



**Community Outreach Applicant Training**  
**March 14, 2024**



# 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

# ProjectDox

## Getting Started

# Browser Requirements

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



# Create Jurisdiction Permit Application

## OnLine Services Portal



**City of Escondido Permit & License Portal**

To link an existing permit or business license so it can be updated through this portal, click [Create Account](#) or [sign in](#), and select the option "My Permits, Licenses, and Projects," then choose "Existing Permits/Licenses/Projects". Follow the instructions on that page.

### Sign In

Enter your email address and password to access the portal.

Enter email

Enter password

[Forgot password?](#)

Log In

# New Account/Login

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

ESCONDIDO  
City of Choice

Welcome to the Portal March 15, 2024

Your session has ended.

E-mail:

Password:

Login

[Forgot password?](#)

You need an account to access your projects. Contact the Jurisdiction if you don't have an account login.

[GETTING STARTED](#) | [ACCEPTING A TASK](#) | [DOWNLOADING APPROVED PLANS](#)

**Welcome to the City of Escondido, CA Login Page!**  
[This new, innovative system will enable you to participate in the electronic plan review process for our city. Our electronic plan review process increases efficiencies, reduces costs, and accelerates community development. For more information on electronic plan review and submittals, please Click Here.](#)

**TERMS AND CONDITIONS OF USE**

Your access to and use of City of Escondido's ePlan is subject to the following terms and conditions, as well as all applicable laws. Your access to Escondido's ePlan is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of Use. Throughout these Terms and Conditions, the words "you", "your", and "user", means you and the employees, consultants, contractors, and other parties who access City of Escondido's ePlan using your password.


**USE OF SITE**


You agree to use City of Escondido's ePlan solely to provide information relating to your application and permit. As a condition of use, User agrees that it shall not copy, reverse engineer, modify, create derivative works of, publicly display

# Applicant - Email

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

Upload and submit request for zTraining [REDACTED]

 [REDACTED]  
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

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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]





# ProjectDox Dashboard

ProjectDox Dashboard June 27, 2023

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**My Projects** 

PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (2)
<a href="#">BLD-TST-20230627</a>	Training Project		First Submission Pending	<span style="background-color: #f4a460; padding: 2px 5px;">Open</span> Applicant Upload
<a href="#">BLD-TST-20230627 001</a>	Training Project		Corrections Requested 	<span style="background-color: #f4a460; padding: 2px 5px;">Open</span> Applicant Resubmit Task
<a href="#">BLD-TST-20230627 002</a>	Training Project		Approved	<span style="background-color: #90ee90; padding: 2px 5px;">Open</span> Download Approved Plans
<a href="#">22000091</a>	TEST-P.DOX 9.2 TEST 397 RES		In Review	

1 - 4 of 4 records   1  

View All Projects



# Home Page

The screenshot displays the ProjectDox application interface. At the top left is the ProjectDox logo. A navigation bar on the right contains buttons for Home, All Tasks, a user profile icon, Logout, and a help icon. Below this, there are tabs for Tasks and Projects, with Projects selected. A secondary navigation bar includes Refresh, Save Settings, and filters for All and Recent. A 'Show 5 records' dropdown is also present. The main content is a table with columns: ACTION, PROJECT, LOCATION, DESCRIPTION, OWNER, STATUS, CREATE DATE, and MARACOLUM... The table contains one record: HWD-2023-0807-03, 123 Main Street, 2nd Story Addition, Tanya Stillman, Upload, 8/7/23 11:25 AM. At the bottom, it shows '1 - 1 of 1 records' and pagination controls.

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE	MARACOLUM...
	▼   Contains...	▼   Contains...	▼   Contains...	▼   Contains...	▼   Contains...	▼   On...	▼   Contains...
	HWD-2023-0807-03	123 Main Street	2nd Story Addition	Tanya Stillman	Upload	8/7/23 11:25 AM	

# Task Page



Home

All Tasks

Logout

Tasks

Projects

Refresh Save Settings Reset Settings

All Overdue Priority Show 14 records


ACTION	PROJECT	LOCATION	DUE DATE	TASK	DESCRIPTION	CREATED
<a href="#">Complete</a>	PL24-0036 TEST	820 Ave	3/19/24 6:04 PM	Upload and Submit	Planning - 12 Month Expiration Planning Plot Plan	3/5/24 5:04 PM


# ProjectDox

## Initial Submission

# Initial Submission – Upload via eForm

Upload and submit request for zTraining [REDACTED]

 [REDACTED]  
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.

