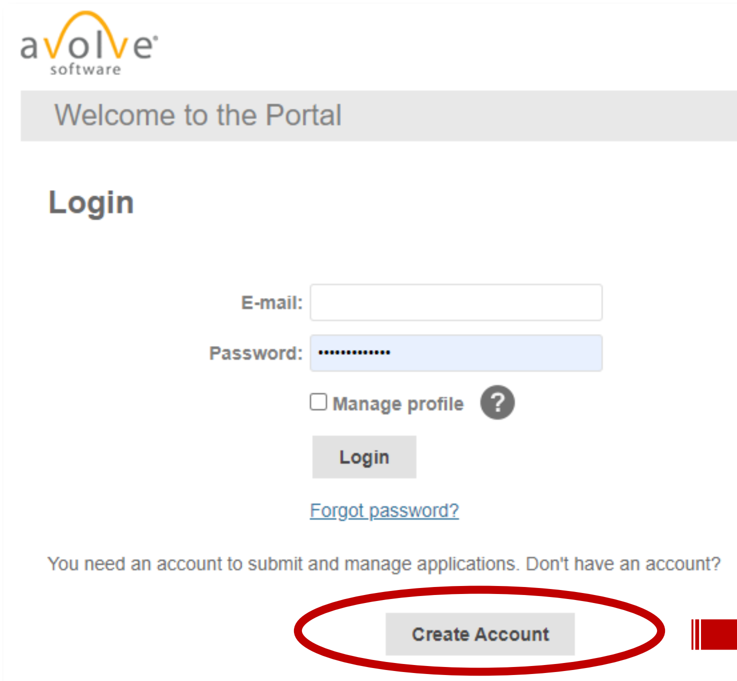
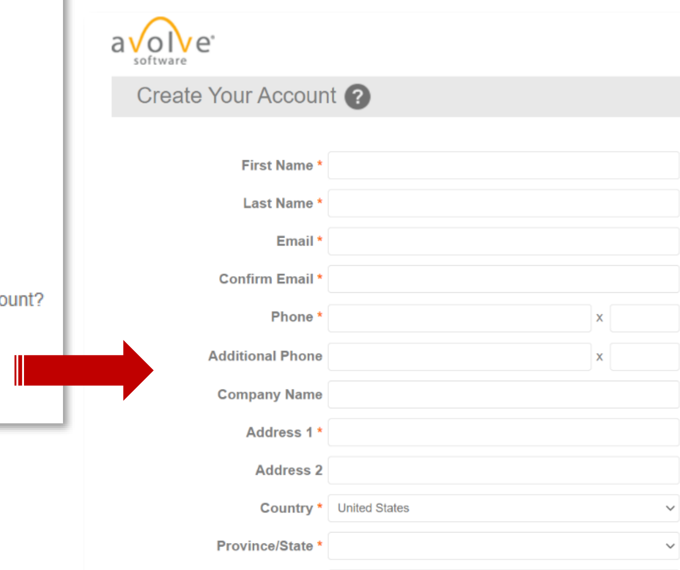
Getting Started in ProjectDox

All plan and permit applications are received and reviewed through the ProjectDox portal. In order to submit an application, all users must have a ProjectDox account.

1. For new users who have never created a ProjectDox account, navigate to the ProjectDox portal and select the create account button.





   a. Enter all required information
   b. Click on the create account button

2. For established users, enter in your E-mail and Password and click the login button.
   a. If your ProjectDox account was created prior to November, 2021, you may need to create an OAS User account in order to submit new applications through the ProjectDox portal.
   b. If you are trying to log in to ProjectDox and are being navigated to a screen requesting contact information, it is our system recognizing your account is incomplete, and is requesting you to complete your account profile. Please complete all contact information and save changes.

