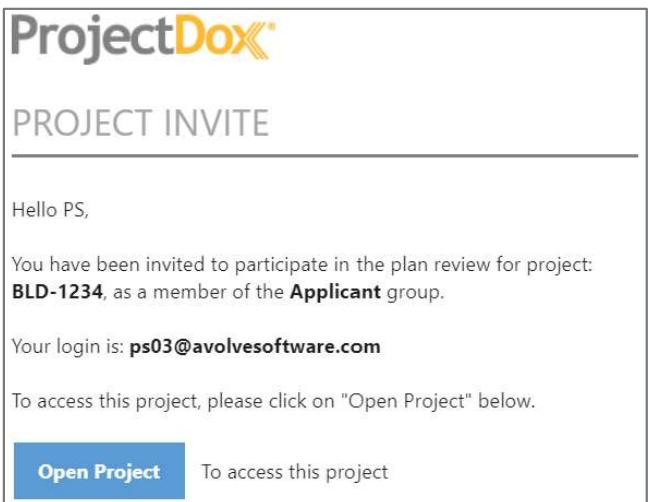


# APPLICANT QUICK GUIDE

This document is a high-level quick reference guide. It is not intended to replace training or provide in-depth instruction.

## Access to ProjectDox

Once the project has been created you will receive an email notification containing a link to the project.



If this is your first time logging in, you will receive an additional email with a verification code that is required to set up your account.

## Initial Login to ProjectDox

Click the **Login** button and enter the Verification Code from the email. Click **Continue**.

A screenshot of a login verification screen. It has a text input field for 'Verification Code \*' and a placeholder text 'Enter the verification code that you received via email to complete the account verification process.' Below the input field are two buttons: 'Continue' and 'Resend Code'.

Fill in the required information, including your new password. Click **Create My Account**.

A screenshot of the 'Create Your Account' form. The form is dated 'March 2, 2021'. It contains fields for First Name, Last Name, Email, Confirm Email, Phone, Additional Phone, Company Name, Address 1, Address 2, Country (with 'United States' selected), Province/State, City, Postal Code/Zip Code, New Password (with a note about password requirements: 'Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@!%\*#?&. Password length: 10-15 characters.'), and Confirm Password. At the bottom are 'Create My Account' and 'Cancel' buttons.

# APPLICANT QUICK GUIDE

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## Key Concepts You Need to Know

**Workflow:** Sequential set of business activities starting from Upload and Submit to downloading the approved plans.

**Task:** An assignment in the workflow process.

**eForm:** Online electronic form designed to capture, validate, and submit data.

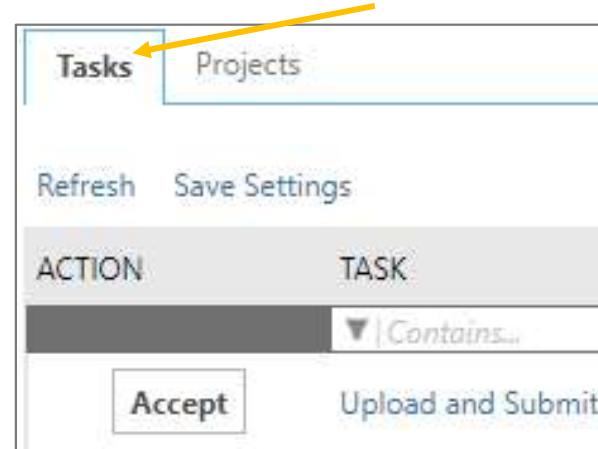
**Accepting a Task:** Accepting a task is an important part of the electronic plan review process. Accepting a task provides access to that task's eForm. The user who accepts the task is responsible for completing the associated actions, including uploading files and making necessary corrections requested by the jurisdiction.

**Completing a Task:** The completion of a task confirms the fulfillment of the requested actions. Completing a task is the only way the jurisdiction will receive notification that you are finished. Once a task is complete no further work may be done until another task is received and accepted.

## Upload and Submit

You will receive an email with a link to start your Upload and Submit task. Click **Start Task** within the email to open the ProjectDox login screen in your browser. Once logged in, your task eForm will open.

You can also accept the task and open the eForm by clicking on **Accept** or the Upload and Submit link on the Home Page Tasks tab.



