ELECTRONIC REVIEW SYSTEM

USER MANUAL

CONTENTS

1.0 INTRODUCTION

This document contains information about the City of Colorado Springs Stormwater Enterprise / Traffic / Engineering Development Review Electronic Review System (Electronic Review System).

If a user is unable to access a project or complete a task, help is available by calling (719) 385-5918 or by contacting the project Review Engineer.

1.1 Web Address

The Electronic Review System is located at the following web address:
https://colorado-springs.avolvecloud.com/Portal/Login/Index/ColoradoSprings

1.2 Browser Requirements

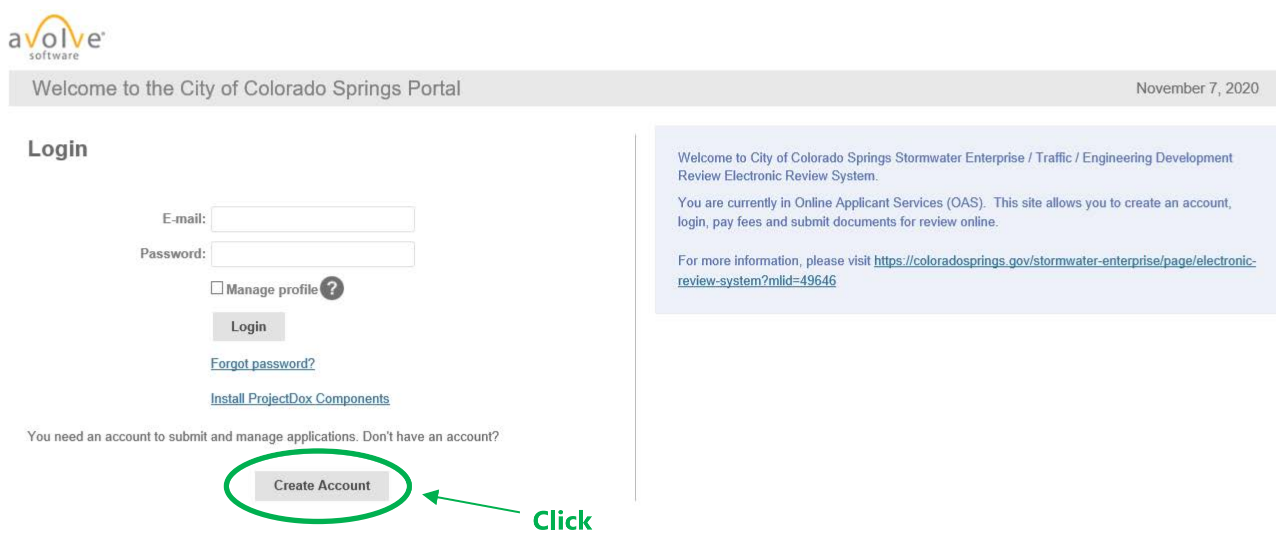
The Electronic review system works with most internet browsers, including Internet Explorer, Chrome, Microsoft Edge, and Firefox. Popups must be enabled for the system to work.

2.0 GETTING STARTED

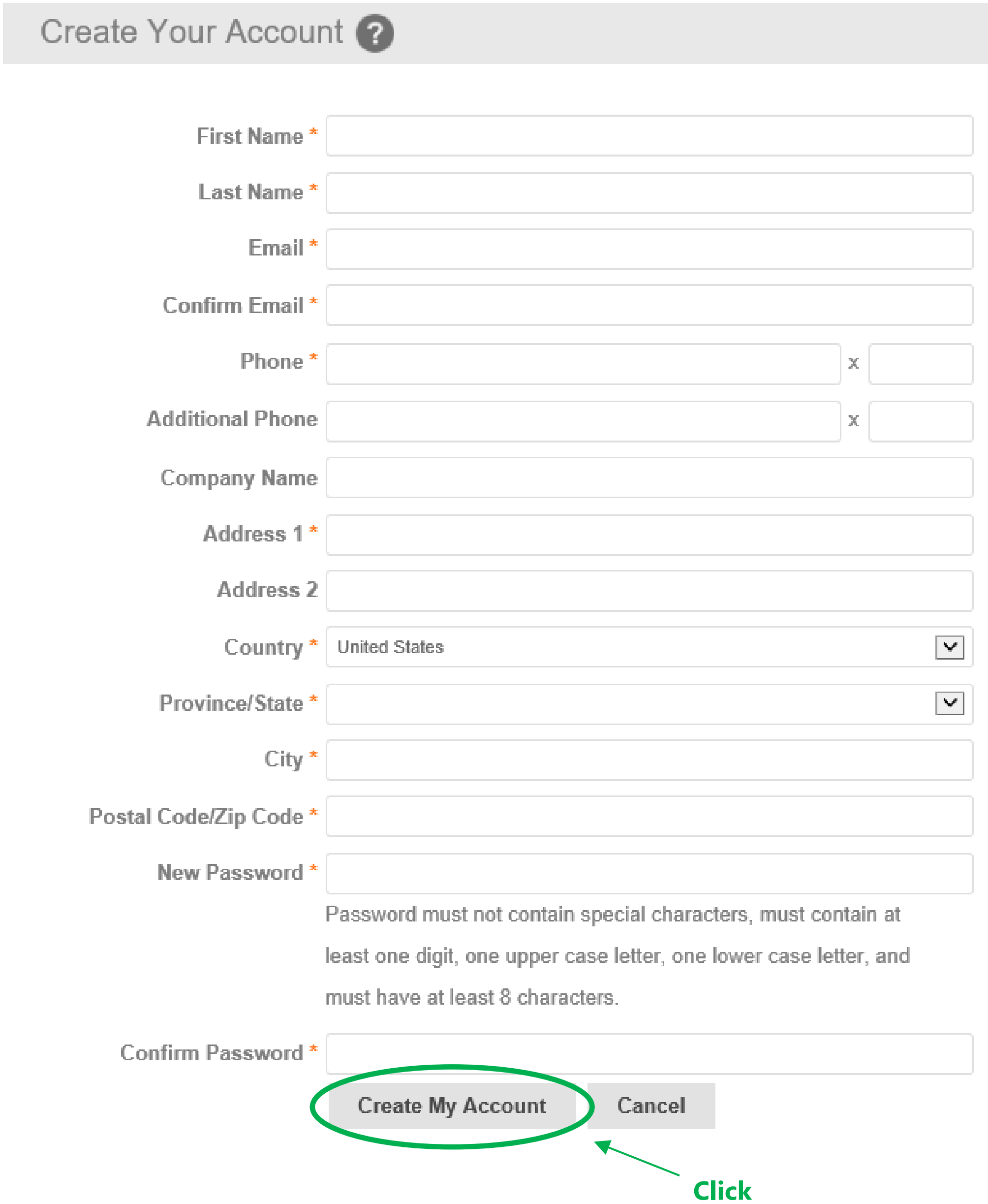
2.1 Create an Account

Applicants who have not submitted documents for review in the Electronic Review System will need to create an account.

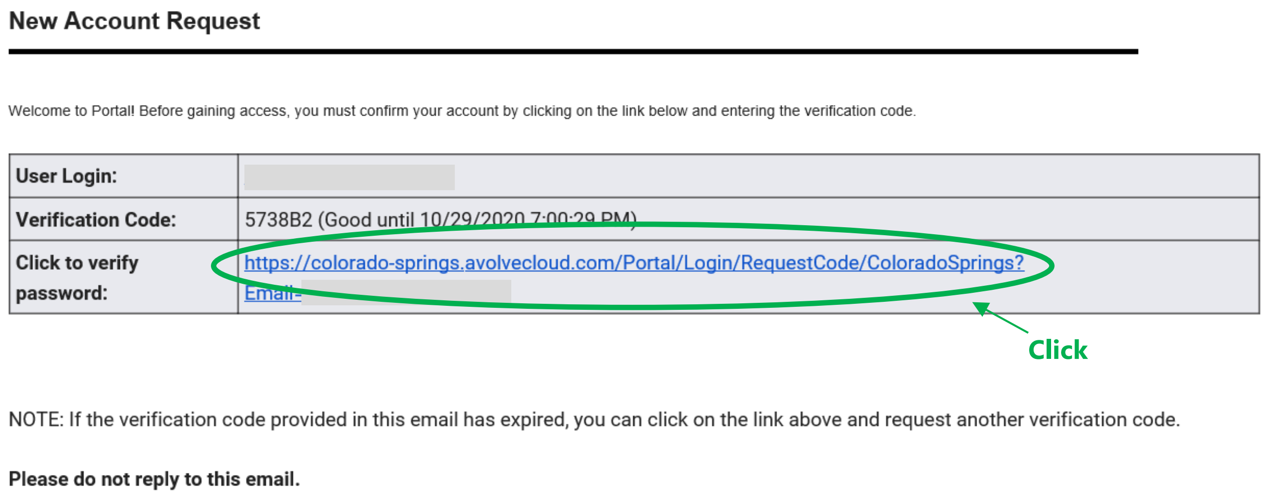
1. On the login page, click on **Create Account**.



2. On the Create Your Account page, fill in the required information. Fields with a red asterisk are required. After filling out the information, click on **Create My Account**.



3. An email from DoNotReplyCOSP@avolvecloud.com will be sent to the email address provided. The email contains a verification code and a link to verify password. Click on the link.



New Account Request

Welcome to Portal! Before gaining access, you must confirm your account by clicking on the link below and entering the verification code.

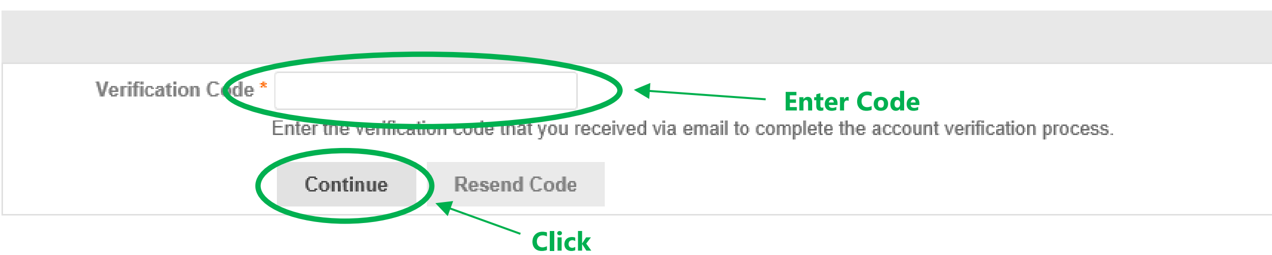
User Login:	
Verification Code:	5738B2 (Good until 10/29/2020 7:00:29 PM)
Click to verify password:	https://colorado-springs.avolvecloud.com/Portal/Login/RequestCode/ColoradoSprings?Email=

Click

NOTE: If the verification code provided in this email has expired, you can click on the link above and request another verification code.

Please do not reply to this email.

4. Enter the verification code from the email, and click **Continue**.

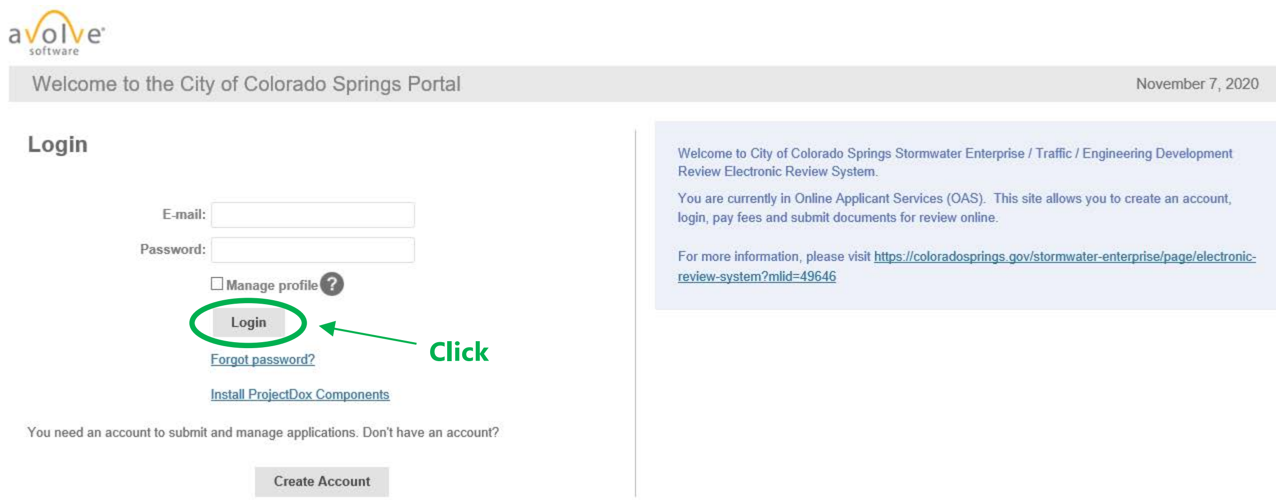


5. Log in.

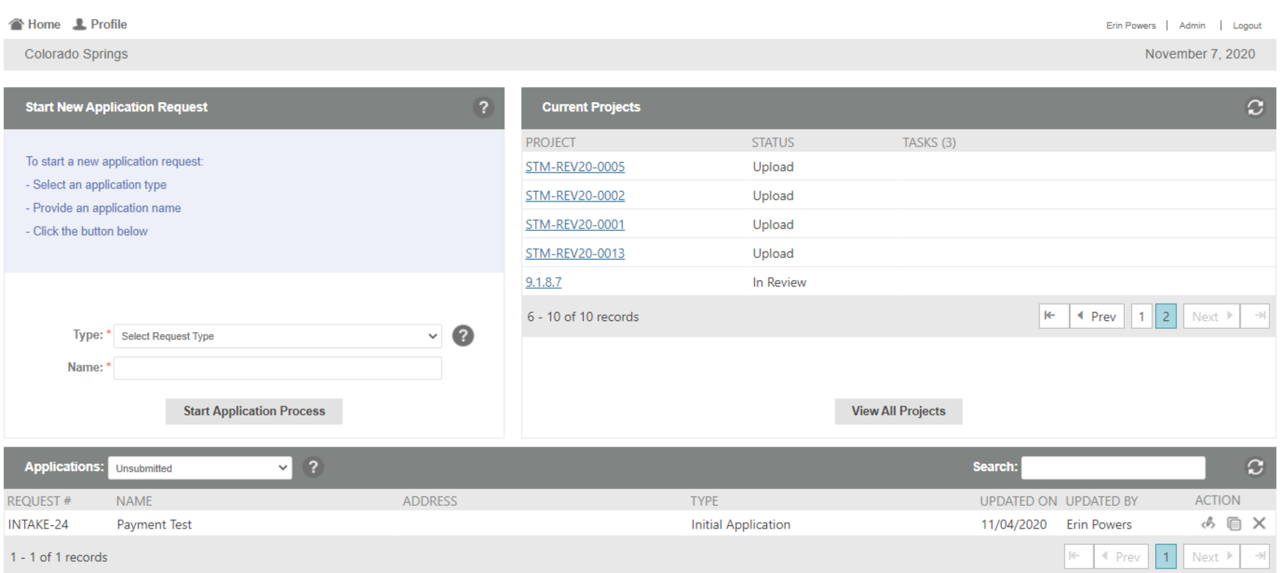
2.2 Logging In

Applicants who have not submitted documents for review in the Electronic Review System will need to create an account.

1. On the login page, enter e-mail and password and click on **Login**.



2. The user will be taken to a screen similar to the following.



3.0 NAVIGATION

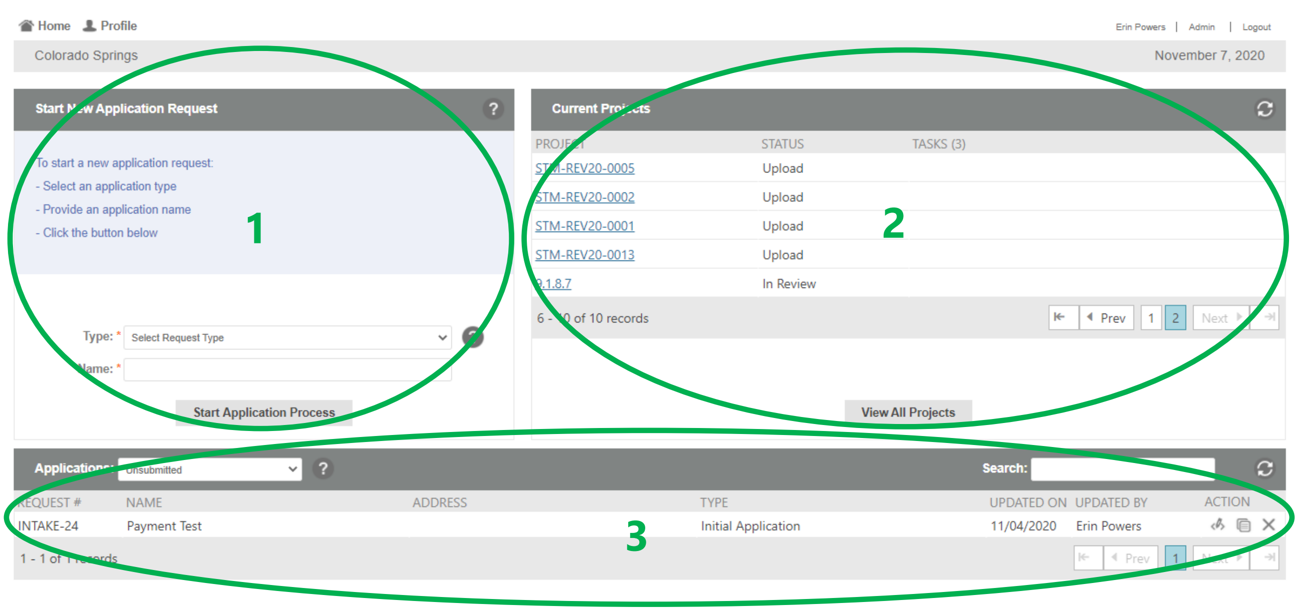
3.1 Terminology

The Electronic Review System uses some new terminology. To make the transition easier, the following table of terms is provided.

