City of Dallas

Online Permit Application
III. Manage my Project

Permit Project Plan Check Invitation
Applicant Upload Task Assignment

Attention John:

Welcome to the City of Dallas electronic plan review system, ePlan. This project invitation has been sent to you in response to your Permit Application request. A project has been created to allow you to electronically upload your drawings and required plan review checklist(s).

You have been assigned a task on Project:1809121001

Click on Project Access to start the uploading process and follow the instructions below, or open the quick reference guide.

1. Enter your User Login and Password.

2. Click on the Applicant Upload Task and accept the task.

3. **To upload plans**

   a. Click on the "Drawings" folder.

   b. Click the "Select Files to Upload" button and follow the instructions to upload your design drawings. Use the following file naming convention format to save your plans:

      - Drawing Sheet ID_Work Description.pdf

         I. Drawing Sheet Identifier: Each drawing sheet file shall be identified with the correct discipline designator and a sheet number that conforms to the United States National CAD Standard, Version 6 www.nationalcadstandard.org, which includes the AIA CAD Layer Guidelines and the Uniform Drawing System. For example, food service or kitchen plans would have a Drawing Sheet Identifier beginning with 'QF' (Level 1 designation for Equipment; Level 2 designation for Food Service), not 'FS' or 'K'. The drawing sheet number (i. e. Sheet Type Designator) after the discipline designators will be at the discretion of the project architect or engineer.

         II. Work Description: Free-text title of drawing sheet with the total number of characters in the filename not to exceed 20 characters, including spaces.

      - For Example: QF1.05_POOL BAR.pdf

   c. Click the "Upload Files" button. Close upload window.

1. **To download checklist(s)**

   a. Click on the "View Folders" button.

   b. Click on the "Submission Requirements" folder.

   c. On each file, select the checkbox and click on the download arrow to save the file(s) on your computer.

   d. Print the document(s) and fill it out.

1. Once you have verified all files have the correct naming convention and that you have uploaded all required documents, check the "Upload Task Complete" Box and select "Upload Complete and Notify the City of Dallas".

2. Verify the task completion in the pop-up window.

3. Your drawings have now been submitted for Pre-Screen Review and Fee Generation by the City of Dallas. You will receive an email of your next task once this is completed by the City.

IMPORTANT: Please leave a w: 2" x h: 6" clear space at the top right corner of your 24" x 36" drawing sheets. The City of Dallas will use that space to accommodate the approval batch stamps. The space should start at 1.5" from the top and 4.5" from the right side. Click here to view an example.

Project:	1809121001
Task:	Applicant Upload Task
Project Access	

Contact the City of Dallas at (214)-948-4480 or biadmin@dallascityhall.com if you have questions regarding this project.

Please do not reply to this email

1. The Project Access link in the ***Applicant Upload Task Assignment*** email will open the login window for the applicant to log into the system.

2. After logging in, two things can occur:

   a. If popup blocker is active on the browser, the web portal of the project will show up. Notice the **project #** is on the left pane on the portal and the ***Applicant Upload Task*** is in the **Task List.**

b. If popup blocker is not active on the browser, a message will popup asking if you want to accept the task. Click on **No**, the project web portal will show up. Notice the **project #** is on the left pane on the portal and the *Applicant Upload Task* is in the **Task List.**

3. **Required documents**. All permits require a set of documents that must be downloaded, fill out and upload it back into the system along with plans. These documents are located in the **Submission Requirements** folder.

Follow these steps to download the required documents and upload them back into the system.

a. Click on the **Submission Requirements** folder.

b. **For each individual file listed, do the following:**
  I. Select the file and click on the download arrow. Make sure the checkbox located left of the file name is selected.

II. The download and Save window will pop up.

III. Save the file on your computer or other media (an USB drive for example).
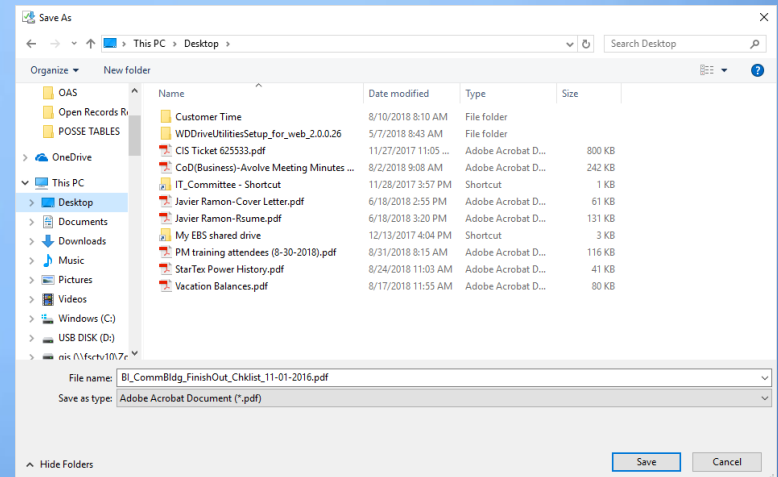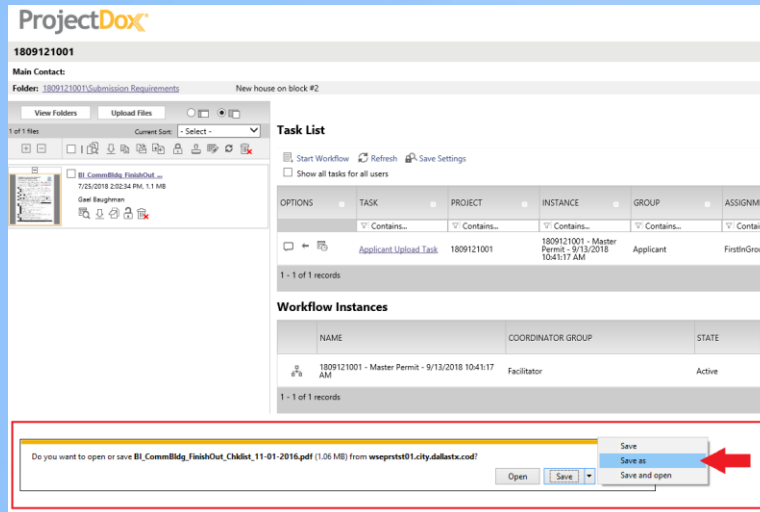
IV. Depending on the software that is installed on the computer, you can either: edit the file and save it back into the computer or media, or, print it/fill out/scan and save it back into the computer or media.