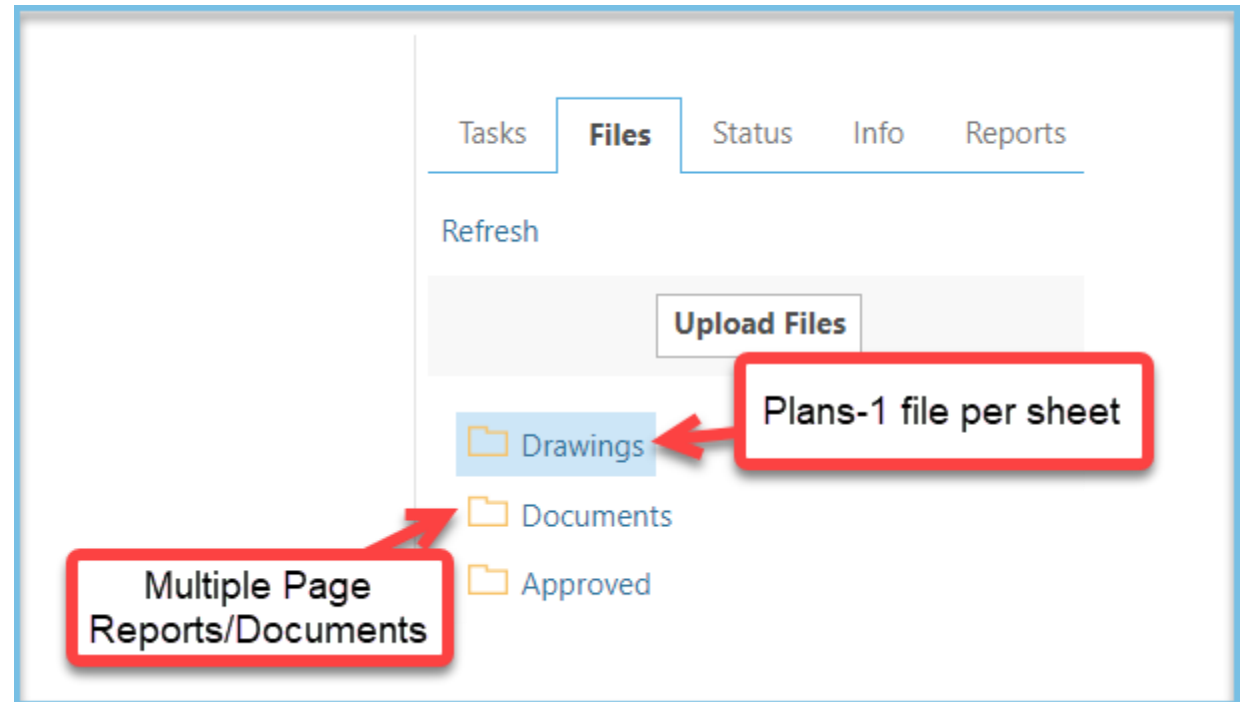
**TIP: Are you a New User?**  
First complete your account setup (required), if you haven't already. Open the separate invite email you received, or to request a new password [click here](#) and then select "forgot password".

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

[Start Task](#) To submit your files  
for zTraining [REDACTED]

# Uploading Files

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



# 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.

The screenshot shows the ESCONDIDO file upload interface. At the top left is the ESCONDIDO logo with the tagline 'City of Choice'. At the top right is a 'Close Window' link. Below the logo, the folder path is displayed: 'Folder: F24-0020 Testing Regex Setup and Instructions\Documents\Drawings'. A 'Browse For Files' button is present, followed by the text 'or drag files into area below.'. On the right side, there is a message: 'To "Start Upload", please correct: [Watch video](#); 1 of 1 file(s) with submission issues.' Below this message is a yellow button labeled 'Remove / Get Report'. A 'Total: 0 / 1' indicator is shown. A file entry for 'Plan Review Doc 2.pdf' (2 MB) is listed with a red caution icon and a yellow box containing the text 'Please fix: file naming'. At the bottom, a legend explains file status: 'Orange files are new uploads', 'Blue files are new version uploads', and 'Red files appear to be same as previously uploaded (will likely be discarded)'. A yellow box at the bottom right contains a green checkmark icon with the text 'Ready to start upload' and a red caution icon with the text 'Remove, fix, re-select to start upload.'

# File Upload Issue Report example:

## FILES WITH SUBMISSION POLICY ISSUES REPORT

Project: GP24- 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 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)

# 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-Number Discipline PageNumbers-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.