New Language	Existing Language
Project	Individual Review
Master Project	Project (Subdivision Filing, Capital Project, etc.)
Changemark*	Comment
District	Review Area (for Stormwater reviews)
Project Location	Subdivision and Filing No.

*Note: This term is built in to the review system, and cannot be altered. Reviewers will normally refer to Changemarks as Comments.

3.2 Home Screen

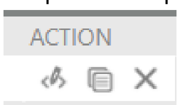


The Home Screen is made up of three distinct parts, described below.

1. Start New Applications
   The area in the upper left region of the screen is used to start new applications. This is the first step in submitting items for review (see Section 3.0).

2. Current Projects
   The area in the upper right region of the screen contains a summary of current projects. Click on the **View All Projects** button to view all projects.

3. Application Storage
   The lower region of the screen contains applications that were started previously and saved. Applications that were submitted can be located by choosing Submitted from the Applications dropdown. Applications can be viewed and edited (if unsubmitted) by using the actions on the right.



   To view or edit an application, click on the left action button. To copy an application, click on the center action button. To delete an application, click on the right action button.

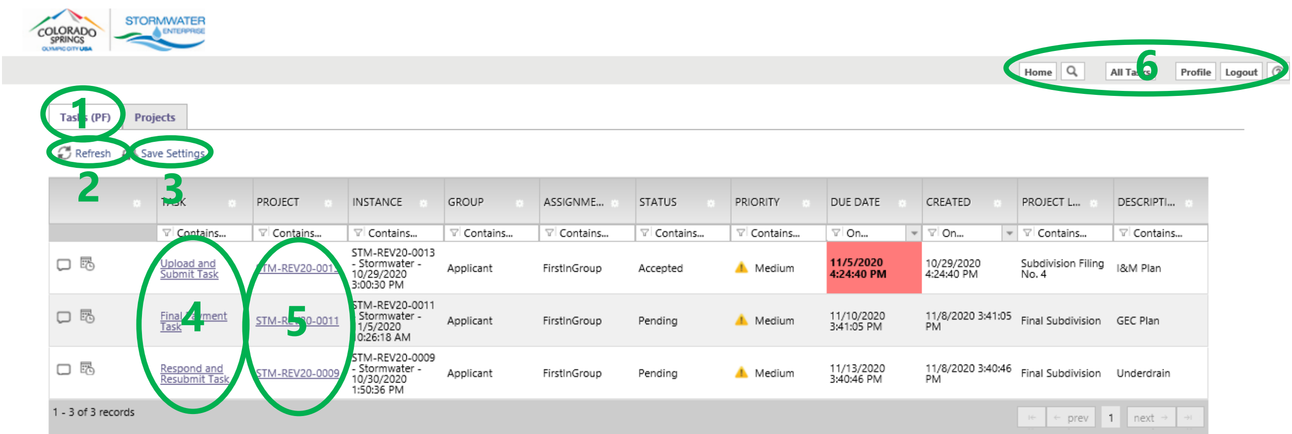
Additional buttons in the Home Screen are described below.

1. Click the Home button to return to the Home Screen.

2. Click the Profile button to view and edit profile information.

3. Click the Logout button to end the current session.

3.3 Tasks Screen



The following numbered areas in the figure above are described below.

1. The Tasks screen shows all tasks that are assigned to a user. When the Tasks tab is white, the Tasks screen is showing. Tasks are displayed by priority and due date, with older tasks showing at the top of the list.

2. Clicking the refresh button will refresh the screen.

3. Columns in the Tasks screen can be moved around and resized as needed. Click Save Settings to save column formatting.

4. Clicking on a task will take the user directly to a task.

5. Clicking on a project number will take the user to the individual Project Page.

6. The navigation options on the upper right region of the screen are explained below.

a. Clicking the Home button takes the user back to the View Tasks or View Projects screen. It does not take users back to the Home Screen.

b. Clicking the search button brings up the Search window. See Section 3.7 for more information.

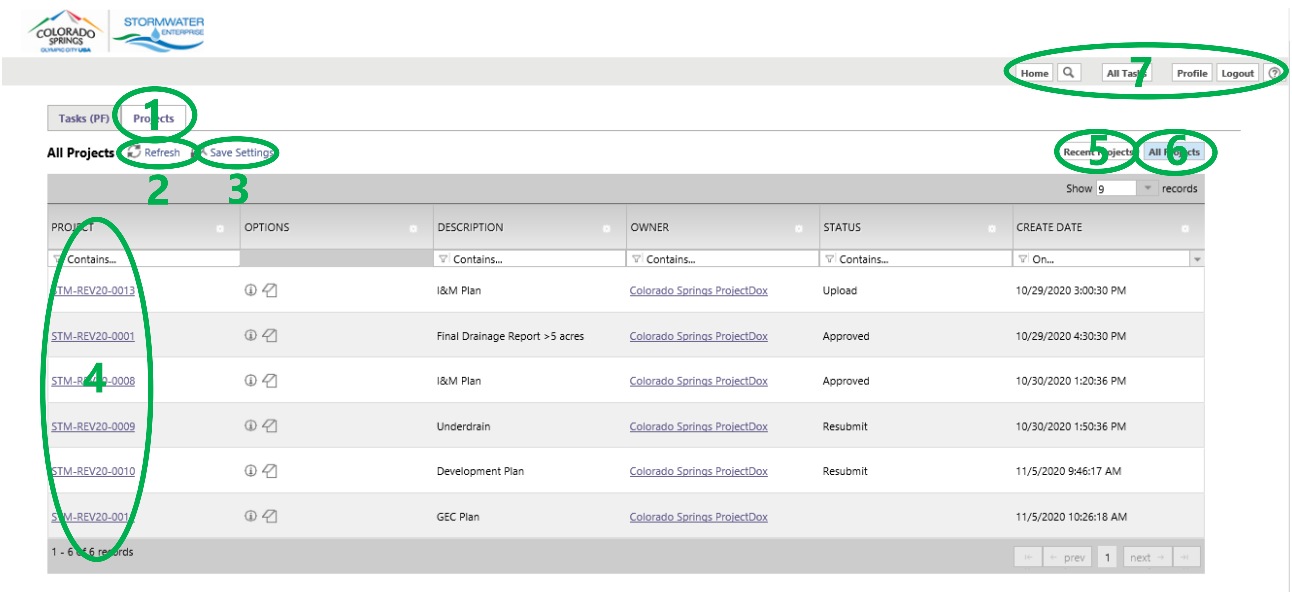
c. Clicking All Tasks opens the tasks list in a separate window.

d. Clicking the Profile button opens a separate Profile window. A user **SHOULD NOT** edit profile information using this window. Profiles can be accessed through the Home Screen.

e. Clicking Logout will end the current session.

f. Clicking the help button will open the help directory in a separate window.

3.4 All Projects Screen



The following numbered areas in the figure above are described below.

1. The All Projects screen shows the projects that are assigned to a user. When the Projects tab is white, the All Projects screen is showing.

2. Clicking the refresh button will refresh the screen.

3. Columns in the All Projects screen can be moved around and resized as needed. Click Save Settings to save column formatting.

4. Clicking on a project number will take the user to the individual Project Page.

5. When Recent Projects is selected (displayed in blue), the All Projects screen shows a list of recent projects associated with the user.

6. When All Projects is selected (displayed in blue), the All Projects screen shows a list of all projects associated with the user. When searching for projects, a user should search within All Projects for more complete results.

7. The navigation options on the upper right region of the screen are explained below.

   a. Clicking the Home button takes the user back to the View Tasks or View Projects screen. It does not take users back to the Home Screen.

   b. Clicking the search button brings up the Search window. See Section 3.7 for more information.

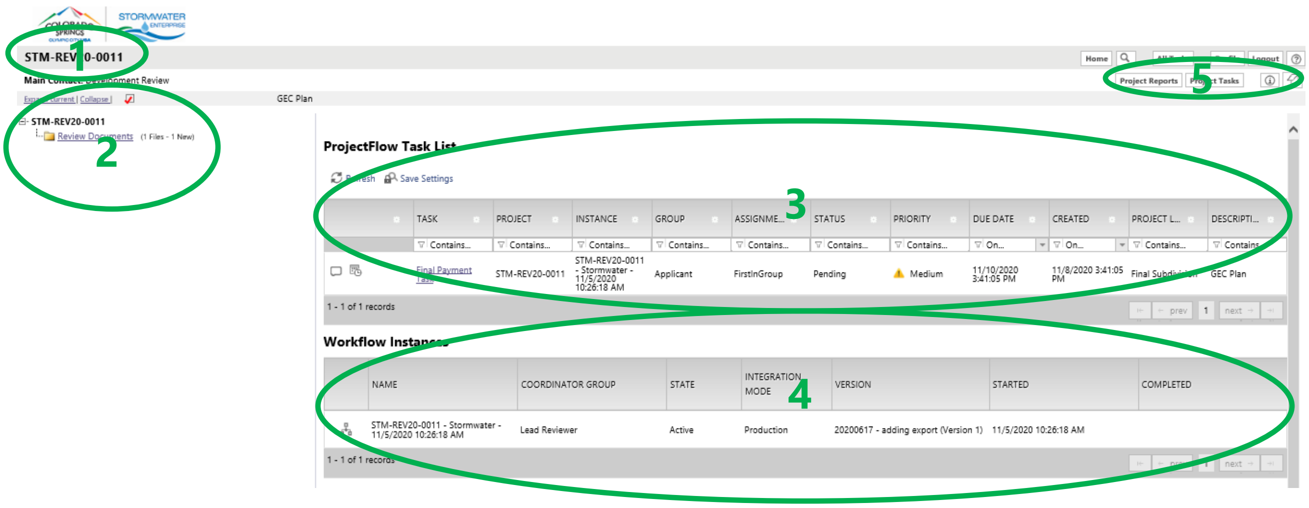
   c. Clicking All Tasks opens the tasks list in a separate window.

   d. Clicking the Profile button opens a separate Profile window. A user **SHOULD NOT** edit profile information using this window. Profiles can be accessed through the Home Screen.

   e. Clicking Logout will end the current session.

   f. Clicking the help button will open the help directory in a separate window.

3.5 Project Page



The Project Page is made up of multiple distinct parts, described below.

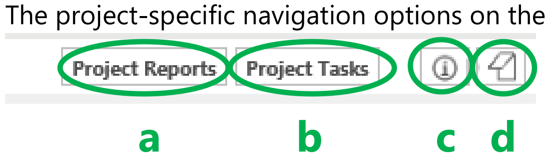
1. Project Number
   The Project Number is displayed in the upper left corner of the Project Page.

2. Project Folders
   This area contains folders for the project. Normally, only the Review Documents folder will be displayed. When a document is approved, the Approved Documents folder will be displayed.

3. ProjectFlow Task List
   The upper center region contains the ProjectFlow Task List. This list displays currently active tasks for the project.

4. Workflow Instances
   The lower center region contains the Workflow Instance. This area will always contain the same information.

5. The project-specific navigation options on the upper right region of the screen are explained below.



   a. Clicking the Project Reports button navigates to a list of available project reports. Reports may or may not be available for individual projects.

b. Clicking the Project Tasks button navigates back to the individual Project Page.

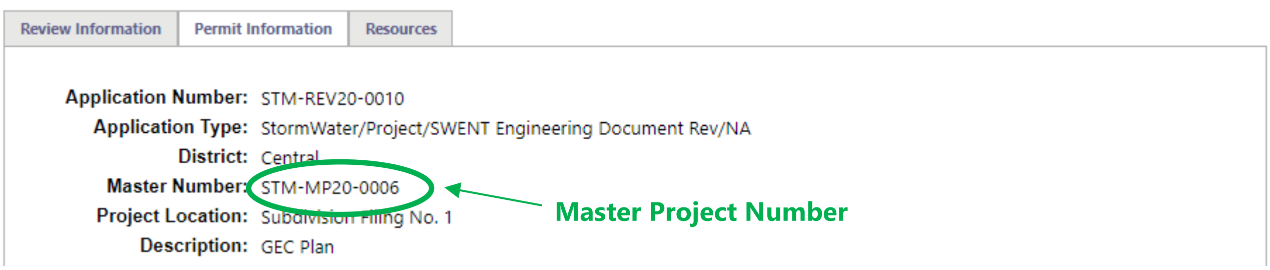
c. Clicking the information button will open project information.

d. Clicking the discussion board button will open a discussion board in a new window if one is available for the project.

3.6 Master Project Number

A master project number is available for every project. It allows reviews to be sorted for a particular subdivision filing or capital project. The master project number is created the first time a document is submitted for review under a particular subdivision filing or capital project.

The master project number can be found by navigating to a task window and clicking on the Permit Information tab.



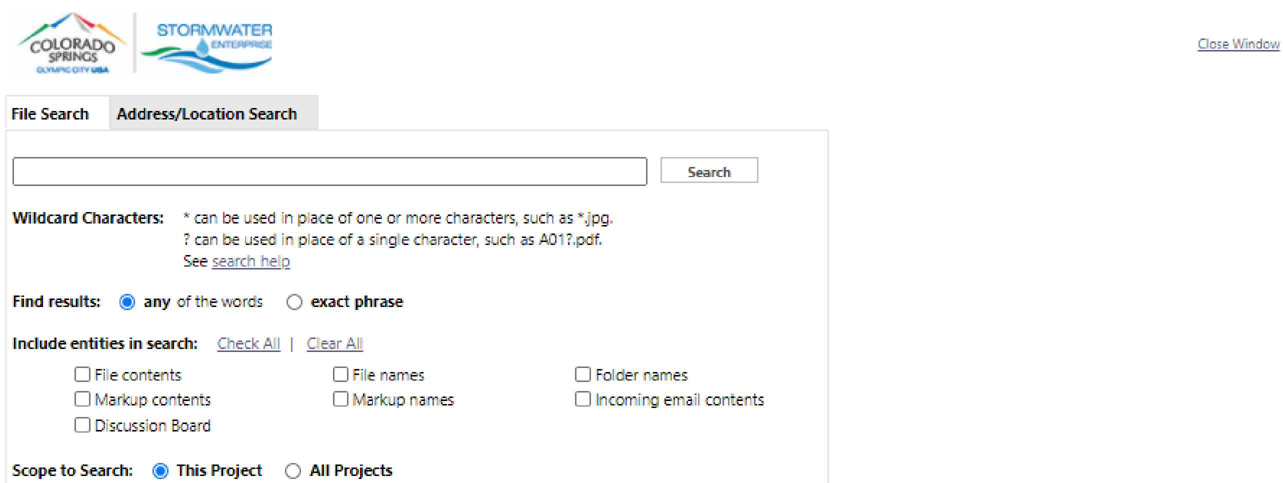
If a user is unable to locate an existing project based on either the Project Location or master project number, they should contact the Review Engineer or call (719) 385-5918.

3.7 Project Search

Locating projects / reviews is easiest if the project number (also referred to as the review number) is known. With the project number, users can search for the project by entering the project number at the top of the PROJECT column on the All Projects screen.

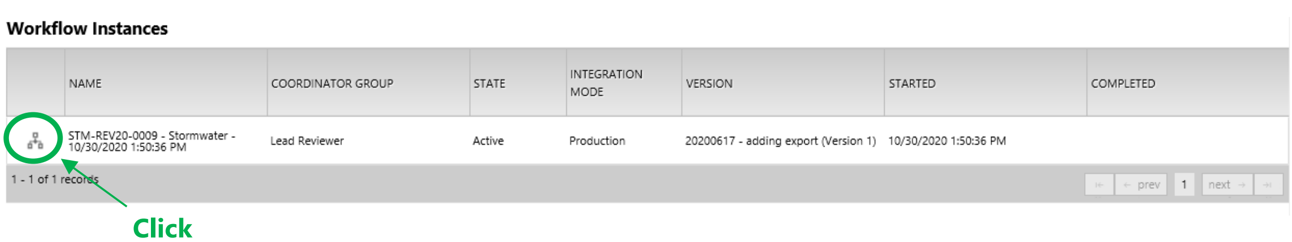
Users can search for existing projects by the project name (chosen originally by the user) using the project search. After opening the search window, users can select from different options. Choosing to search File contents, File names, and All Projects is recommended. An example of the available search options is shown below.