V. Once the file is filled out and saved back on the computer or media, the document must be uploaded back into the system inside the **Documents** folder.

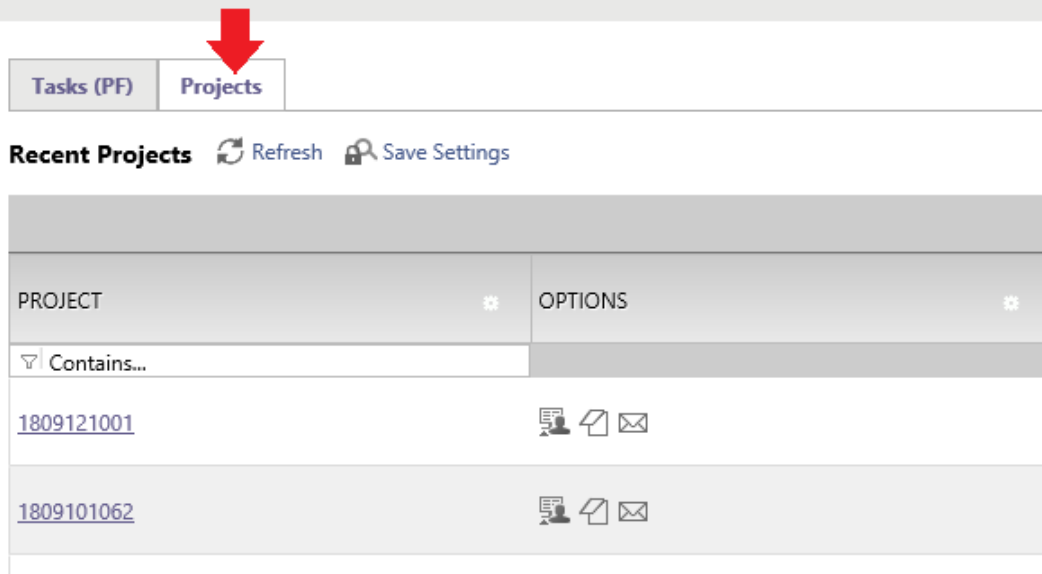VI. If the editing process took time, it's most likely that the system logged you out from the session.

If you need to log in, continue to next step; (1), otherwise continue to step 5.

1). After logging back in, click on **Manage My Existing Projects**

2). Click on the **Projects** tab. (If the background color of the tab is white, this means it is selected)

2). If you find your project, go to next step (4), otherwise click on **All Projects** and, under **PROJECT,** enter the project number and press **Enter**.

4). Click on your project number.

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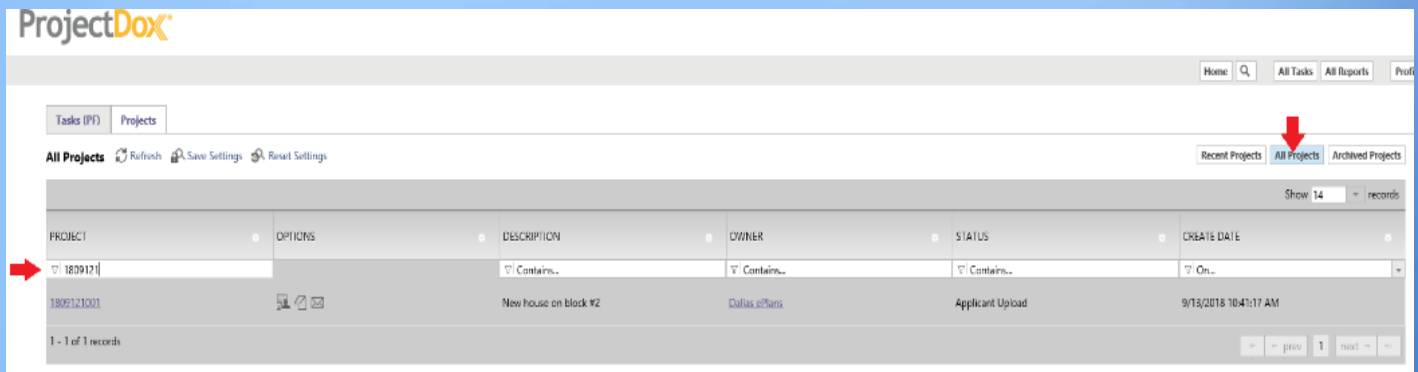
Tasks (PF)	Projects

All Projects ↻ Refresh   🔒 Save Settings   🔓 Reset Settings

PROJECT	⚙	OPTIONS	⚙
▽ 1809121			
1809121001		🖳 ⟋ ✉	

1 - 1 of 1 records

4. Upload the required documents and plans. Click on **Application Upload Task** and accept the task.

5. Maximize the window and open the section related to the project number.

6. For requirement documents select the *Documents* folder and for plans select the *Drawings* folder. For demonstration purposes, I will upload plans in this example, but the same process applies for uploading required documents into the *Documents* folder.