# Prescreen Corrections

# 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

 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**

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## 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.*

20231124 11:00 AM

**ESCONDIDO**  
City of Choice

**avolve**  
software

# Prescreen Corrections - eForm

Follow the steps:

## PRESCREEN CORRECTIONS

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**Task Information** [Invite Others](#)

---

### Task Information

**Project Name:** z [REDACTED]  
**Project Description:** Videos  
**Coordinator:** Mara Fitter  
**Review Cycle:** 1  
**Current User Login:** Mara Fitter (mfitter@avolvesoftware.com)  
**Task Due Date:** 3/9/21 3:50 PM

---

### Task Instructions

Please follow the steps below:

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

---

**Resolve Review Comments** [?](#)

**Unresolved Comments:** 1  
**Info Only Comments:** 0  
**Files with Markups:** 2

**Plan Review:**  [Watch Video](#)

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

# Prescreen Corrections – Review Comments Grid

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

Resolve Review Comments ?

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

Plan Review: **Review Comments**

Dept: Show All Status: Show All Response: Show All Search:  Close Window

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

Refresh Watch video

					Add Comment / Ask Question	Please enter your responses <span>?</span>	
<input type="checkbox"/>	Ref.# 1	Permit Tech	Mara Fitter	6/27/23 11:17 AM		Type your response here.	
	Unresolved	All files must leave a blank 2x2 inch square area in the upper right hand corner.					
	Checklist Item						
<input type="checkbox"/>	Ref.# 2	Permit Tech	Mara Fitter	6/27/23 11:19 AM		No response required.	
	Info Only	Please follow the city's published standards for all submissions. They can be found on our website.					
	Comment						

# Prescreen Corrections - eForm

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

Version Upload for: z1  ?

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?**   [Watch Video](#)

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

Uploaded files:

Select folder to open file list.

- ▶ Drawings (24 - 0 New)
- ▶ Documents (1 - 0 New)
- ▶ Approved

# Applicant - Upload Versioned Files

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

Version Upload for: BLD1234 20230717 ?

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

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

Uploaded files:

Select folder to open file list.

- Drawings (6 - 0 New)
- Documents
- Approved

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

Confirmation ?

### Upload File Versions

Project: BLD1234 20230717

Select:  All project files that may require new versions

Drawings\1st floor architectural.pdf	<input type="button" value="Select File"/>
Drawings\1st floor electrical.pdf	<input type="button" value="Select File"/>
Drawings\1st floor plan.pdf	<input type="button" value="Select File"/>
Drawings\A1-01 First Floor Plan.pdf	<input type="button" value="Select File"/>
Drawings\A2-2 2nd floor Proposed Addition 100380704.pdf	<input type="button" value="Select File"/>
Drawings\Brookwood Plat.pdf	<input type="button" value="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)

# Prescreen Corrections - eForm

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

---

**Confirmation** 

\*Response has been provided for all comments and files have been uploaded (if requested) \*Required