If users are having a difficult time locating a particular project, it is recommended they contact the Review Engineer or call (719) 385-5918 for more information.

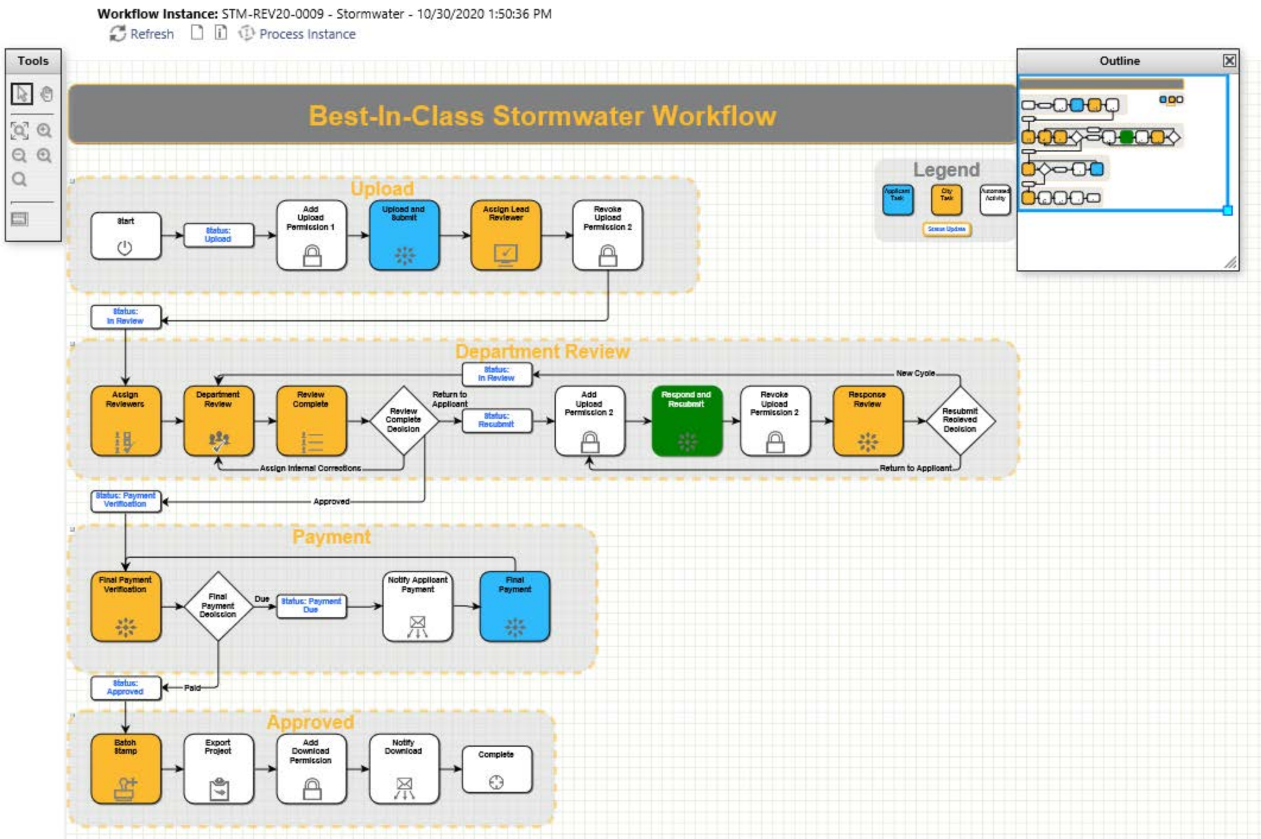


3.8 Check Project Status

To check on an individual project status, navigate to the individual Project Page. Under Workflow Instances, click the view workflow button.



A new window will open showing the project workflow. The current status of the review is shown in green. The Department Review task corresponds to the bulk of the review.



3.9 Add Applicant User

Applicants may add users when there is an active task. The options shown below are available in every task window.

Additional users can be added either to the Applicant View Only group or to the Applicant Alternatives group. Users in the view only group will not be able to make changes to the project. Users in the alternatives group will be able to view and respond to comments. To add a user, fill out the name and email forms, select a group from the dropdown menu, and click Invite User.

To remove a previously added user, select the group and user from the dropdown menus and then click Remove User.

4.0 SUBMITTAL REQUIREMENTS

The following requirements are provided to enable a more efficient review and filing process.

4.1 Formatting Requirements

All documents uploaded for review in the Electronic Review System must be in pdf format.

Documents for review must be combined in one document. If file size makes a single document impractical (for reports larger than approx. 400 pages), appendices may be uploaded as a second document.

4.2 Naming Requirements

Files must be named using the following format:

Subdivision Name_Filing No. XX_Application Type

For example, a final drainage report for The Farm Filing No. 7 would have the following name:

The Farm_Filing No. 7_Final Drainage Report

Capital projects should substitute project name for Subdivision Name_Filing No. XX.

All reviews for an individual document (first, final, etc.) must have the same name. If a different name is accidentally used, upload a second document using the original name.

File names can have a maximum of 70 characters.

4.3 Rapid Response Projects

Rapid responses certificates must be uploaded with every rapid response review. If a certificate is not uploaded, the review will not be treated as rapid response.

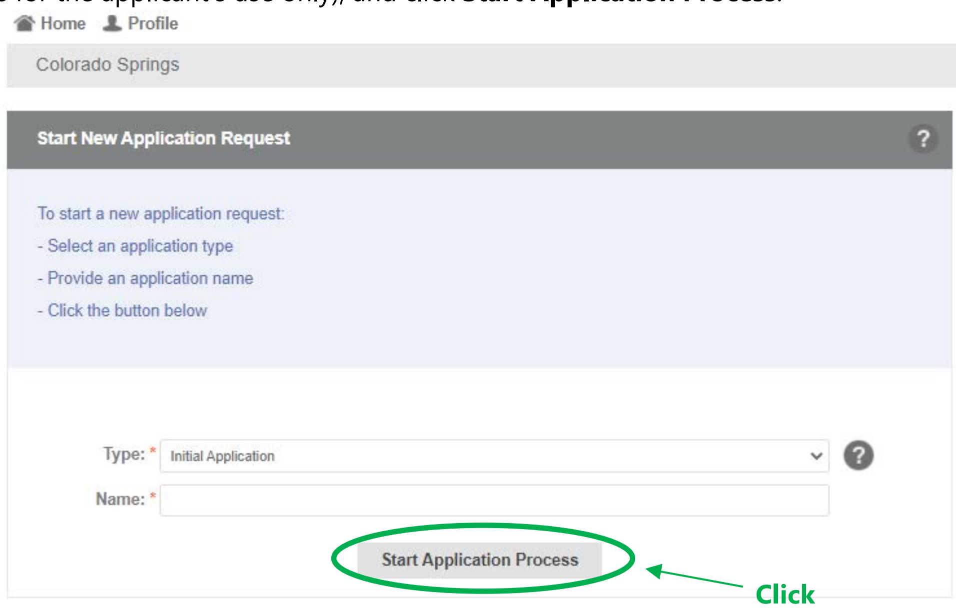
5.0 REVIEW PROCESS

After logging in to the system, the following steps are involved in the review process.

5.1 Submit Application

The first step in the review process is to submit an application.

1. In the Home Screen, select Initial Application as the application type, enter a name for the project (this is for the applicant's use only), and click **Start Application Process**.

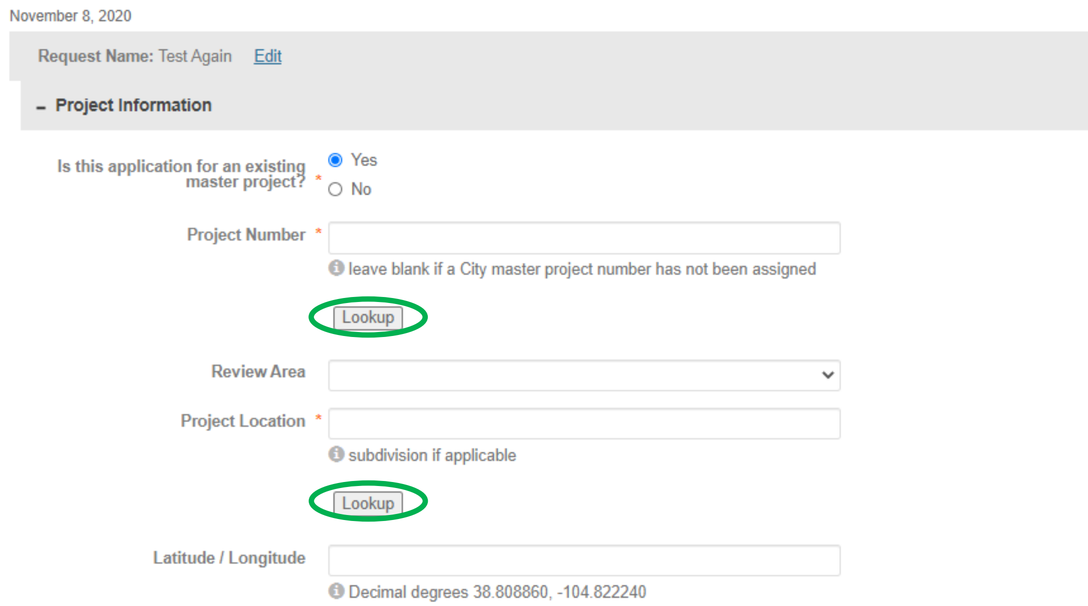


2. In the application form, fill out all required fields (denoted by a red asterisk).

   a. If this is not the first review submitted for a particular project, select No in the "Is this application for an existing master project" field.

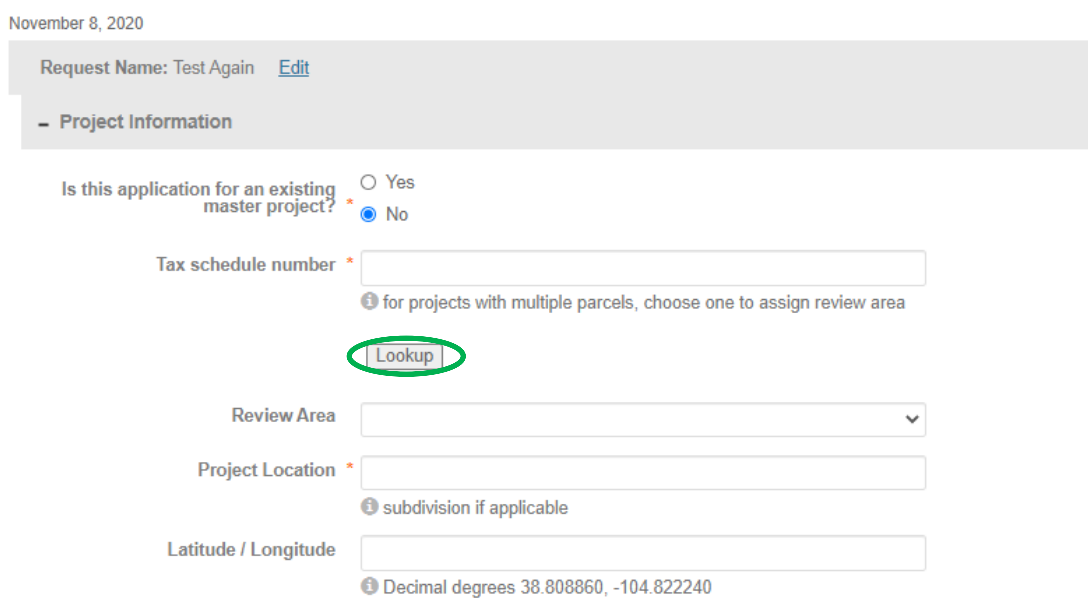
      If a master project number is available (see Section 3.6), enter the number and click Lookup. If a master project number has been assigned previously, a user can also enter the Project Location (Subdivision and Filing No.) and click Lookup. Only one of the two Lookup options needs to be used.

      Many application fields will be automatically populated. Fill in all remaining required fields and proceed to the bottom of the form.



b. If this is the first review submitted for a particular project, select No in the "Is this application for an existing master project" field.

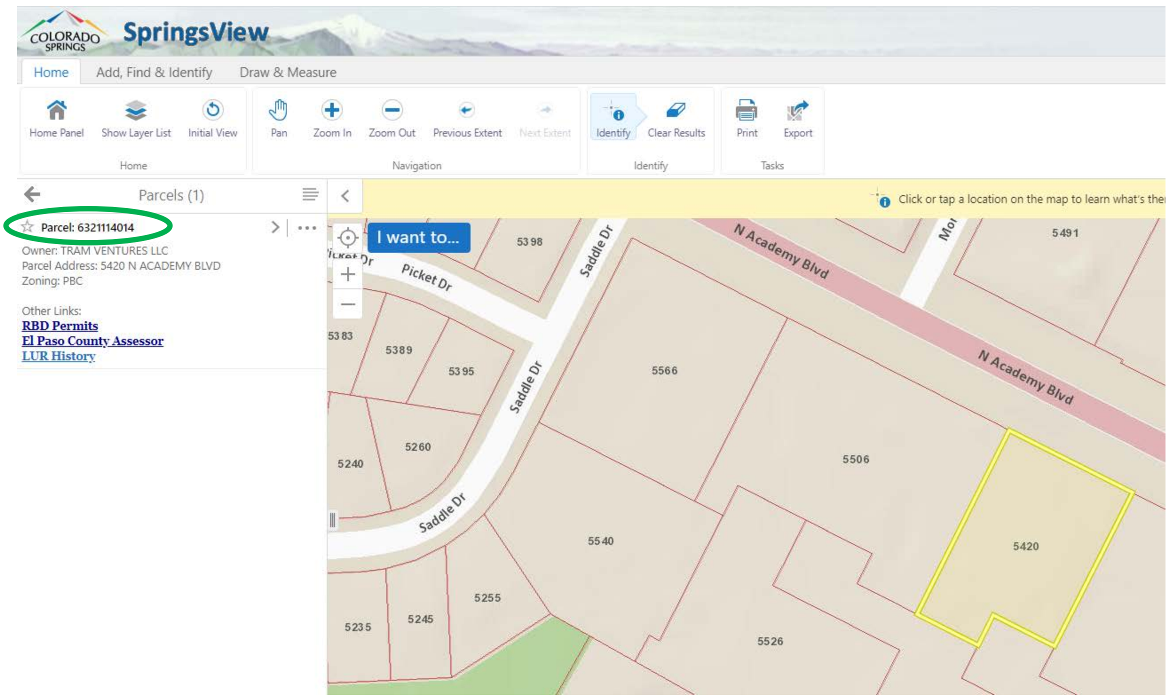
Enter the tax schedule number and click Lookup. See below for more information on the Tax schedule number and Latitude/Longitude. Fill in all remaining fields and proceed to the bottom of the form.



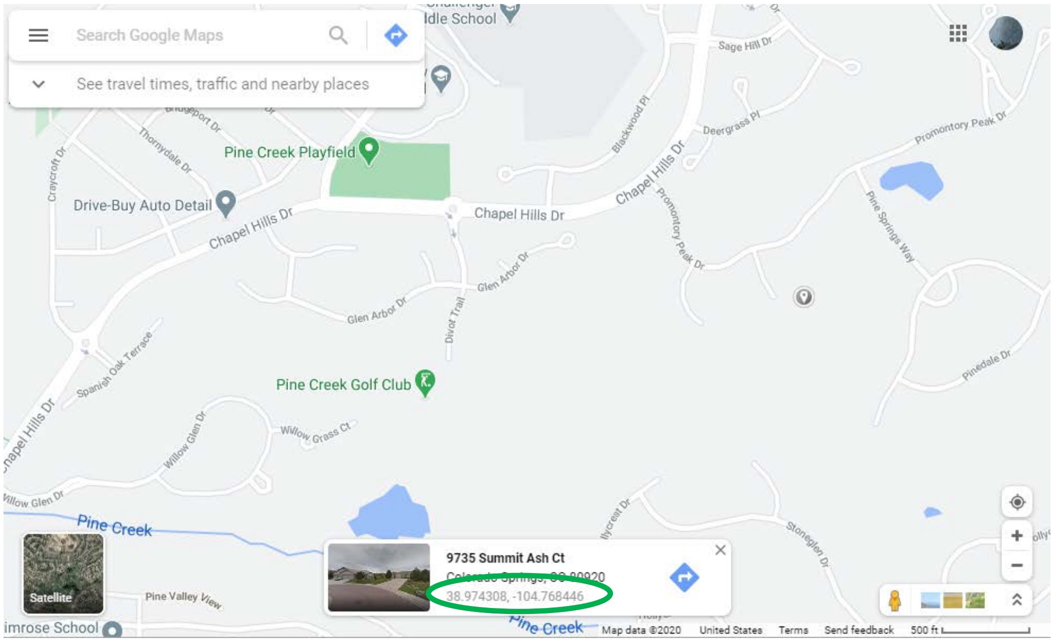
If a tax schedule number is not found or is not known, navigate to SpringsView (https://gis.coloradosprings.gov/Html5Viewer/?viewer=springsview). Locate the correct area of the City, click Identify, and select an appropriate parcel. The tax schedule number is located after Parcel: in the pane on the left of the page.