Click on *Drawings* folder to upload your plans.
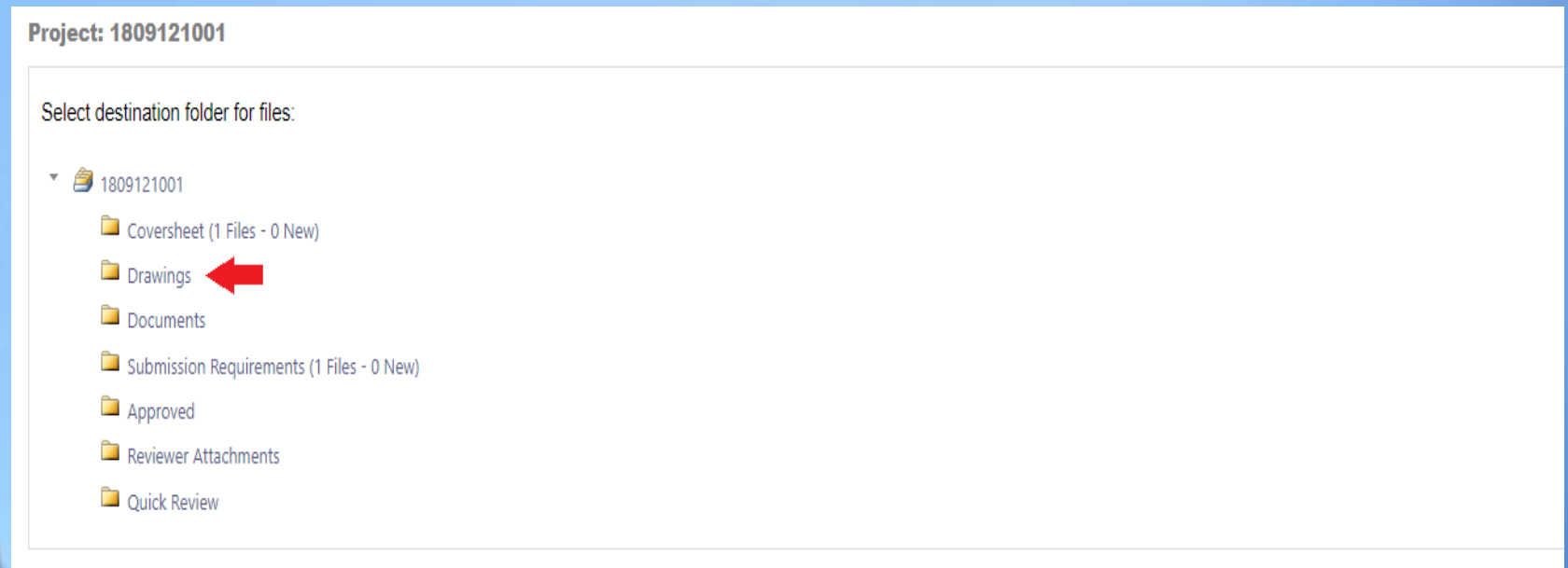
7. Click on *Select Files to Upload.*

Project: 1809121001

Select your files to upload to this folder:

> Select Files to Upload   View Folders

📁 1809121001\Drawings
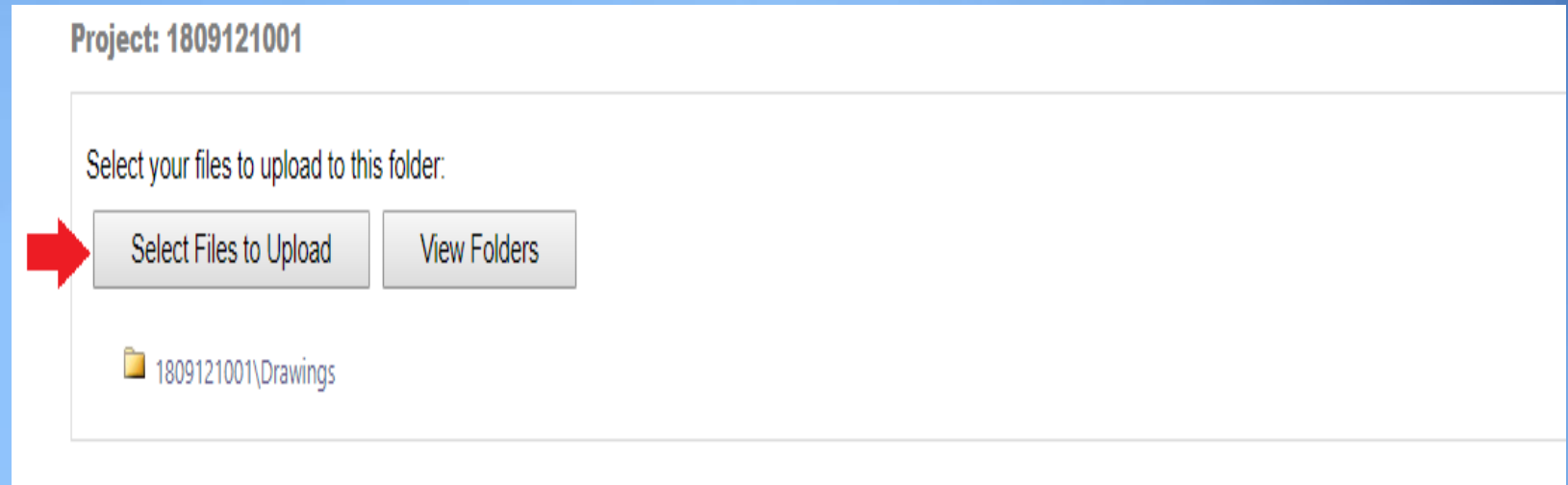
8. On the upload window you can use one of two methods to upload files; **drag and drop** or **browse the computer**. **Note. Only one plan per pdf file.**

