved plans are ready for download for Project Project Name.

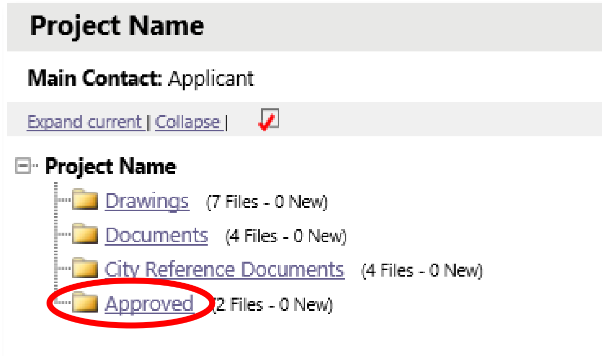
In order to download your approved plans, login to ProjectDox and download your plans from the **Approved Plans** and **Approved Supporting Docs** folders.

Project:	**Project Name**
Task:	**Notify Download**
Assigned by:	**Administrator Temp**
Project Access	**Login to ProjectDox**

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

Please do not reply to this email.

6.2 Click into the **Approved** folder on the left side of your screen (This folder will only appear once the project is approved). The approved folder will expand to show all approved drawings and documents.



6.3 Click in the box next to any plans that you would like to download. When your selection is complete, click the download icon. You may download one file at a time or all at once. If a group of files are larger than 10MB it will automatically download all files into a .ZIP file which you can save to your computer.