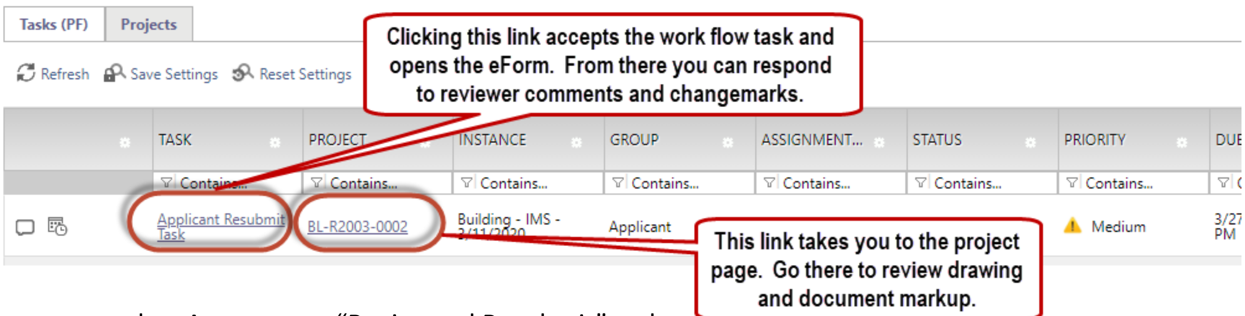
3. Once logged in, select the appropriate department you are applying to and continue to fill out the application accordingly.

We strongly encourage that a design professional complete and submit the application. Incorrect information submitted on an application will cause significant delays on your project.

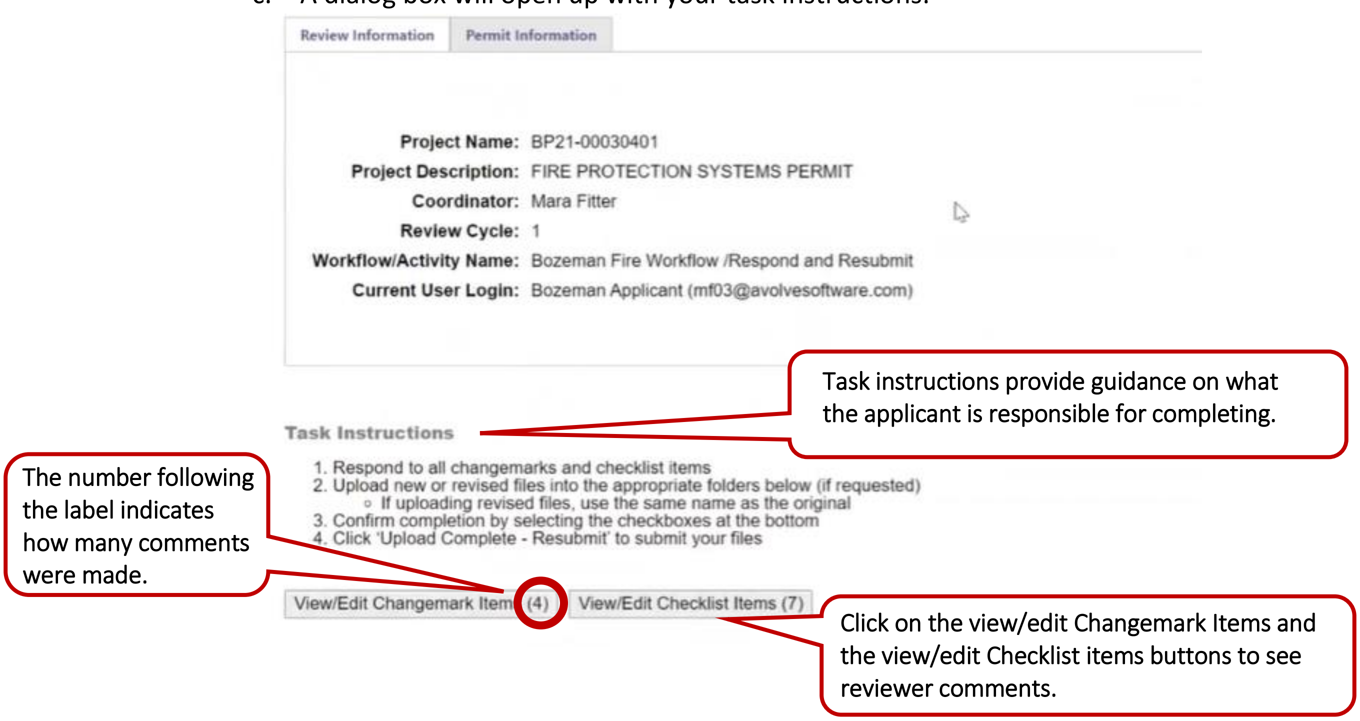
How to Review and Address Changemarks and Checklist items in ProjectDox