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

---

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**Submit**

Save for Later

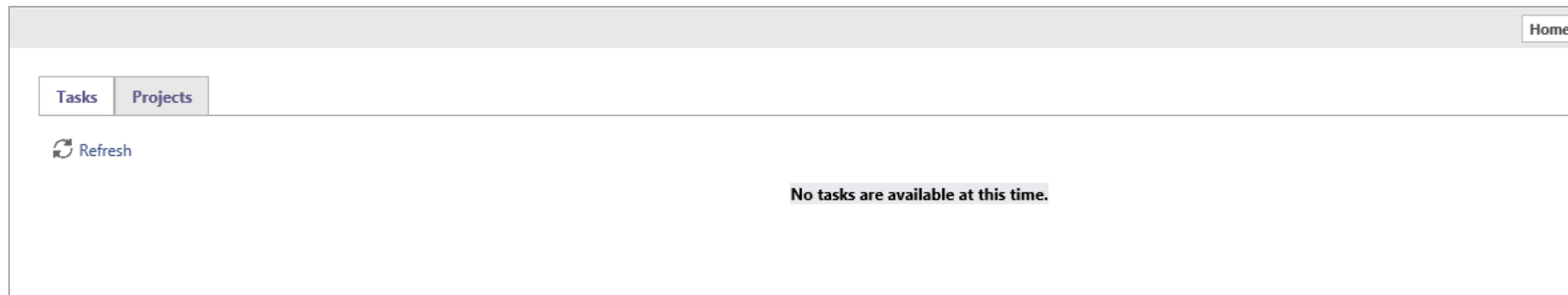
# ProjectDox

## Review



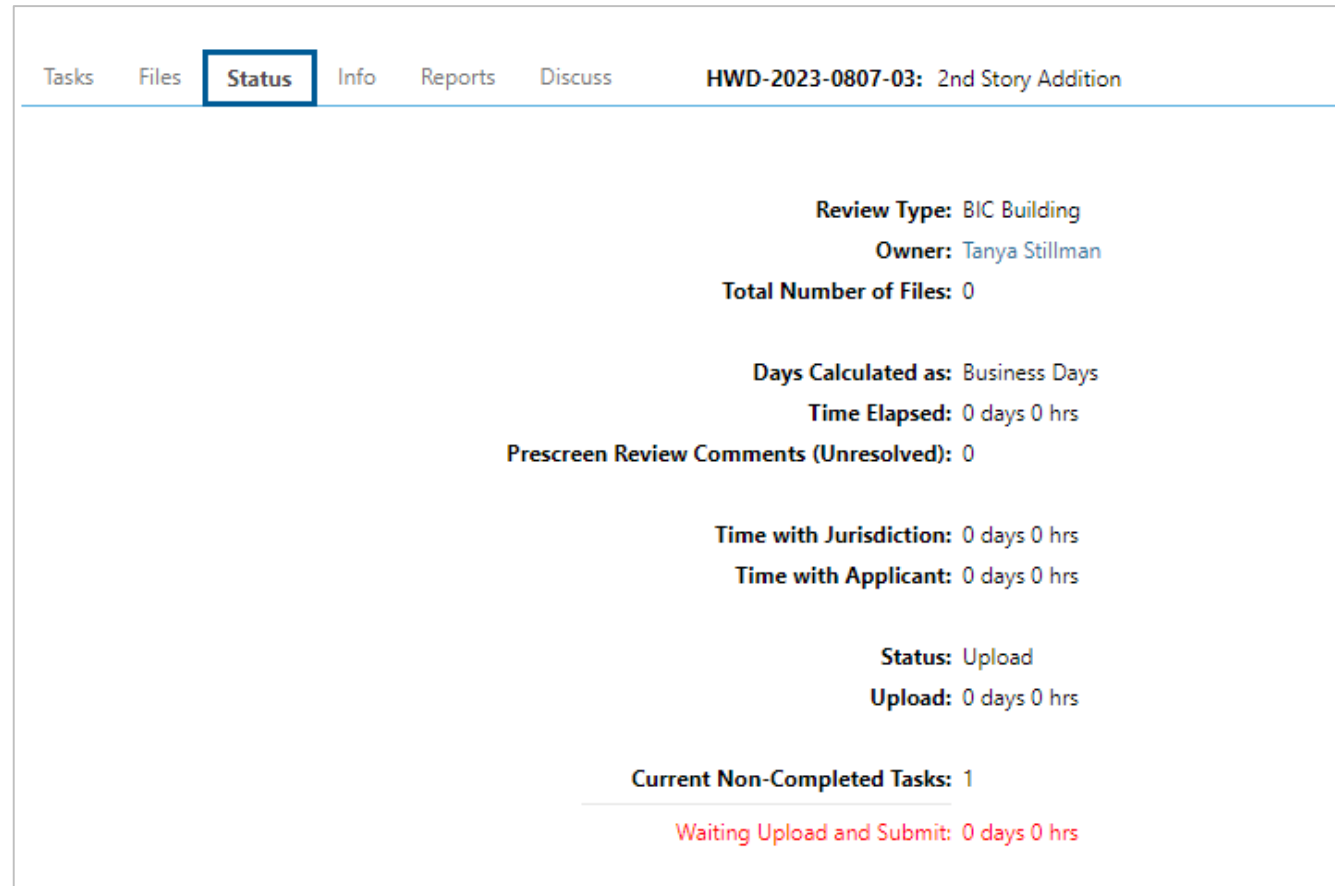
# Project Status – What’s Going On?

- 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.