a. **Drag and drop.** Notice that more than one file can be selected at once, so you can select all documents (required documents or plans) at once and drag them to the Browse for files box.
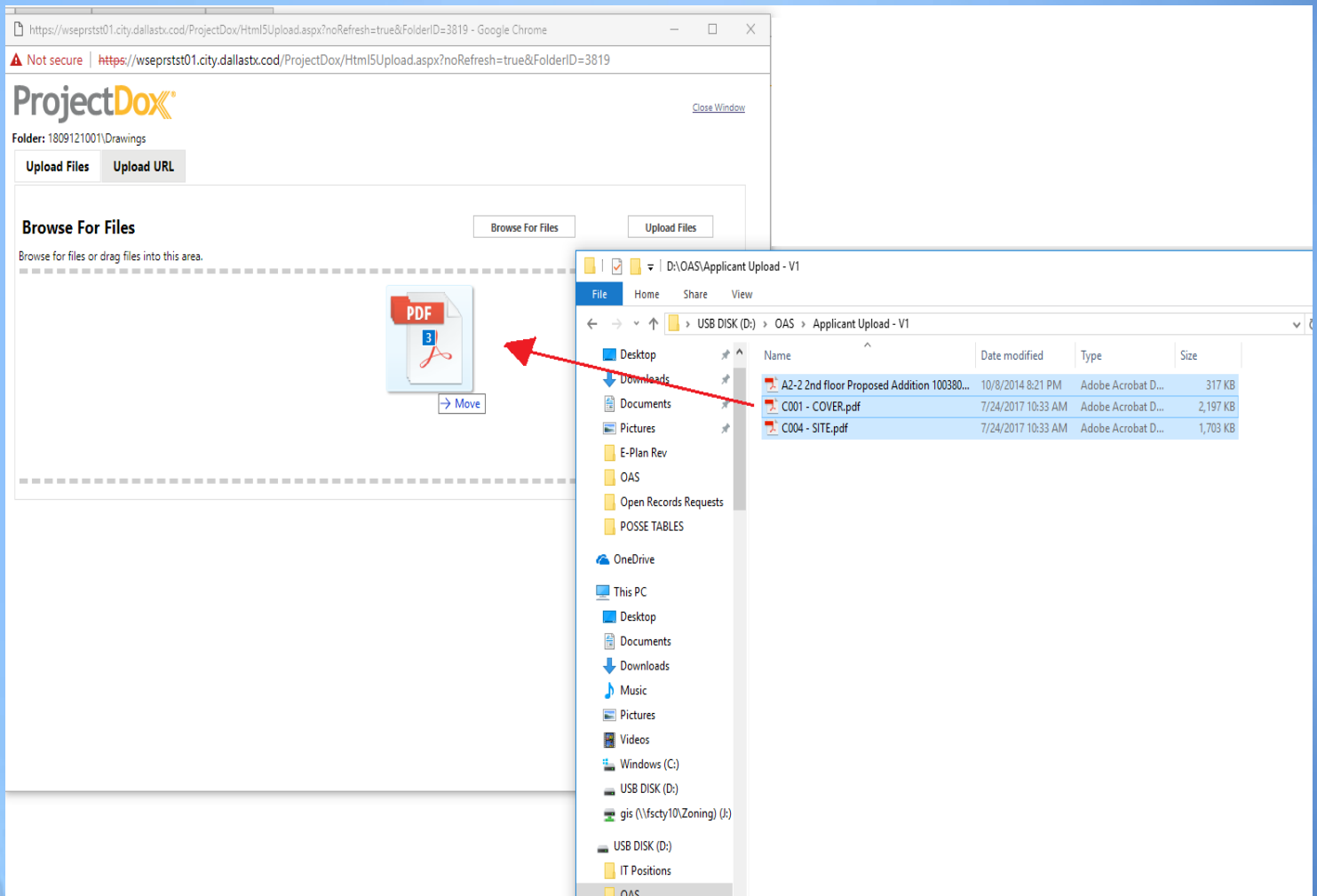
b. **Browse the computer**. Click on **Browse** and select all documents (required documents or plans) to be uploaded and click on **Open**. Notice that more than one file can be selected at once.

9. Uploading progress window. After selecting all files, a window with a list of selected files will show up. Click on *Upload Files* to proceed.

10. The upload process will open a window with a list of files that have been uploaded. Wait until all flies has been uploaded and click on **Close** to return to the previous window (applicant upload window).

11. Notice the Project section of the **applicant upload** window has changed. If any of the files have been uploaded by mistake, you can remove them by clicking on the red **X**.
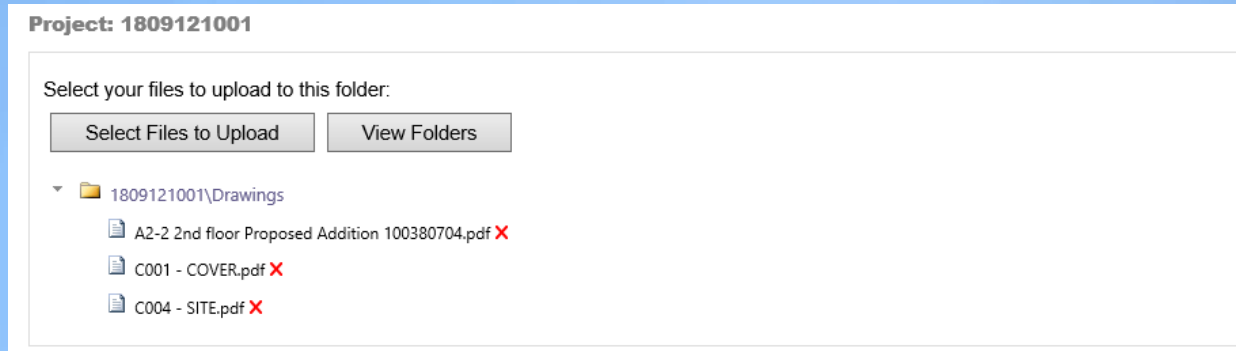
12. Now click on **View folders**. Notice **Drawings folder** displays the total number of files imported inside the parenthesis ().
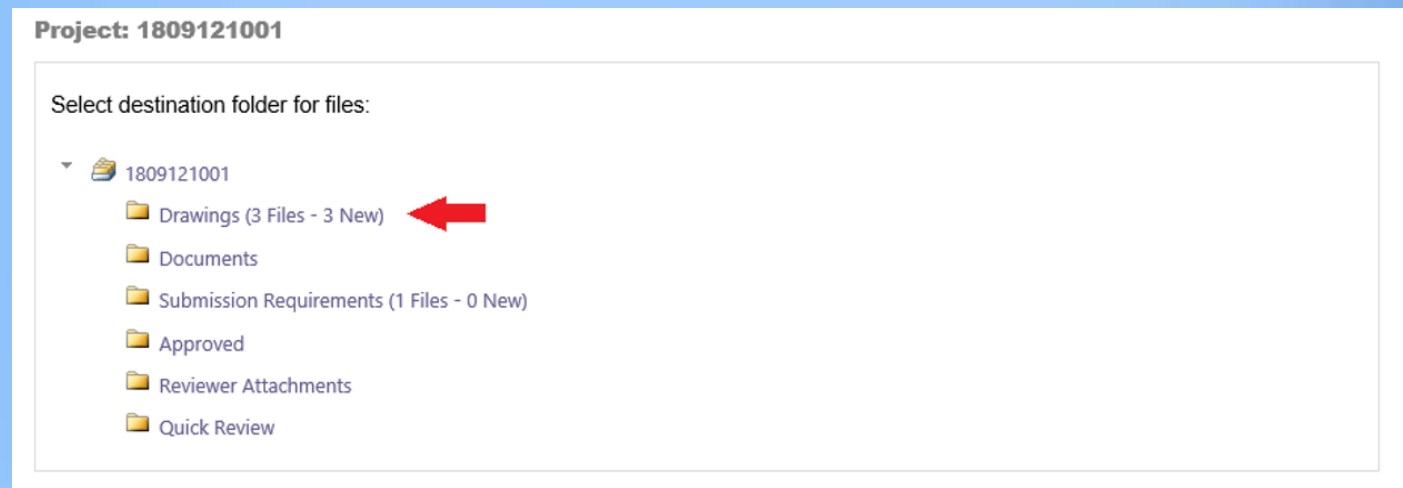
13. Depending on the size of the file(s), the upload process could take longer than expected and is a good practice to verify that all file(s) has been uploaded before completing the uploading process. To verify, go back to the task and click on the folder (**Drawings folder** in this case) to open it.