Accepting the Task

1. Once City Staff reviewers have completed their review and corrections are required – the applicant will receive an automated email from DoNotReplyBZMT@avolve.com indicating the review is complete and a task has been returned and assigned to the applicant.
    a. Log into ProjectDox via your preferred web browser (Chrome recommended) or click the link provided in the email
        i. If you log in, locate the "Applicant Resubmit" task for your project under the Tasks tab on the home page.

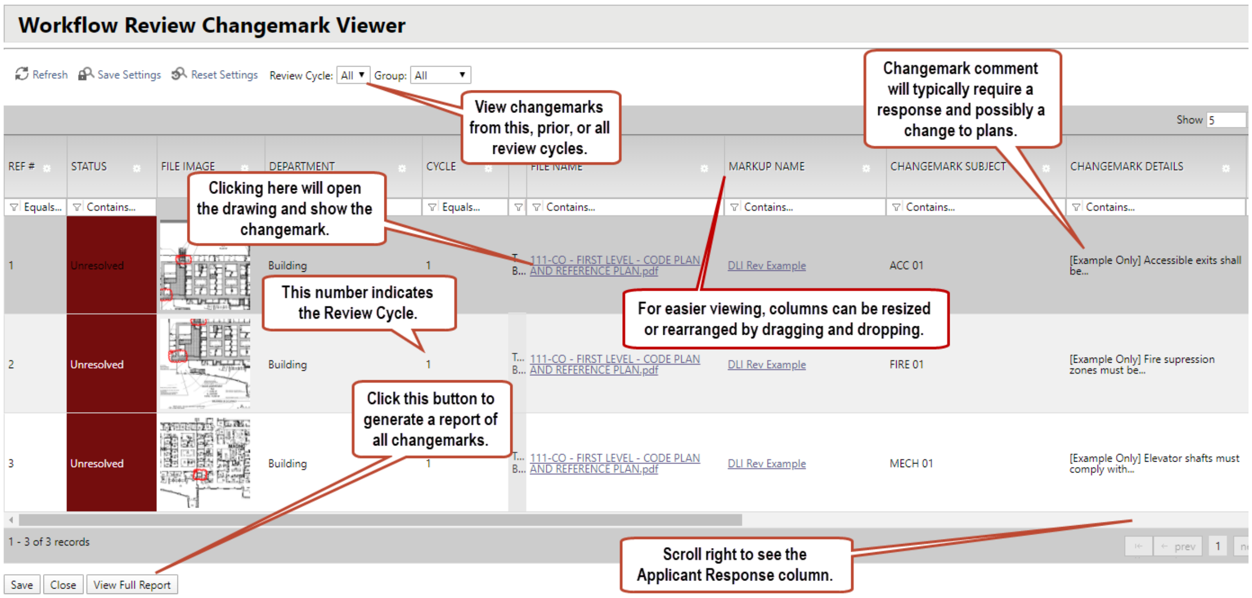


    b. Accept your "Revise and Resubmit" task
        i. **The task can only be accepted by one individual (user account.) If there are multiple individuals listed on the project, the first person to accept the task is the only one who can make changes, provide a response, and complete the task.**
    c. A dialog box will open up with your task instructions:

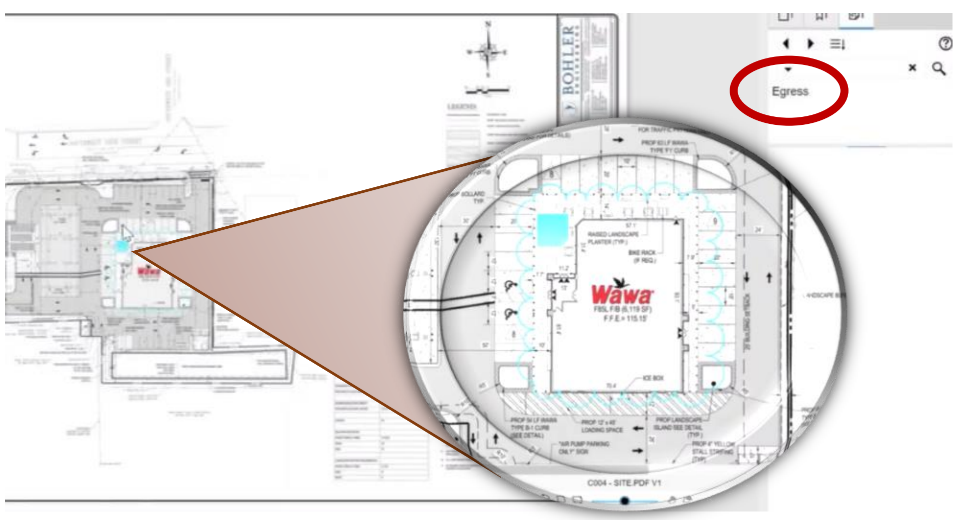


Viewing Reviewer Changemark Comments

2. There are three different ways to view changemarks in ProjectDox:
    a. From the task dialog box
        i. Within the task dialog box, click the View/Edit Changemark Item button
        ii. Comments from City Staff reviewers will be available to you to view and address, and will pop up in a new dialog box (Changemark Viewer)
        iii. To navigate directly to the document with the changemarks, click on the hyperlink located in the "Markup Name" column



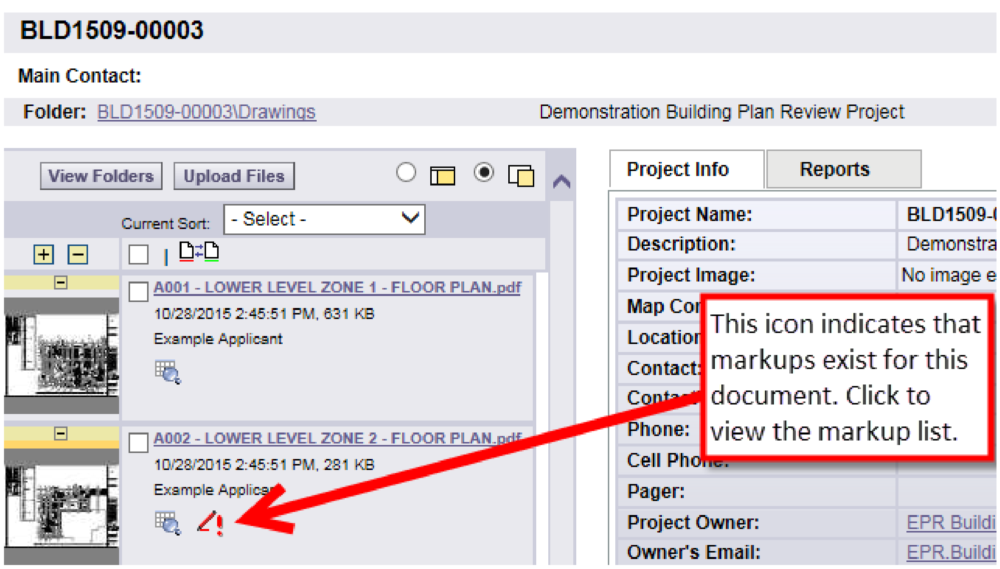
        iv. Clicking on the Markup Name file will open up the document and allow you to see the specific area of the changemark
        v. To zoom in to the specific area of the changemark you can click on the title – in the example below it is titled "Egress," and clicking on the word "Egress" will zoom you in to the view the reviewer was looking at when comments were made. You can also use the slider at the bottom to manually zoom in and out.

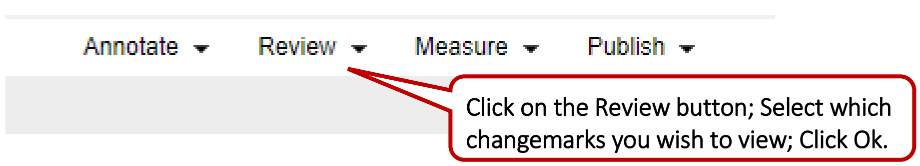


b. From the project reports tab (outside of the task dialog box)
   i. Within the project and outside the task dialog box, you can download the project report with all the changemarks in a table.
   ii. Navigate to the top right corner of your screen; click on Project Reports.
   iii. Find the report titled "ProjectFlow Changemarks" and select the icon directly to the left.
   iv. This will open up the Changemarks Report in a new dialog box; From there you can view or save the document.

c. From the project folder view (outside of the task dialog box)
   i. Within the project and outside the task dialog box, you can view all of the comments provided by reviewers
   ii. Open the drawings or documents folder on the left column of the screen

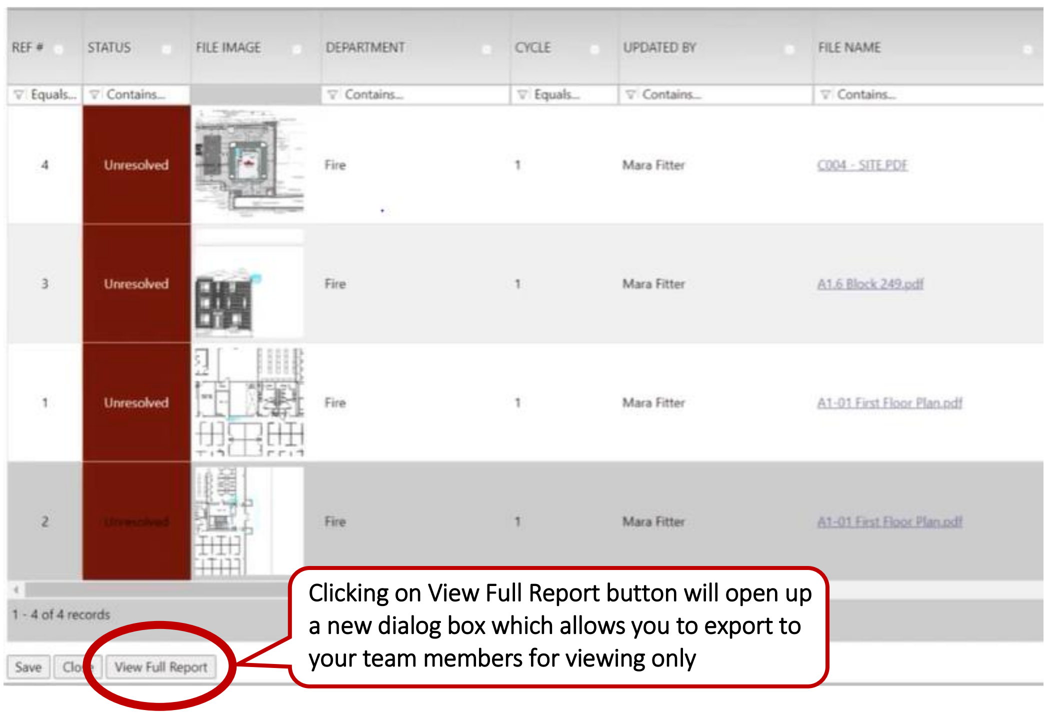
   iii. Click on the document you wish to view; click on the Review button at the top of the screen; Select which changemarks you wish to view and click OK.





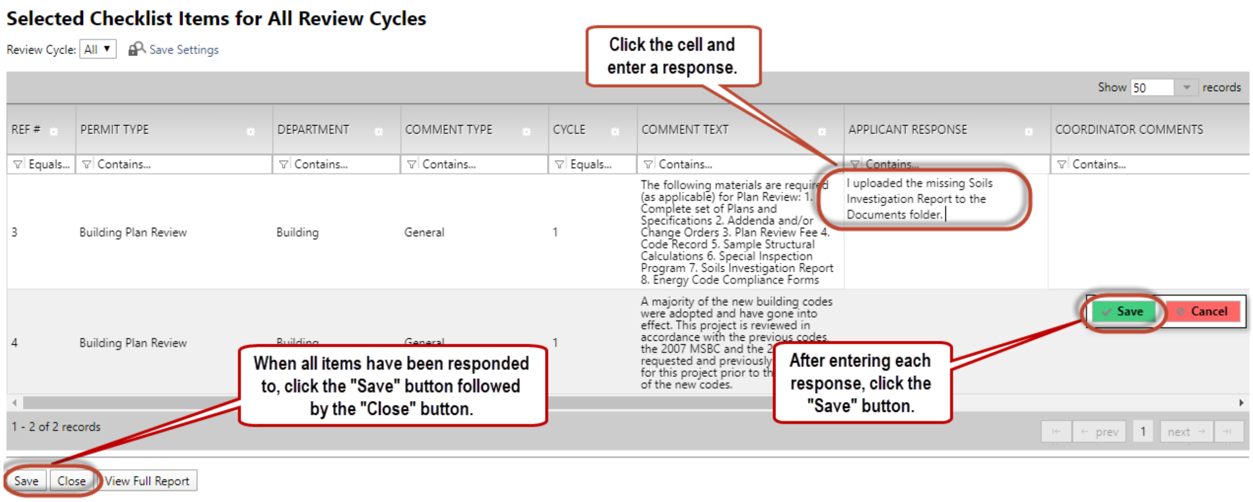
Sharing Reviewer Comments with Your Team

3. The changemark viewer shows you everything you need to change. ***Only the individual/account assigned the task will be able to go into the application and address reviewer comments and upload files.***
    a. To export Changemarks to share with the rest of your team
        i. In the Changemark Viewer, scroll all the way to the bottom and click on the "View Full Report" button
        ii. This launches the changemark report and allows you to export the content and save it as a document outside of ProjectDox; the report is a read only and no longer linked to the document in ProjectDox.
        iii. To save the file to your desktop or local folder for distribution to your team, click on the "save" icon located along the top of the report.



Responding to Reviewer Changemark Comments

4. Any reviewer comments with a status of "Unresolved" must be responded to. Comments that have a status of "Info Only" or "Conditional" are for informational purposes only. You may have to scroll to the right to see all checklist table columns.
    a. Review the comments and **enter a response that describes the action you have taken** in the "Applicant Response" column. You must do this for each item that has a status of "Unresolved".



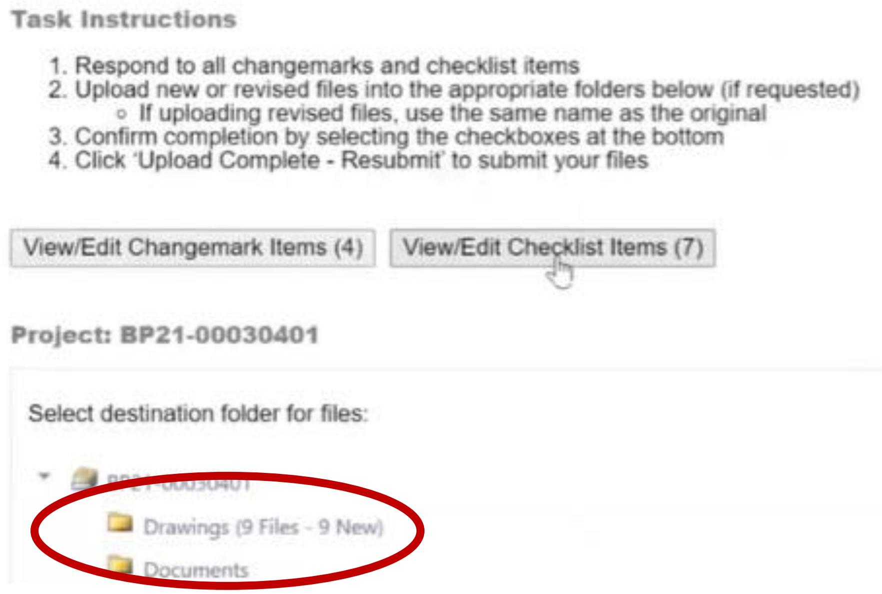
    b. Click in the applicant response box and begin typing your response.
    c. Click save after you make your comment/response and continue to the next changemark. Repeat this for each item that requires a response.
    d. You do not have to complete your responses all at once. You may return to this page to add or modify responses up until you complete the Applicant Resubmit task.
    e. You may close the changemark window and the Applicant Resubmit eForm (Task dialog box) and return as often as necessary to respond to all Checklist and Changemark items that require a response.

Viewing Reviewer Checklist Comments

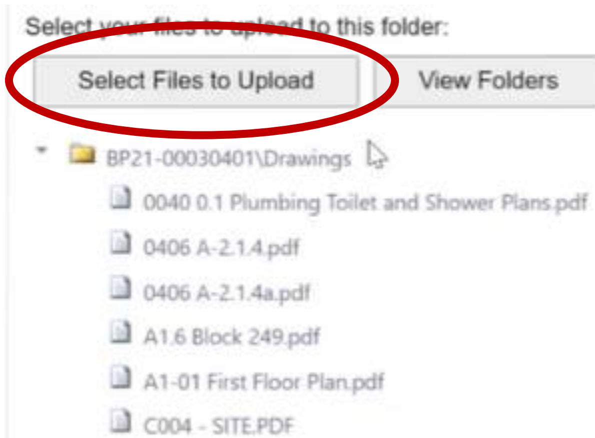
5. Repeat the same steps for checklist items as you did for changemarks
    a. Review the comments and **enter a response that describes the action you have taken** in the "Applicant Response" column. You must do this for each item that has a status of "Unresolved".

Uploading New Documents and Completing the Task

6. Once you are ready to make your edits/changes in your source documents and drawings:
    a. Go to your document or drawing (outside of PDox), update the file based on the changemarks and consistent with the responses you have just entered into PDox
    b. To upload the revised files, Select the Drawings or Documents file from the original task dialog box:



c. Select Files to Upload – Revised files must be named exactly as their previous version. For example, if you made changes to a file called "C004 – SITE.PDF", the revised file you upload must also be named "C004 – SITE.PDF".



IMPORTANT: Drawings and documents that are resubmitted **MUST** have the same name as the originally submitted file. ProjectDox relies on the file name to identify that a new version of a file was submitted. If the resubmitted file has a different name ProjectDox will consider it to be a new addition to the project instead of a new version of an existing project document.

d. Either Browse for Files or Drag and Drop files

e. After you have selected all the files you wish to upload click the Upload Files button
   i. Be sure to do this for both the Documents and the Drawings folders

f. Once you have uploaded all documents and/or drawings and addressed all reviewer comments, you have almost finished your task
   i. Check all three acknowledgments and click on the Upload Complete –Resubmit Button. ***After you select this button you will no longer be able to upload files to the project.**
   ii. Only after explicitly completing the task will department reviewers see your responses to Checklist Comments and Changemarks, and be prompted to review revised drawings and documents.