If the project is currently located outside of the City limits, use the tax schedule for a nearby parcel that is within the City limits.

If the project involves multiple tax schedule numbers, choose one to enter.

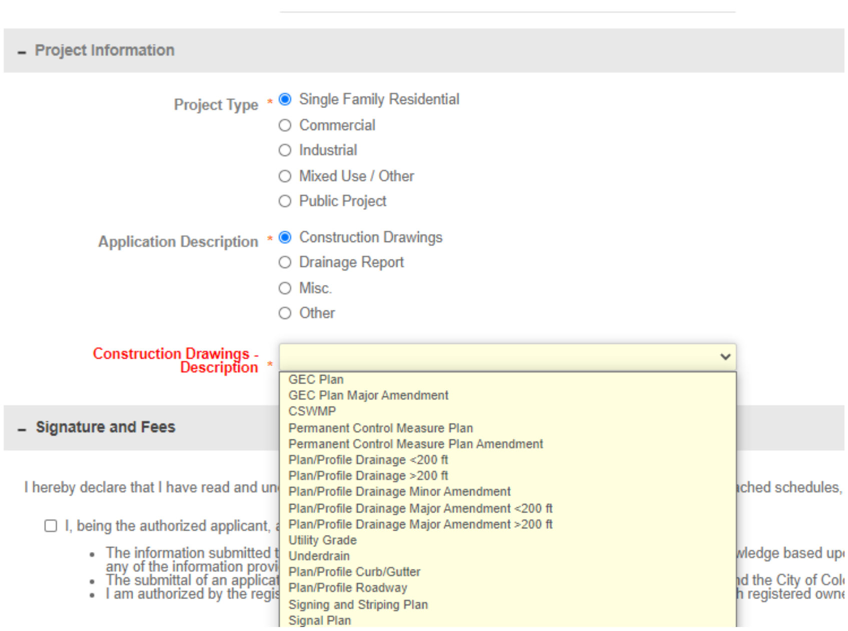


If the Latitude/Longitude is not known, users can locate this information by navigating to Google Maps (https://www.google.com/maps). Locate the correct area and click on the project area. A text box will show up at the bottom of the screen with the Latitude/Longitude information.

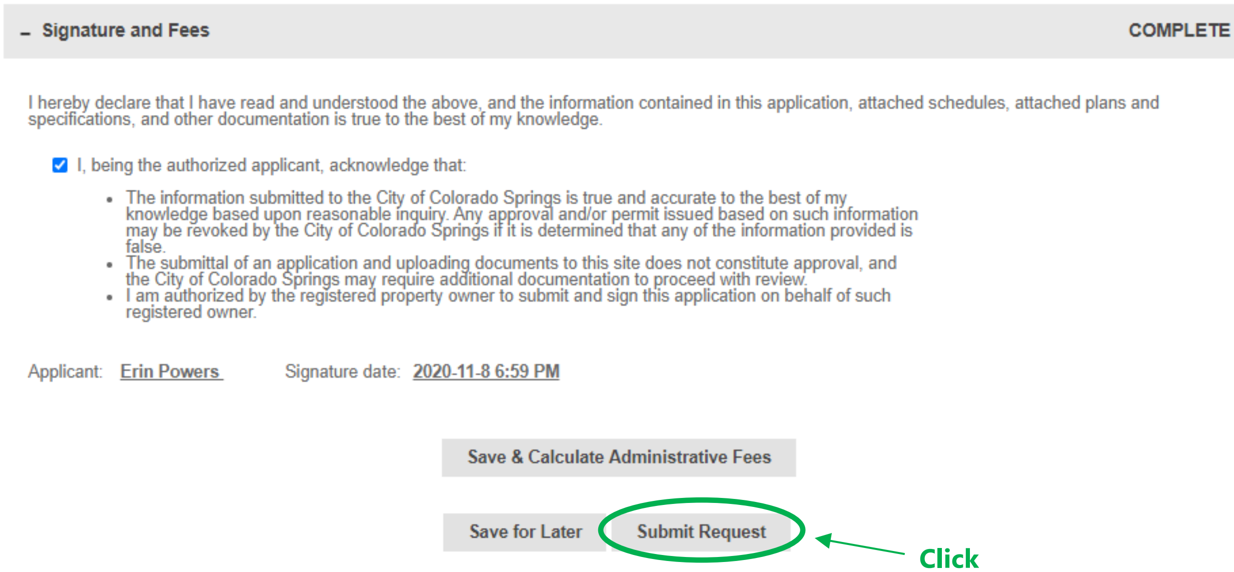


3. At the bottom of the form, select the Project Type. If the project does not fit cleanly in one of the Project Type options, choose Mixed Use / Other. Public Project should only be selected for projects that are publicly managed and funded.

   Select Application Description by first choosing from one of the four options. A dropdown menu will appear with additional options within each category. Select an option from the dropdown menu.

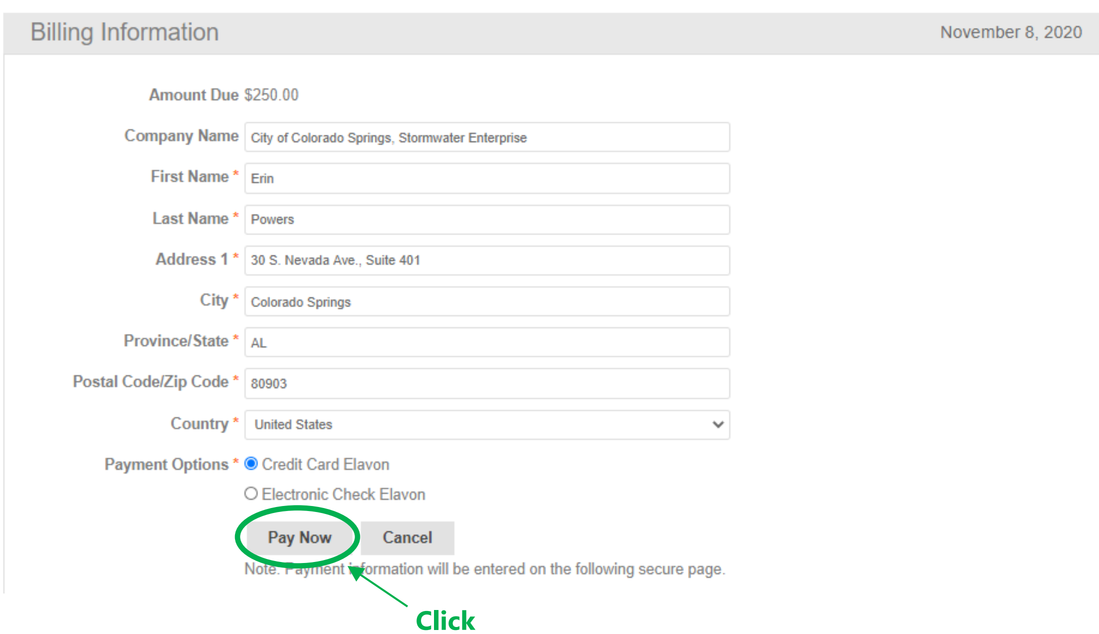


4. Select the applicant authorization statement and click **Submit**. If not review fee is required, the application has been submitted.



Applicants can also choose **Save & Calculate Administrative Fees** to determine the fees owed or **Save for Later** to save the application to complete at a later time.

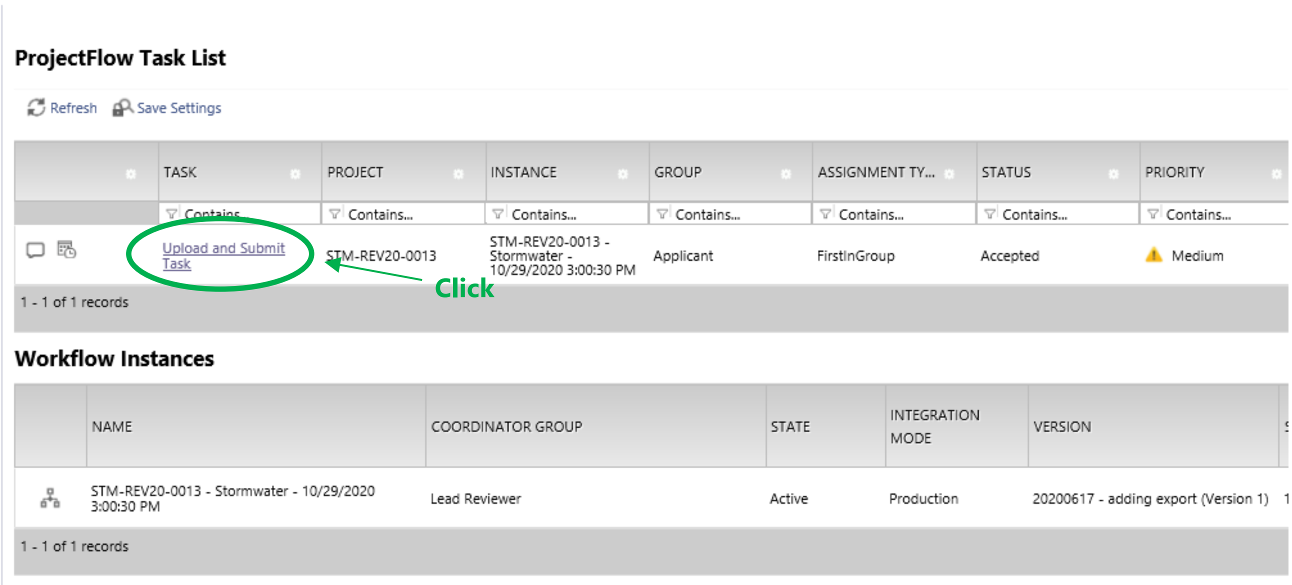
5. If a review fee is required, fill in the appropriate billing information and choose a Payment Option. Then click **Submit**. Follow the instructions to complete payment. The application is submitted when the payment is completed.



5.2 Upload and Submit Task

After an application has been submitted, review documents are submitted by completing the upload and submit task.

1. In the ProjectFlow Task List, click on **Upload and Submit Task** and click Ok in the popup window to accept the task. The task will open in a new window.



2. In the Upload and Submit window, click on the **Review Documents** folder.

UPLOAD AND SUBMIT

Review Information | Permit Information | Resources

Project Name: STM-REV20-0001
Project Description: Variance Letter
Coordinator: Colorado Springs ProjectDox
Workflow/Activity Name: BIC Stormwater/Upload and Submit
Current User Login: FEng LEng (erinswent@gmail.com)

Task Instructions

1. Upload files into the appropriate folders below
2. Confirm completion by selecting the checkbox at the bottom
3. Click 'Upload Complete - Submit' to submit your files

Project: STM-REV20-0001

Select destination folder for files:

STM-REV20-0001
Review Documents

Click

Add Group Members

First Name	Last Name	Email	Invite to Group	
			Applicant View Only	Invite User

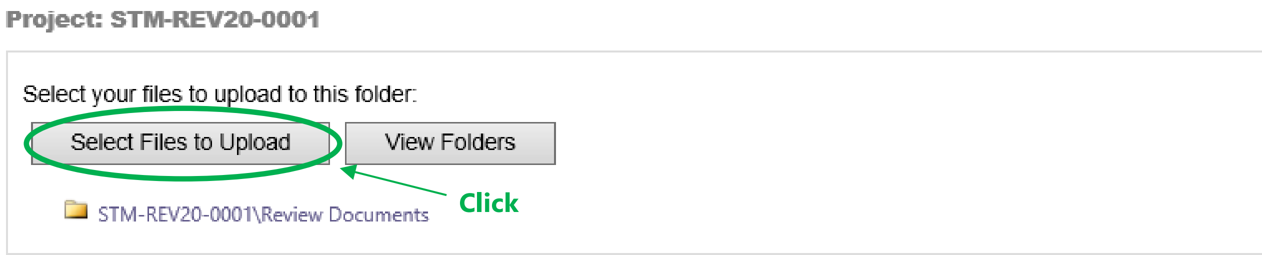
Remove Group Members

Remove from Group	User	
Applicant View Only		Remove User

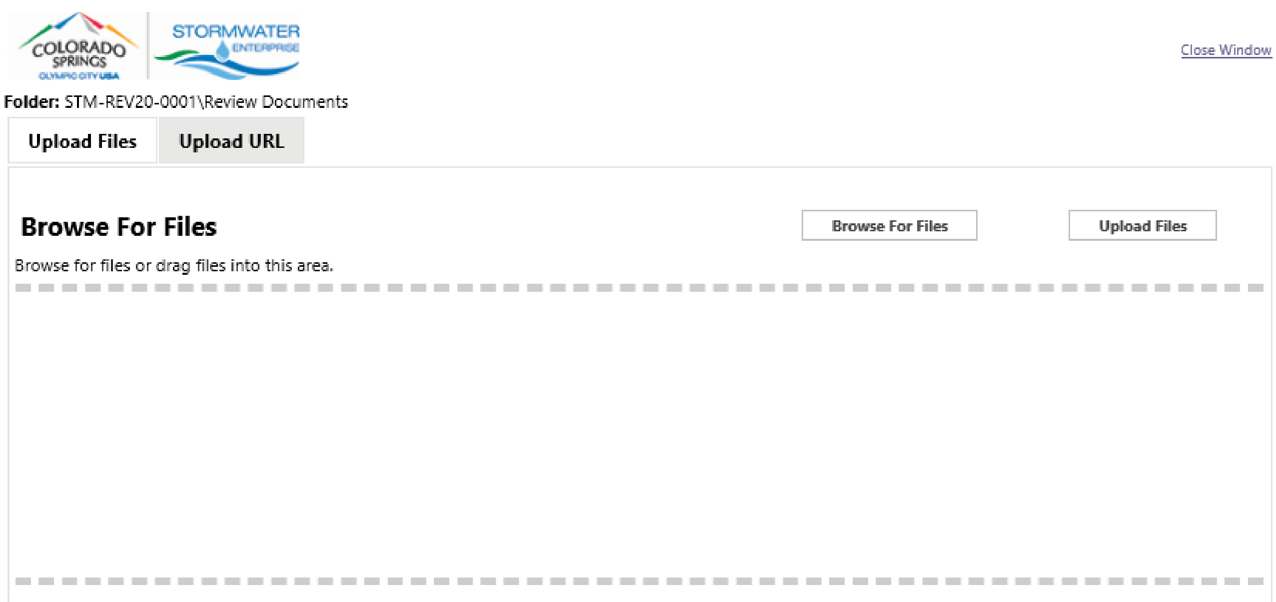
☐ Upload Task Complete (I have uploaded all required drawings and/or documents)

Upload Complete - Submit | Save For Later

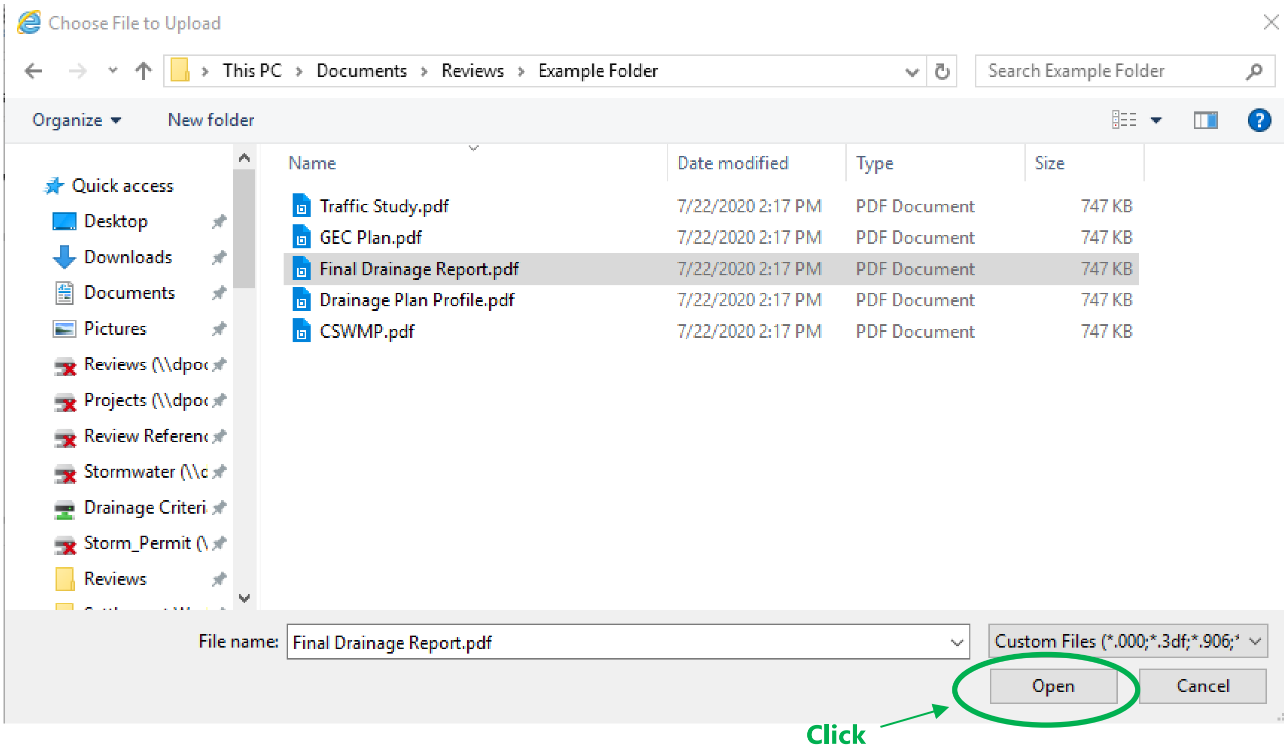
3. Click **Select Files to Upload**. A popup window will open.