14. Make sure that all files are in and none of the files show Processing (Processing...). If there is a least one that still uploading, you have to wait until the process finishes.

All files uploaded example

File uploading in process example

15. After all, documents are verified and uploaded. Go back to the **Applicant Upload window.**

16. Go down until the end of the window.

17. Select checkbox **Upload Task Complete (I have uploaded all required drawings and/or documents)** and click on the **Upload Complete – Notify the City of Dallas** button.

Task Instructions

Select appropriate destination folder then select files to upload to selected folder. Repeat until all required submission files are uploaded. TO START REVIEW PROCESS: Please select "Upload Complete - Notify Dallas" enabled by first selecting checkbox "Upload Task Complete". (bottom of page)
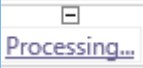
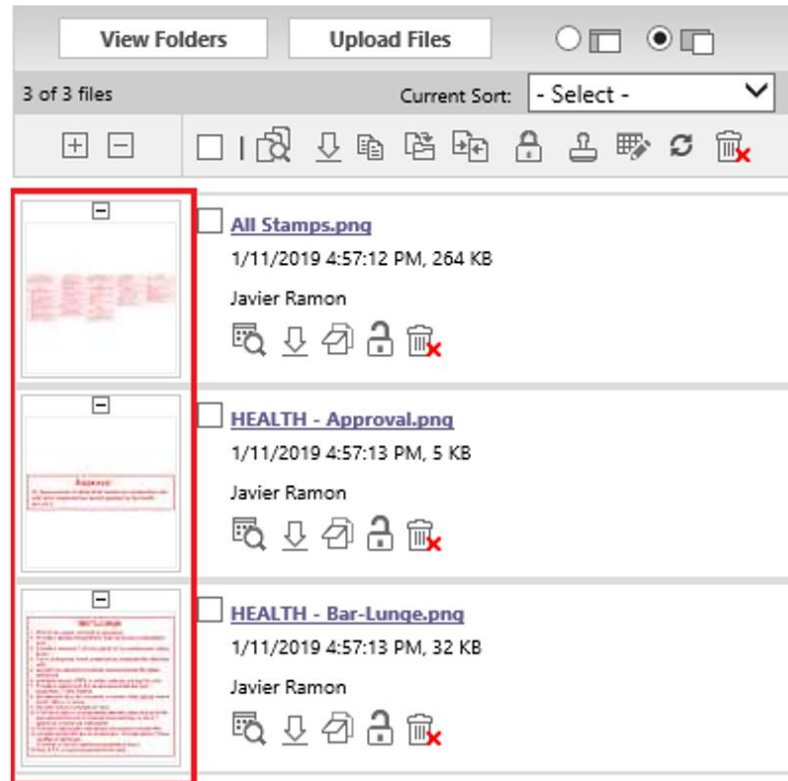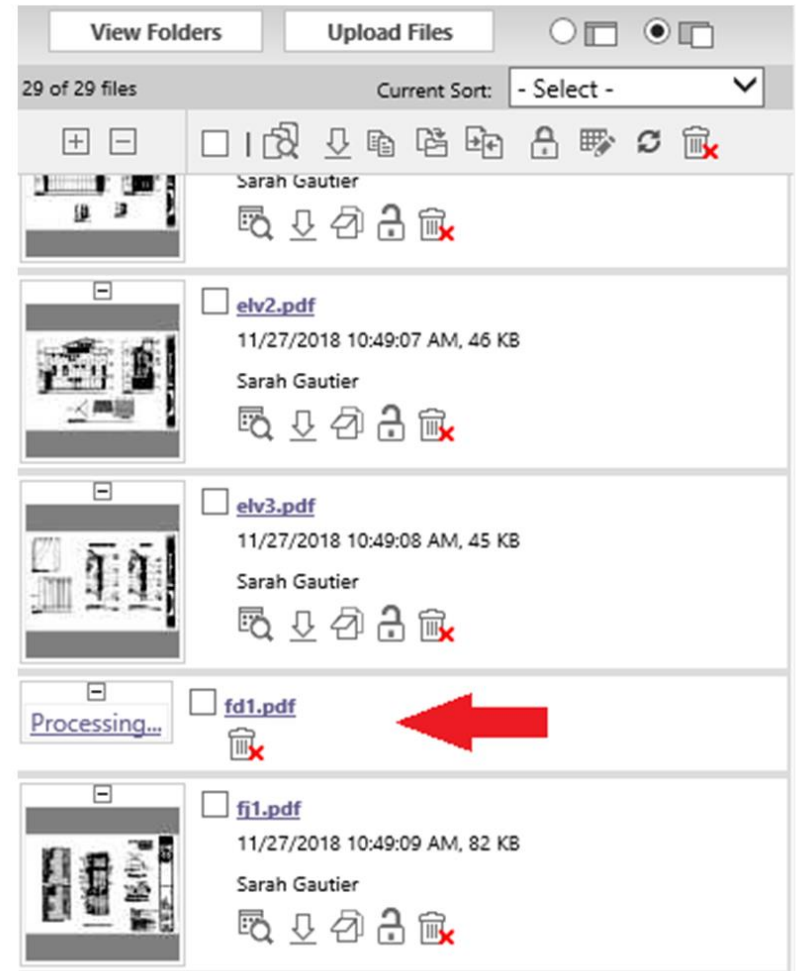**Project: 1809121001**

Select destination folder for files:

- ▾ 📁 1809121001
  - 📁 Coversheet (1 Files - 0 New)
  - 📁 Drawings (3 Files - 3 New)
  - 📁 Documents (1 Files - 1 New)
  - 📁 Submission Requirements (1 Files - 0 New)
  - 📁 Approved
  - 📁 Reviewer Attachments
  - 📁 Quick Review

☑ Upload Task Complete (I have uploaded all required drawings and/or documents)

[Upload Complete - Notify the City of Dallas] [Close]

18. Once you receive the following message, proceed to close it.

Congratulations! You have completed the Submission of your plans. The City will perform a Prescreen Review at this time.

Close
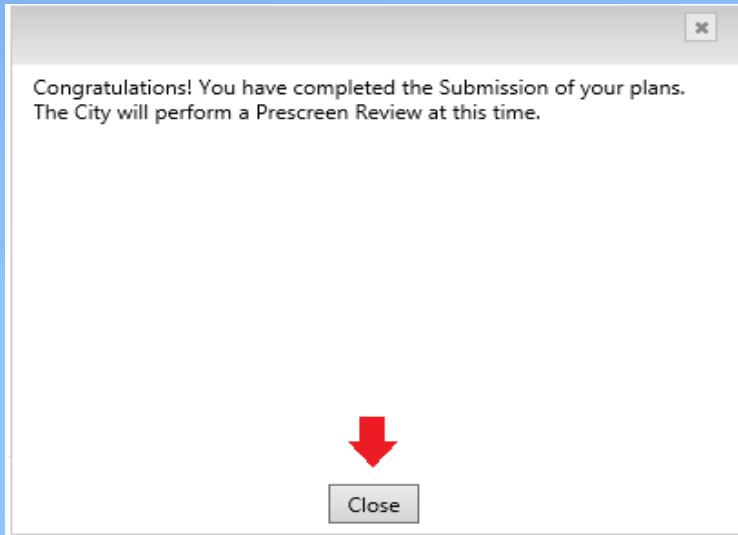
19. An email message will be delivered to you indicating the application upload task is complete, and the application is in the pre-screen process.

ProjectDox

Applicant Upload Complete

Attention John:

Thank you for completing your APPLICANT UPLOAD task on Project: **1809121001**. Your request is now in the PRE-SCREEN stage. You cannot upload additional information at this stage. We will pre-screen your request for the minimum application requirements and ePlans submission standards.

Contact the City of Dallas at (214)-948-4480 or biadmin@dallascityhall.com if you have questions regarding this project.

Please do not reply to this email.

At this time your application is under pre-screening and there is no action required on your part, except to wait for another email communication from **ProjectDox** to continue with the next step of the workflow.

No matter if all required documents are in order or more information is needed, an email communication will be sent to the applicant indicating process success or more information is needed. For the purpose of this tutorial, the prescreen process succeeded.

20. After the prescreen process succeeds, an email communication will be sent to the applicant indicating that initial fees must be paid before continuing with the review process. Click on either links; <u>ProjectDox</u> or <u>Project Access</u> on the email to start the **Initial Fess Payment** process.

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Project Fees Due Notification

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Attention John:

Thank you for using the City of Dallas Electronic Plan Review System.

In order for your permit to move on to the next step in the process, please remit payment for the permit fee. You may pay on-line or in person at the City of Dallas Building Department.

To pay for fees online, please login to ProjectDox and click on the "Fee Payment" task.