Review the submittal requirements as outlined by the jurisdiction and upload to the appropriate folder(s).

# APPLICANT QUICK GUIDE

## Step 1: To Upload, select the desired folder.

**Task Instructions** [Learn how](#)  
Please follow the steps below:

**STEP 1 of 3:** Select and upload your drawing and supporting document files into this project, as required

File Upload for: BLD - 1234 [?](#)

Please click appropriately for the **type of files** you are uploading. [Learn how](#)

[Upload Drawings](#) [Upload Documents](#)

Uploaded files:

No files uploaded yet.

Click Browse for **Files** or drag files into the upload window. Click **Start Upload**. This step may be repeated to add additional files.



## Step 2: Confirm all files have been upload.

**STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit

Confirmation [?](#)

\*All files for this project have been uploaded \*Required

## Step 3: Complete your task by clicking Submit.

**STEP 3 of 3:** Click the "Submit" button below to complete your task

[Submit](#) [Save for Later](#)

Receipt of your upload will be confirmed by email.

**UPLOAD COMPLETED**

Hello PS,

The following files have been received for project -  
**BLD-1234 : Corner Shop**

Files received:

1. A1-01 First Floor Plan.pdf
2. E-01 Utility.pdf
3. L-01 Grading.pdf

# APPLICANT QUICK GUIDE

## Prescreen Corrections

If corrections are needed, you will receive an email notification for the Prescreen Corrections task. Click **Start Task** from your email or login to ProjectDox and accept the task.

**PRESCREEN CORRECTIONS**

Hello PS,

You have a task to complete to continue your plan review.

Unfortunately, your uploaded files submission has not met prescreen acceptance requirements.

**TIP: Getting through Prescreen**  
Please review all submission requirements and use "Add Comment" in Discuss Prescreen if you have any questions or comments.

To review and resubmit, please click on "Start Task" below.

**Start Task** To submit your updates for **BLD-1234 : Corner Shop**

**Step 1: Respond to comments** provided by the jurisdiction. A summary of the number of comments will be listed. Click **Review Comments**.

**STEP 1 of 4:** Respond to any comments, as needed

**Resolve Review Comments** 

**Unresolved Comments:** 1  
**Info Only Comments:** 0  
**Files with Markups:** 0

**Plan Review:** **Review Comments**

Review and respond to the comments.

| Add Comment / Ask Question |   |                  | Please enter your responses  |                          |
|----------------------------|---|------------------|---|--------------------------|
| Ref.# 1                    | Coordinator                                   | Preeti Schatzman | 3/9/21 5:27 PM  | Type your response here. |
| Unresolved                 | Your submission is missing storm water files. |                  |   |                          |
| Comment                    |   |                  |   |                          |
|                            |   |                  |   |                          |

After making the requested corrections, type your response in the text field box. To ask a question of the jurisdiction click **Add Comment/Ask Question**. It may be required to respond to all comments.

## Step 2: Upload New or Versioned Files.

- If there are New Files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
  - If Yes, follow the same procedures as initial upload
  - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

**Versioned Files** **New Files**

Are your updated files named exactly the **same** as the prior versions?  Yes  No [Learn how](#)

*\* "name-v2.pdf" is not an "exact" file name match to "name.pdf"*

Please click appropriately for the **type of files** you are uploading. [Learn how](#)

**Upload Drawings** **Upload Documents**

# APPLICANT QUICK GUIDE

Step 3 and 4: Confirm all requirements have been met and click Submit.

STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit

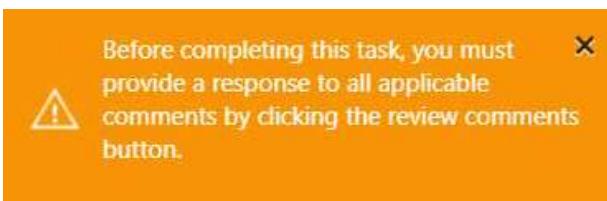
Confirmation [?](#)

\*I have completed all Prescreen requests [\\*Required](#)

STEP 4 of 4: Click the "Submit" button below to complete your task

[Submit](#) [Save for Later](#)

Note: If all review comments require a response and they have not been provided, you will see the following notification and will not be able to complete your task until required responses have been entered.