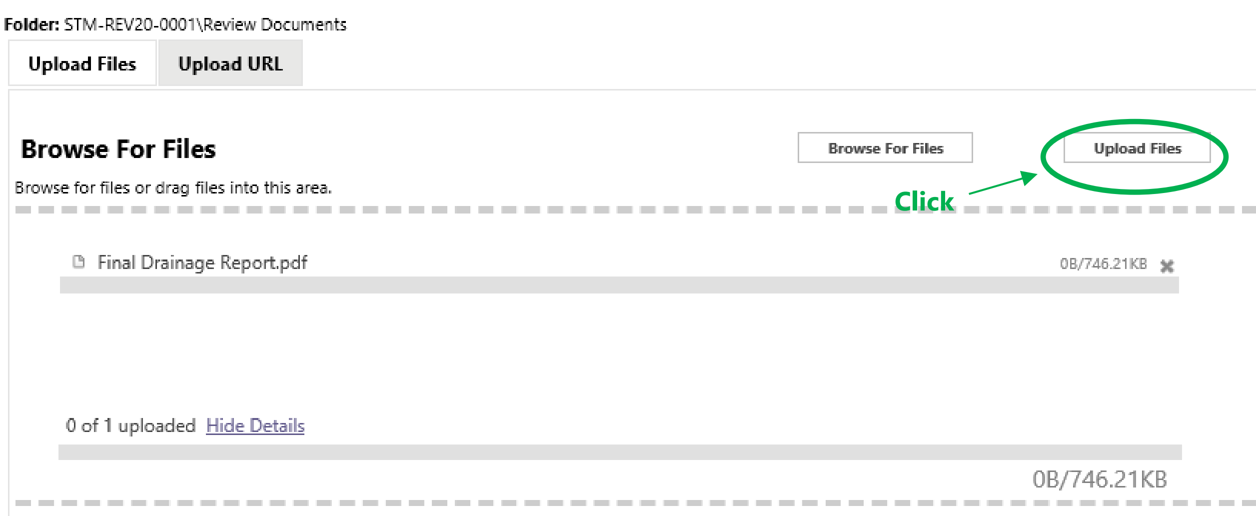
4. In the upload files window, click **Browse for Files**. A popup window will open. The Upload Files Tab must be selected.



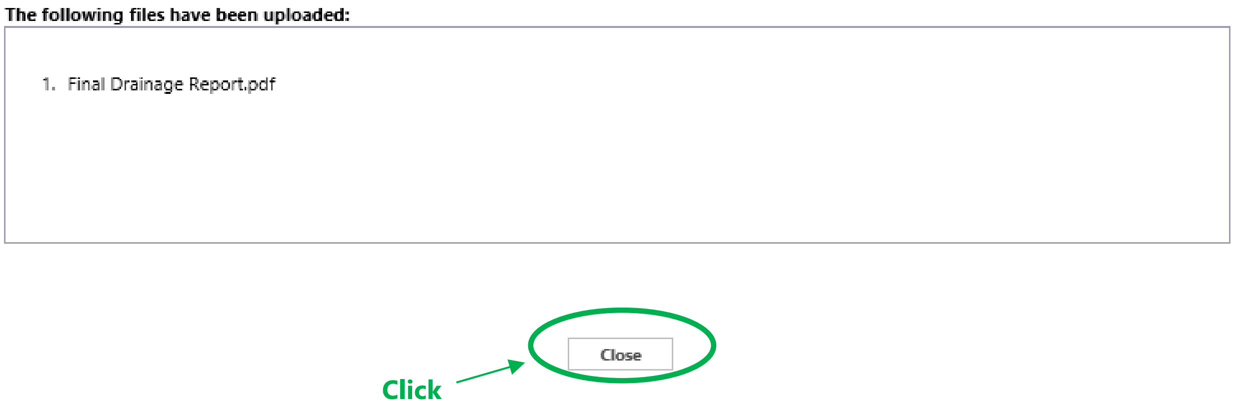
5. Navigate to desired folder, select document for review, and click **Open**. Make sure the naming requirements in Section 4.2 are followed.



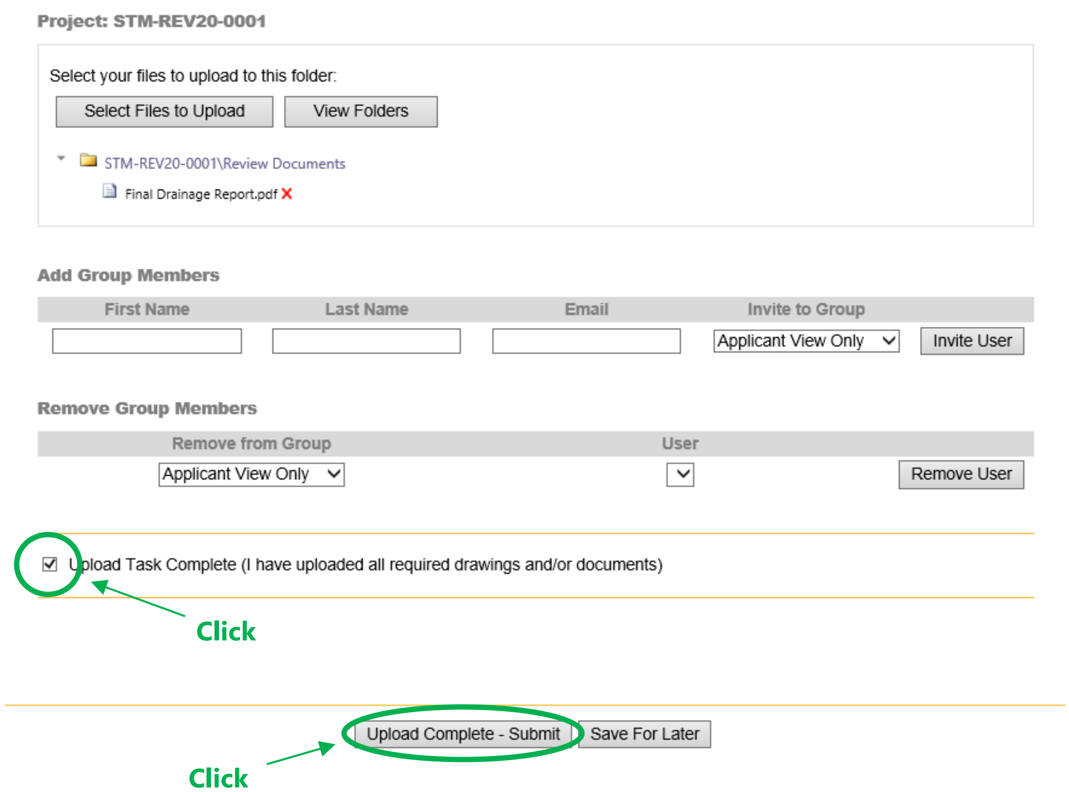
6. Click **Upload Files**.



7. Click **Close** to close the window. Return to the Upload and Submit window.



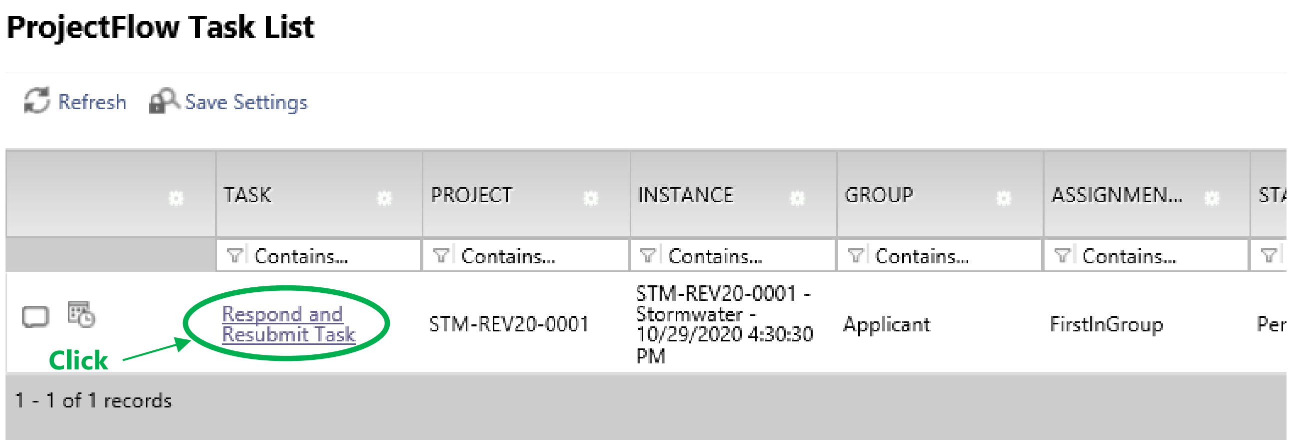
8. The uploaded file will be displayed in the Review Documents folder. Select Upload Task Complete, and then click **Upload Complete – Submit** and click Yes or Ok in the popup window. This completes the task. A confirmation email will be sent to the applicant email address on file.



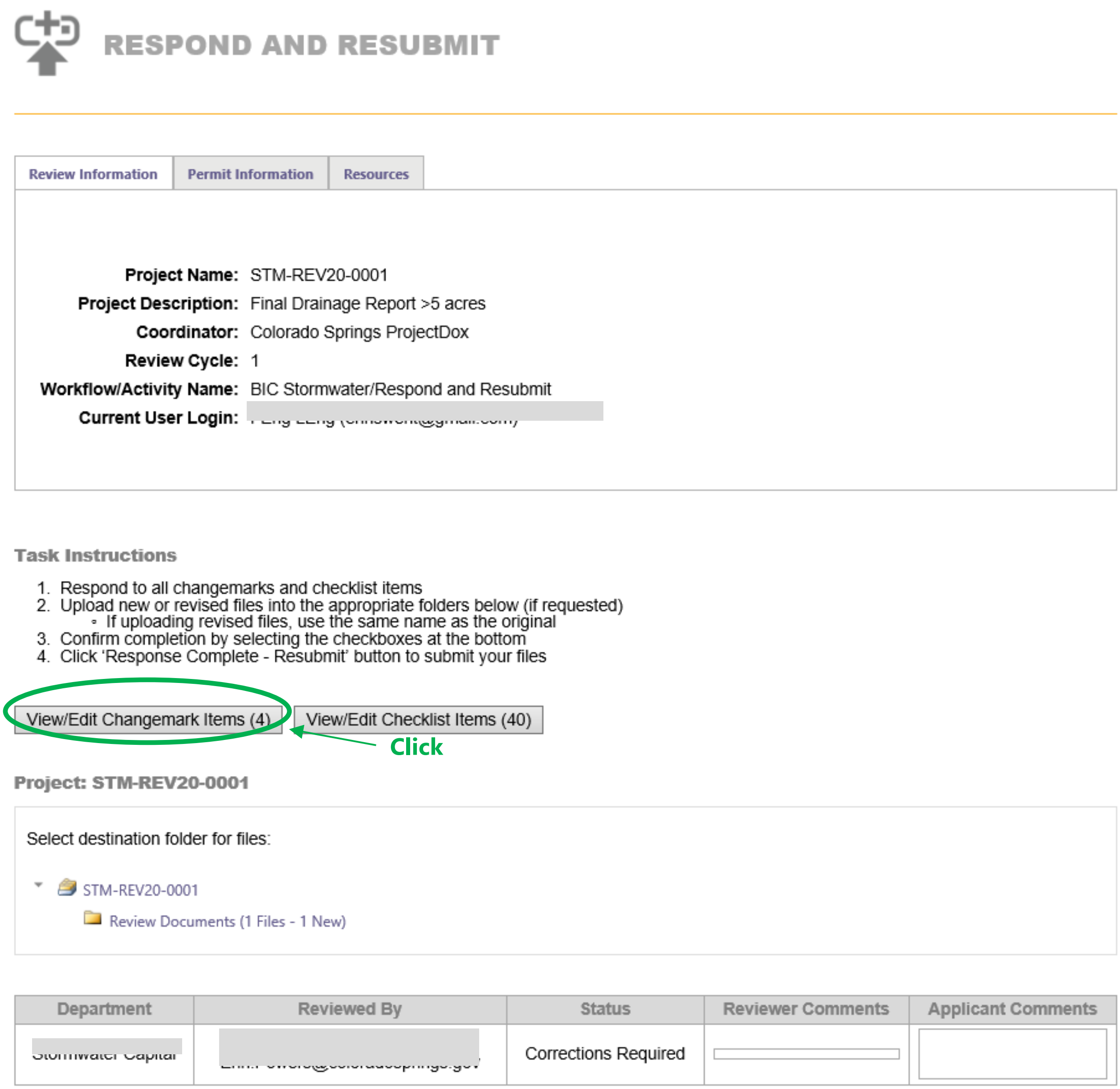
5.3 Respond and Resubmit Task

After a review cycle has been completed, applicants will receive an email notifying them to complete the Respond and Resubmit task.

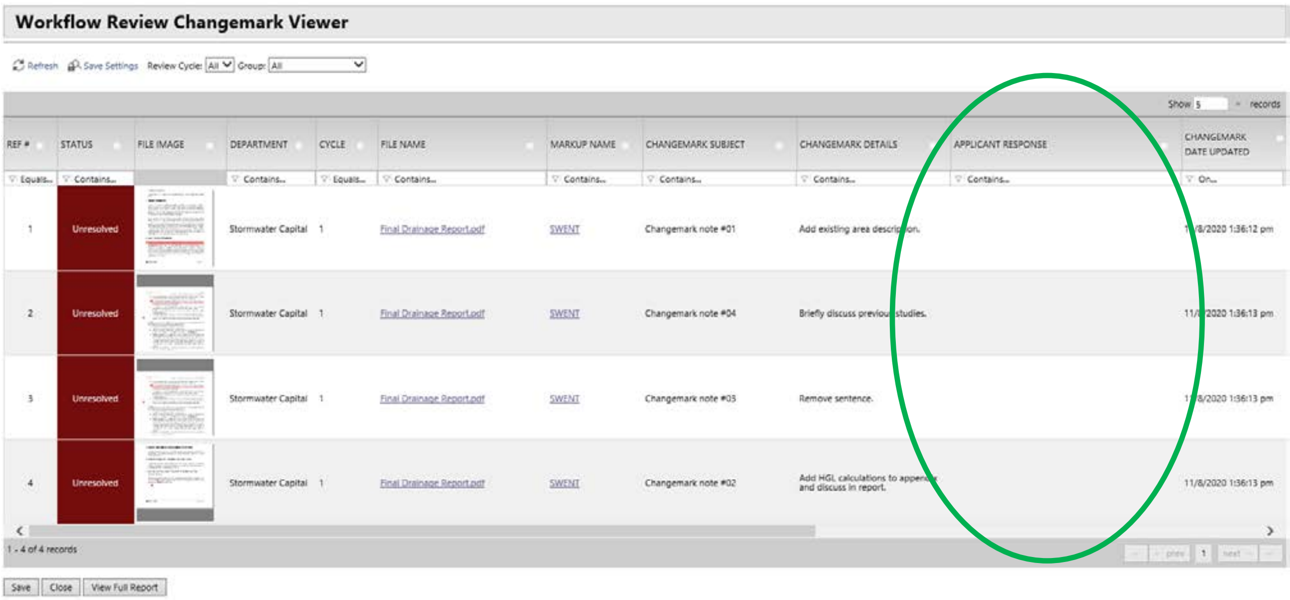
1. In the ProjectFlow Task List, click on **Respond and Resubmit Task** and click Ok in the popup window to accept the task. The task will open in a new window.



