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.

**ProjectDox**

**PROJECT INVITE**

Hello PS,

You have been invited to participate in the plan review for project: **BLD-1234**, as a member of the **Applicant** group.

Your login is: **ps03@avolvesoftware.com**

To access this project, please click on "Open Project" below.

**Open Project**  To access this 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**.

**Verification Code**

Enter the verification code that you received via email to complete the account verification process.

**Continue**  **Resend Code**

---

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

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 uploaded.

Step 3: Complete your task by clicking Submit.

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
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.

**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.

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

Review and respond to the comments.

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
APPLICANT QUICK GUIDE

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

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.

Before completing this task, you must provide a response to all applicable comments by clicking the review comments button.

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.
- View the reviewer comments and markups
- Click on file name to open the drawing with markups
- Add your response in the Applicant Response column
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.

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.

Step 3: Mark the task complete and click Submit.

If your resubmittal needs corrections, you will receive an email and task with required actions necessary before the subsequent review can begin.
CONGRATULATIONS! Approved Plans Ready for Download

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

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.