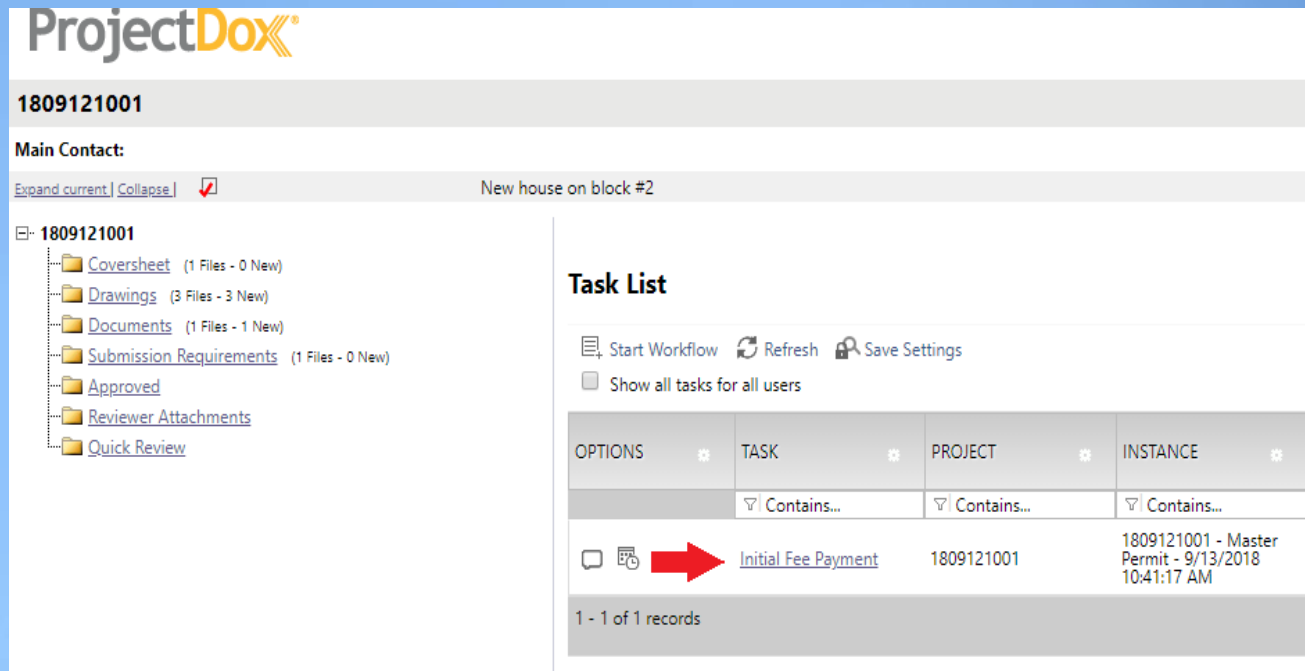After fees are paid your permit will move to the next step in the review process.

Project:	1809121001
Task:	**Initial Fee Payment**
	Project Access

Contact the City of Dallas at (214)-948-4480 or biadmin@dallascityhall.com if you have questions regarding this project.

Please do not reply to this email.

21. Click on **Initial Fee Payment** task.

22. Click **OK** on the next question to accept the task.
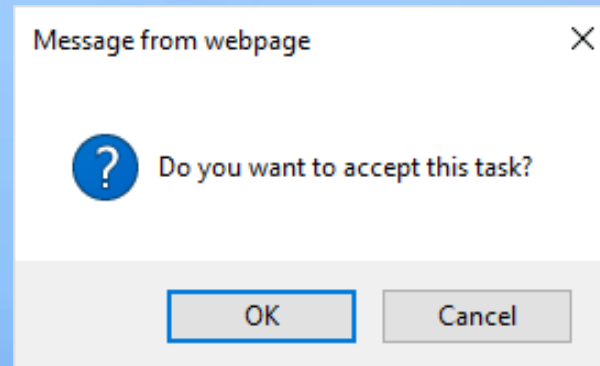
23. Proceed to enter your credit card information and click Pay.

24. The following message will appear while the transaction is being. processed.

Please Wait...

Your payment has been submitted. Please do not press "Pay" again or close your browser. It may take a few minutes to process your payment.
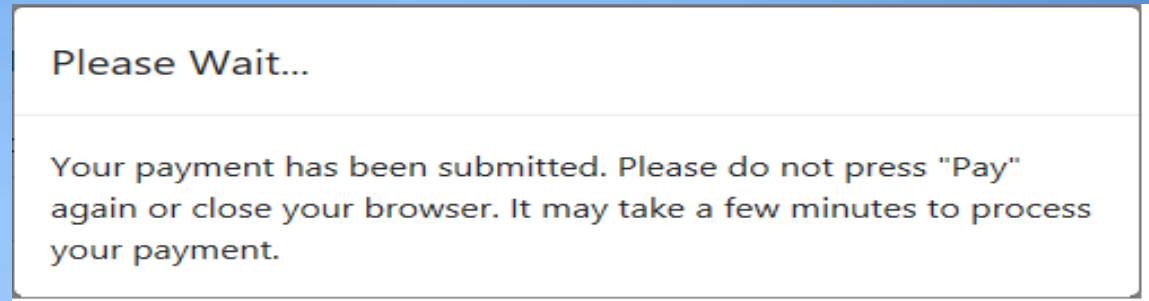
25. When the transaction is finished, you will receive a series of confirmation messages:

a. **ProjectDox**. Initial Payment Window

b. **Email confirmation**. The applicant will receive an email with the link to view a receipt. Notice there will be a permit # in the email.
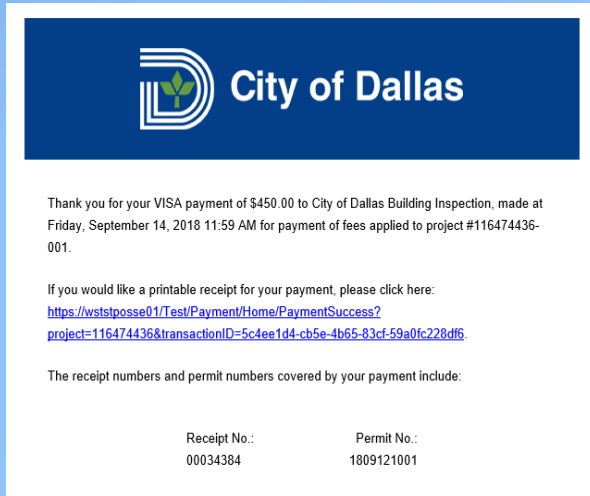
b. Click on the link to view the receipt. Note the web browser will alert about opening the page.
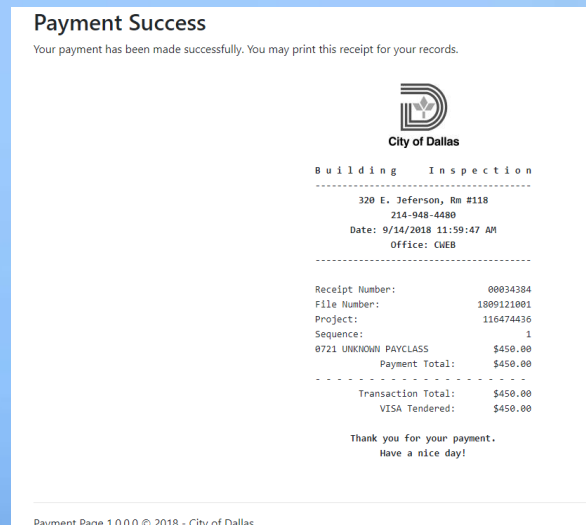
26. On the Project Dox Initial Payment Window, click on checkbox **I have paid all outstanding fees** and click on the **Fees Paid** button.

27. Click **OK** on the next message.
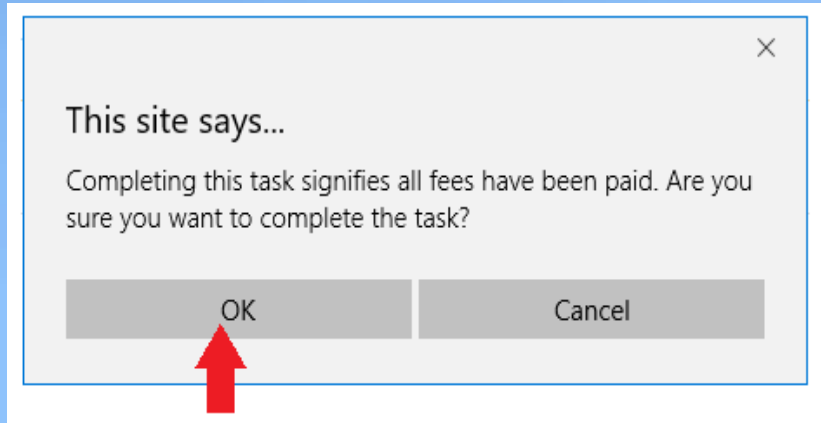
28. At this time your application is under review and there is no action required.

29. During the review process three outcomes can occur; ***Waiting for for Information, Approved or Fees Owed***. No matter the outcome, an email communication will be sent to the applicant for either; asking for additional information, pay additional fees or approve and right to download final drawings.

30. For the purpose of this exercise, we will assume the review process was approved and additional fees are outstanding. The applicant will receive a communication email similar to:

31. Repeat steps 21 through 27 above to pay outstanding fees and receive the confirmation message.

32. At this time your application is complete, and a final email will be sent to the applicant asking to log in and download the approved plans.

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Approved Plans Ready for Download Notification

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Attention John:

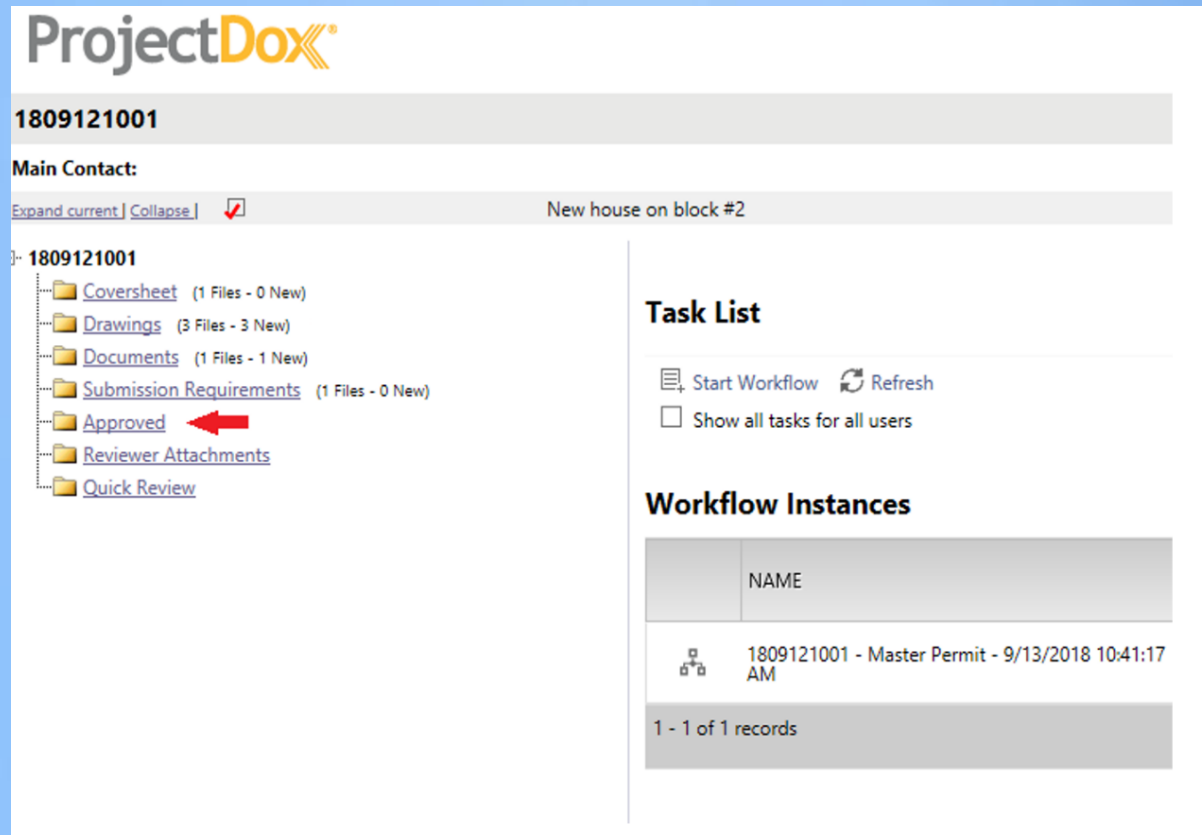Congratulations, your approved plans are ready for download for Project 1809121001.

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

Project:	1809121001
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.

33. Review step 3 above for instructions on how to download files from a folder. The only difference here is that step 4 explains how to download the files from the **Submission Requirements** folder, the approved plans will be in the **Approved** folder instead.

34. After downloading the drawings, you can logout from the system.