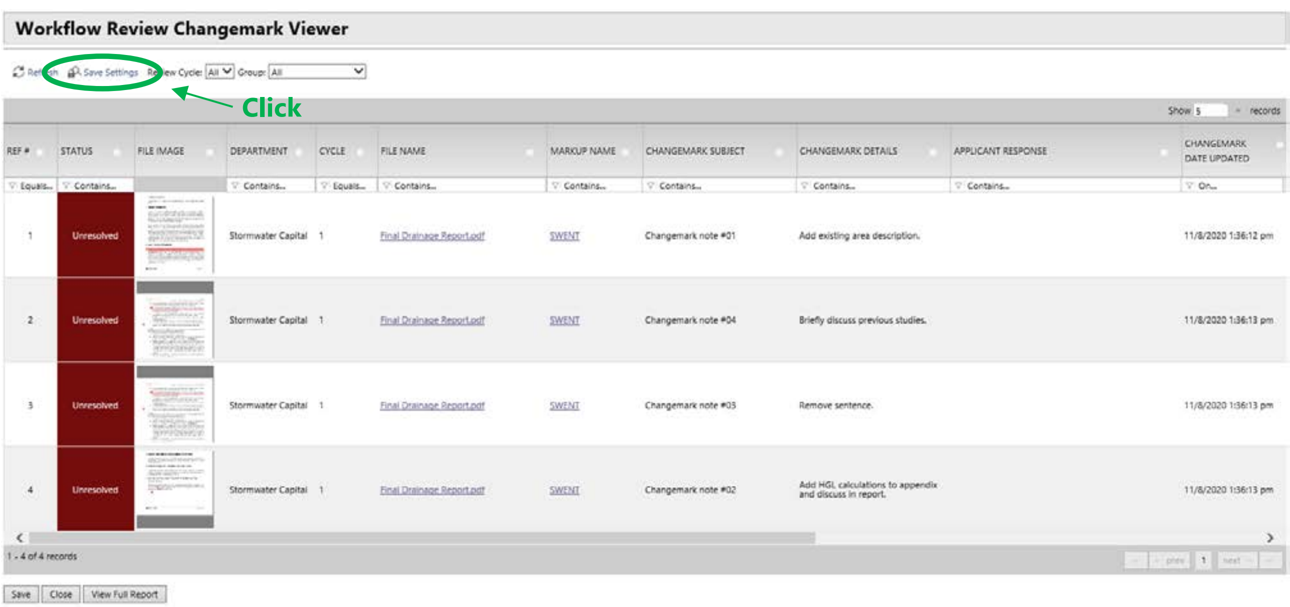
2. In the Respond and Resubmit window, the user can view changemark items (comments) and checklist items made by reviewers. The user can also see which departments were involved in the review, and what the status is for each of the departmental reviews. To view changemark items (comments), click on the **View Changemark Items** box. A new window will open.



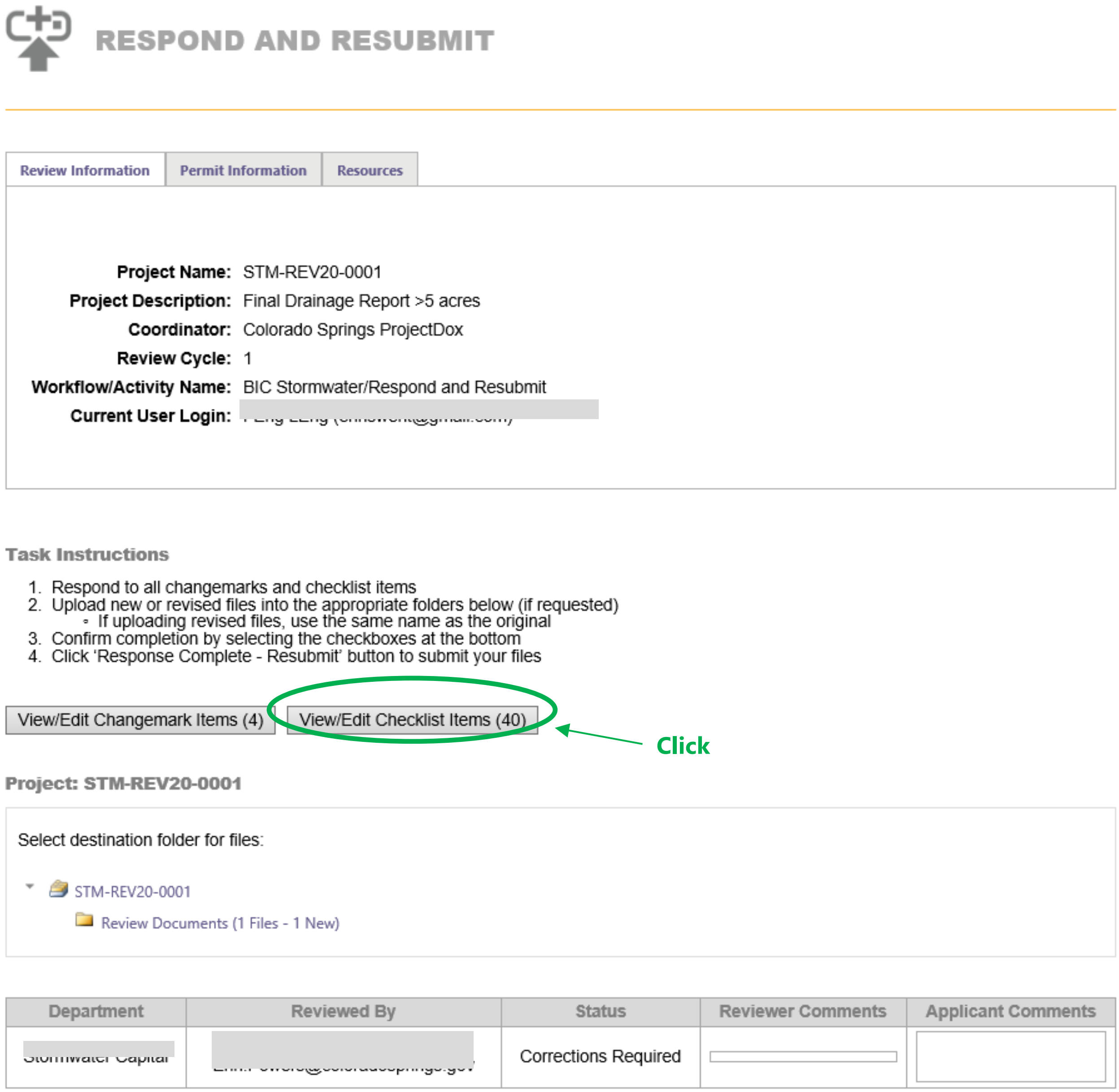
3. To respond to changemarks (comments), scroll over to the right in the table and fill out the applicant response column. While this is not required, it is encouraged when additional explanation would be helpful.



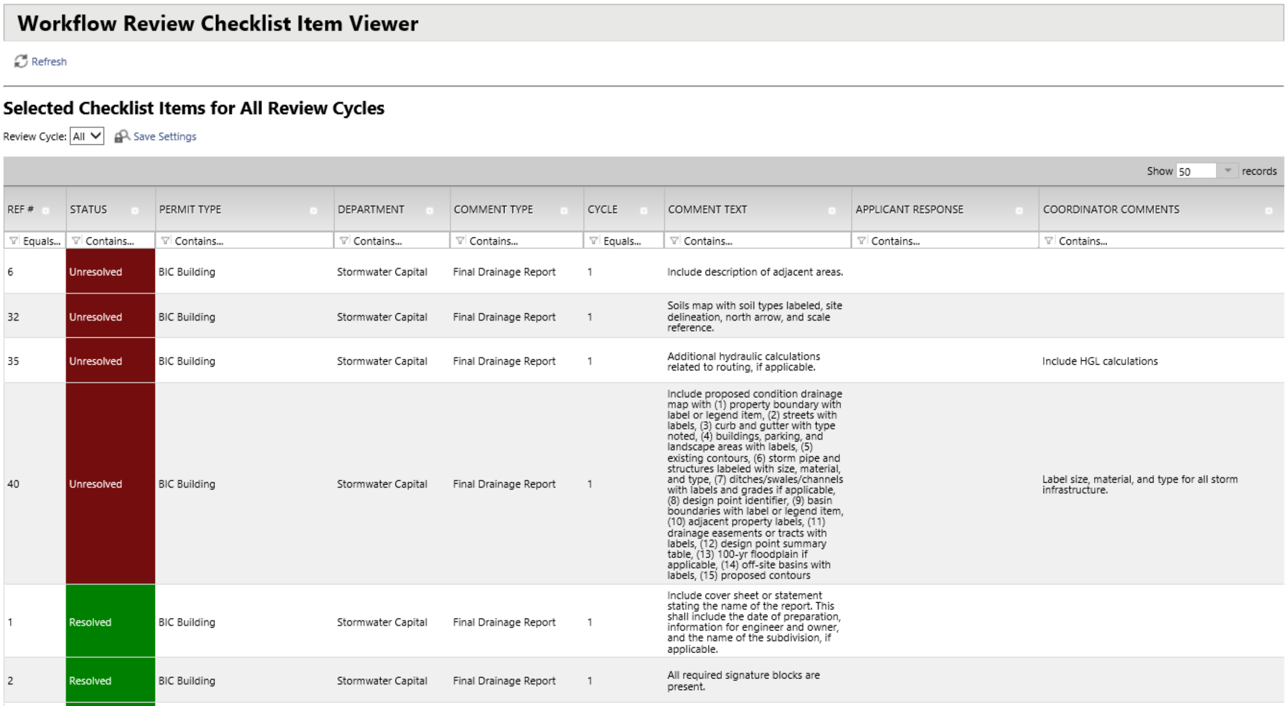
4. Note that columns can be reordered and resized as needed. To save column settings, click save settings.



5. To view checklist items, click on the **View Checklist Items** box in the Respond and Resubmit window. A new window will open.



6. To respond to checklist items, scroll over to the right in the table and fill out the applicant response column. While this is not required, it is encouraged when additional explanation would be helpful. Note that columns can be resized and reordered as needed. See Step 4 for more information.


Workflow Review Checklist Item Viewer

Refresh

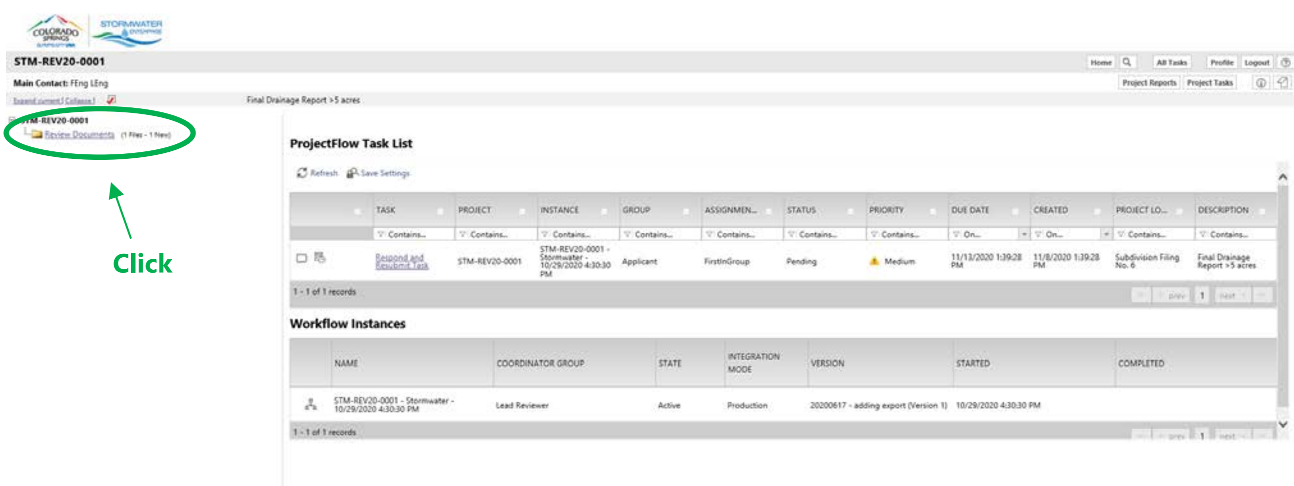
Selected Checklist Items for All Review Cycles

Review Cycle: All Save Settings

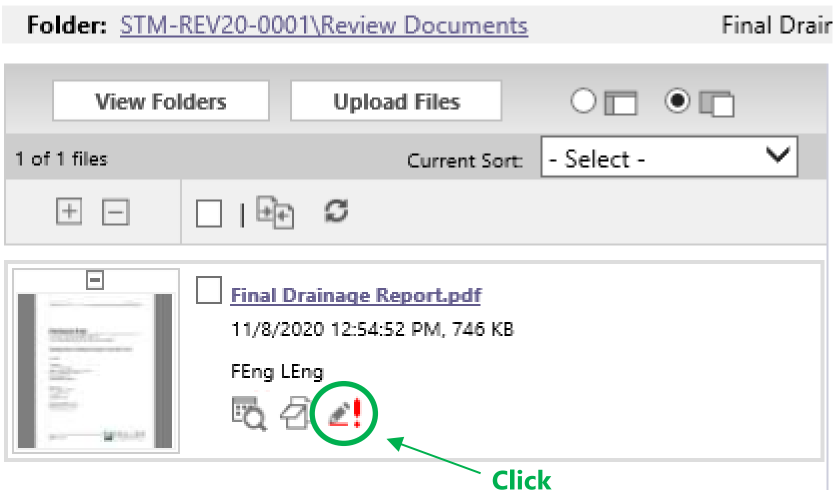
Show 50 records

REF #	STATUS	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS
Equals...	Contains...	Contains...	Contains...	Contains...	Equals...	Contains...	Contains...	Contains...
6	Unresolved	BIC Building	Stormwater Capital	Final Drainage Report	1	Include description of adjacent areas.		
32	Unresolved	BIC Building	Stormwater Capital	Final Drainage Report	1	Soils map with soil types labeled, site delineation, north arrow, and scale reference.		
35	Unresolved	BIC Building	Stormwater Capital	Final Drainage Report	1	Additional hydraulic calculations related to routing, if applicable.		Include HGL calculations
40	Unresolved	BIC Building	Stormwater Capital	Final Drainage Report	1	Include proposed condition drainage map with (1) property boundary with label or legend item, (2) streets with labels, (3) curb and gutter with type noted, (4) buildings, parking, and landscape areas with labels, (5) existing contours, (6) storm pipe and structures labeled with size, material, and type, (7) ditches/swales/channels with labels and grades if applicable, (8) design point identifier, (9) basin boundaries with label or legend item, (10) adjacent property labels, (11) drainage easements or tracts with labels, (12) design point summary table, (13) 100-yr floodplain if applicable, (14) off-site basins with labels, (15) proposed contours		Label size, material, and type for all storm infrastructure.
1	Resolved	BIC Building	Stormwater Capital	Final Drainage Report	1	Include cover sheet or statement stating the name of the report. This shall include the date of preparation, information for engineer and owner, and the name of the subdivision, if applicable.		
2	Resolved	BIC Building	Stormwater Capital	Final Drainage Report	1	All required signature blocks are present.		

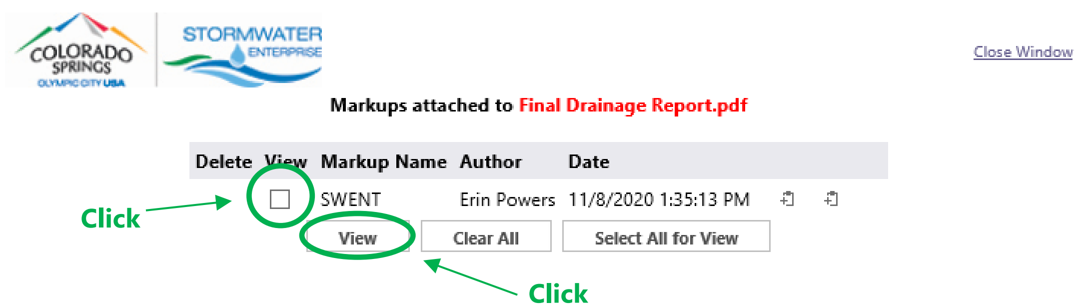
7. To view and download a full markup, return to the Project window in ProjectDox. Click on the **Review Documents** folder.



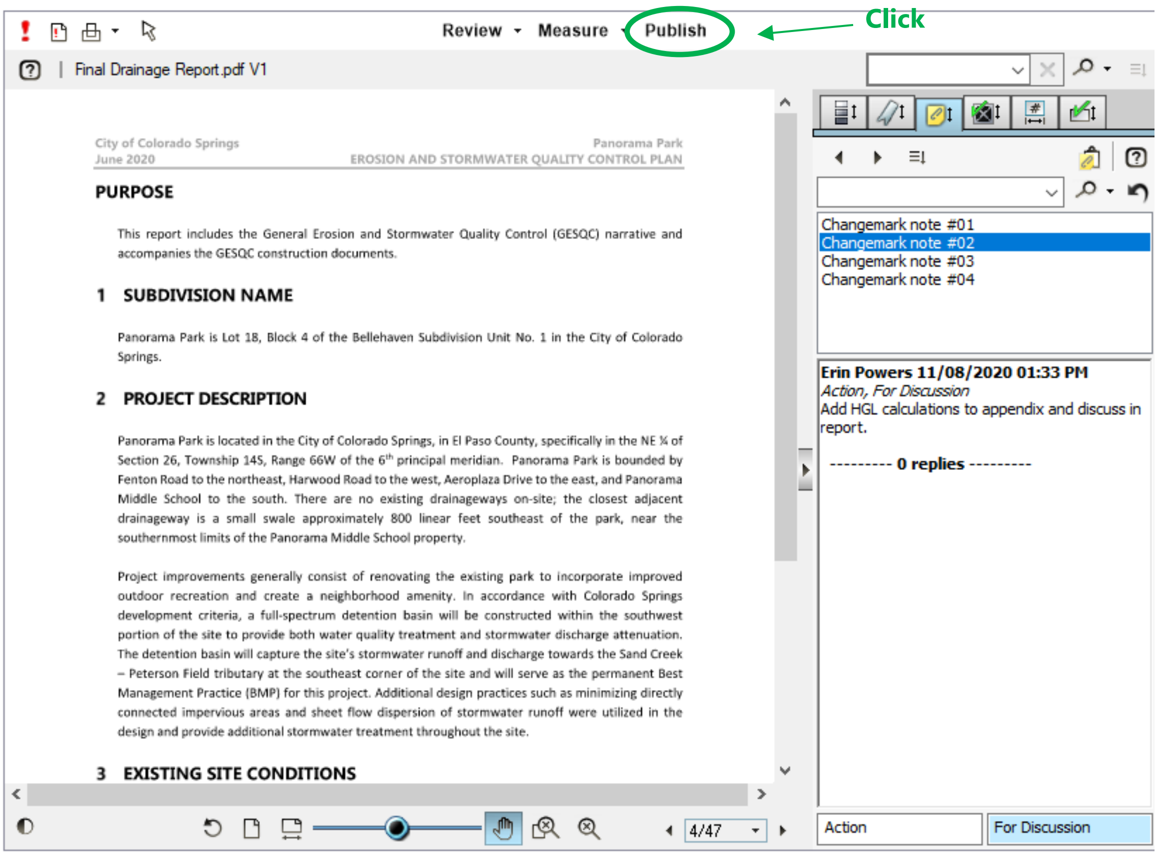
8. Click on the markups button. A new window will open.



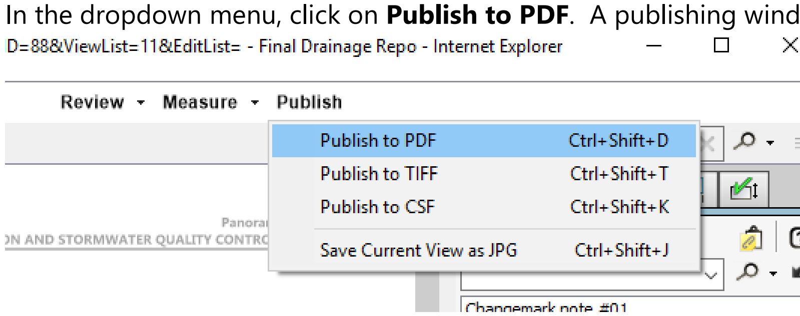
9. Select the View box for each markup, then click **View**. Often, there will only be one markup to view. A view markup window will open.



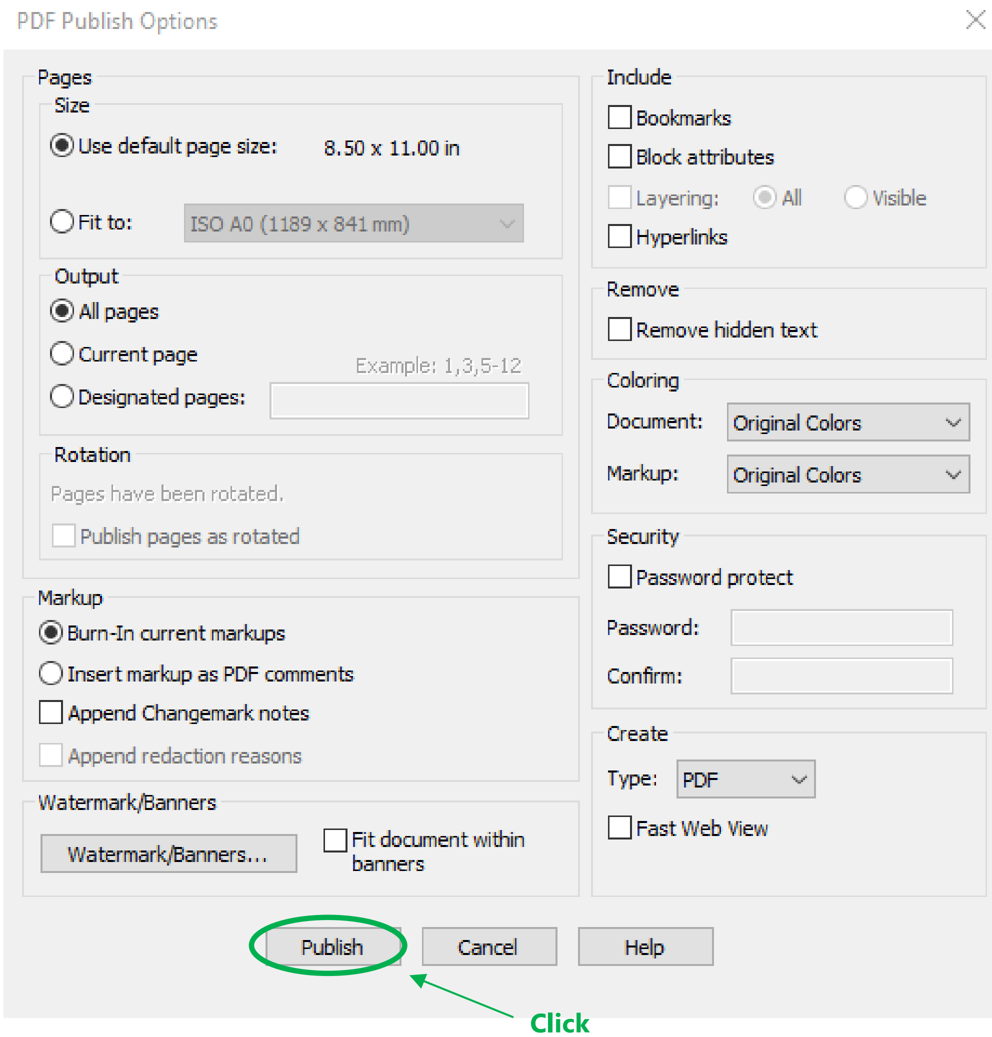
10. In the view markup window, the user has the option to view all changemarks (comments) in the viewer, or to download the markups as a pdf. To download the markups, click on **Publish**.



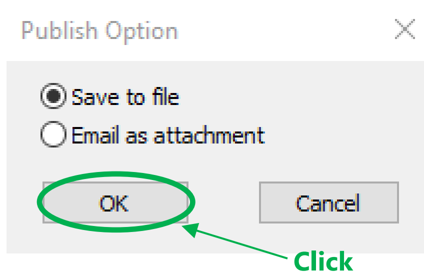
11. In the dropdown menu, click on **Publish to PDF**. A publishing window will open.



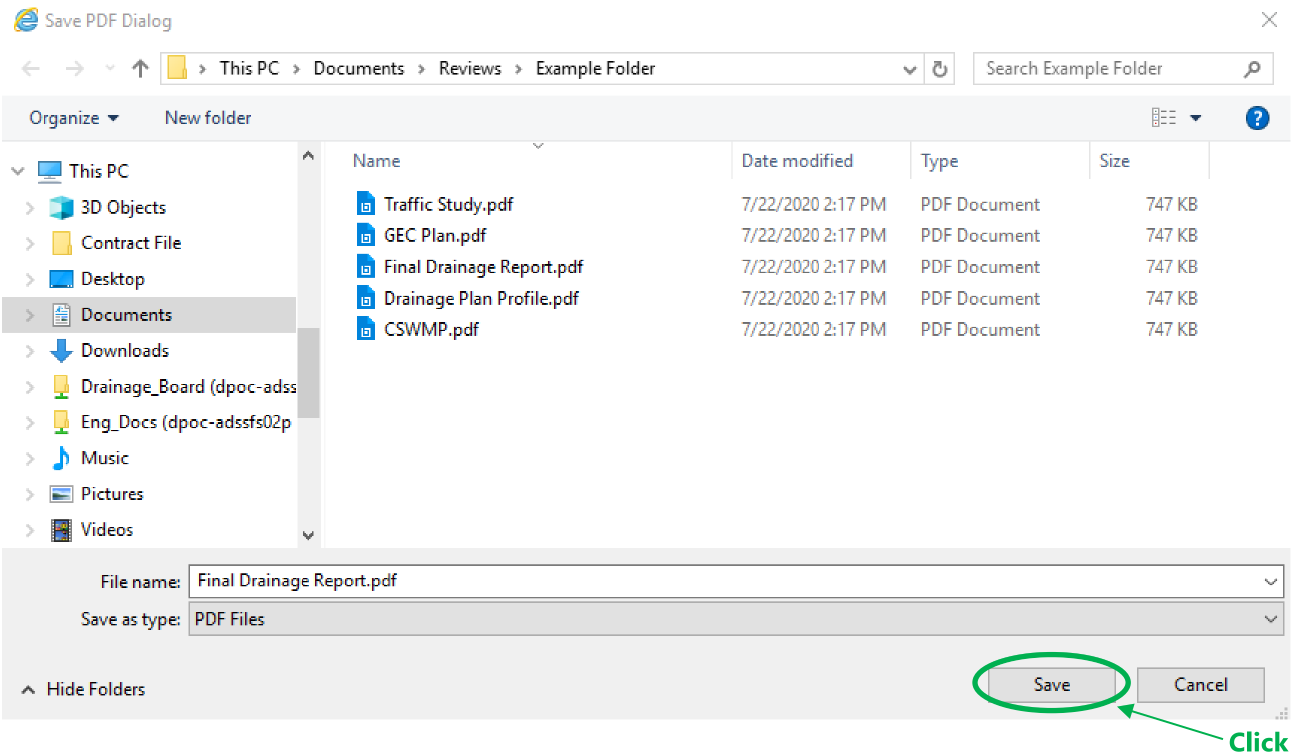
12. Select options from the publishing window as needed, and then click on **Publish**. Normally, the default settings will work.



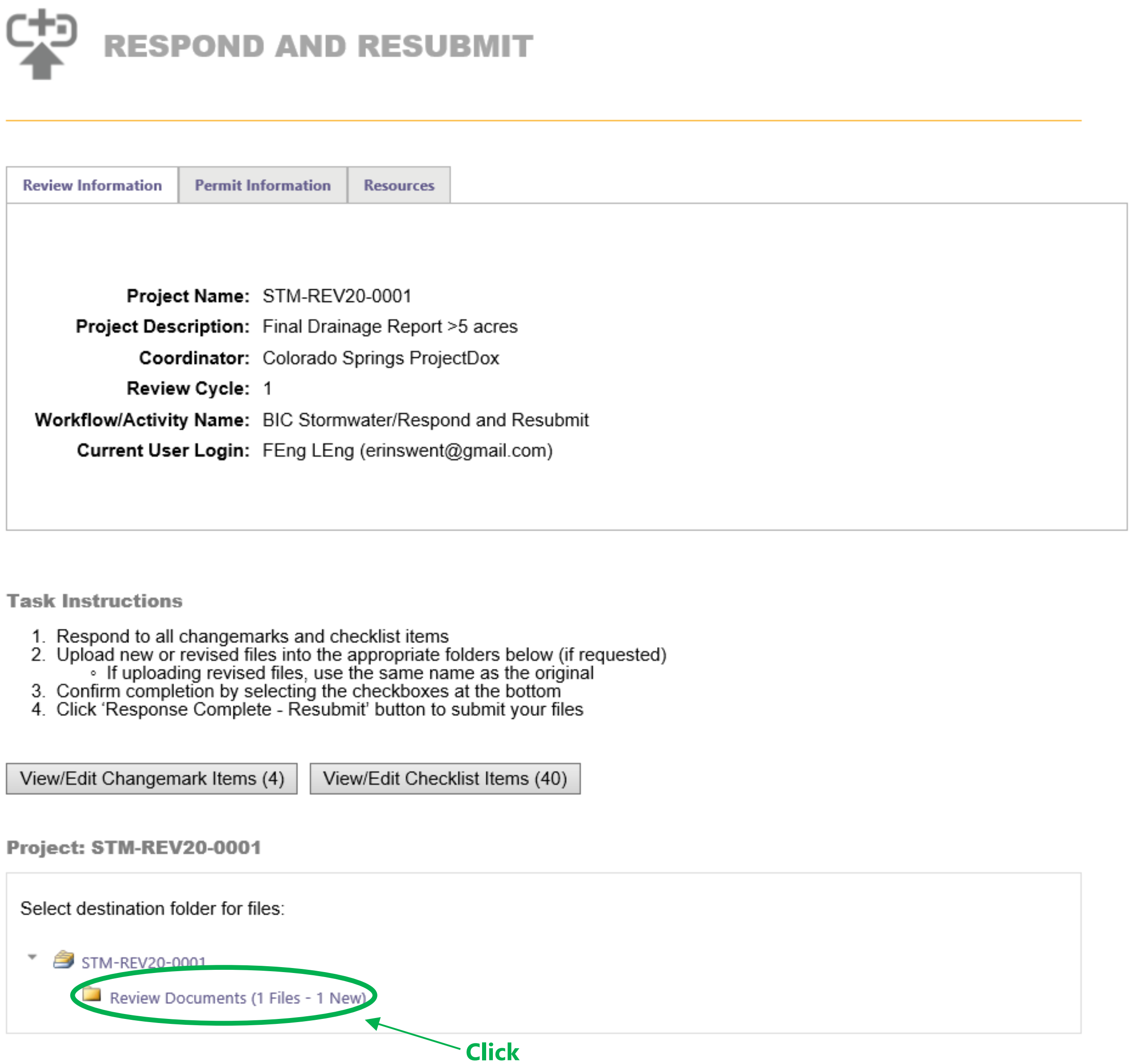
13. After the publisher has completed, click **OK**.



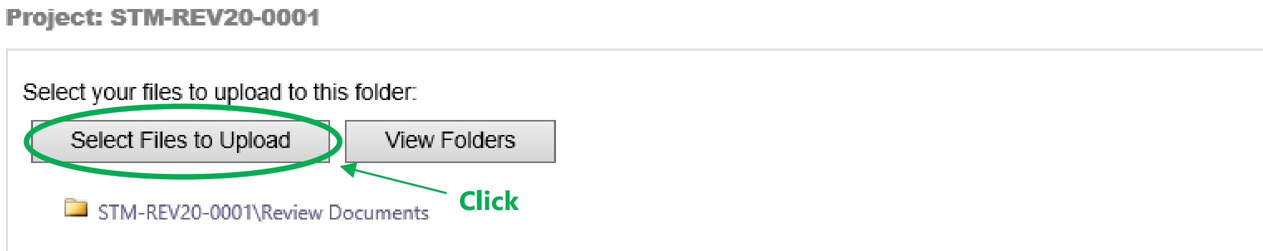
14. Name the markups file, navigate to the desired folder, and click **Save**.



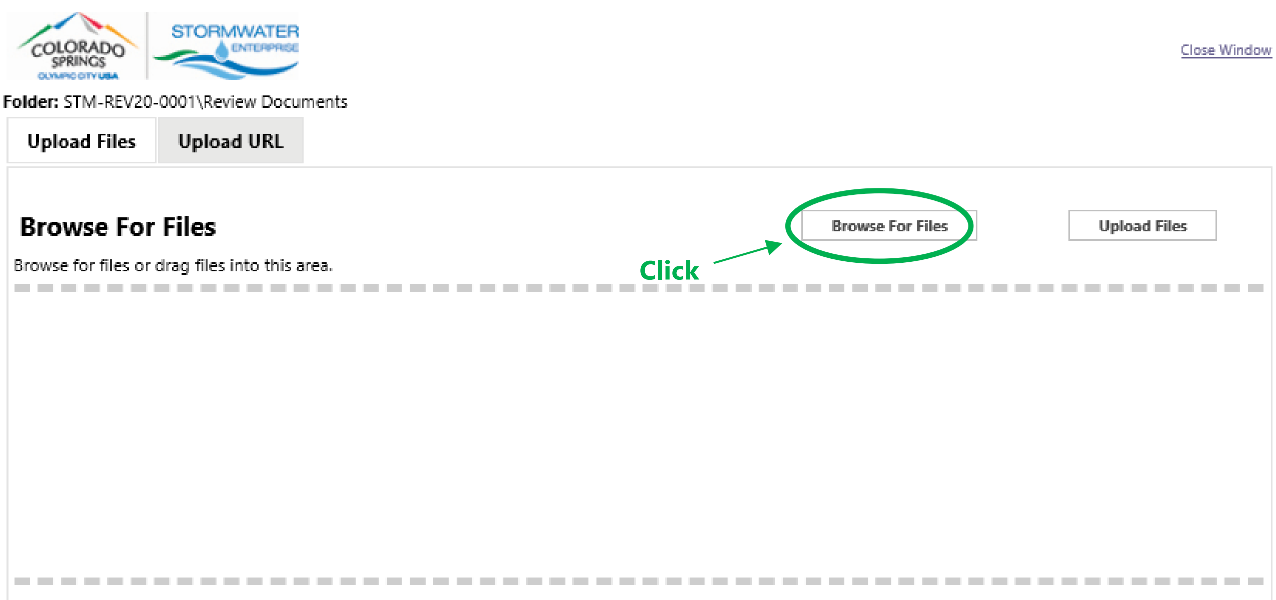
15. Return to the Revise and Resubmit window. After addressing all changemarks (comments) and checklist items as needed, upload a revised version of the document. Make sure the revised document name matches the original document name. To upload a file, click on the **Review Documents** folder.



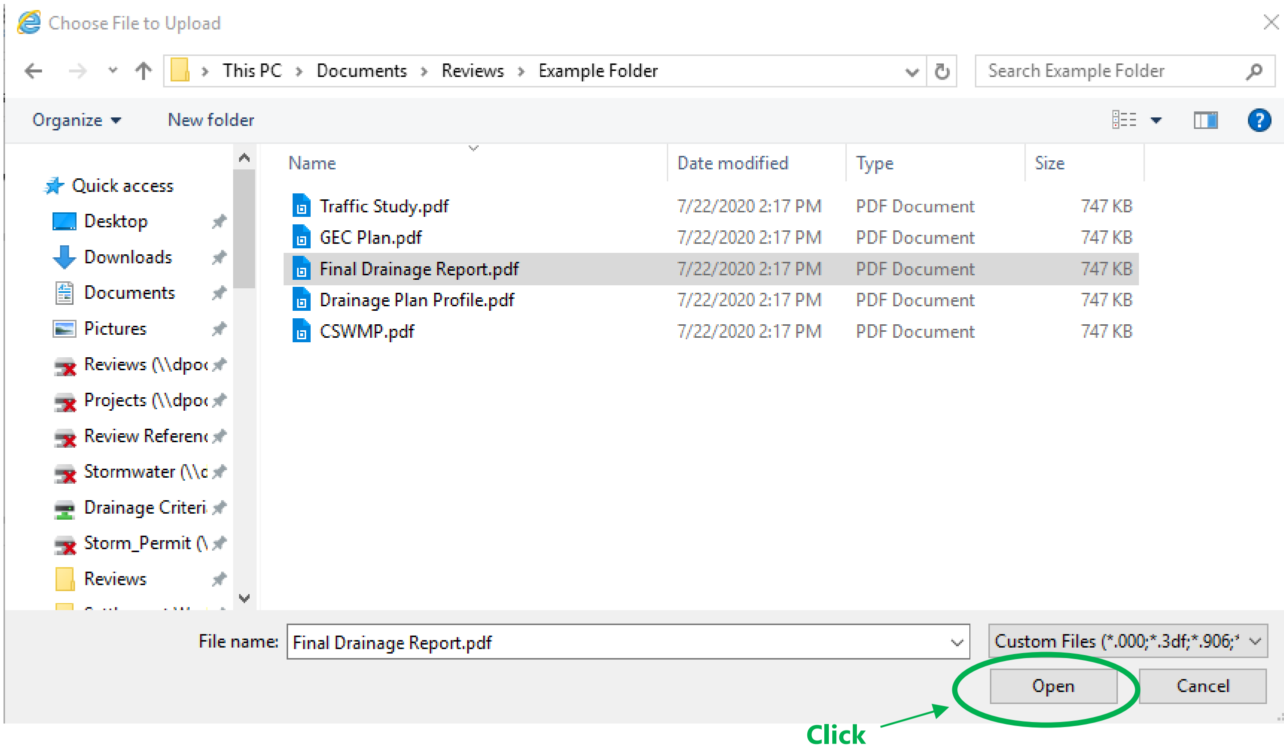
16. Click **Select Files to Upload**. A popup window will open.



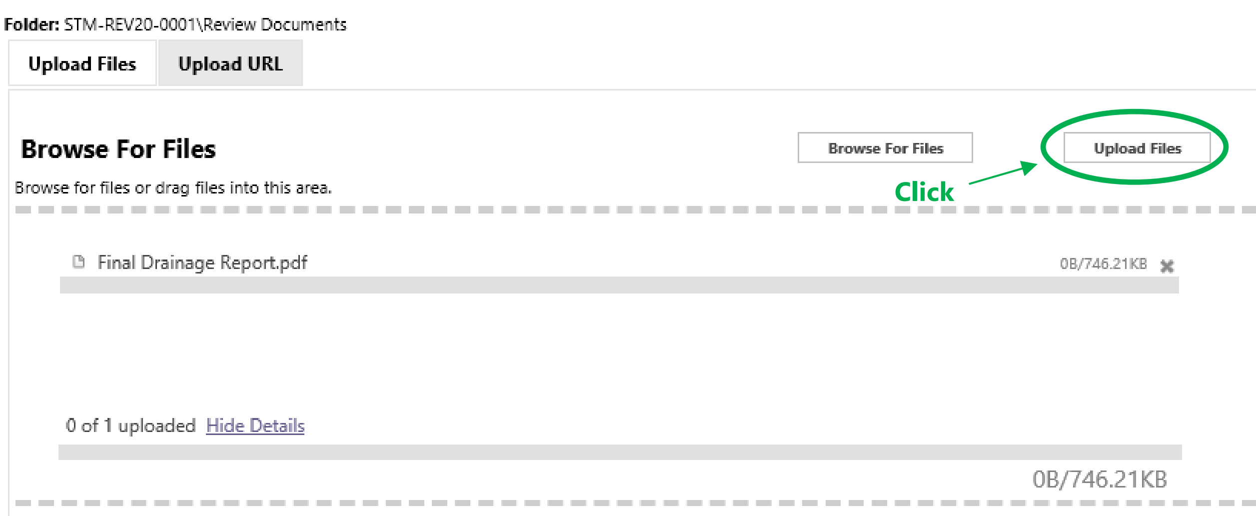
17. In the upload files window, click **Browse for Files**. A popup window will open. The Upload Files Tab must be selected.



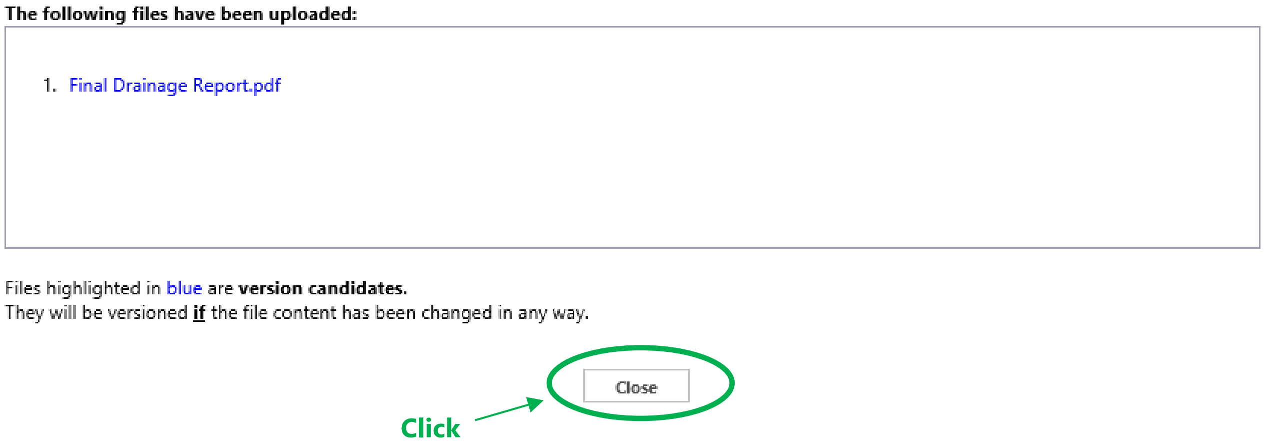
18. Navigate to desired folder, select document for review, and click **Open**. Make sure the naming requirements in Section 4.2 are followed.



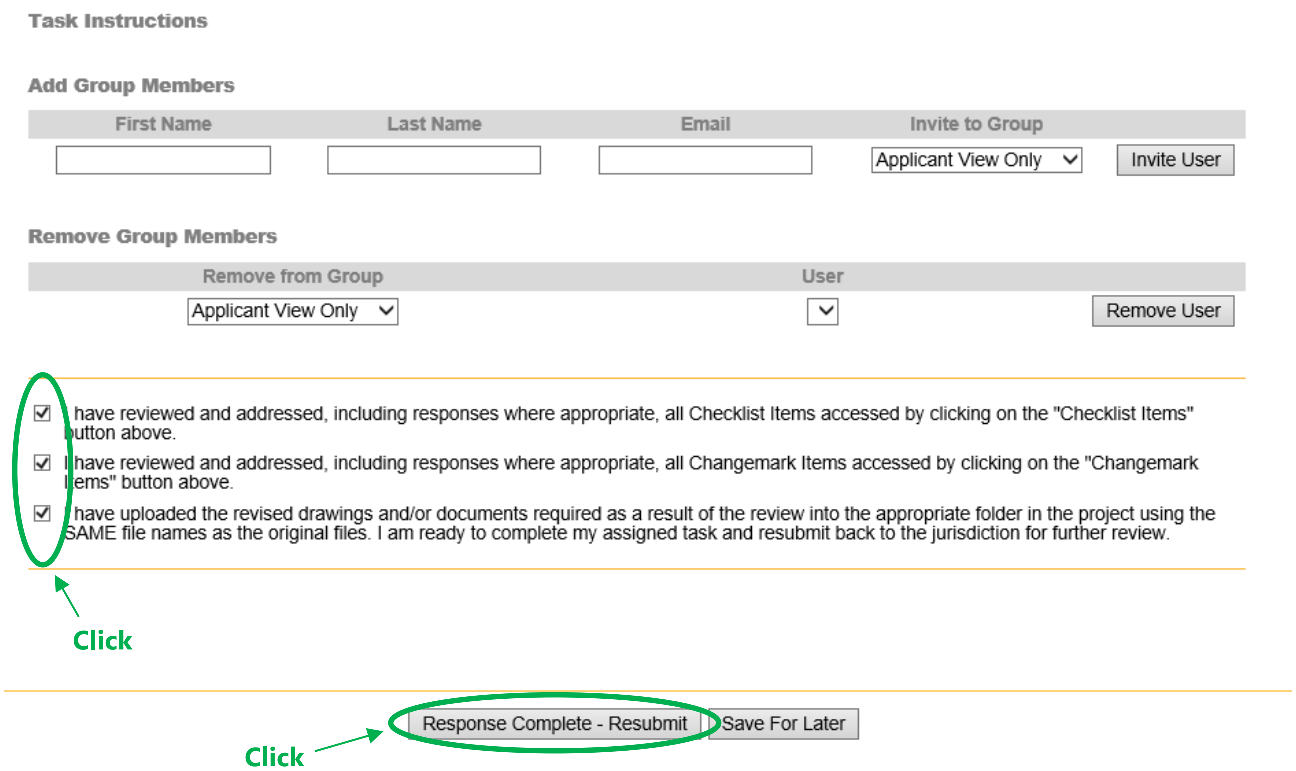
19. Click **Upload Files**.



20. Make sure the new document shown in blue. If the document is not shown in blue, revise the name and re-upload the file. Click **Close** to close the window. Return to the Revise and Resubmit window.



21. In the Revise and Resubmit window, select all three statements, click **Response Complete – Resubmit**, and click Yes or Ok in the popup window. This completes the task. A confirmation email will be sent to the applicant email address on file.



5.4 Final Payment Task

After all comments have been addressed, and applicant will receive a Final Payment task and email if additional fees are due to complete the review. This task is not required for all projects.

1. In the ProjectFlow Task List, click on **Final Payment Task** and click Ok in the popup window to accept the task. The task will open in a new window.

ProjectFlow Task List

Refresh Save Settings

	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMEN...	STATUS
	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
	Final Payment Task	STM-REV20-0001	STM-REV20-0001 - Stormwater - 10/29/2020 4:30:30 PM	Applicant	FirstInGroup	Pending

1 - 1 of 1 records

2. Navigate to the Final Payment Task email. Click on the payment link in the email, then make the payment in Accela (additional information will be added to this section – contact the Review Engineer for assistance).

3. In the Final Payment window, select the statement indicating fees have been paid, click on **Complete**, and click Yes or Ok in the popup window. This completes the task. A confirmation email will be sent to the applicant email address on file.

FINAL PAYMENT

Review Information | Permit Information | Resources

Project Name:	STM-REV20-0001
Project Description:	Final Drainage Report >5 acres
Coordinator:	Colorado Springs ProjectDox
Review Cycle:	2
Workflow/Activity Name:	BIC Stormwater/Final Payment
Current User Login:	FEng LEng (erinswent@gmail.com)

Task Instructions

1. Pay all final fees
2. Respond to discussion board comments
3. Confirm completion by selecting the checkbox at the bottom
4. Click 'Complete' to submit for verification

Discussion Comments

Add Comment

Show 5 records

DISCUSSION COMMENT	PARTICIPANT	DATE/TIME

0 - 0 of 0 records   prev 1 next

☑ All fees have been paid, current balance is $0.

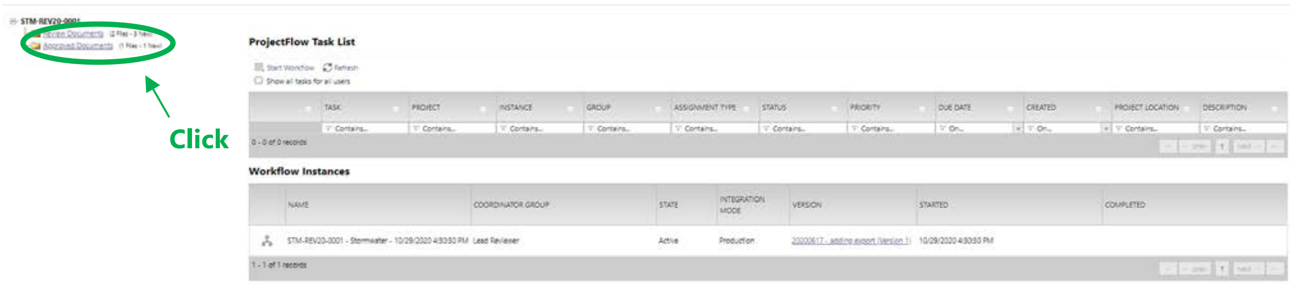
Complete   Save For Later

Click   Click

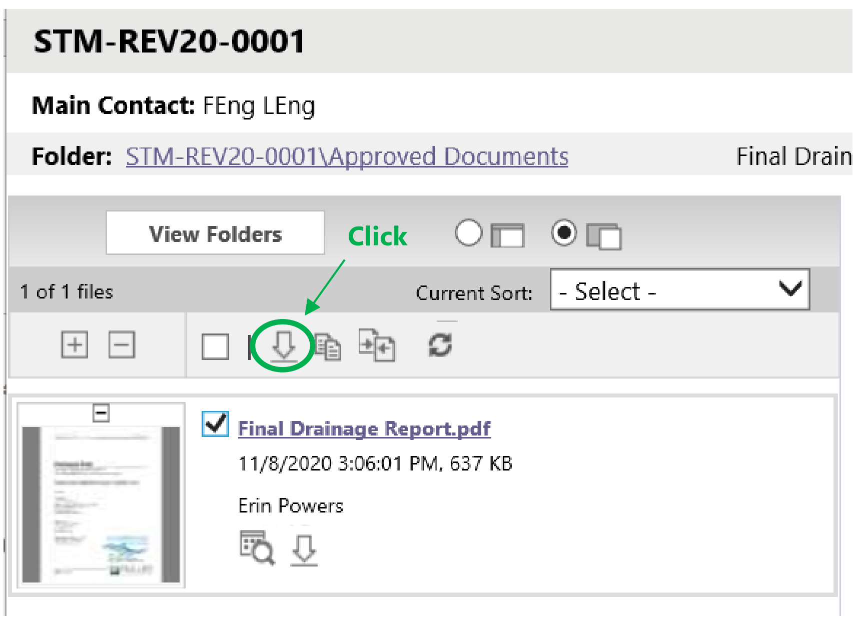
5.5 Download Approved Document

After a document has been approved, the applicant is sent an email. The following steps describe how to download an approved document.

1. Navigate to the project and open the **Approved Documents** folder.



2. In the Approved Documents folder, select the file you wish to download and click the either of the download buttons.



3. All approved documents will have stamps indicating approval. Save the approved document in the desired location. This completes the review process.