ESCONDIDO
City of Choice

Community Outreach Applicant Training
March 14, 2024

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software
ProjectDox

ProjectDox

- Help Videos
- Simplified and Secure Login/Dashboard
- Easy Status Look-up
- Improved eForm upload capabilities
- Centralized communication
  - View and Respond to Review Comments Online
  - View and Respond to Review Comments via Excel

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Getting Started

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Browser Requirements

- Supported browsers:
  - **Chrome**
  - **Edge**
  - **Firefox**
  - **Safari**
- Must turn off browser pop-up blocker for jurisdiction's website

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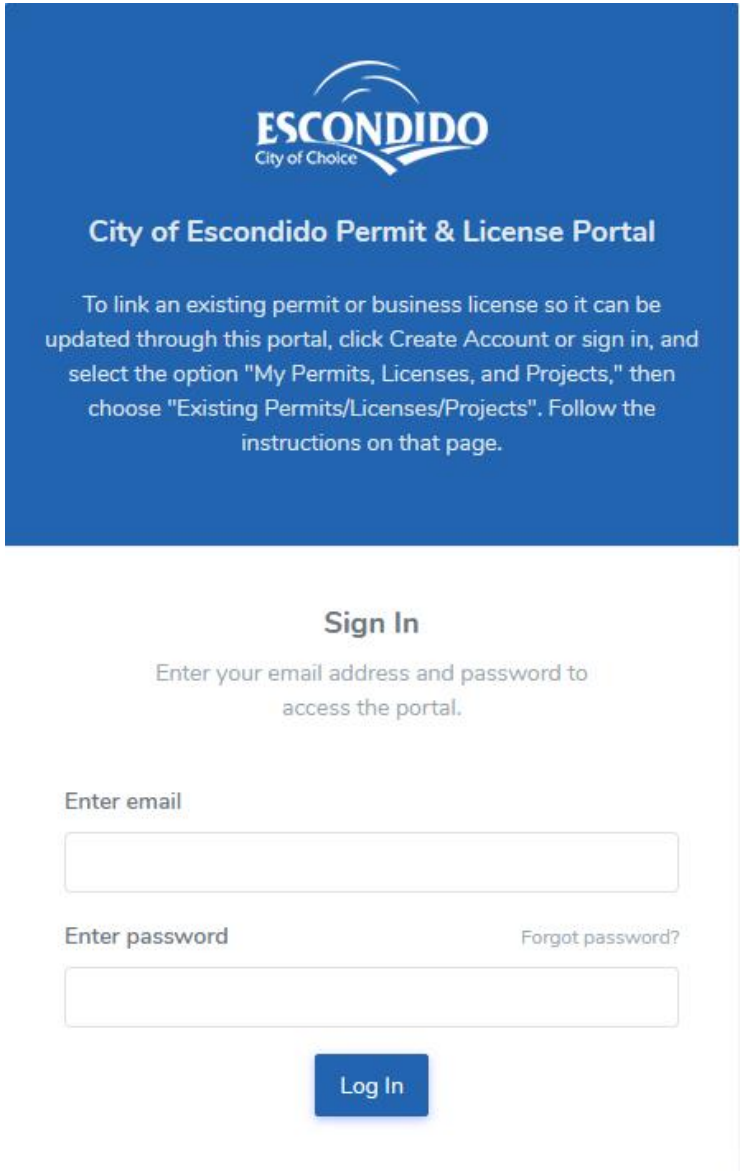
Create Jurisdiction Permit Application

[OnLine Services Portal]



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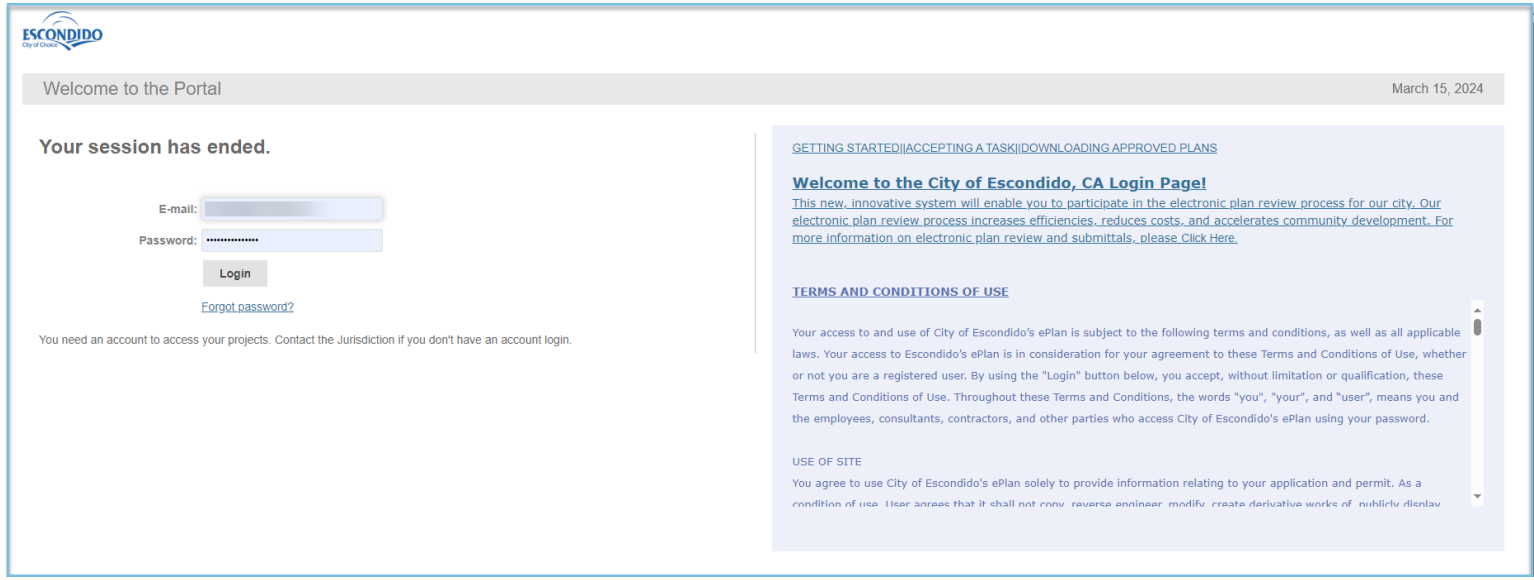
New Account/Login

- Follow instructions to apply for a permit.
- Email invitation from ProjectDox to create an account.
- Forgot your Password? Easy to reset!



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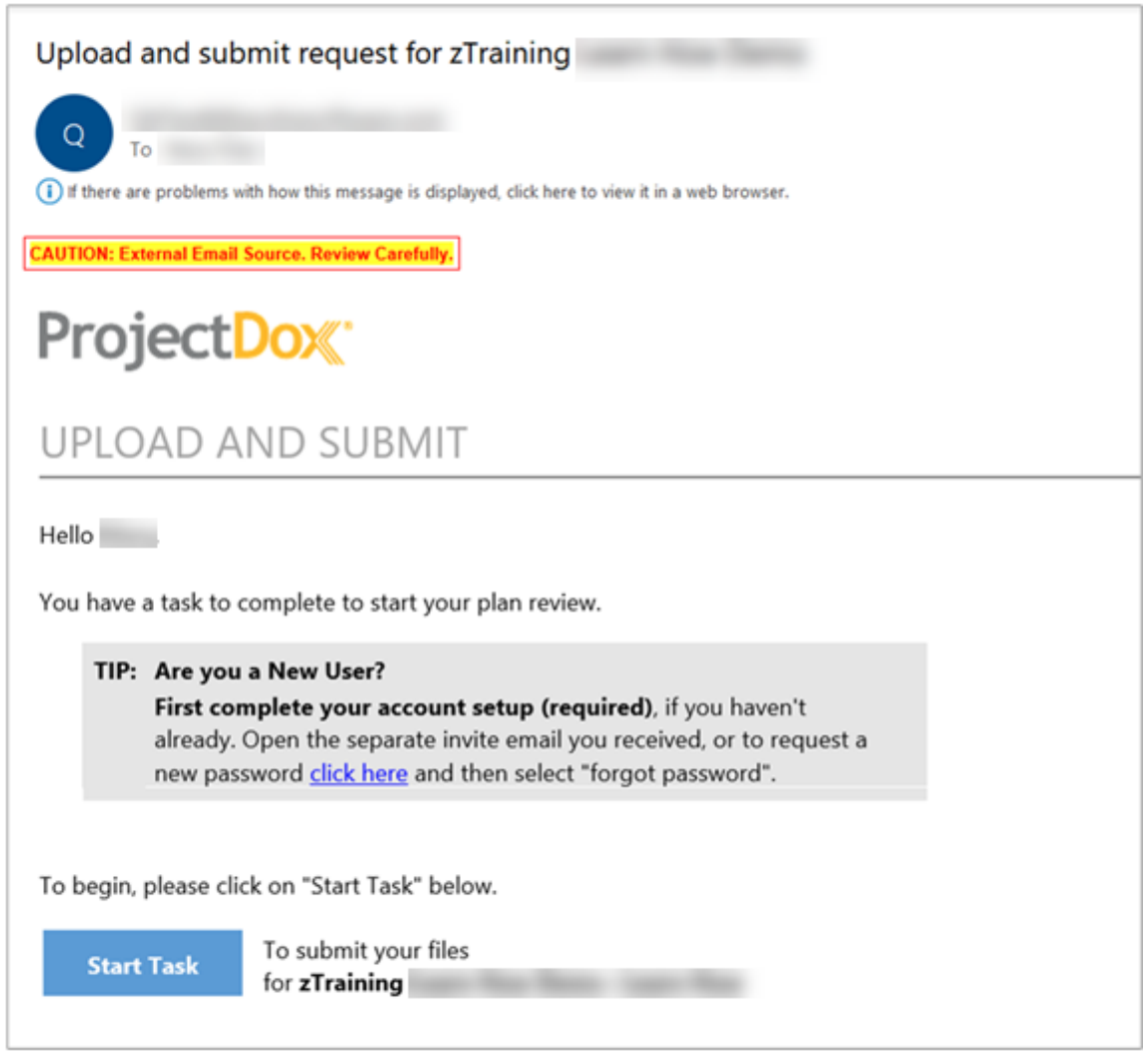
Applicant - Email

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



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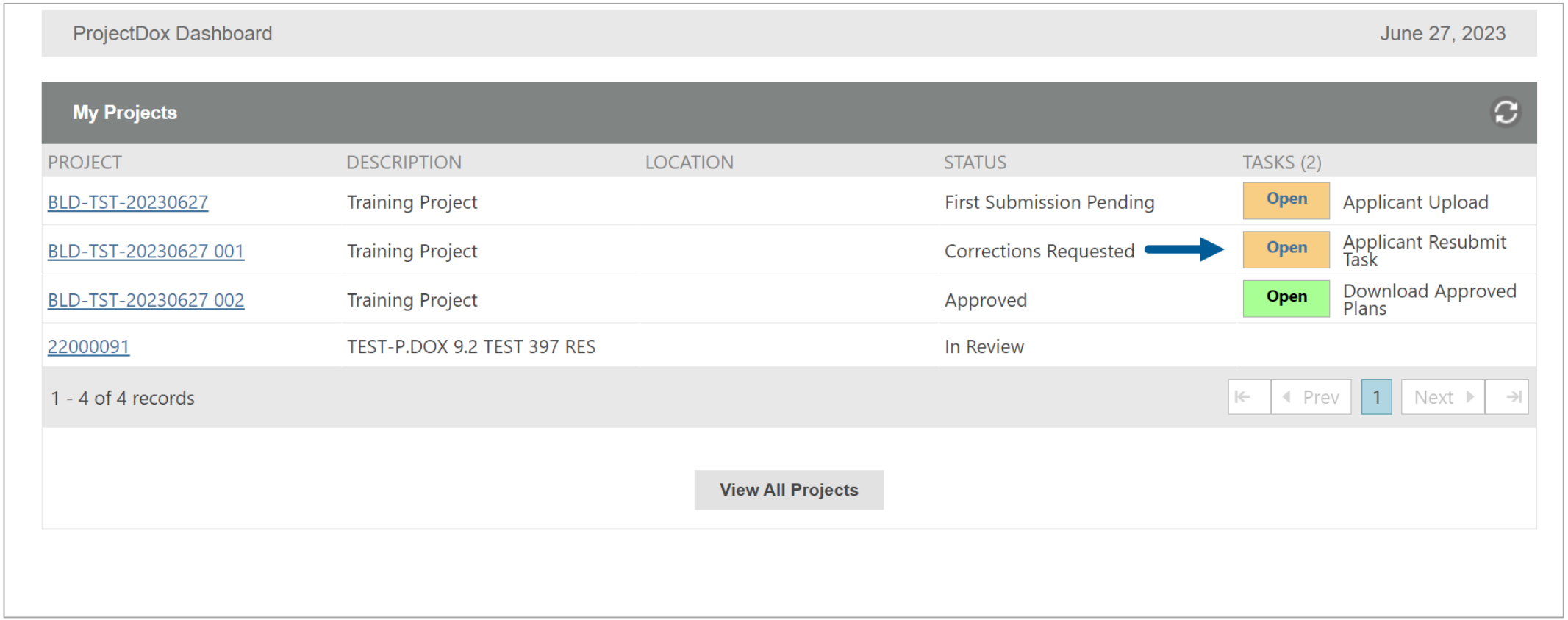
ProjectDox Dashboard



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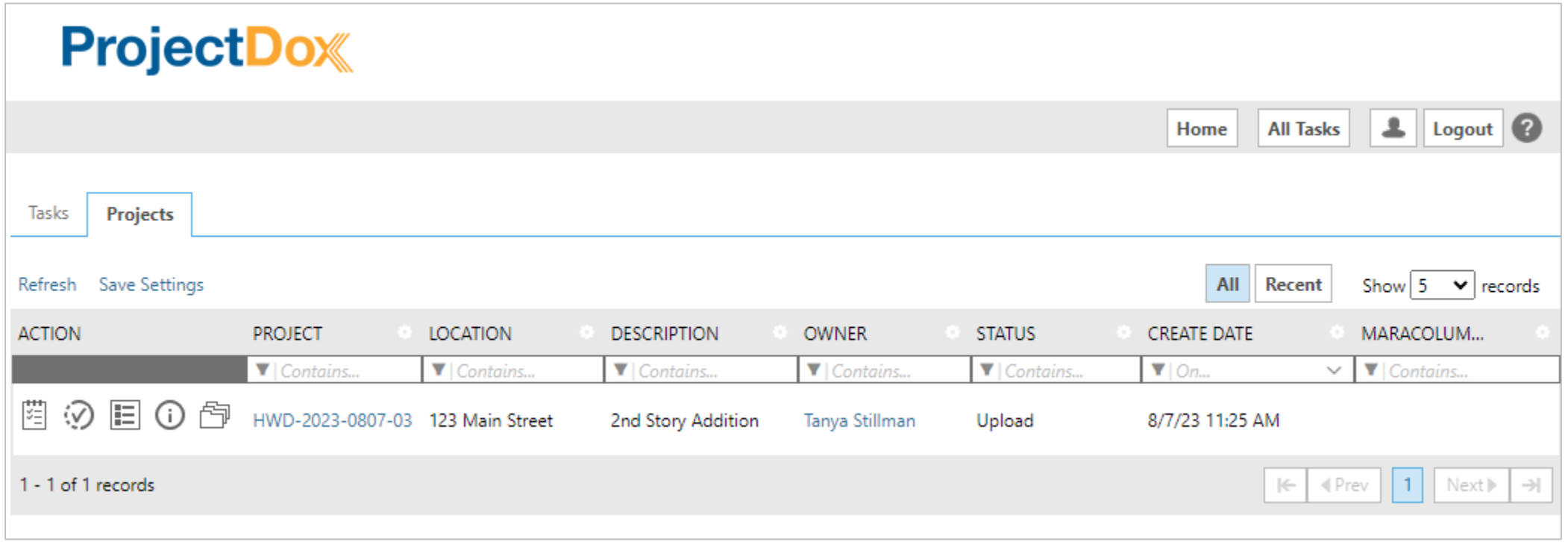
Home Page



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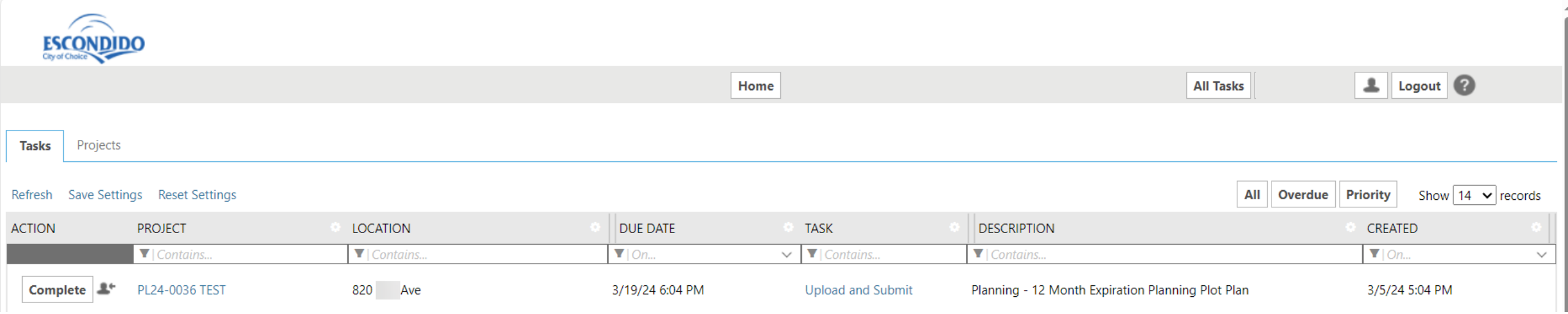
Task Page



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Initial Submission

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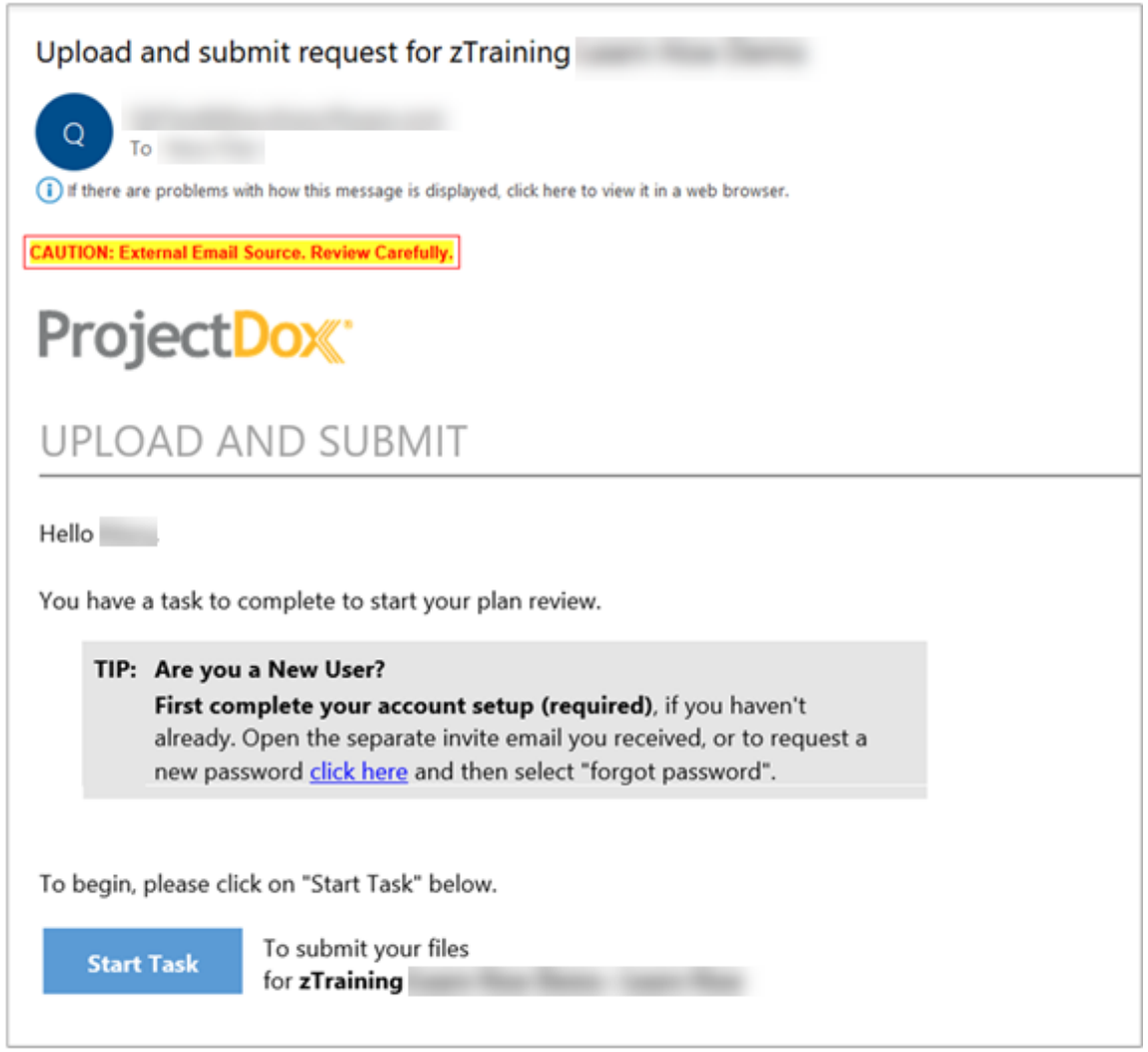
Initial Submission – Upload via eForm


Upload and submit request for zTraining [redacted]

Q

To [redacted]

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: External Email Source. Review Carefully.

ProjectDox

UPLOAD AND SUBMIT

Hello [redacted]

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

TIP: **Are you a New User?**
First complete your account setup (required), if you haven't already. Open the separate invite email you received, or to request a new password click here and then select "forgot password".

To begin, please click on "Start Task" below.

Start Task

To submit your files for **zTraining** [redacted]

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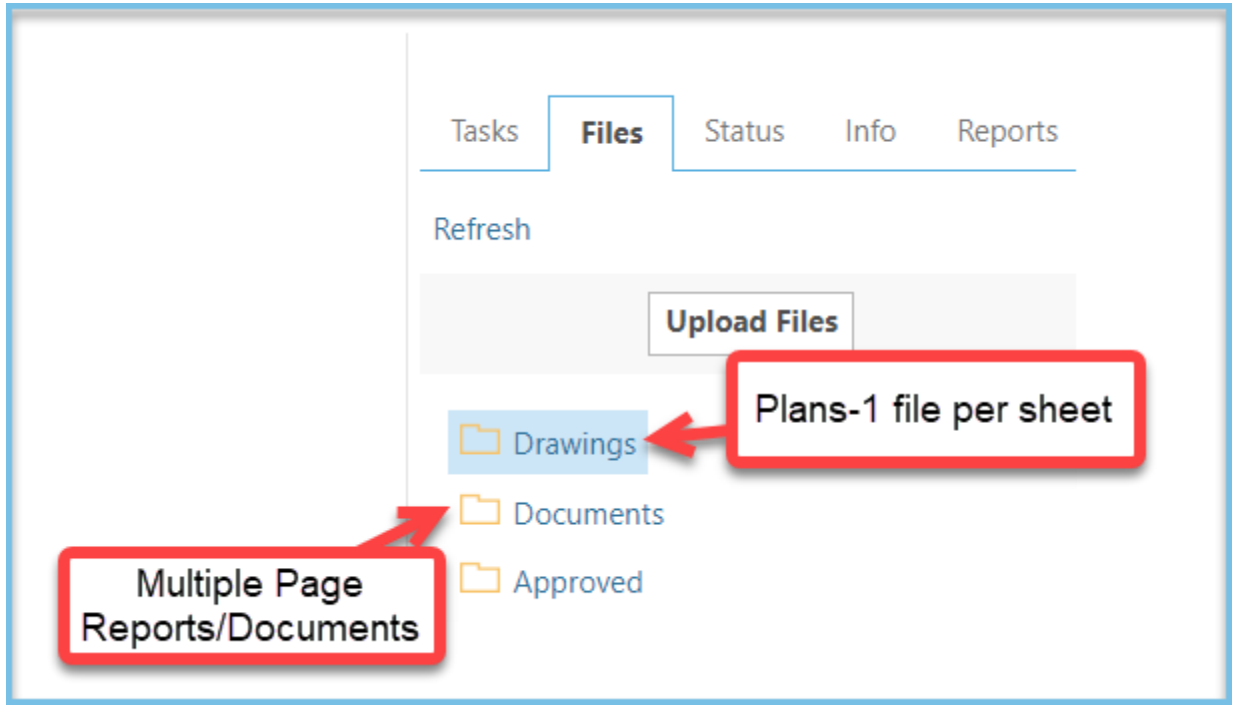
Uploading Files

- 3 folders available for Files
  - Drawings folder for Plans
  - Documents folder for Reports / Documents
  - Approved or Decision folder
    - Stamped and completed reviews



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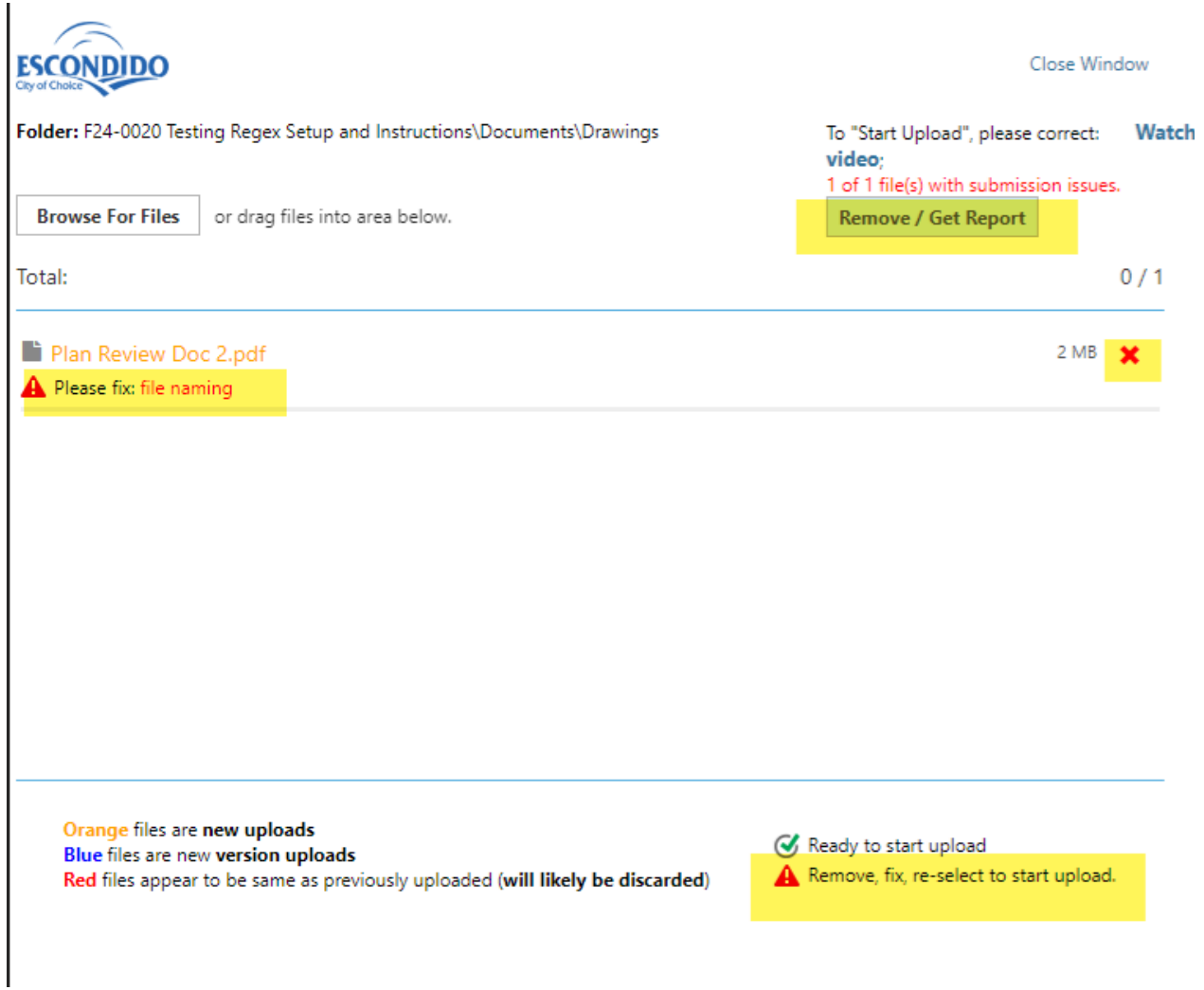
File upload Issue report

If there is a problem uploading files the file is noted with a red caution icon and a report is available to review and correct the issue.



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File Upload Issue Report example:

FILES WITH SUBMISSION POLICY ISSUES REPORT

Project: **GP24-[redacted] SA Respond and Resubmit - E - Grading E - Grading**
Report Date: **3/14/24 12:12 PM**

Unfortunately, these files cannot be uploaded into your plan review project because they do not satisfy one or more of the jurisdictional PDF submission polices.

To resolve, please follow the steps below

Step 1 of 2: Correct the issues

Please review the file list below with submission policy issues that were NOT successfully uploaded. Correct the issues denoted which may be any of the following:

invalid file	file cannot be read or the file may not be a PDF file
password	file appears to be password protected, please resave the file without password protection
file naming	file naming is incorrect, check submission policy for acceptable file naming convention
sheet rotated	recreate this PDF file in landscape orientation (sheet height less than sheet width)
sheet size	recreate this PDF file to meet the minimum or maximum sheet/page size requirements
multi-page	only single page PDF files allowed, split this multi-page PDF file into one page/sheet per PDF file
not signed	file is required to be digitally signed, check submission policy for accepted digital signing methods

Files to be corrected - issues as submitted to folder: GP24[redacted] SA Respond and Resubmit\Drawings (1 total)

Files should meet the following Naming pattern:

Case Number: For Example: B##-#### followed by

Discipline Initial: For Example: A (A for Architectural) followed by

Page Numbers: (001 3 digit numbers) followed by **-** [dash]

FileName: (No spaces and a maximum of 20 characters)

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File Upload Issue Report example:

A link to the discipline reference sheet can be found here

City of Escondido example:

City of Escondido Example:

Case-NumberDisciplinePageNumbers-FileName

B##-####A001-FileName
PL##-####G001-FileName
GP##-####C001-FileName

A1-01 First Floor Plan F.pdf
Please fix: file naming

Step 2 of 2: Upload corrected files

Return to your assigned submission task to select your corrected files. They will be rescanned for submission policies and if there are no issues, you will be able to upload these files to your plan review project and complete your submission task.

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Prescreen Corrections

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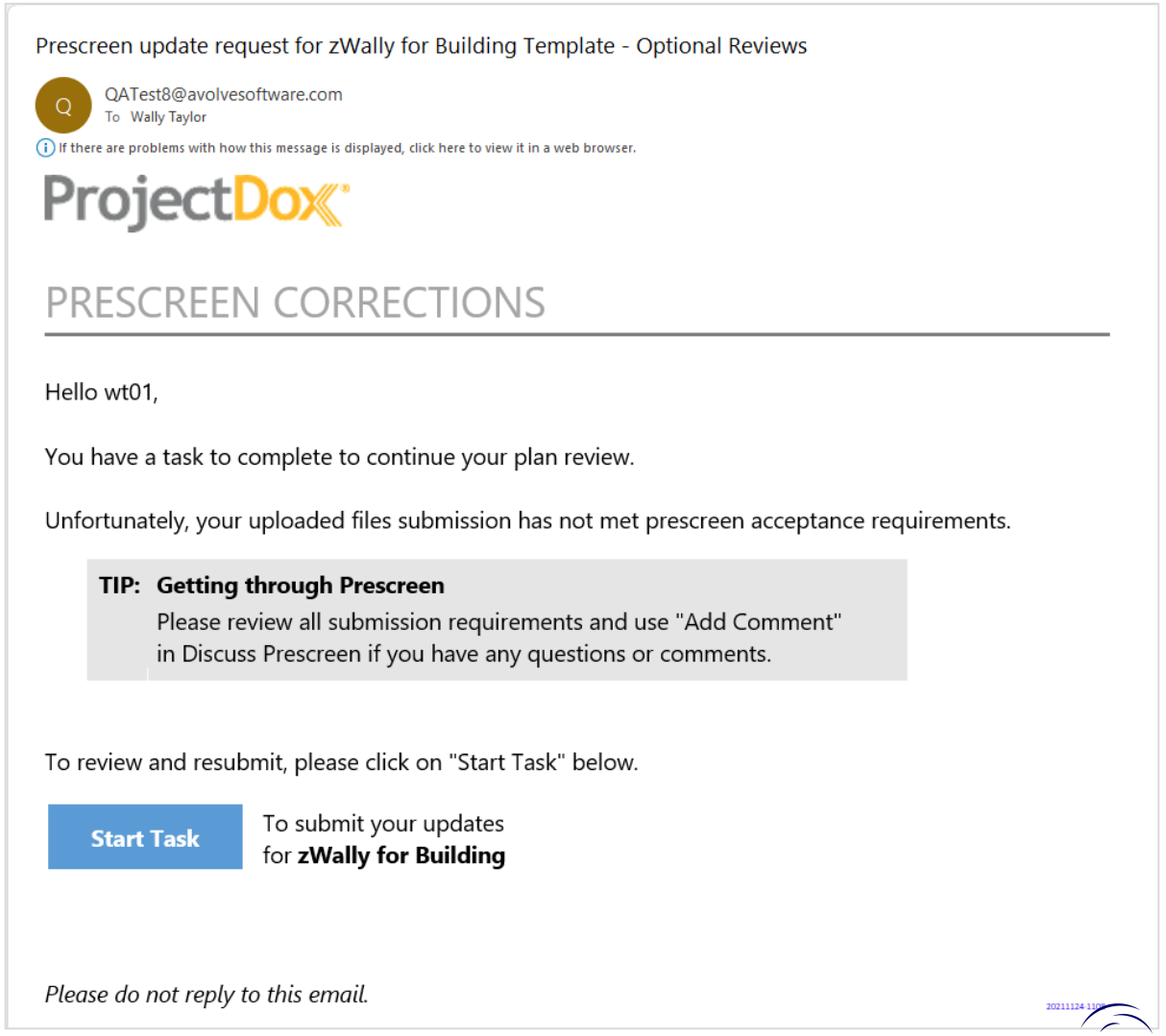
Prescreen Corrections - Email

- Jurisdiction does Prescreen prior to Formal Review
- Email notice for corrections needed



Prescreen update request for zWally for Building Template - Optional Reviews

Q QATest8@avolvesoftware.com
To Wally Taylor

If there are problems with how this message is displayed, click here to view it in a web browser.

ProjectDox

PRESCREEN CORRECTIONS

Hello wt01,

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 **zWally for Building**

Please do not reply to this email.

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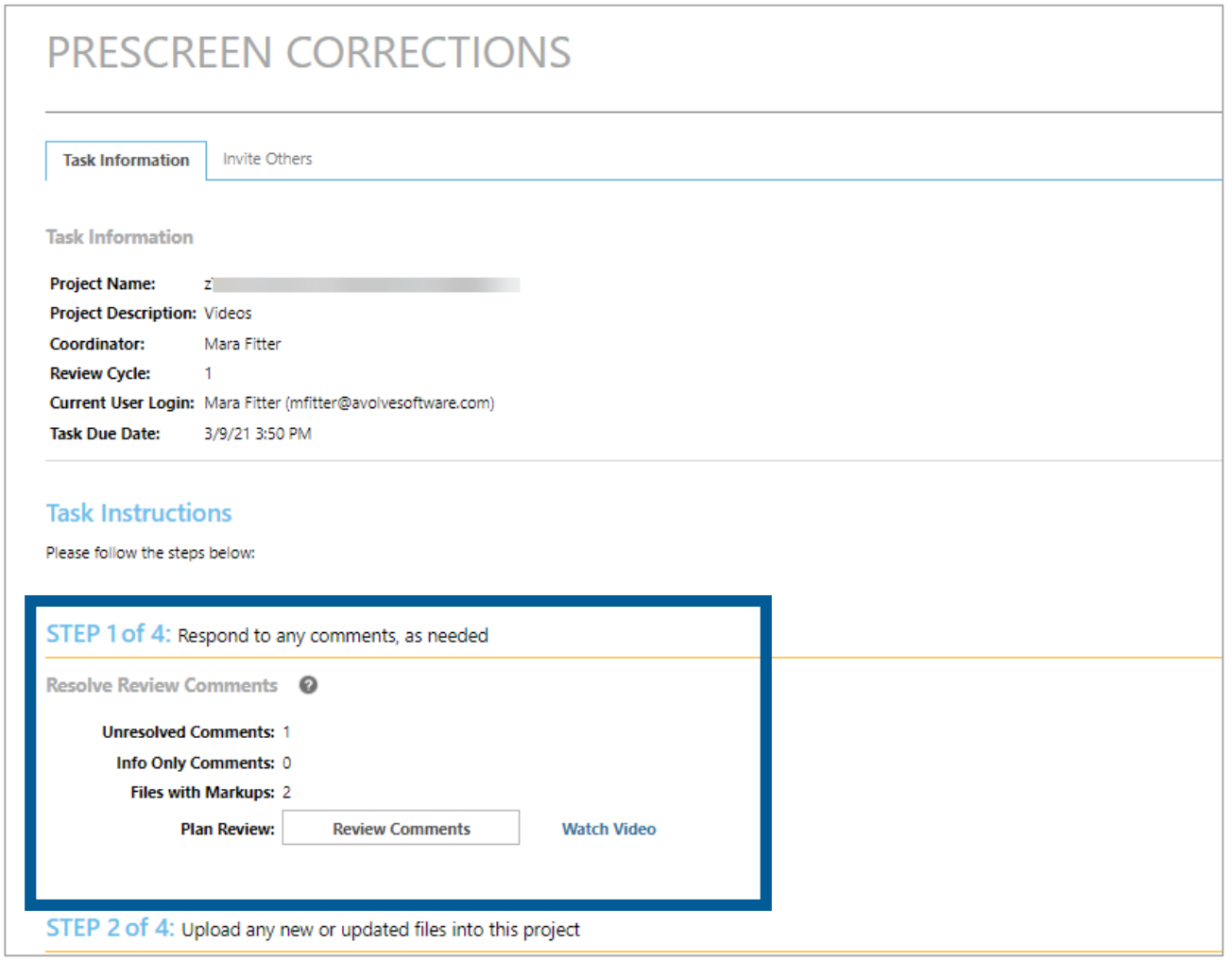
Prescreen Corrections - eForm

Follow the steps:



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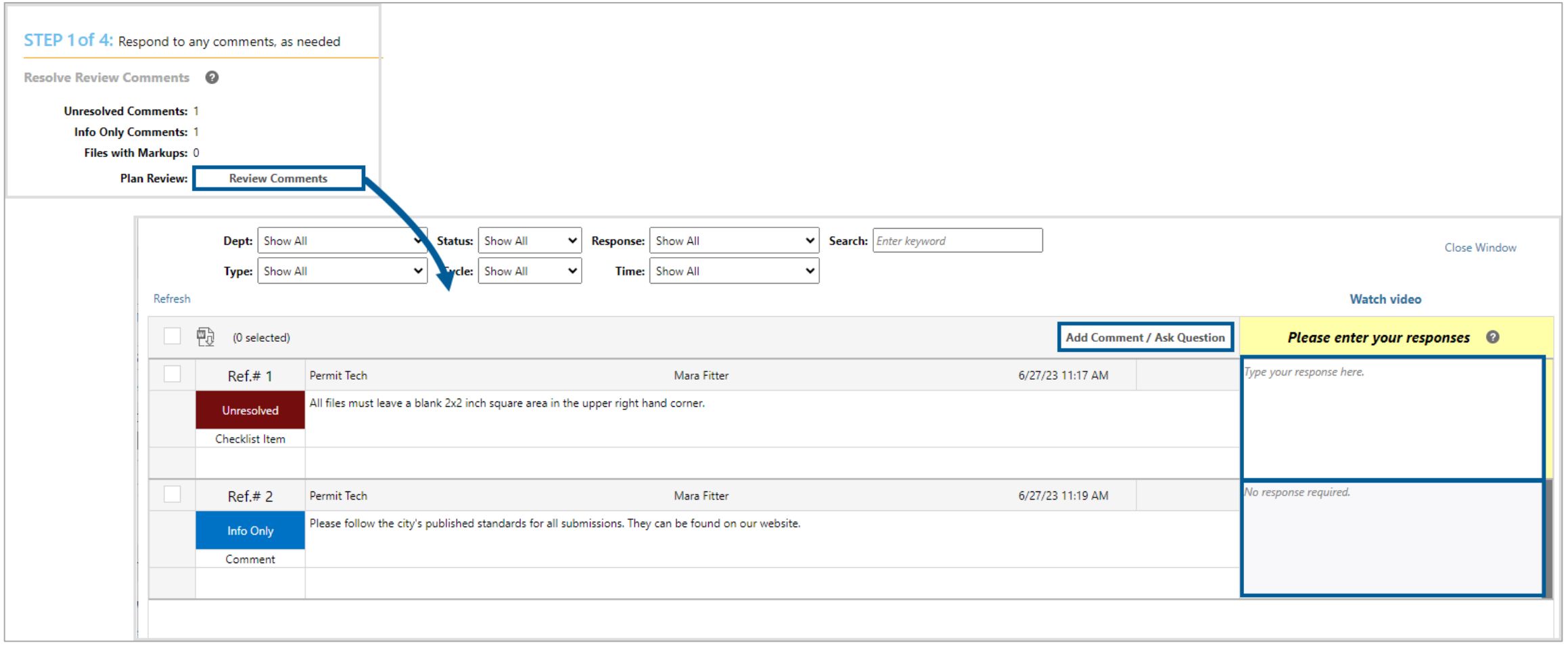
Prescreen Corrections – Review Comments Grid



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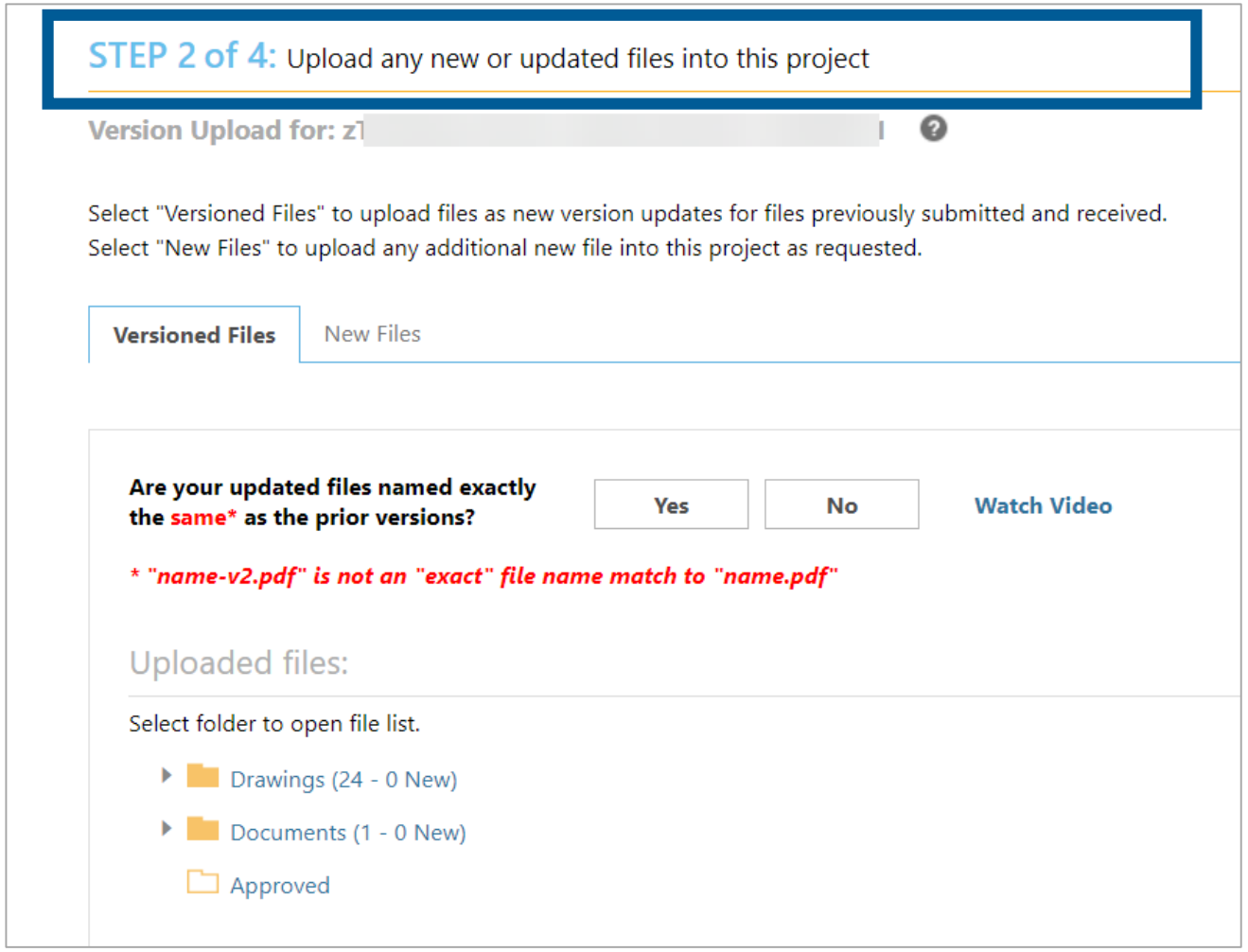
Prescreen Corrections - eForm



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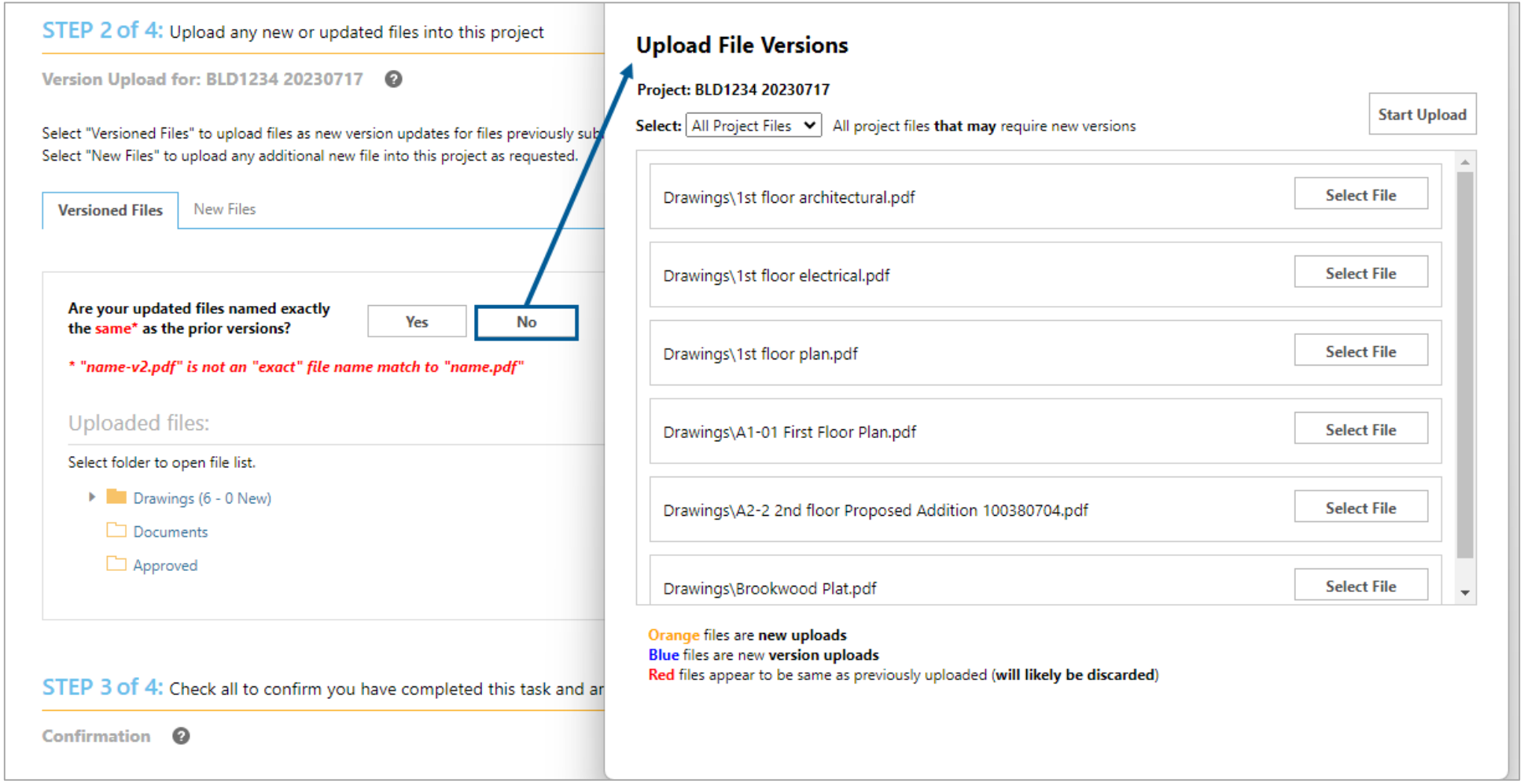
Applicant - Upload Versioned Files



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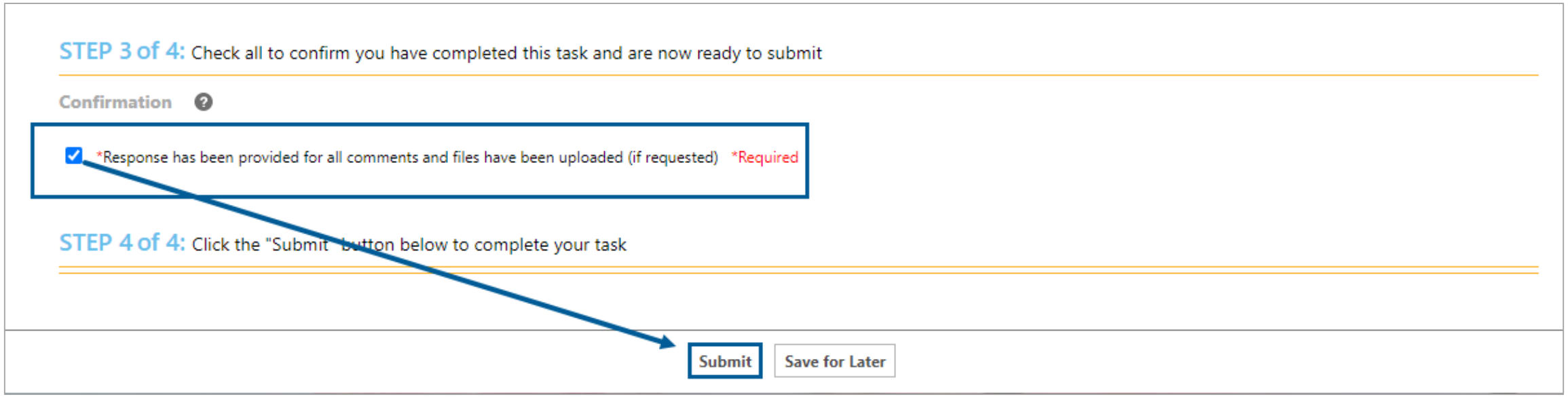
Prescreen Corrections - eForm



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Review

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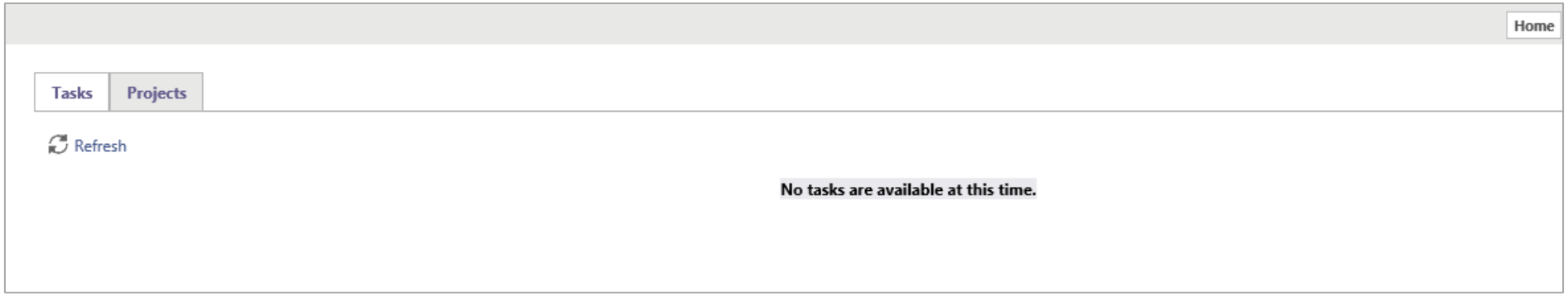
Project Status – What's Going On?

- Departments are reviewing your submission during this time.
- No action is required on your part until you receive notification.
- You can easily check the status of your project at any time.



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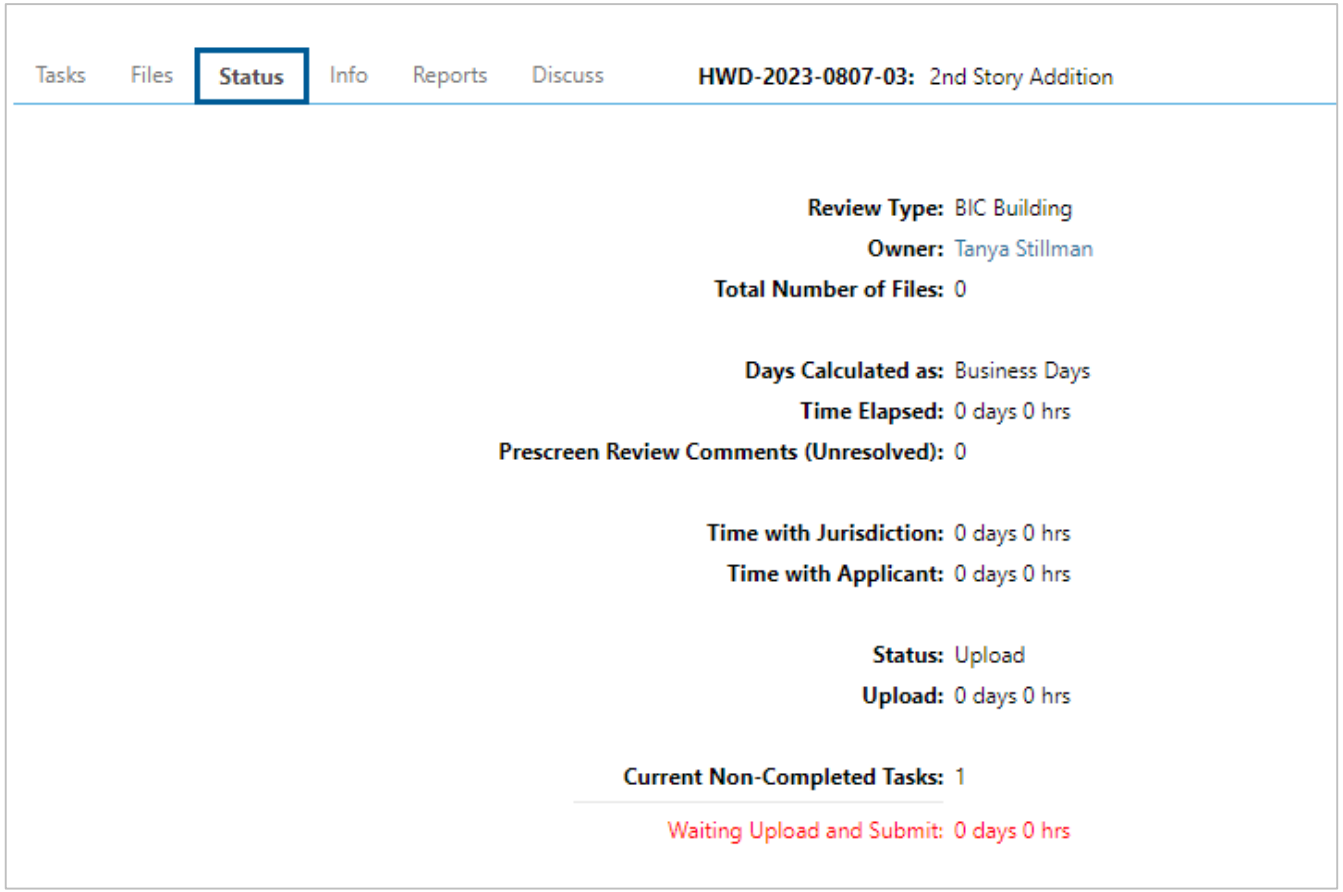
Project Status – In the Project

- Project Status tab



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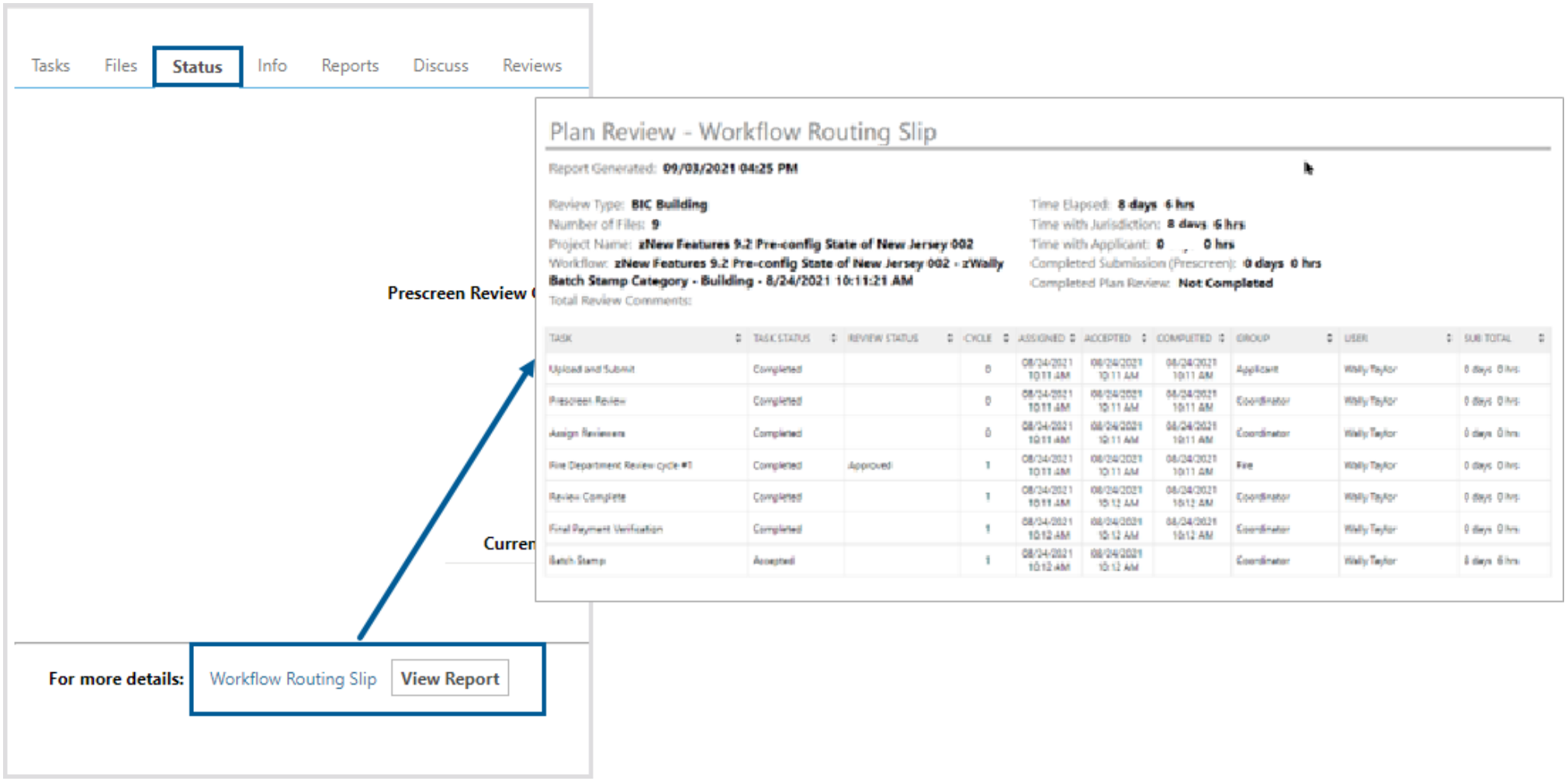
Project Status - Workflow Routing Slip



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Respond and Resubmit

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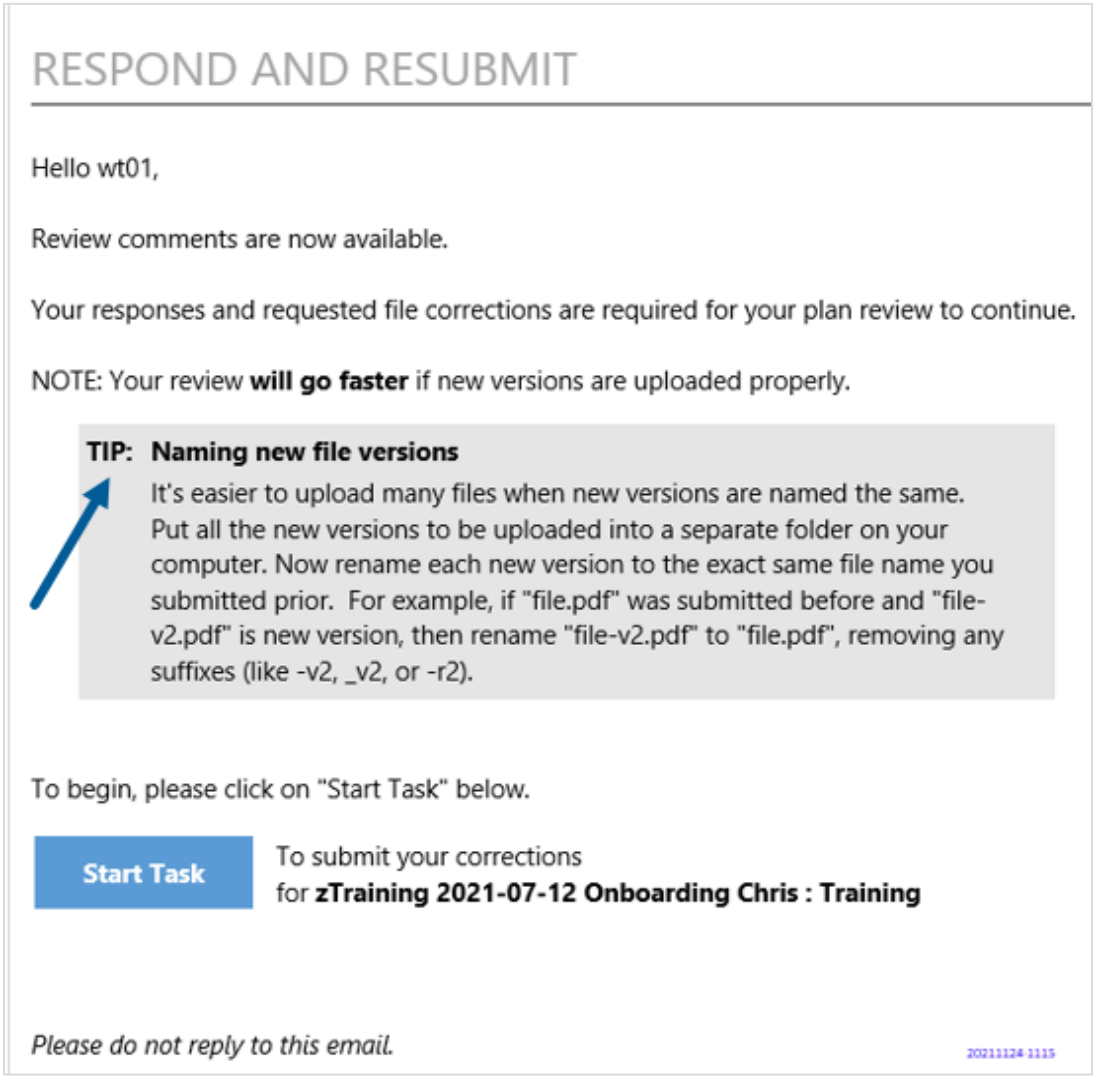
Respond and Resubmit - Email



RESPOND AND RESUBMIT

Hello wt01,

Review comments are now available.

Your responses and requested file corrections are required for your plan review to continue.

NOTE: Your review **will go faster** if new versions are uploaded properly.

TIP: Naming new file versions

It's easier to upload many files when new versions are named the same. Put all the new versions to be uploaded into a separate folder on your computer. Now rename each new version to the exact same file name you submitted prior. For example, if "file.pdf" was submitted before and "file-v2.pdf" is new version, then rename "file-v2.pdf" to "file.pdf", removing any suffixes (like -v2, _v2, or -r2).

To begin, please click on "Start Task" below.

Start Task

To submit your corrections
for **zTraining 2021-07-12 Onboarding Chris : Training**

Please do not reply to this email.

20211124 1115

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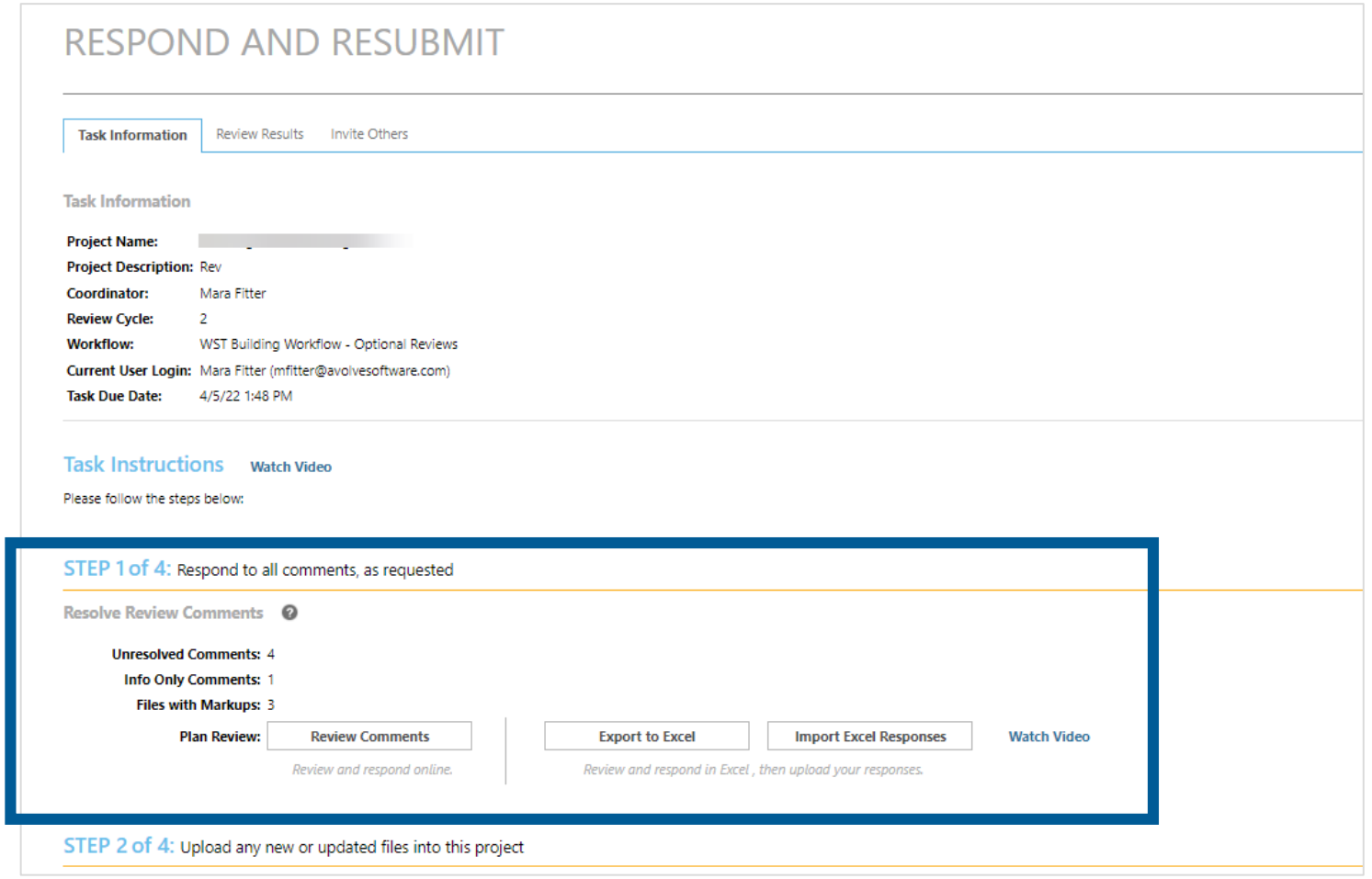
Respond and Resubmit - eForm

Follow the steps:



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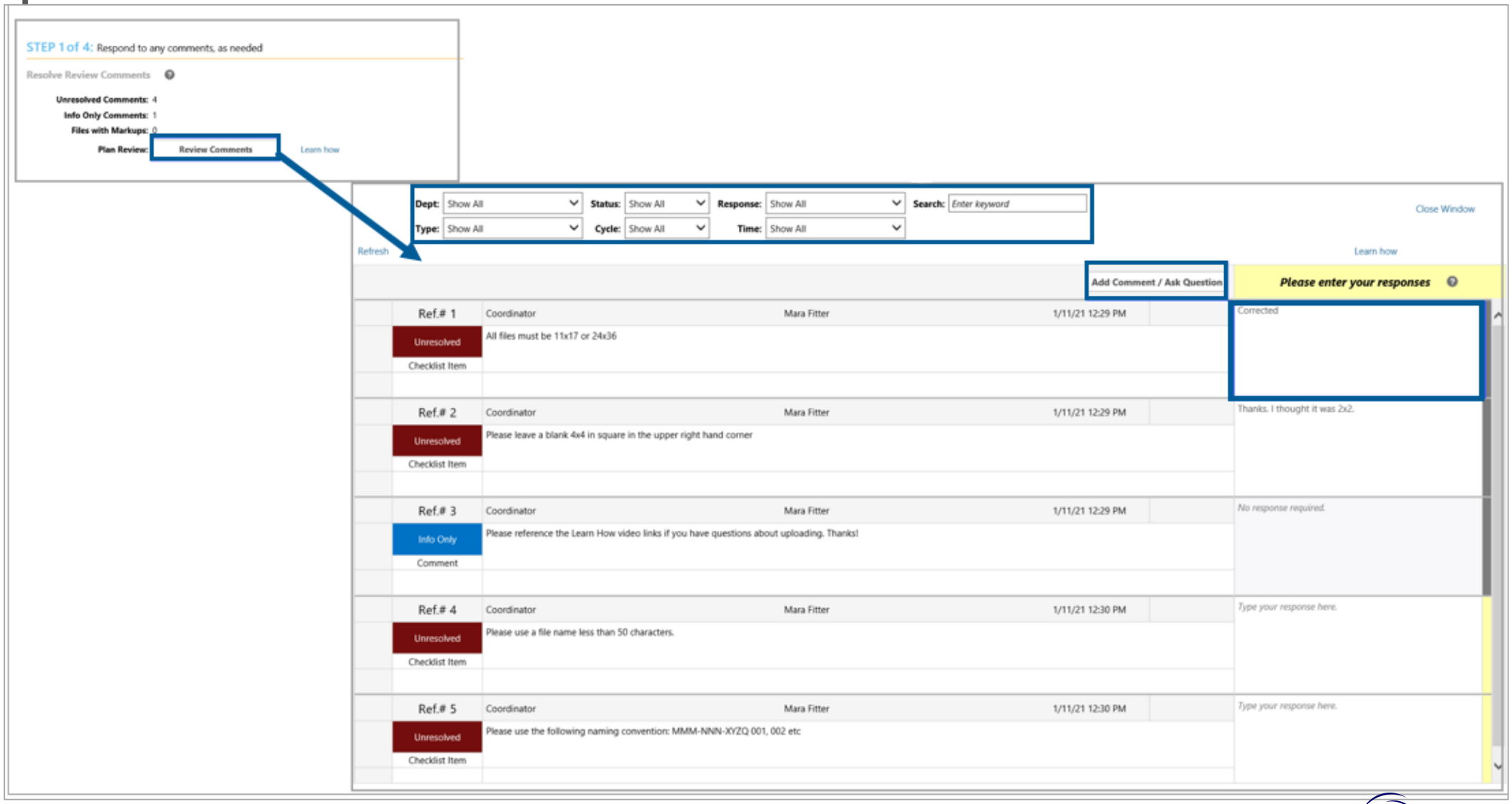
Applicant – Review Comments



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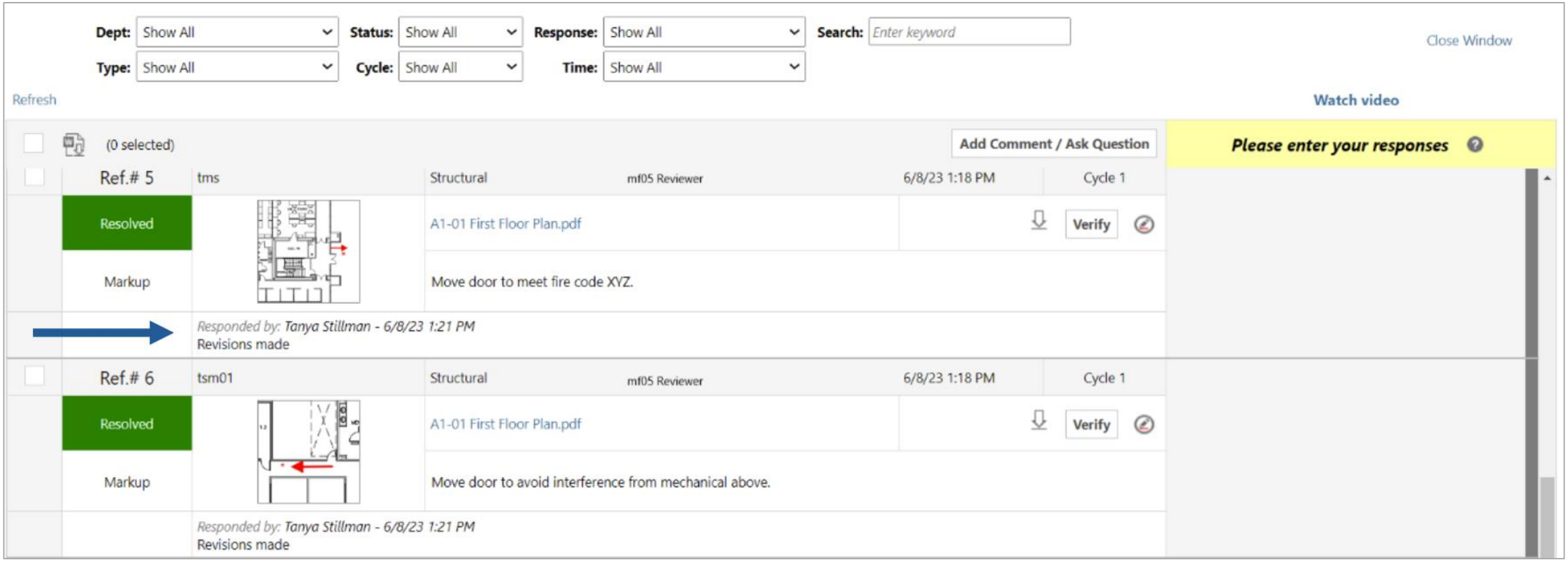
Review Comments Grid



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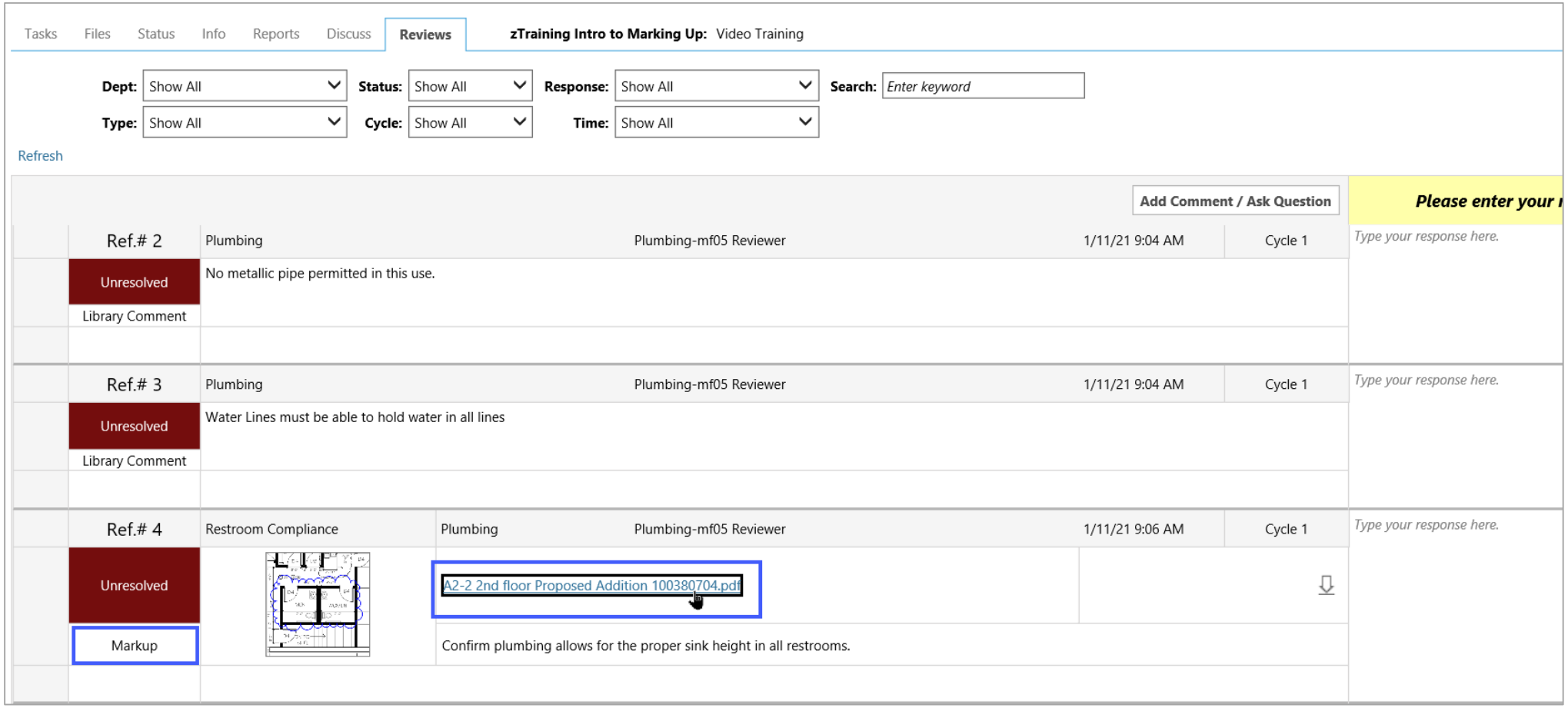

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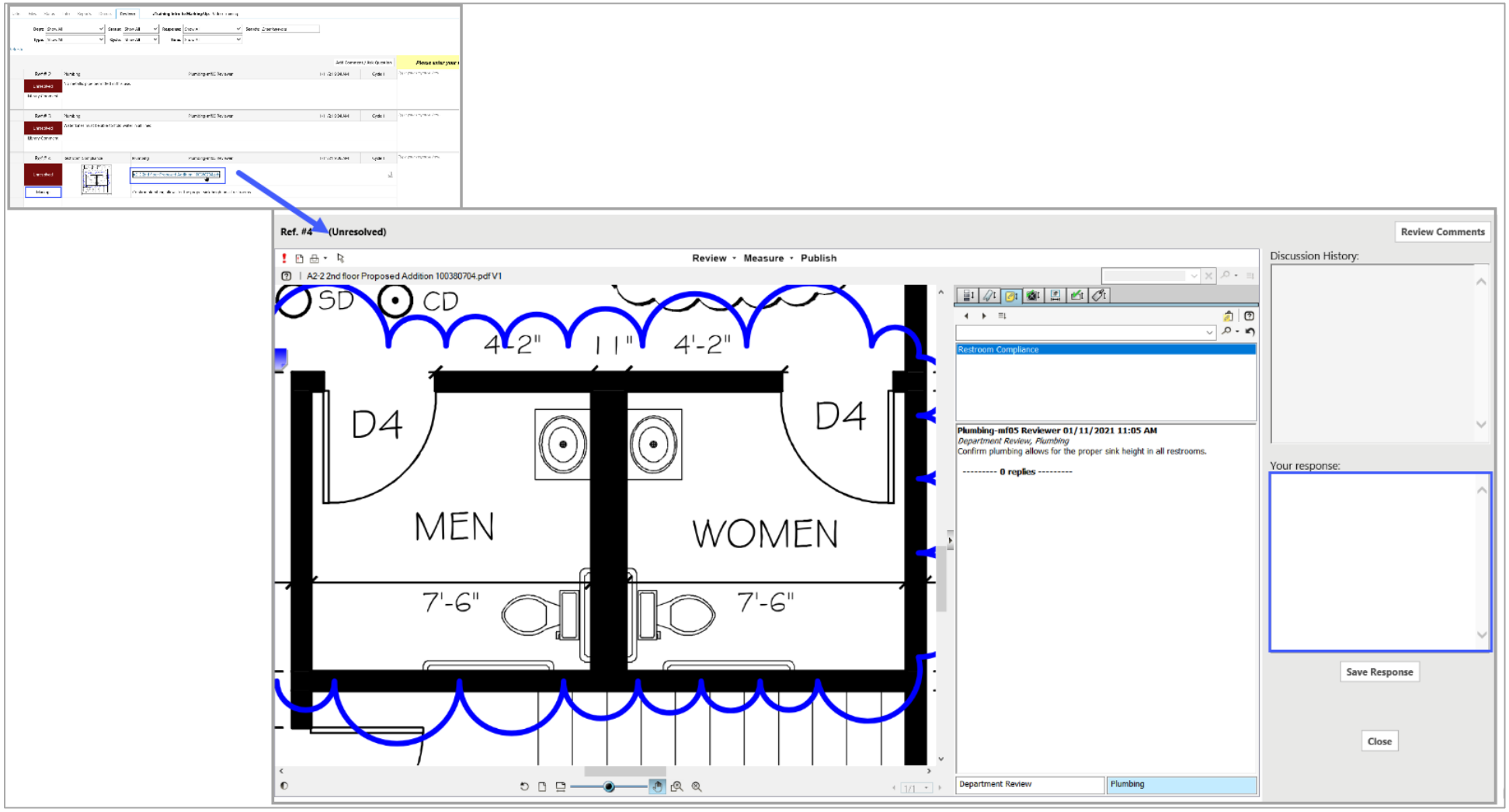
Applicant – Review Comments



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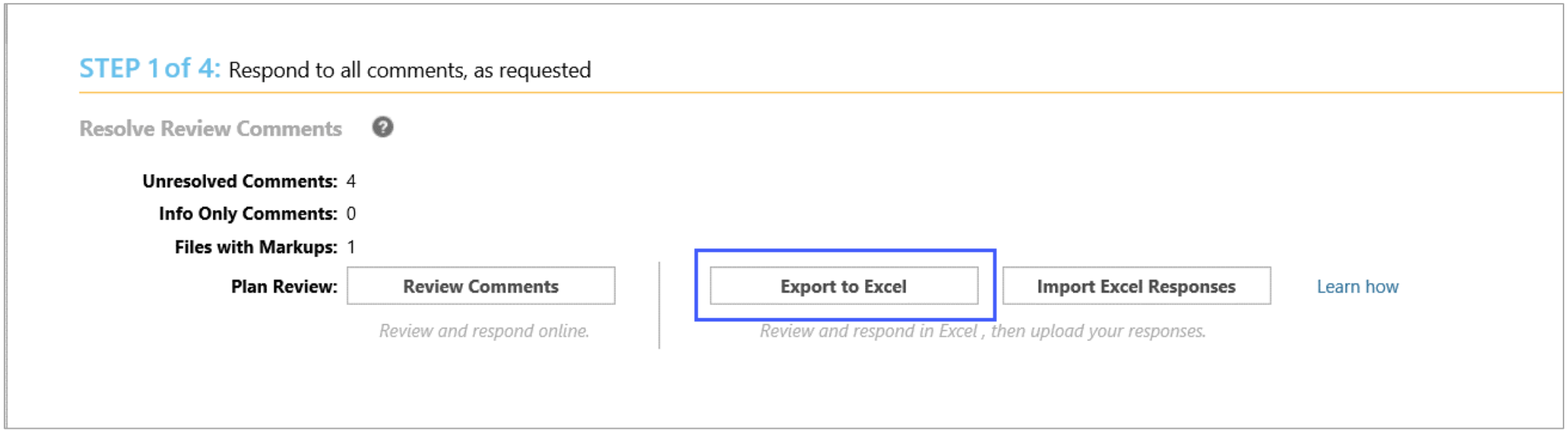
Applicant – Export/Import Review Comments - Excel



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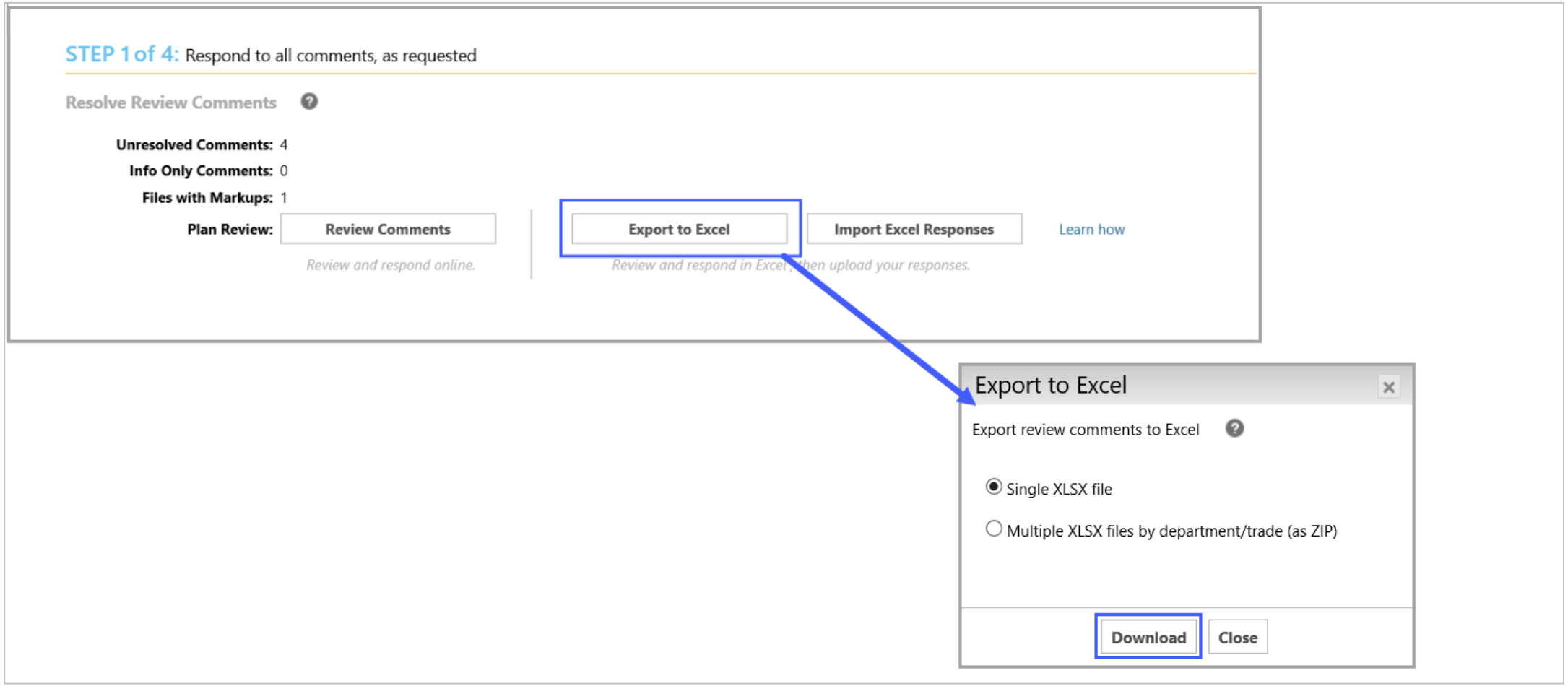
Applicant – Export/Import Review Comments



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Applicant – Export/Import Review Comments

REF #	REVIEWED BY	TYPE	VIEW	ENTER YOUR COMMENT RESPONSE HERE	DISCUSSION	CYCLE	STATUS
1	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:03 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-mf05 Reviewer 1/11/21 9:04 AM	Library Comment No metallic pipe permitted in this use.				1	Unresolved
3	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:04 AM	Library Comment Water Lines must be able to hold water in all lines				1	Unresolved
4	Plumbing Plumbing-mf05 Reviewer 1/11/21 9:06 AM	Markup A2-2 2nd floor Proposed Addition 100380704.pdf Restroom Compliance Confirm plumbing allows for the proper sink height in all restrooms.	open			1	Unresolved

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Applicant – Export/Import Review Comments

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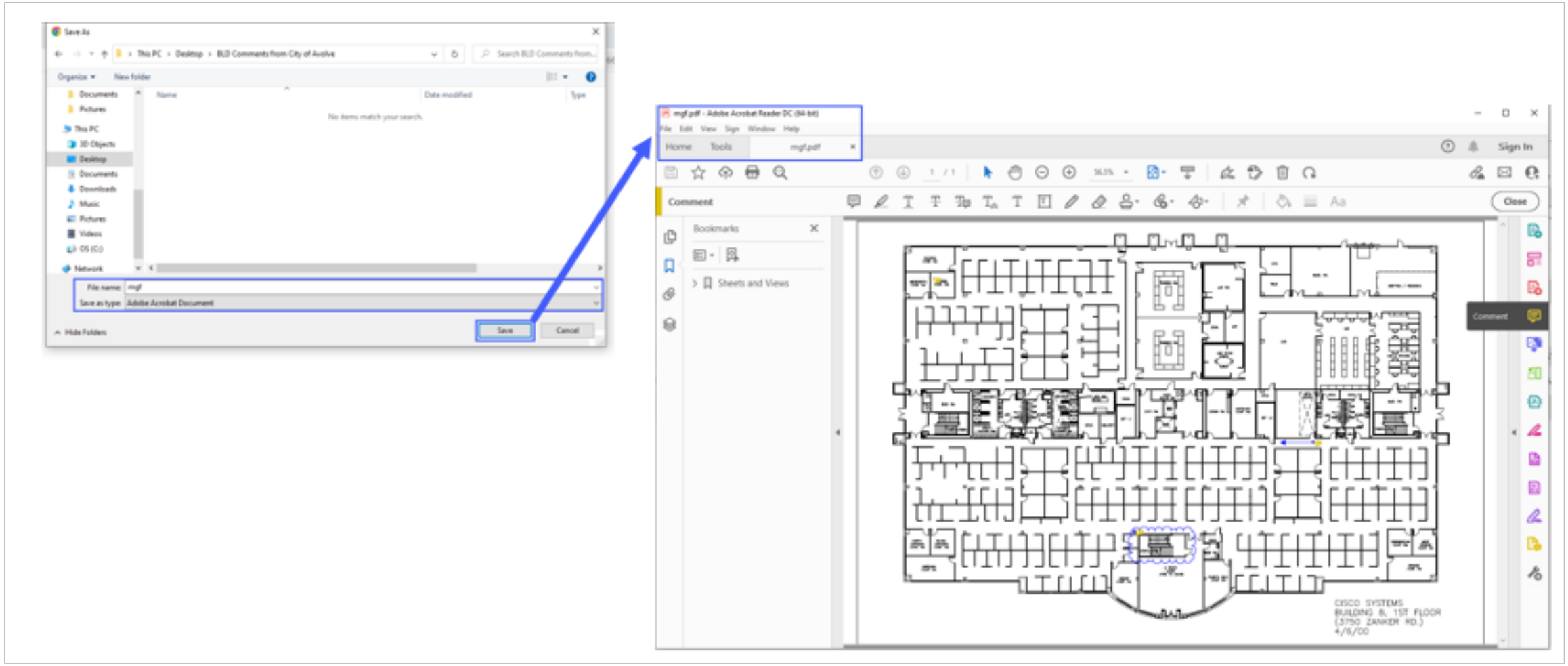
Applicant – Export/Import Review Comments



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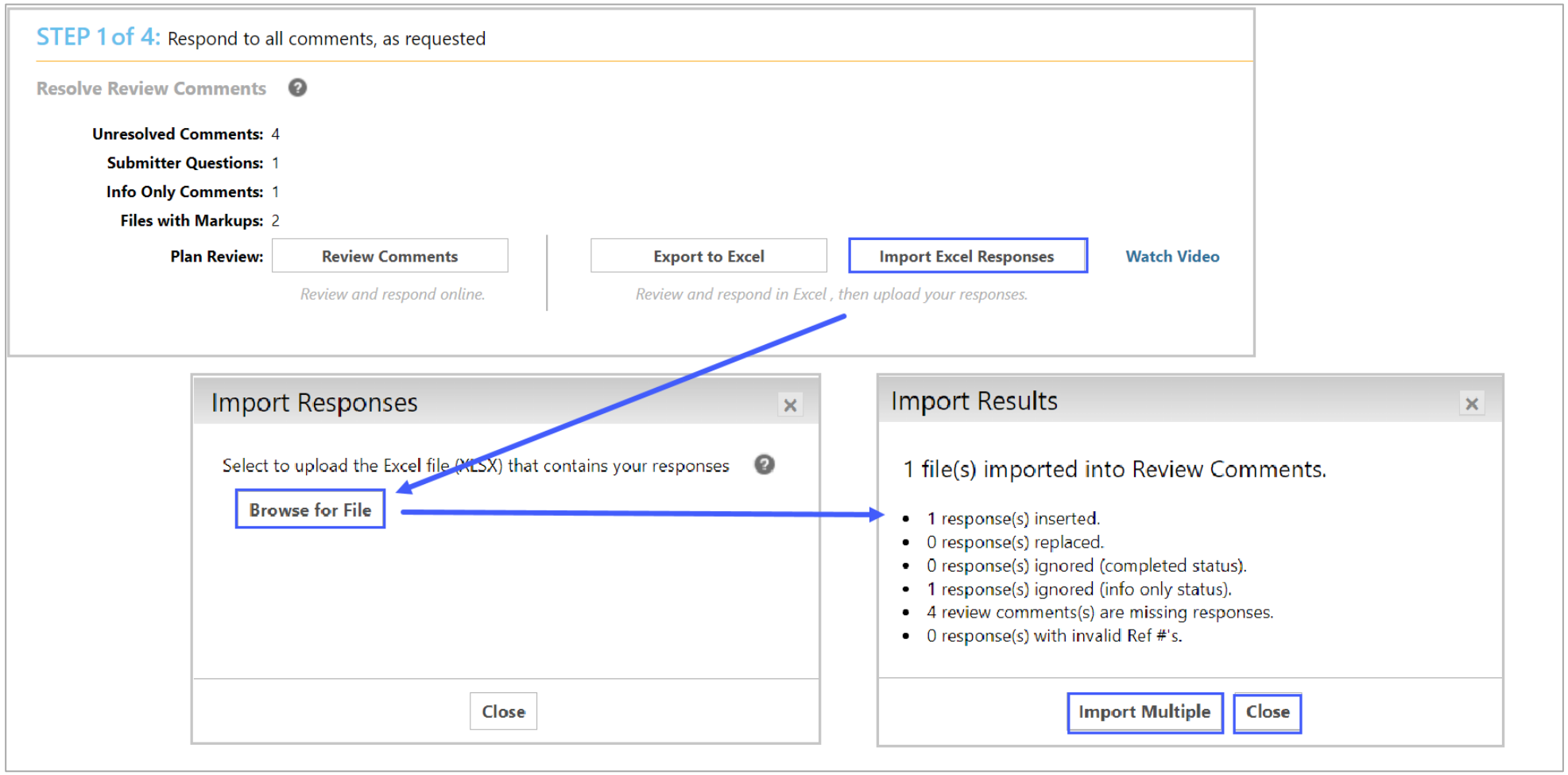
Applicant – Export/Import Review Comments



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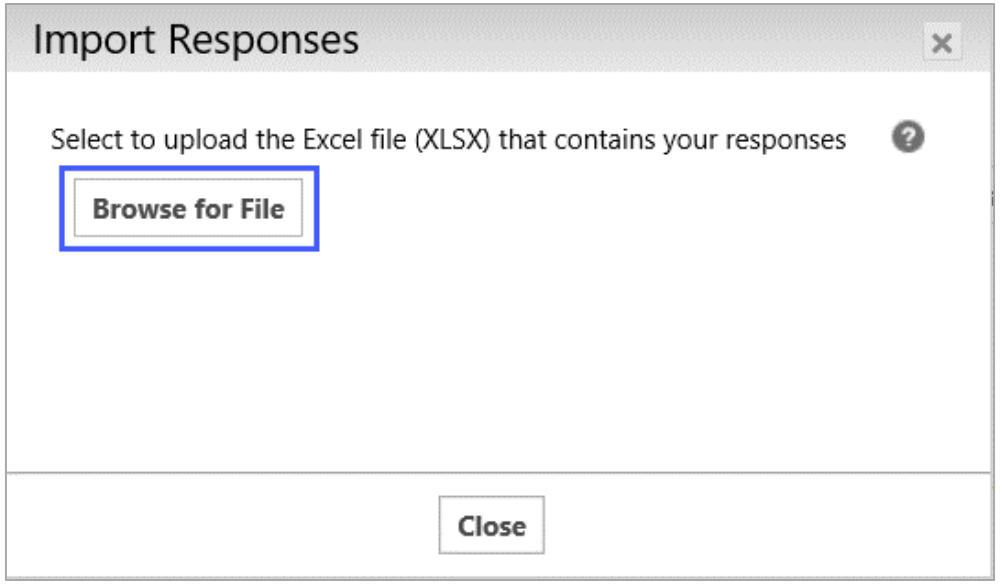
Applicant – Export/Import Review Comments



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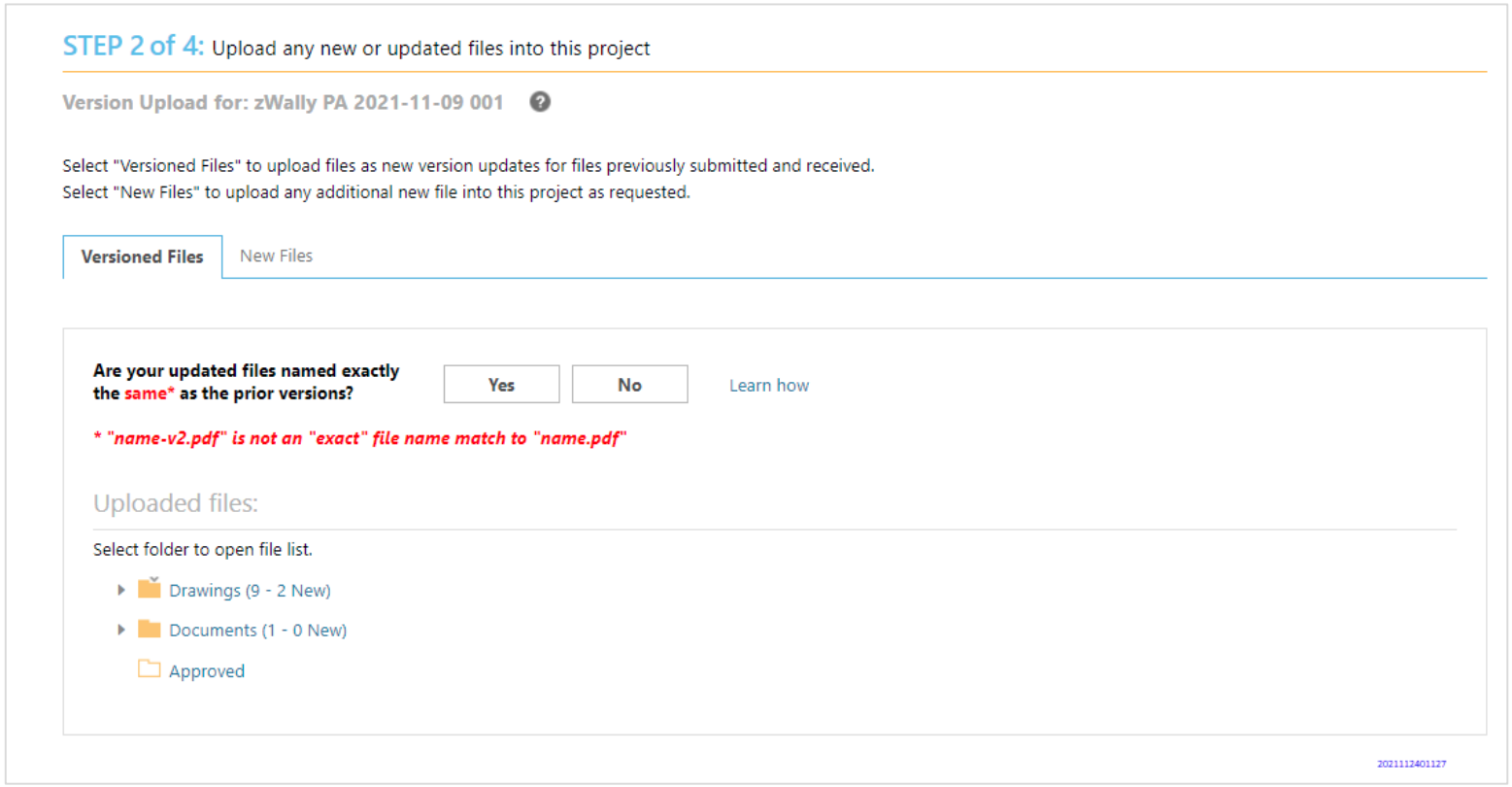
Respond and Resubmit - eForm

Follow the steps:



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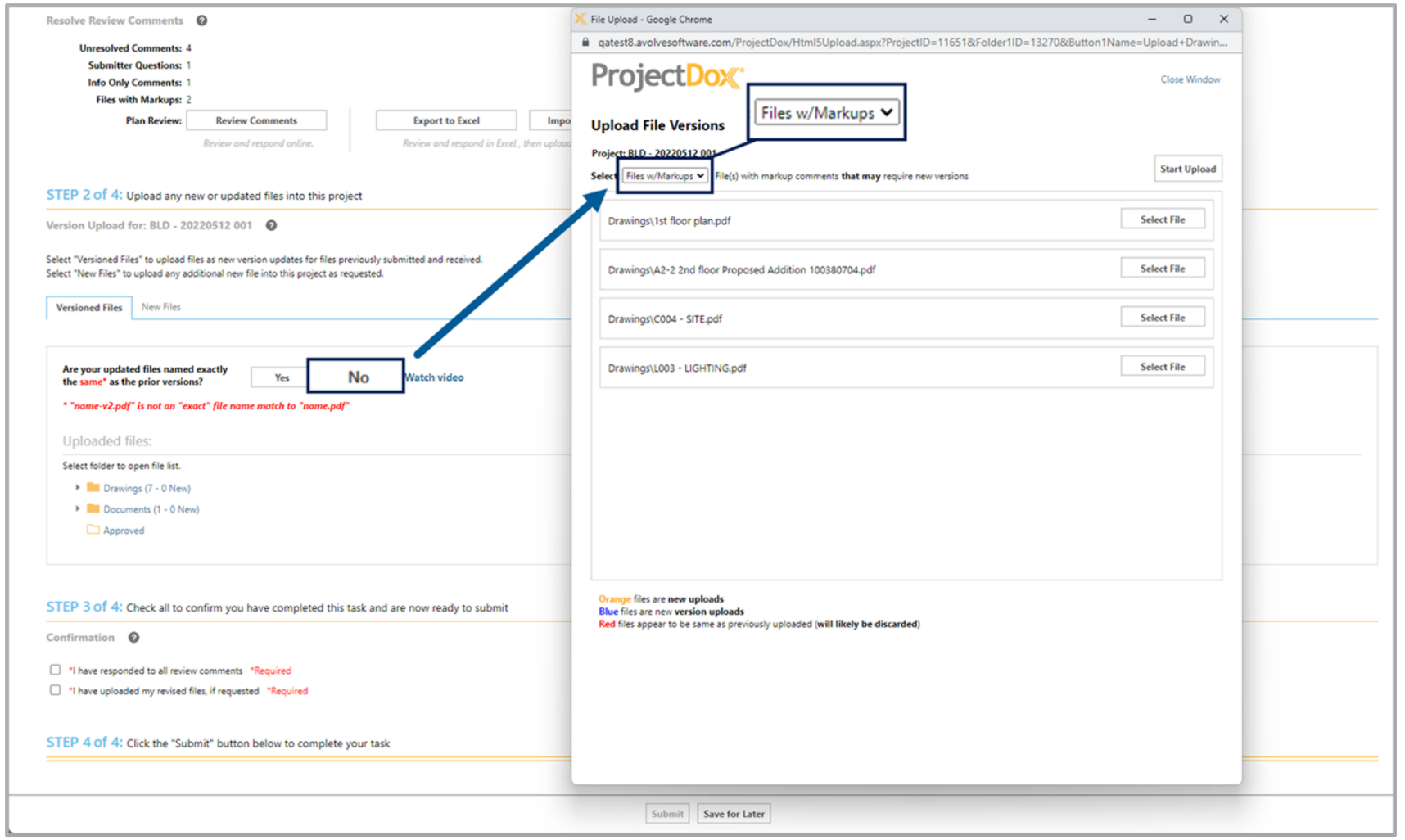
Applicant - Upload Versioned Files



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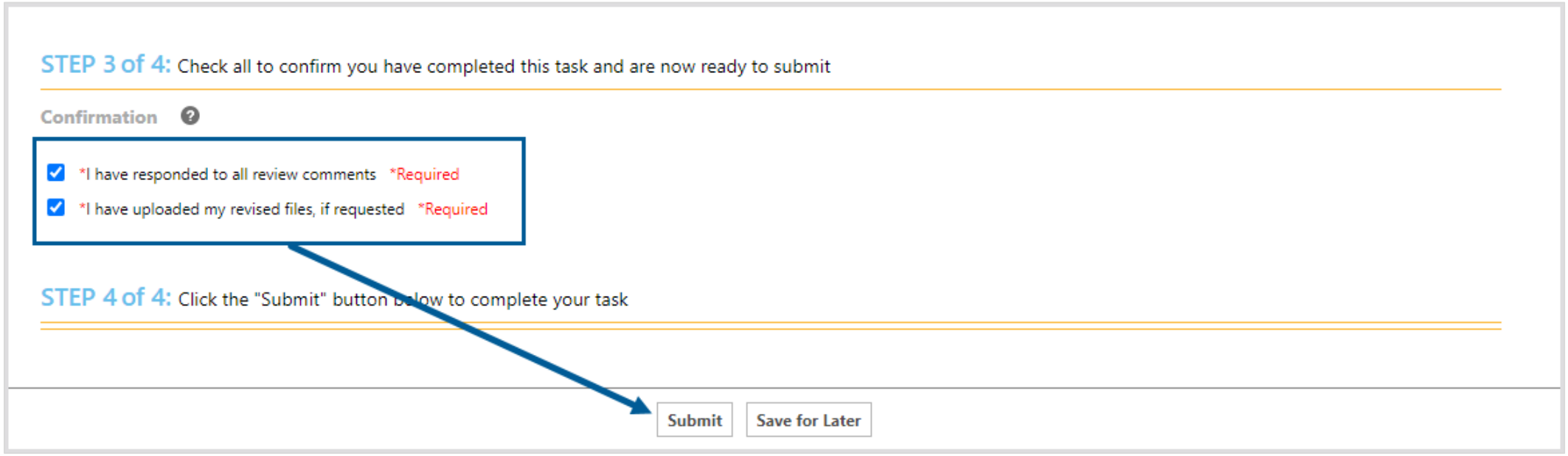
Respond and Resubmit - eForm

Follow the steps:



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Final Documents

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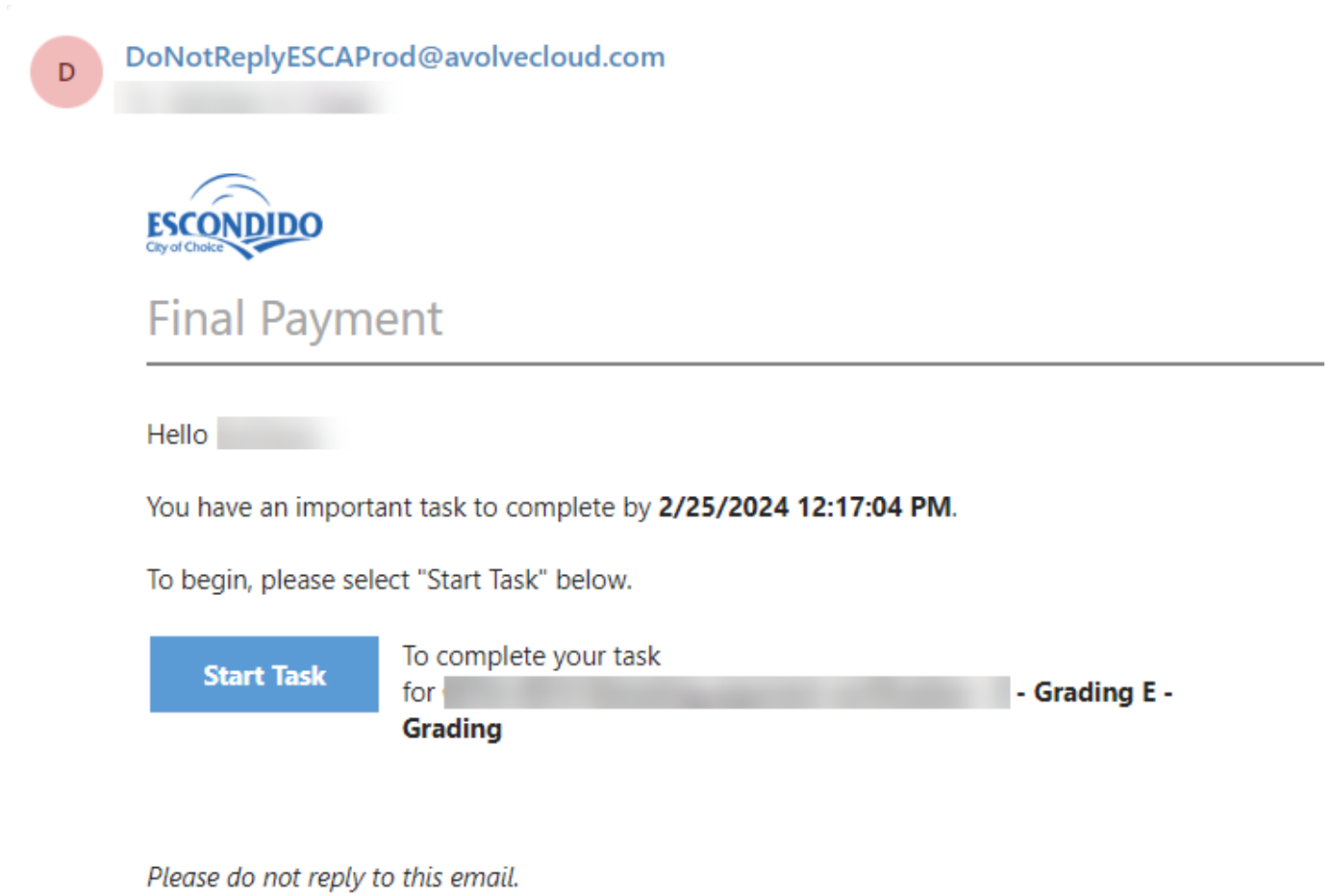
Applicant - Final Payment Email



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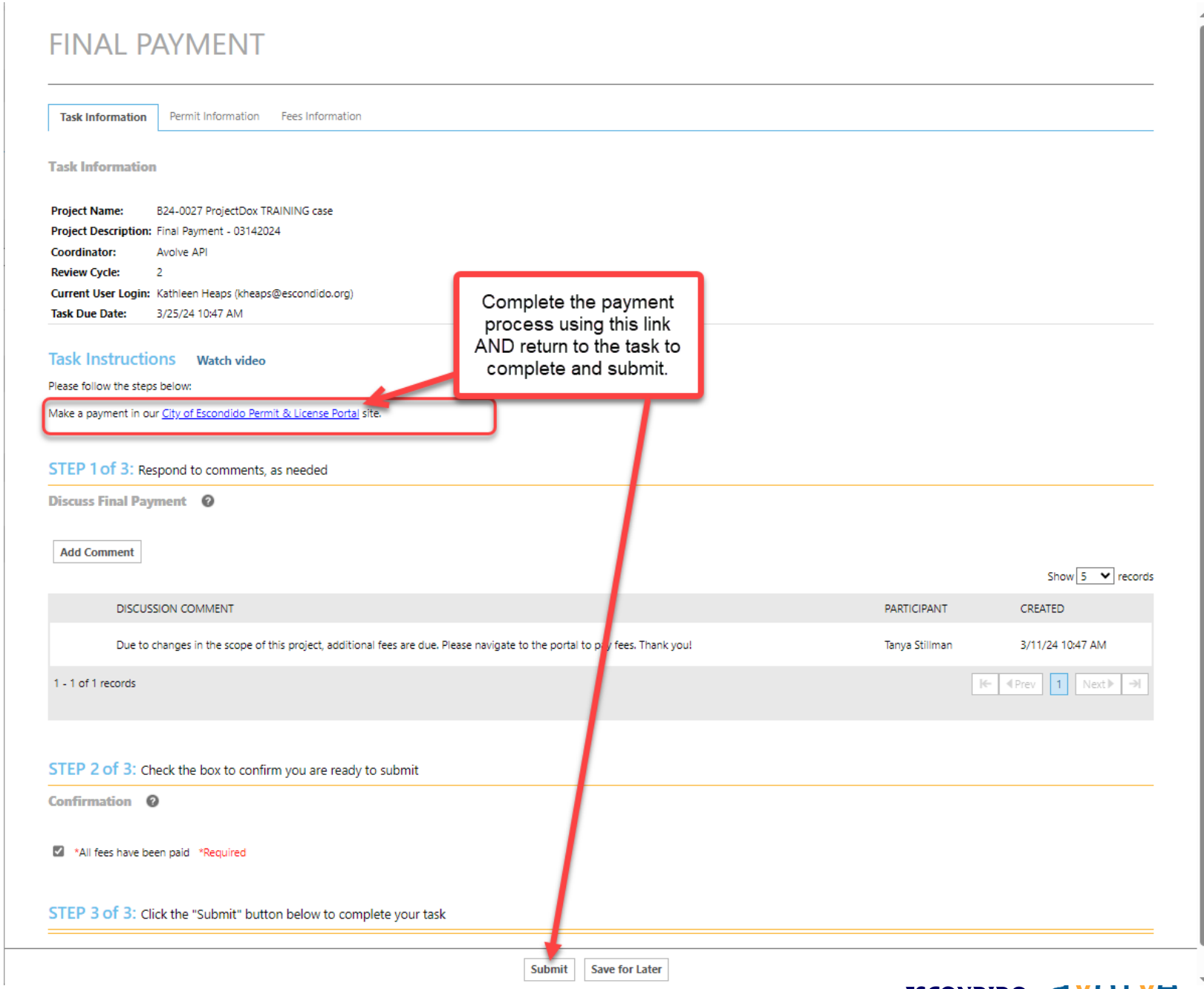
Final Payment Task



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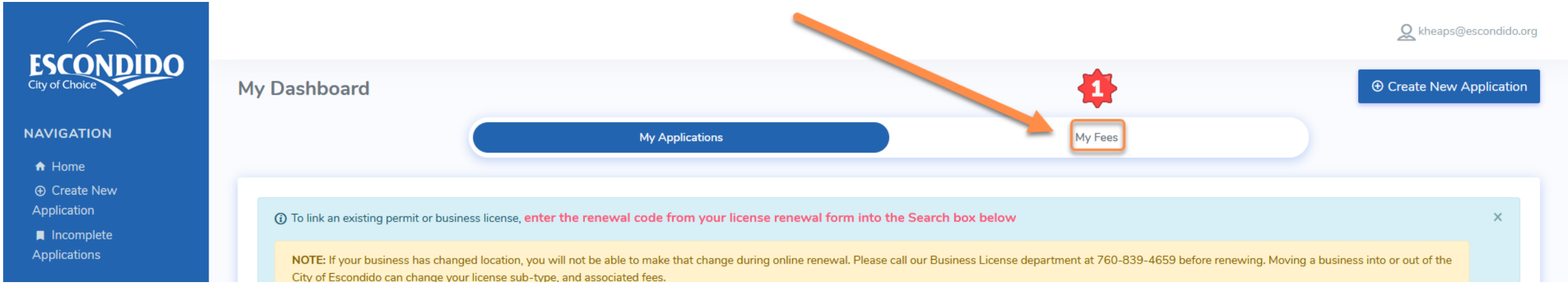
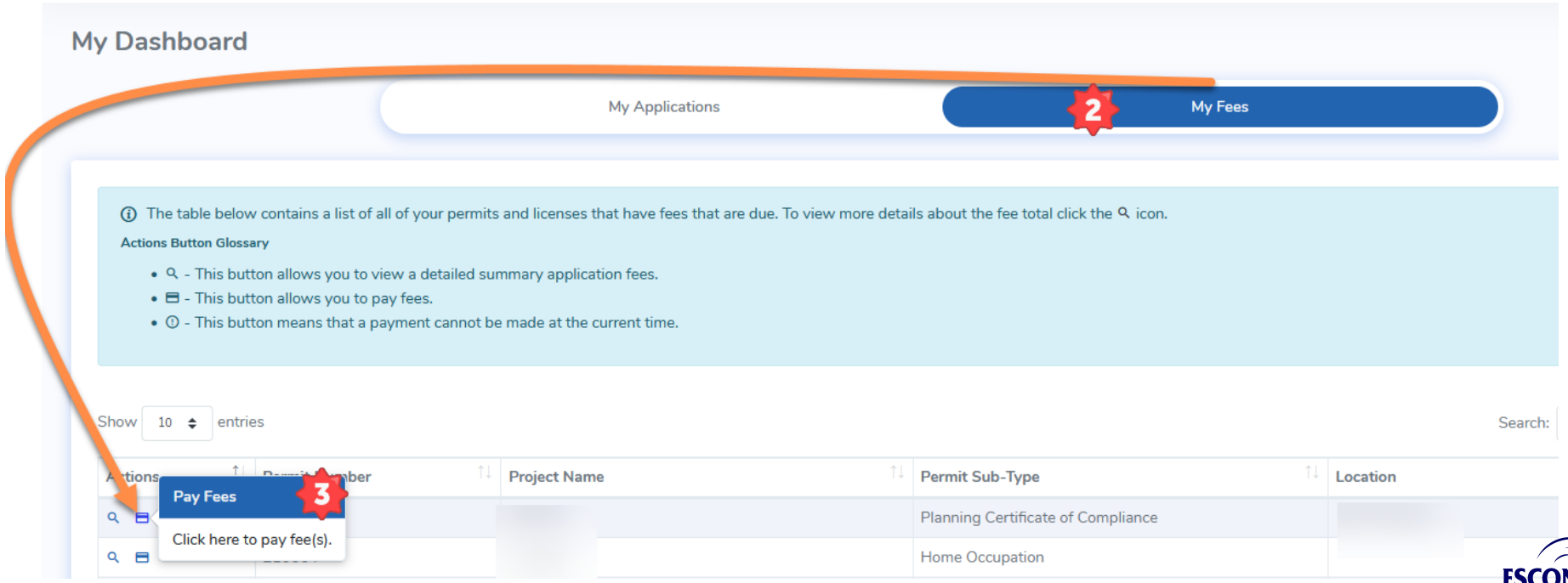
Completing the Final Fee Payment Task





*****NOTE*****

Return to ProjectDox to complete the Final Payment task.

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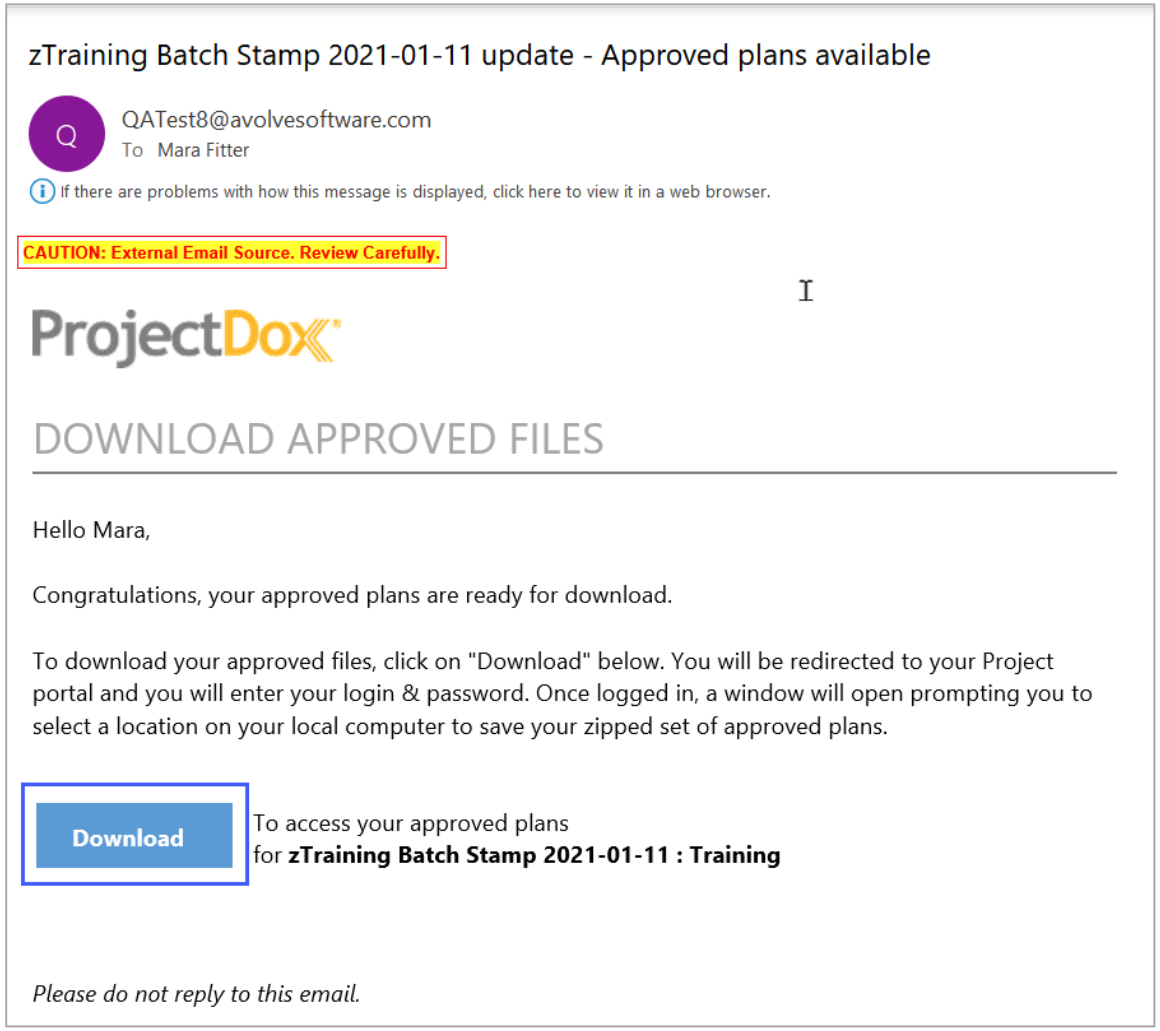
Applicant - Download Approved Files Using Email



zTraining Batch Stamp 2021-01-11 update - Approved plans available

QATest8@avolvesoftware.com
To Mara Fitter

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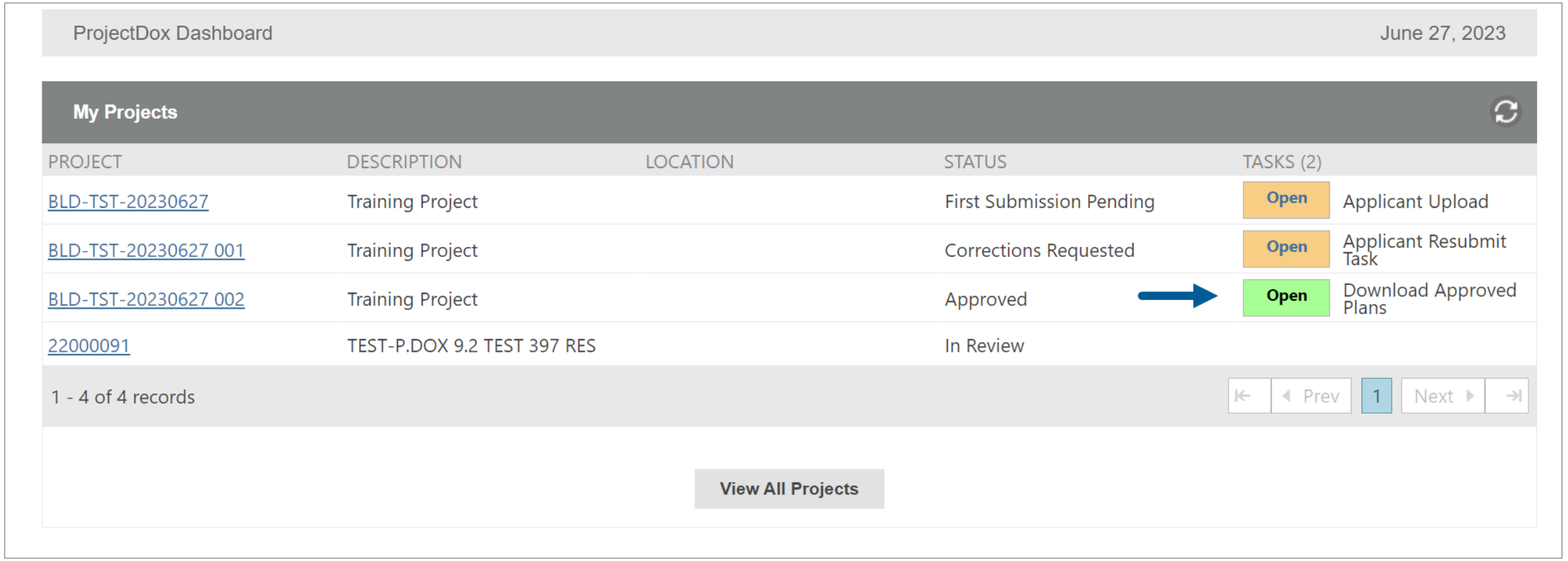

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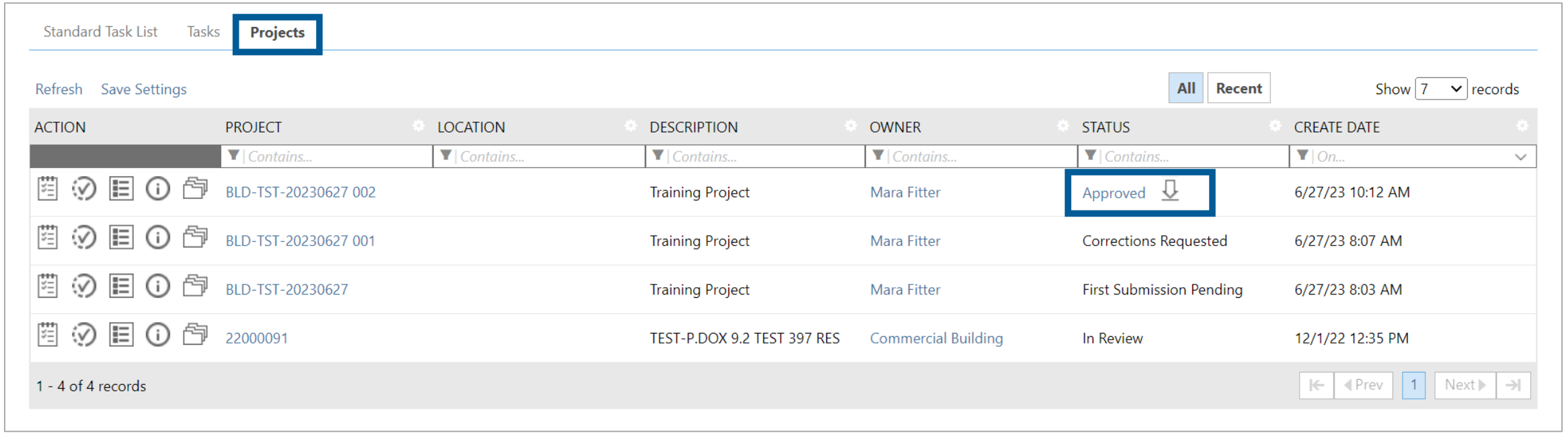

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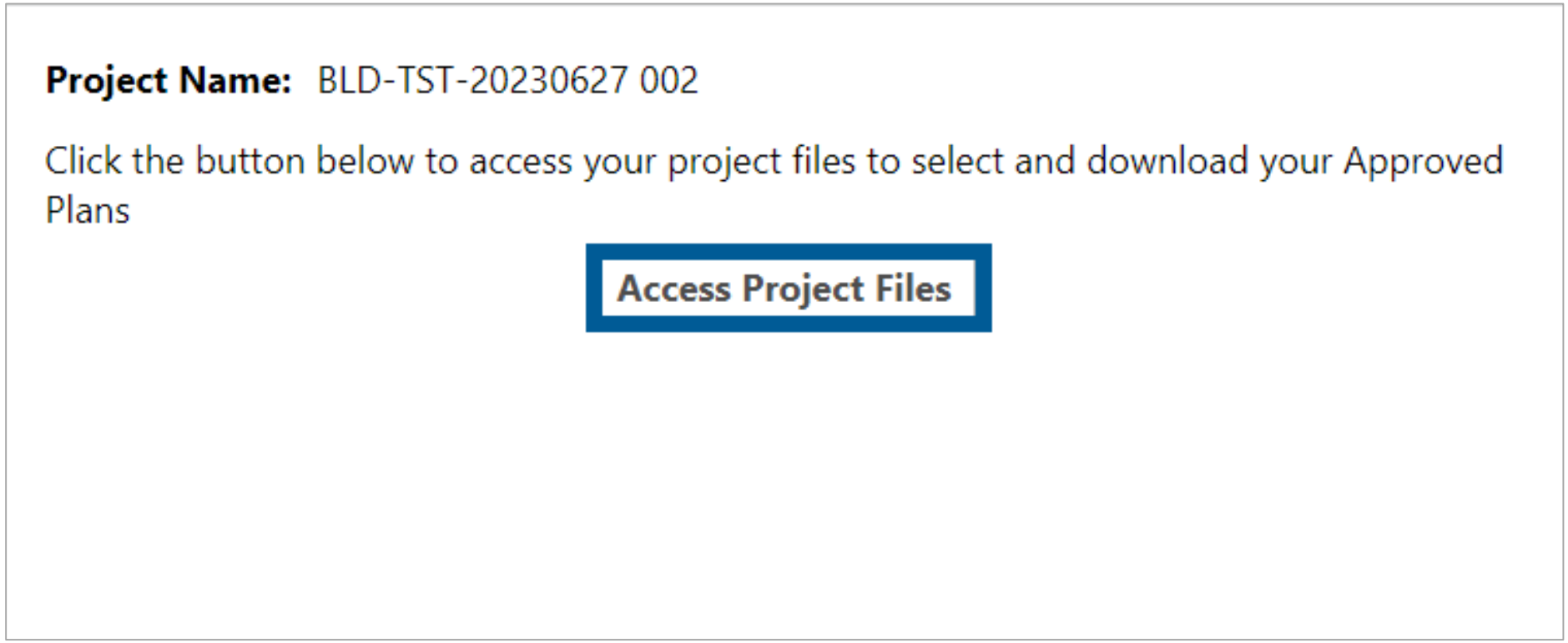

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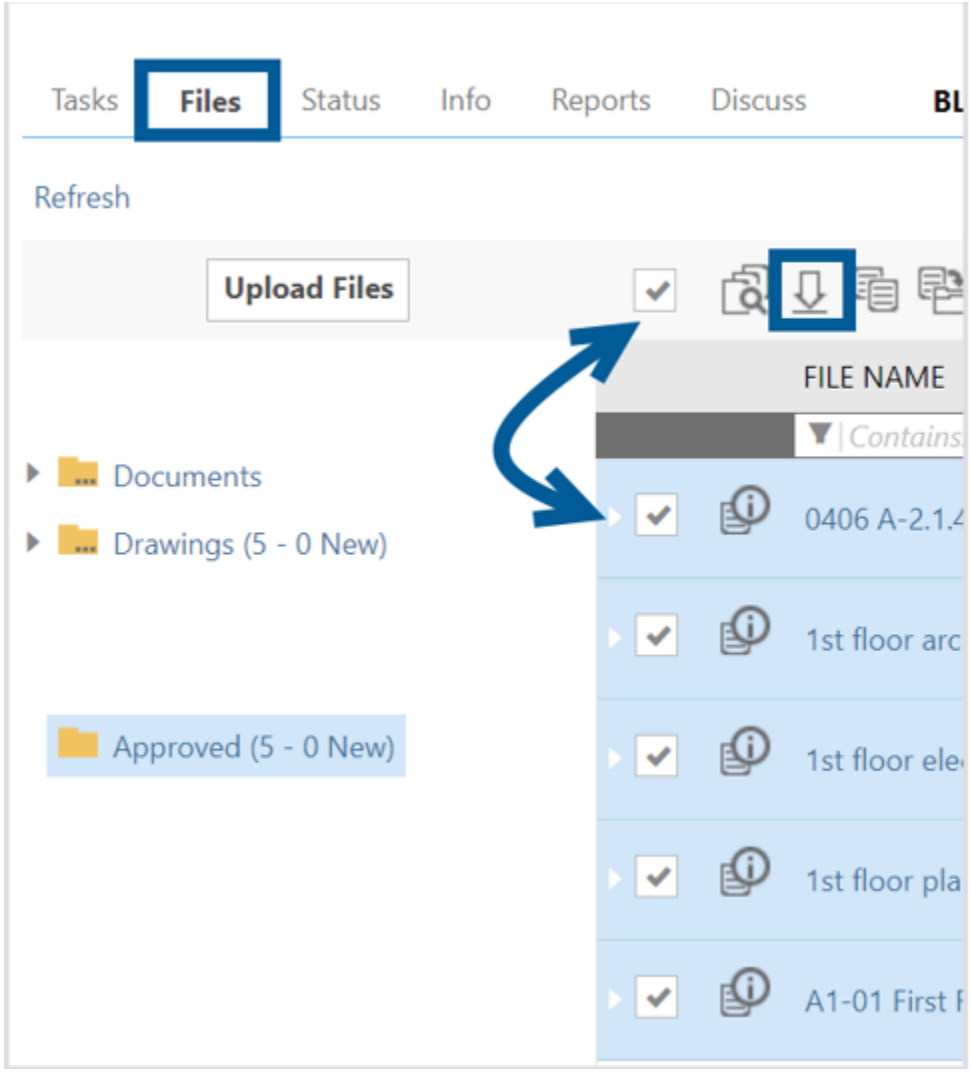

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