The Prescreen Corrections task can be repeated as many times as necessary until all corrections have been submitted. You will receive an email when your Prescreen review is accepted and review is beginning.

## Respond and Resubmit (Corrections Required)

After all departments have reviewed your plans, you will receive an email with instructions for your Respond and Resubmit task. Click on **Start Task** in

the email or Accept the task in ProjectDox. There are several steps to complete on the eForm, as described below:

### Step 1: Resolving Review Comments.

- Click on the **Review Comments** button on the eForm in order to access the Review Comments window

Resolve Review Comments [?](#)

Unresolved Comments: 1  
Info Only Comments: 1  
Files with Markups: 1

[Plan Review](#) **Review Comments** [Export to Excel](#) [Import Excel Responses](#)

*Review and respond online.* *Review and respond in Excel, then upload your responses.*

- View the reviewer comments and markups
- Click on file name to open the drawing with markups

| Review Comments   |  |                            |                  |                 |         |
|---|--|----------------------------|------------------|-----------------|---------|
| <a href="#">Add Comment / Ask Question</a> <b>Please enter your responses</b> <a href="#">?</a> |  |                            |                  |                 |         |
| Type your response here.  |  |                            |                  |                 |         |
| Ref.# 2   | Move door left   | Mechanical                 | Preeti Schatzman | 3/10/21 4:46 PM | Cycle 1 |
| Unresolved  |  | A1-01 First Floor Plan.pdf |                  |                 |         |
| Markup  | Door is too close to mechanical equipment  |                            |                  |                 |         |
| Ref.# 3   | Mechanical   | Preeti Schatzman           |                  | 3/10/21 4:47 PM | Cycle 1 |
| Info Only   | Make sure to do the following when re-submitting:                                    |                            |                  |                 |         |
| Comment   | <ul style="list-style-type: none"><li>Item A</li><li>Item B</li><li>Item C</li></ul> |                            |                  |                 |         |

- Add your response in the Applicant Response column

| Review Comments   |   |   |                  |                 |         |
|---|---|---|------------------|-----------------|---------|
| <a href="#">Add Comment / Ask Question</a> <b>Please enter your responses</b> <a href="#">?</a> |   |   |                  |                 |         |
| Type your response here.  |   |   |                  |                 |         |
| Ref.# 2   | Move door left                            | Mechanical                                  | Preeti Schatzman | 3/10/21 4:46 PM | Cycle 1 |
| Unresolved  |   | I have made changes and uploaded a new file |                  |                 |         |
| Markup  | A1-01 First Floor Plan.pdf                |   |                  |                 |         |
|   | Door is too close to mechanical equipment |   |                  |                 |         |

# APPLICANT QUICK GUIDE

## Step 2: Upload New or Versioned Files.

- If there are new files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
  - If Yes, follow the same procedures as Upload and Submit
  - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

The screenshot shows the 'New Files' tab selected. It includes a question about file naming, a note about file name matching, and buttons for 'Upload Drawings' and 'Upload Documents'.

## Step 3: Mark the task complete and click Submit.

The screenshot shows the 'Confirmation' step with two required checkboxes checked: 'I have responded to all review comments' and 'I have uploaded my revised files, if requested'. A yellow arrow points to the 'Submit' button.

If your resubmittal needs corrections, you will receive an email and task with required actions necessary before the subsequent review can begin.

## Final Payment

Once approved, you will receive an email notification and task for any fees due. It is your responsibility to pay all final fees per the jurisdiction's guidelines.

Mark the task complete and click **Submit**.

The screenshot shows the 'Confirmation' step with a checked checkbox for 'All fees have been paid'. A yellow arrow points to the 'Submit' button.

# APPLICANT QUICK GUIDE

## Congratulations! Approved Plans Ready for Download

You will receive an email notification directing you to download and save your approved plans.

ProjectDox®

### DOWNLOAD APPROVED FILES

Hello PS,

Congratulations, your approved plans are ready for download.

To download your approved files, click on "Download" below. You will be redirected to your Project portal and you will enter your login & password. Once logged in, a window will open prompting you to select a location on your local computer to download and save your approved plans.

**Download** To access your approved plans for **BLD-1234 : Corner Shop**

*Please do not reply to this email.*

REMINDER: The Online Help for ProjectDox is available here:

