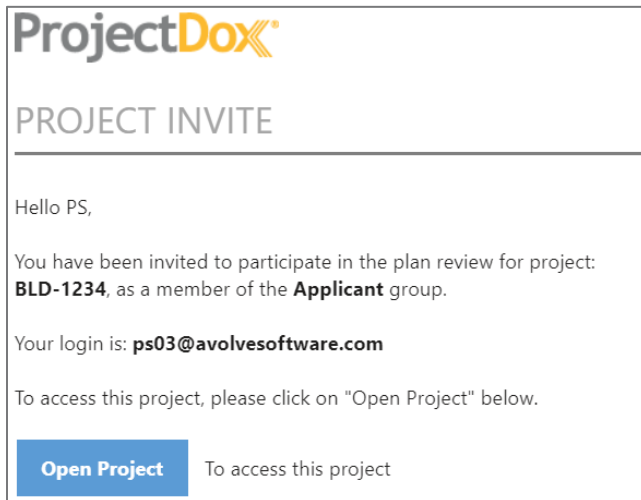


APPLICANT QUICK GUIDE

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**.

Verification Code *

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

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

Create Your Account ? March 2, 2021

First Name *

Last Name *

Email *

Confirm Email *

Phone *

 x

Additional Phone

 x

Company Name

Address 1 *

Address 2

Country *

United States

Province/State *

City *

Postal Code/Zip Code *

New Password *

Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@!%*#?& Password length: 10-15 characters.

Confirm Password *

APPLICANT QUICK GUIDE

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.

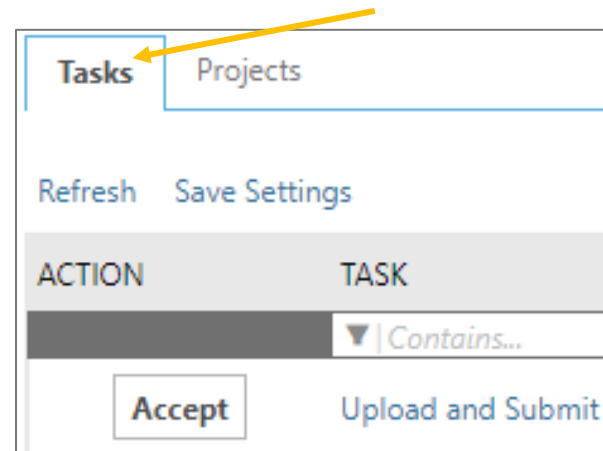
Accepting a Task: Accepting a task is an important part of the electronic plan review process. Accepting a task provides access to that task's eForm. The user who accepts the task is responsible for completing the associated actions, including uploading files and making necessary corrections requested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

Submitted Plans

- Preferred File types is PDF (no URLs or hyperlinks)
- Upload each page of the drawings as an individual file
- Upload files in landscape orientation.
- The files shall be named in the following format:
 - "Sheet number-Sheet description" (maximum 32 characters)
 - Example: AS1-Site Plan
 - Exclude extraneous information in the file names such as dates, version numbers, etc.

Supporting Document Files

- Preferred File type is PDF
- Support files that are required for the project shall be uploaded in the supporting documents as multi-page documents.

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.

ProjectDox

Close Window

Folder: Gael Test\Drawings

Browse For Files

or drag files into this area.

Start Upload

Orange files are new uploads

Blue files are new version uploads

Red files appear to be same as previously uploaded (will likely be discarded)

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:

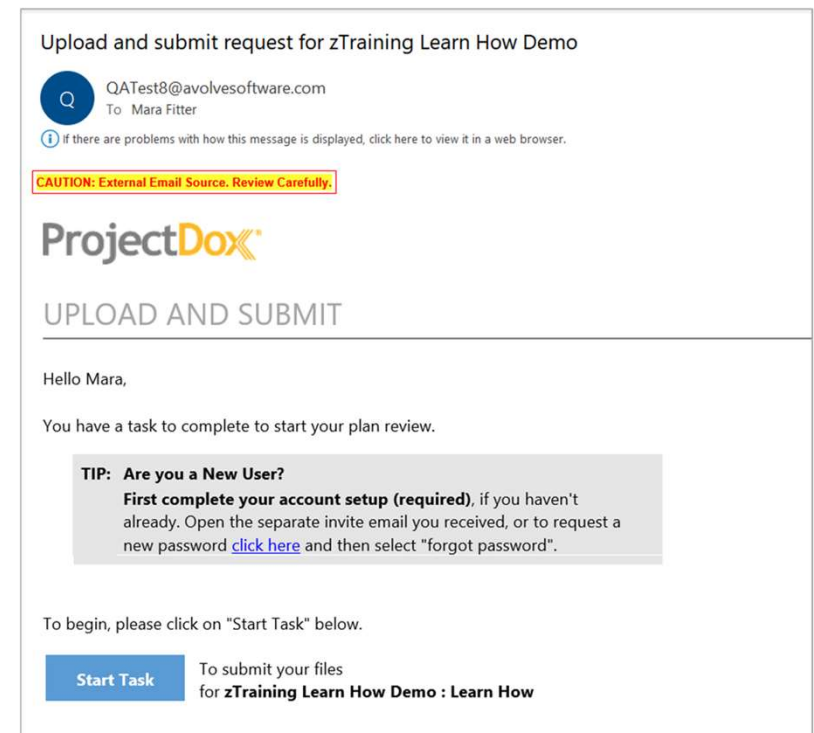
1. A1-01 First Floor Plan.pdf

2. E-01 Utility.pdf

3. L-01 Grading.pdf

Applicant - Email

- New User Tips
- Direct link to Tasks
- Workflow notifications
- Direct link to Download Approved Files



An optional feature, updated email templates includes intuitive instructions and allows the applicant to accept the task from the email by clicking Start Task.

Applicant - eForm Initial Submission

UPLOAD AND SUBMIT

Task Information

Invite Others

Task Information

Project Name: zTraining 20220531 002

Project Description: New Residential

Coordinator: Avolve Support

Workflow: WST Building Workflow - Optional Reviews

Current User Login: Mara01 Applicant (mra01@avolvesoftware.com)

Task Due Date: 6/7/22 8:05 AM

Task Instructions

Watch Video

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: zTraining 20220531 002

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

Upload Drawings

Upload Documents

Uploaded files:

No files uploaded yet.

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

Submit

Save for Later

Numbered Task Instructions

Watch Video links

Applicant can upload directly from eForm

Applicant – Invite Others

UPLOAD AND SUBMIT

Task Information

Invite Others

Invite/Remove Project User ?

Invite to Group: Applicant ▼

First Name:

Last Name:

Email:

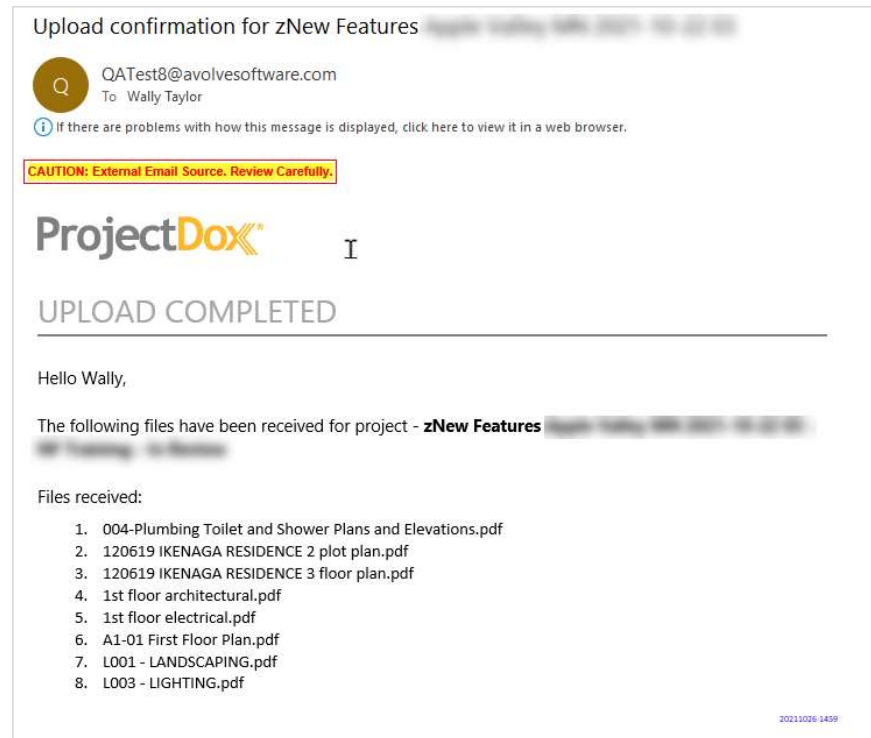
Invite User

Remove from Group: Applicant ▼

Name: Mara Applicant (mf01@avolvesoftware.com) ▼

Remove User

Applicant – Upload Confirmation



Email acknowledgment of submission, including list of uploaded files.

Applicant - eForm Subsequent Submissions

RESPOND AND RESUBMIT

Task Information

Review Results

Invite Others

Task Information

Project Name: BLD - 20220512 001

Project Description: New Construction

Coordinator: Avelia Support

Review Cycle: 2

Workflow: WST Building Workflow - Optional Reviews

Current User Login: Mara Filler (mfiller@avolvesoftware.com)

Task Due Date: 5/19/22 10:04 AM

Task Instructions

Watch Video

Please follow the steps below:

STEP 1 of 4: Respond to all comments as requested

Resolve Review Comments

Unresolved Comments: 4

Submitter Questions: 1

Info Only Comments: 1

Files with Markups: 2

Plan Review

Review Comments

Export to Excel

Import Excel Responses

Watch Video

Review and respond online.

Review and respond in Excel, then upload your responses.

STEP 2 of 4: Upload any new or updated files into this project

Version Uploaded for: BLD - 20220512 001

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.

Select "New Files" to upload any additional new file into this project as requested.

Versioned Files

New Files

Are your updated files named exactly the same as the prior versions?

Yes

No

Watch Video

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

Uploaded files:

Select folder to open file list:

Drawings (7 - 1 New)

Documents (1 - 2 New)

Approved

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

Confirmation

☐ I have responded to all review comments *Required

☐ I have uploaded my revised files, if requested *Required

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

Submit

Save for Later

© 2022 Avolve Software Corp. All Rights Reserved.

avolve
software

When subsequent versions of files are named the same, the upload tool will check the data content and automatically version the new upload when data has changed.

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 - Upload Versioned Files

The screenshot displays the 'ProjectDox' upload interface. On the left, the main review page shows 'STEP 2 of 4: Upload any new or updated files into this project'. It includes a 'Version Upload for: BLD - 20220512 001' section with a 'New Files' tab selected. A question asks 'Are your updated files named exactly the same as the prior versions?' with a 'No' button highlighted. A blue arrow points from the 'No' button to the 'Files w/Markups' dropdown in the 'Upload File Versions' modal. The modal is titled 'ProjectDox' and 'Upload File Versions'. It shows a list of files to be uploaded, including 'Drawings\1st floor plan.pdf', 'Drawings\A2-2 2nd floor Proposed Addition 100380704.pdf', 'Drawings\C004 - SITE.pdf', and 'Drawings\L003 - LIGHTING.pdf'. A legend at the bottom of the modal explains the color coding: Orange for new uploads, Blue for new version uploads, and Red for files appearing to be the same as previously uploaded.

Resolve Review Comments

Unresolved Comments: 4
Submitter Questions: 1
Info Only Comments: 1
Files with Markups: 2

Plan Review: Review Comments Export to Excel Import

Review and respond online. Review and respond in Excel, then upload

STEP 2 of 4: Upload any new or updated files into this project

Version Upload for: BLD - 20220512 001

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files New Files

Are your updated files named exactly the same as the prior versions? Yes No Watch video

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

Uploaded files:

Select folder to open file list:

- Drawings (7 - 0 New)
- Documents (1 - 0 New)
- Approved

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

Confirmation

☐ *I have responded to all review comments *Required*

☐ *I have uploaded my revised files, if requested *Required*

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

Submit Save for Later

File Upload - Google Chrome

qatest8.avolvesoftware.com/ProjectDox/Html5Upload.aspx?ProjectID=11651&FolderID=13270&ButtonName=Upload+Drawin...

ProjectDox

Close Window

Upload File Versions Files w/Markups

Project: BLD - 20220512 001

Select Files w/Markups File(s) with markup comments that may require new versions

Start Upload

Drawings\1st floor plan.pdf Select File

Drawings\A2-2 2nd floor Proposed Addition 100380704.pdf Select File

Drawings\C004 - SITE.pdf Select File

Drawings\L003 - LIGHTING.pdf Select File

Orange files are new uploads
Blue files are new version uploads
Red files appear to be same as previously uploaded (will likely be discarded)

Subsequent versions of files do not need to be named the same. If the versioned file has a different name, the upload tool will ask the user to select the original file.

Applicant – File Upload

ProjectDox[®]Close Window

Folder: zTraining 20220531 002\Drawings

Browse For Files

 or drag files into this area.

Start Upload

C004 - SITE.pdf

0B/2.30MB

✗

L001 - LANDSCAPING.pdf

0B/930.68KB

✗

L003 - LIGHTING.pdf

0B/804.13KB

✗

A1-01 First Floor Plan.pdf

0B/118.22KB

✗

1st floor electrical.pdf

0B/265.07KB

✗

0 of 5 uploaded [Hide Details](#)

0B/4.36MB

Orange files are new uploads

Blue files are new version uploads

Red files appear to be same as previously uploaded (will likely be discarded)

When files are uploaded, the upload tool will check the file prior to upload and either version the file (blue), upload as a new file (orange), or reject upload (red).

In-project Navigation - Status Tab

Tasks Files **Status** Info Reports Discuss Reviews

Plan Review - Workflow Routing Slip

Report Generated: 09/03/2021 04:25 PM

Review Type: **BIC Building** Time Elapsed: **8 days 4 hrs**
Number of Files: **9** Time with Jurisdiction: **8 days 6 hrs**
Project Name: **zNew Features 9.2 Pre-config State of New Jersey 002** Time with Applicant: **0 0 hrs**
Workflow: **zNew Features 9.2 Pre-config State of New Jersey 002 - zWally** Completed Submission (Prescreen): **0 days 0 hrs**
Batch Stamp Category - Building - 8/24/2021 10:11:21 AM Completed Plan Review: **Not Completed**
Total Review Comments:

TASK	TASK STATUS	REVIEW STATUS	CYCLE	ASSIGNED	ACCEPTED	COMPLETED	GROUP	USER	SUB TOTAL
Upload and Submit	Completed		0	08/24/2021 10:11 AM	08/24/2021 10:11 AM	08/24/2021 10:11 AM	Applicant	Wally Taylor	0 days 0 hrs
Prescreen Review	Completed		0	08/24/2021 10:11 AM	08/24/2021 10:11 AM	08/24/2021 10:11 AM	Coordinator	Wally Taylor	0 days 0 hrs
Assign Reviewers	Completed		0	08/24/2021 10:11 AM	08/24/2021 10:11 AM	08/24/2021 10:11 AM	Coordinator	Wally Taylor	0 days 0 hrs
Fire Department Review Cycle #1	Completed	Approved	1	08/24/2021 10:11 AM	08/24/2021 10:11 AM	08/24/2021 10:11 AM	Fee	Wally Taylor	0 days 0 hrs
Review Complete	Completed		1	08/24/2021 10:11 AM	08/24/2021 10:12 AM	08/24/2021 10:12 AM	Coordinator	Wally Taylor	0 days 0 hrs
Final Payment Verification	Completed		1	08/24/2021 10:12 AM	08/24/2021 10:12 AM	08/24/2021 10:12 AM	Coordinator	Wally Taylor	0 days 0 hrs
Batch Stamp	Accepted		1	08/24/2021 10:12 AM	08/24/2021 10:12 AM		Coordinator	Wally Taylor	8 days 6 hrs

Prescreen Review

Current

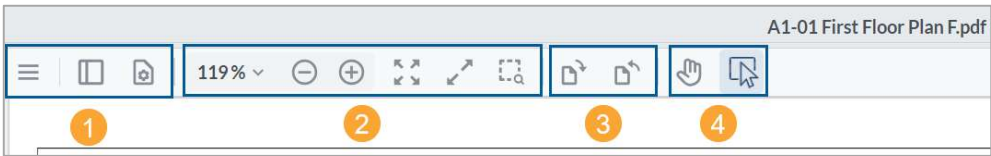
For more details: Workflow Routing Slip View Report

Gives general overview information.
Ability to generate the Workflow Routing Slip report for additional details.

Applicant Quick Guide – ProjectDox Viewer

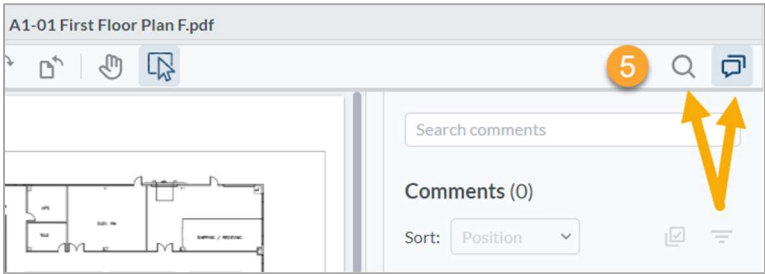
Main Tool Bar:

(1) Menu dropdown icon, Panel toggle button, and Page Controls button. (2) Zoom features. (3) Rotate Files. (4) Panel toggle button and Select tool.



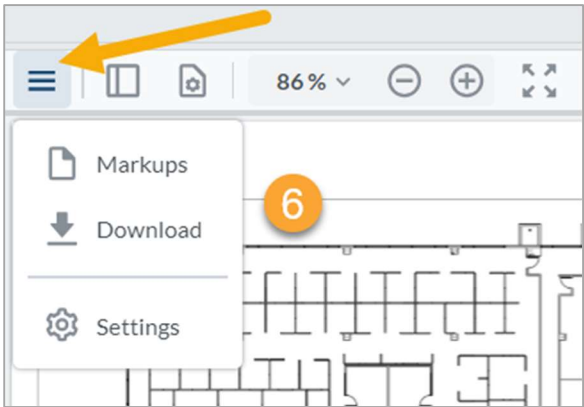
Right-side Panels:

(5) Toggle between or close the Search and Comments Panels.



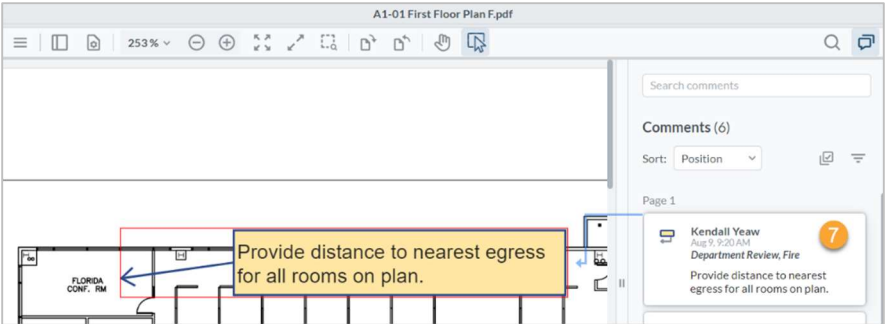
Menu:

(6) Select Markups to view or download files with Markups and comments.



Markup Layers:

With markup layers open on a file, click on a (7) comment in the Comments Panel to jump to each comment on the markup layer. Respond to comments in the Review Comments Grid.



Applicant – Review Comments

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

Resolve Review Comments ⓘ

Unresolved Comments: 4
Info Only Comments: 1
Files with Markups: 0

Plan Review: [Review Comments](#) [Learn how](#)

Refresh

Dept: Show All ▼ Status: Show All ▼ Response: Show All ▼ Search: [Close Window](#)

Type: Show All ▼ Cycle: Show All ▼ Time: Show All ▼ [Learn how](#)

[Add Comment / Ask Question](#) **Please enter your responses** ⓘ

Ref.# 1	Coordinator	Mara Fitter	1/11/21 12:29 PM		Corrected
Unresolved	All files must be 11x17 or 24x36				
Checklist Item					
Ref.# 2	Coordinator	Mara Fitter	1/11/21 12:29 PM		Thanks. I thought it was 2x2.
Unresolved	Please leave a blank 4x4 in square in the upper right hand corner				
Checklist Item					
Ref.# 3	Coordinator	Mara Fitter	1/11/21 12:29 PM		No response required.
Info Only	Please reference the Learn How video links if you have questions about uploading. Thanks!				
Comment					
Ref.# 4	Coordinator	Mara Fitter	1/11/21 12:30 PM		Type your response here.
Unresolved	Please use a file name less than 50 characters.				
Checklist Item					
Ref.# 5	Coordinator	Mara Fitter	1/11/21 12:30 PM		Type your response here.
Unresolved	Please use the following naming convention: MMM-NNN-XYZQ 001, 002 etc				
Checklist Item					

Multiple ways to access Review Comments.

From the eForm, clicking the Review Comments link will open the window where the applicant can read and respond to comments as well as ask a question.

Applicant – Review Comments

Tasks Files Status Info Reports Discuss **Reviews** zTraining Intro to Marking Up: Video Training

Dept: Show All Status: Show All Response: Show All Search: Enter keyword

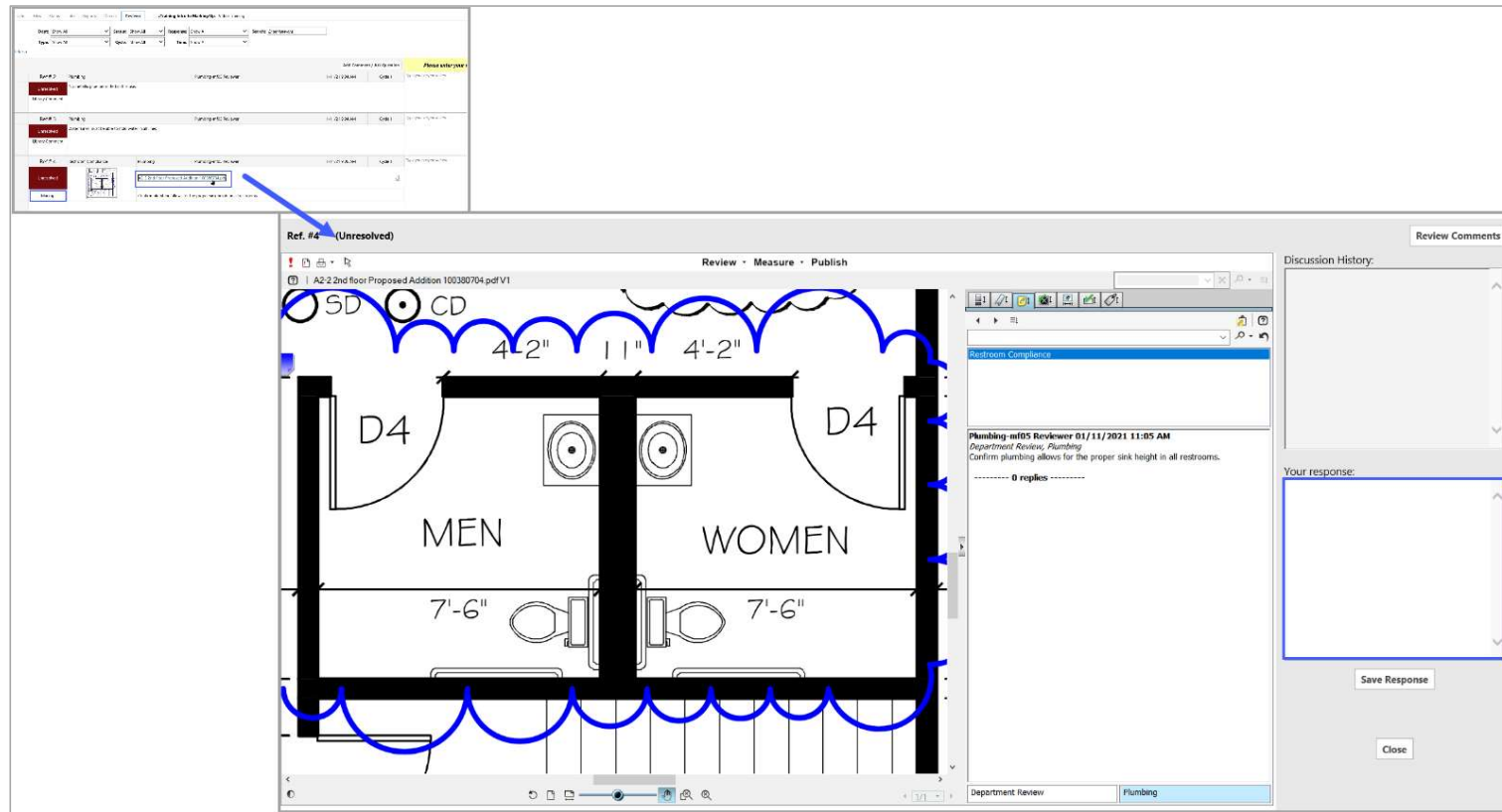
Type: Show All Cycle: Show All Time: Show All

Refresh

						Add Comment / Ask Question	Please enter your response here.
Ref.# 2	Plumbing	Plumbing-mf05 Reviewer		1/11/21 9:04 AM	Cycle 1	Type your response here.	
Unresolved	No metallic pipe permitted in this use.						
Library Comment							
Ref.# 3	Plumbing	Plumbing-mf05 Reviewer		1/11/21 9:04 AM	Cycle 1	Type your response here.	
Unresolved	Water Lines must be able to hold water in all lines						
Library Comment							
Ref.# 4	Restroom Compliance	Plumbing	Plumbing-mf05 Reviewer	1/11/21 9:06 AM	Cycle 1	Type your response here.	
Unresolved		A2-2 2nd floor Proposed Addition 100380704.pdf					
Markup	Confirm plumbing allows for the proper sink height in all restrooms.						

From the Reviews tab, the Review Comments grid will display.
Click on the name of a file to open that file in a new browser tab.

Applicant – Review Comments



The file will open at the changemark and allow the applicant response to be added.

Applicant – Export/Import Review Comments

STEP 1 of 4: Respond to all comments, as requested

Resolve Review Comments ?

Unresolved Comments: 4
Info Only Comments: 0
Files with Markups: 1

Plan Review:

Review Comments <i>Review and respond online.</i>	Export to Excel <i>Review and respond in Excel , then upload your responses.</i>	Import Excel Responses	Learn how
--	---	--	---------------------------

If desired, when in Department Review, the Applicant can Export Review Comments to Excel, review and respond in Excel, and import the comments back into ProjectDox.

Applicant can also export Review Comments to Excel at Prescreen Corrections and/or Resubmit to Excel.

Applicant – Export/Import Review Comments

The screenshot displays the 'Resolve Review Comments' section of the ProjectDox interface. At the top, it indicates 'STEP 1 of 4: Respond to all comments, as requested'. Below this, a summary shows 'Unresolved Comments: 4', 'Info Only Comments: 0', and 'Files with Markups: 1'. The 'Plan Review' section contains three buttons: 'Review Comments' (with the subtext 'Review and respond online.'), 'Export to Excel' (highlighted with a blue box and an arrow pointing to a modal), and 'Import Excel Responses' (with the subtext 'Review and respond in Excel, then upload your responses.' and a 'Learn how' link). The 'Export to Excel' modal dialog is open, showing two radio button options: 'Single XLSX file' (selected) and 'Multiple XLSX files by department/trade (as ZIP)'. At the bottom of the modal are 'Download' and 'Close' buttons, with 'Download' also highlighted by a blue box.

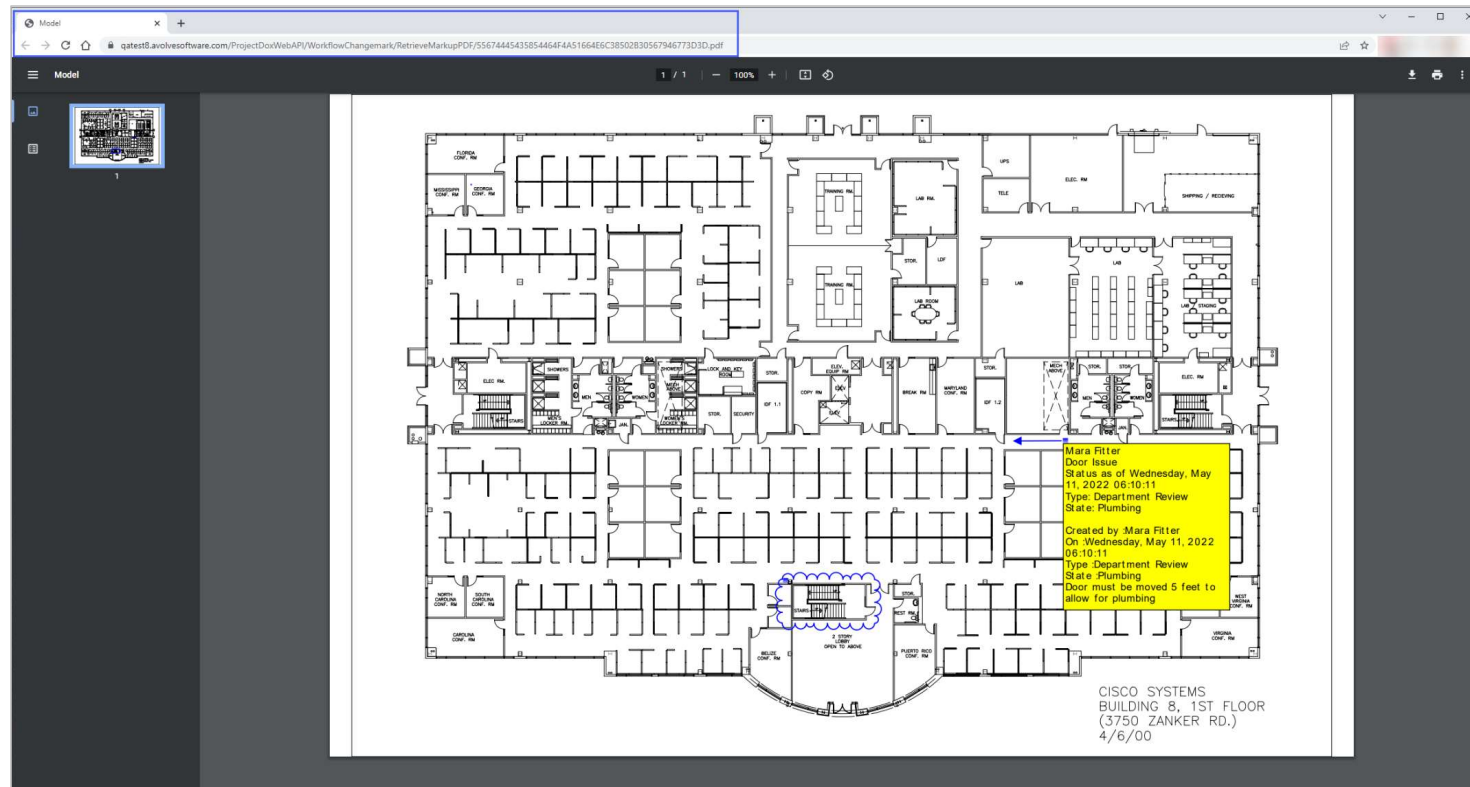
When exporting Review Comments, ProjectDox gives the applicant the option to export on one single file or multiple files by department.

Applicant – Export/Import Review Comments

REF #	REVIEWED BY	TYPE	VIEW	ENTER YOUR COMMENT RESPONSE HERE	DISCUSSION	CYCLE	STATUS
1	Plumbing Plumbing-mt05 Reviewer 1/11/21 9:53 AM	Comment Add comment allows the Coordinator or Reviewer to add comments using their own words, or to copy and paste from an outside document. Rich-Text is an option.				1	Unresolved
2	Plumbing Plumbing-mt05 Reviewer 1/11/21 9:54 AM	Library Comment No metallic pipe permitted in this use.				1	Unresolved
3	Plumbing Plumbing-mt05 Reviewer 1/11/21 9:54 AM	Library Comment Water Lines must be able to hold water in all lines				1	Unresolved
4	Plumbing Plumbing-mt05 Reviewer 1/11/21 9:56 AM	Markup A2-2 2nd floor Proposed Addition 100180704.pdf Restroom Compliance Confirm plumbing allows for the proper sink height in all restrooms.	Open			1	Unresolved

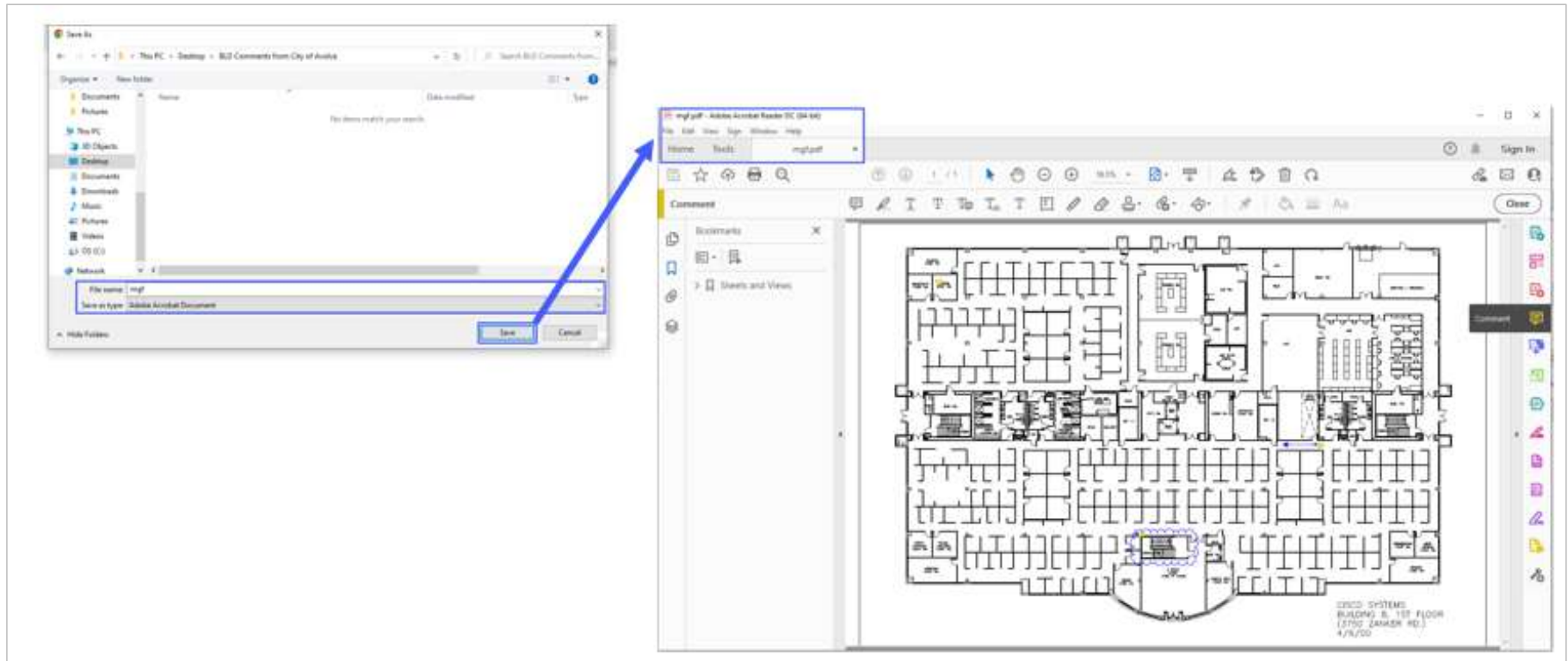
In Excel, changemarks can be viewed outside of ProjectDox by clicking on the open link.

Applicant – Export/Import Review Comments



Depending on the local browser setting the file will open in pdf in a new browser window/tab.

Applicant – Export/Import Review Comments



Applicant will be given the option to download the file. The default file name is the name of the markup layer.

Applicant – Export/Import Review Comments

STEP 1 of 4: Respond to all comments, as requested

Resolve Review Comments ?

Unresolved Comments: 4
Submitter Questions: 1
Info Only Comments: 1
Files with Markups: 2

Plan Review: [Review Comments](#) | [Export to Excel](#) | [Import Excel Responses](#) | [Watch Video](#)

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

Import Responses [X]

Select to upload the Excel file (XLSX) that contains your responses ?

[Browse for File](#)

[Close](#)

Import Results [X]

1 file(s) imported into Review Comments.

- 1 response(s) inserted.
- 0 response(s) replaced.
- 0 response(s) ignored (completed status).
- 1 response(s) ignored (info only status).
- 4 review comments(s) are missing responses.
- 0 response(s) with invalid Ref #'s.

[Import Multiple](#) [Close](#)

The screenshot illustrates the process of importing review comments from an Excel file. It shows the 'Import Excel Responses' button in the main interface, which triggers a file selection dialog ('Import Responses'). A blue arrow points from this button to the 'Browse for File' button in the dialog. Another blue arrow points from the 'Browse for File' button to the 'Import Results' window, which displays the outcome of the import: 1 file was imported, resulting in 1 response inserted, 0 replaced, 0 ignored (completed status), 1 ignored (info only status), 4 missing responses, and 0 invalid references.

Comments from Excel do not have to be imported at one time. If the Applicant has not completed their task, they can upload new or updated comments.

APPLICANT QUICK GUIDE

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

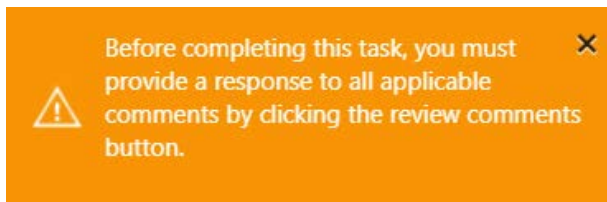
STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

☒ *I have completed all Prescreen requests *Required

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

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

Add Comment / Ask Question							Please enter your responses ?
Ref.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1		Type your response here.
Unresolved	Markup	A1-01 First Floor Plan.pdf					
		Door is too close to mechanical equipment					
Ref.# 3	Mechanical	Preeti Schatzman	3/10/21 4:47 PM	Cycle 1			No response required.
Info Only	Comment	Make sure to do the following when re-submitting:					
		- Item A - Item B - Item C					

- Add your response in the Applicant Response column

Add Comment / Ask Question							Please enter your responses ?
Ref.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1		I have made changes and uploaded a new file
Unresolved	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 'Versioned Files' tab selected. It contains a question: 'Are your updated files named exactly the same as the prior versions?' with 'Yes' and 'No' buttons and a 'Learn how' link. Below this is a red error message: '* "name-v2.pdf" is not an "exact" file name match to "name.pdf"'. At the bottom, there are two buttons: 'Upload Drawings' and 'Upload Documents'.

Step 3: Mark the task complete and click Submit.

The screenshot shows the 'STEP 3 of 4' confirmation screen. It has a 'Confirmation' header with a help icon. There are two checked checkboxes: '*I have responded to all review comments *Required' and '*I have uploaded my revised files, if requested *Required'. A yellow arrow points from the second checkbox to the 'Submit' button at the bottom.

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' screen with a header and a help icon. There is a checked checkbox: '*All fees have been paid *Required'. A yellow arrow points from this checkbox to the 'Submit' button at the bottom.

APPLICANT QUICK GUIDE

Congratulations! Approved Plans Ready for Download

You will receive an email notification directing you to download and save your approved plans. This does not mean the permit has been issued. Please contact the Building & Safety Division to sign and pay for the permit(s).



DOWNLOAD APPROVED FILES

Hello PS,

[Congratulations](#), your approved plans are ready for download.

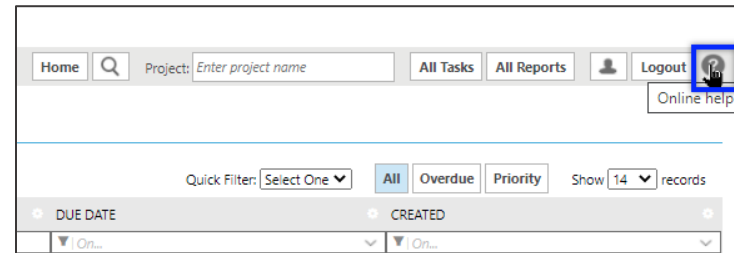
To download your approved files, click on "Download" below. You will be redirected to your Project portal and you will enter your login & password. Once logged in, a window will open prompting you to select a location on your local computer to download and save your approved plans.

Download

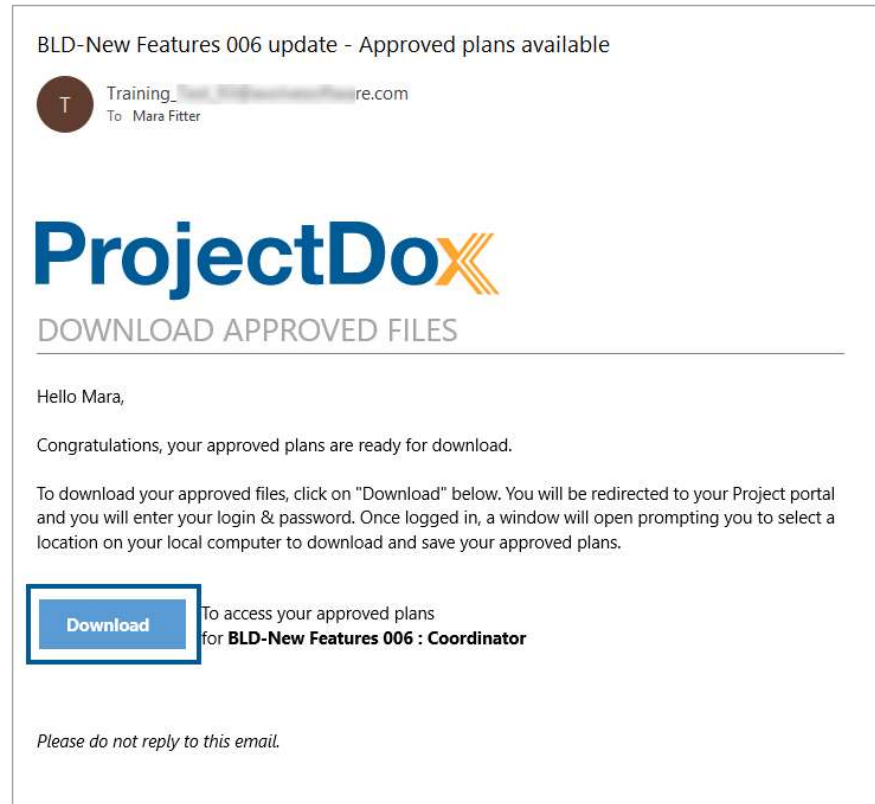
To access your approved plans for **BLD-1234 : Corner Shop**

Please do not reply to this email.

REMINDER: The Online Help for ProjectDox is available here:



Applicant - Downloading Approved Files Using Email



Updated Email Templates are an optional feature. The Download Approved Files email allows the applicant to download from the email.

Applicant - Downloading Approved Files Using Dashboard

ProjectDox Dashboard				June 27, 2023	
My Projects					
PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (2)	
BLD-TST-20230627	Training Project		First Submission Pending	Open	Applicant Upload
BLD-TST-20230627 001	Training Project		Corrections Requested	Open	Applicant Resubmit Task
BLD-TST-20230627 002	Training Project		Approved		Open Download Approved Plans
22000091	TEST-P.DOX 9.2 TEST 397 RES		In Review		
1 - 4 of 4 records					 Prev
				1	Next 
View All Projects					

Updated Email Templates are an optional feature. The Download Approved Files email allows the applicant to download from the email.

Applicant - Downloading Approved Files – Home Page

ProjectDox

Home Project: Enter project name All Tasks Logout

Tasks **Projects**

Refresh Save Settings

STATUS Contains... On...

All Recent Show 10 records

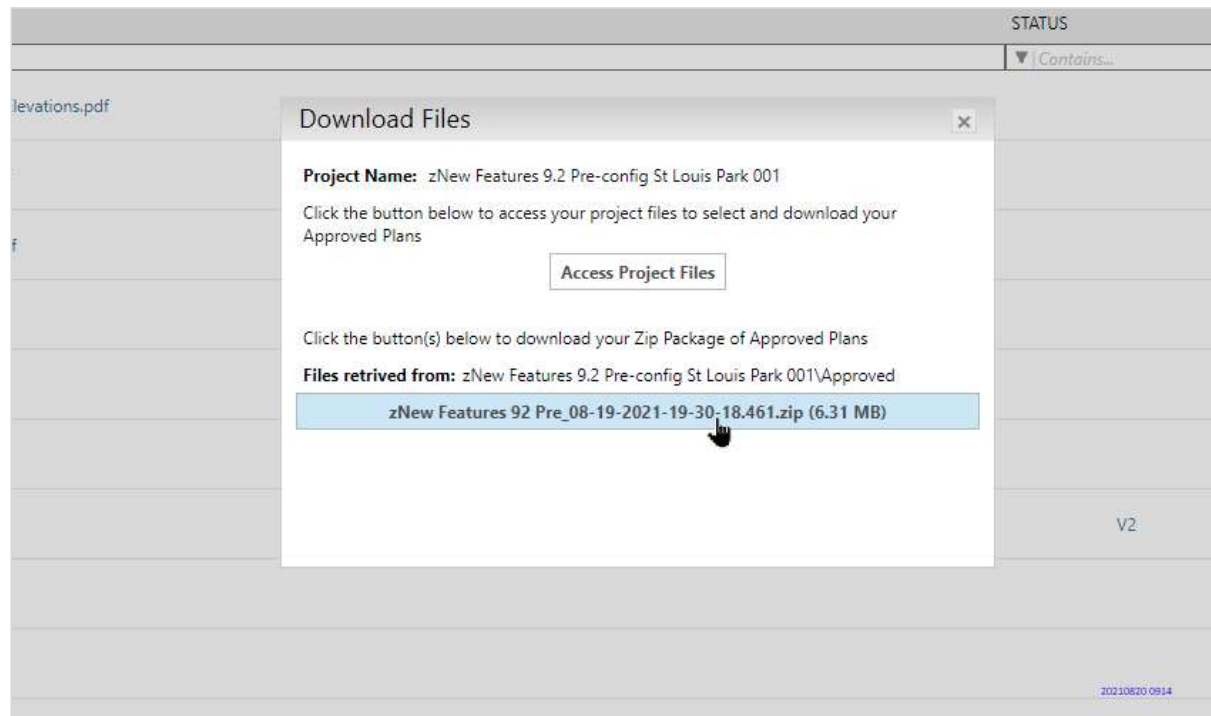
ACTION	PROJECT	DESCRIPTION	COORDINATOR	STATUS	CREATE DATE
	Contains...	Contains...	Contains...	On...	
	zTraining Batch Stamp 2021-01-11	Training	Mara Fitter	Approved	1/11/21 11:39 AM
	zTraining Intro to Marking Up	Video Training	Mara Fitter	Resubmit	12/14/20 11:39 AM
	zTraining Demo 2020-11-10	Training Video	Mara Fitter	Review	11/10/20 6:48 AM
	zTraining Downloading Markups	Training Videos	Mara Fitter	Resubmit	10/26/20 1:52 PM
	zTraining Excel Copy Project	Copy Project with Markups	Mara Fitter	In Review	10/22/20 11:11 AM
	zTraining Export Excel Video	Video Training	Mara Fitter	Resubmit	10/20/20 8:16 AM
	zTraining Uploading Version Files-F002	Video	Mara Fitter	Resubmit	10/5/20 7:00 AM
	zTraining Uploading Version Files-F001	Video	Mara Fitter	In Review	10/5/20 6:31 AM
	zTraining Version Upload Button 2020-09-22	Videos	Mara Fitter	Prescreen Corrections	9/22/20 9:23 AM
	zTraining Version Upload Button 20200921	Videos	Mara Fitter	Prescreen	9/21/20 1:30 PM

1 - 10 of 24 records

1 2 3

The applicant may also opt to download from the ProjectDox Home page.

Applicant - Downloading Approved Files



Providing a zip package is an optional setting in the Batch Stamp Template. If turned on, the applicant will get the option to download the approved files in a zip package.