# Project Status – In the Project

- Project Status tab



The screenshot shows a web interface for a project. At the top, there is a navigation bar with tabs: "Tasks", "Files", "Status" (highlighted with a blue border), "Info", "Reports", and "Discuss". To the right of the tabs, the project name "HWD-2023-0807-03: 2nd Story Addition" is displayed. Below the navigation bar, the main content area displays the following information:

- Review Type:** BIC Building
- Owner:** Tanya Stillman
- Total Number of Files:** 0
- Days Calculated as:** Business Days
- Time Elapsed:** 0 days 0 hrs
- Prescreen Review Comments (Unresolved):** 0
- Time with Jurisdiction:** 0 days 0 hrs
- Time with Applicant:** 0 days 0 hrs
- Status:** Upload
- Upload:** 0 days 0 hrs
- Current Non-Completed Tasks:** 1
  - Waiting Upload and Submit: 0 days 0 hrs

# Project Status - Workflow Routing Slip

Tasks Files Status Info Reports Discuss Reviews

### Plan Review - Workflow Routing Slip


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

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

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	Fire	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

For more details: Workflow Routing Slip View Report

Prescreen Review



Current



# Respond and Resubmit

# Respond and Resubmit - Email

## RESPOND AND RESUBMIT

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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



# 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](#)

Dept: Show All

Status: Show All

Response: Show All

Search:

[Close Window](#)

Type: Show All

Cycle: Show All

Time: Show All

[Learn how](#)

Refresh
Add Comment / Ask Question
**Please enter your responses** ?



Ref.# 1	Coordinator	Mara Fitter	1/11/21 12:29 PM	
Unresolved	All files must be 11x17 or 24x36			Corrected
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				

# Review Comments Grid

Dept:  Status:  Response:  Search:  Close Window


Type:  Cycle:  Time:

Refresh Watch video

<input type="checkbox"/>	(0 selected)	Add Comment / Ask Question					<b>Please enter your responses</b> ?
<input type="checkbox"/>	Ref.# 5	tms	Structural	mf05 Reviewer	6/8/23 1:18 PM	Cycle 1	
	Resolved		A1-01 First Floor Plan.pdf		<input type="button" value="Verify"/>	<input type="button" value="Refresh"/>	
	Markup		Move door to meet fire code XYZ.				
	Responded by: Tanya Stillman - 6/8/23 1:21 PM Revisions made						
<input type="checkbox"/>	Ref.# 6	tsm01	Structural	mf05 Reviewer	6/8/23 1:18 PM	Cycle 1	
	Resolved		A1-01 First Floor Plan.pdf		<input type="button" value="Verify"/>	<input type="button" value="Refresh"/>	
	Markup		Move door to avoid interference from mechanical above.				
	Responded by: Tanya Stillman - 6/8/23 1:21 PM Revisions made						



# Applicant – Review Comments

Tasks Files Status Info Reports Discuss <b>Reviews</b> zTraining Intro to Marking Up: Video Training											
<b>Dept:</b> Show All		<b>Status:</b> Show All		<b>Response:</b> Show All		<b>Search:</b> <input type="text" value="Enter keyword"/>					
<b>Type:</b> Show All		<b>Cycle:</b> Show All		<b>Time:</b> Show All							
Refresh											
								<a href="#">Add Comment / Ask Question</a>		<b>Please enter your response here.</b>	
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	Markup		A2-2 2nd floor Proposed Addition 100380704.pdf						↓		
	Confirm plumbing allows for the proper sink height in all restrooms.										

# Applicant – Review Comments

The screenshot displays a software interface for reviewing comments. At the top left, a table lists review items:

Item #	Item Name	Department	Reviewer	Review Date	Status
Ref #2	Handicap	Plumbing/MSW	11/12/2021	Open	Unresolved
Ref #3	Handicap	Plumbing/MSW	11/12/2021	Open	Unresolved
Ref #4	Handicap	Plumbing/MSW	11/12/2021	Open	Unresolved

A blue arrow points from the 'Ref #4' row to the main review window. The main window shows a floor plan of restrooms with dimensions and a review comment:

**Ref. #4 (Unresolved)**

**Review - Measure - Publish**

A2-2 2nd floor Proposed Addition 100380704.pdf V1

SD CD

4'-2" 11" 4'-2"

D4 D4

MEN WOMEN

7'-6" 7'-6"

**Restroom Compliance**

**Plumbing-mf05 Reviewer 01/11/2021 11:05 AM**  
Department Review, Plumbing  
Confirm plumbing allows for the proper sink height in all restrooms.  
----- 0 replies -----

Your response:

Save Response

Close

# Applicant – Export/Import Review Comments - Excel

**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**

*Review and respond online.*

**Export to Excel**

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

**Import Excel Responses**

[Learn how](#)

# 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:**

<b>Review Comments</b> <i>Review and respond online.</i>	<b>Export to Excel</b> <i>Review and respond in Excel when upload your responses.</i>	<b>Import Excel Responses</b>	<a href="#">Learn how</a>
---	--	-------------------------------	---------------------------

**Export to Excel** dialog box:

Export review comments to Excel ?

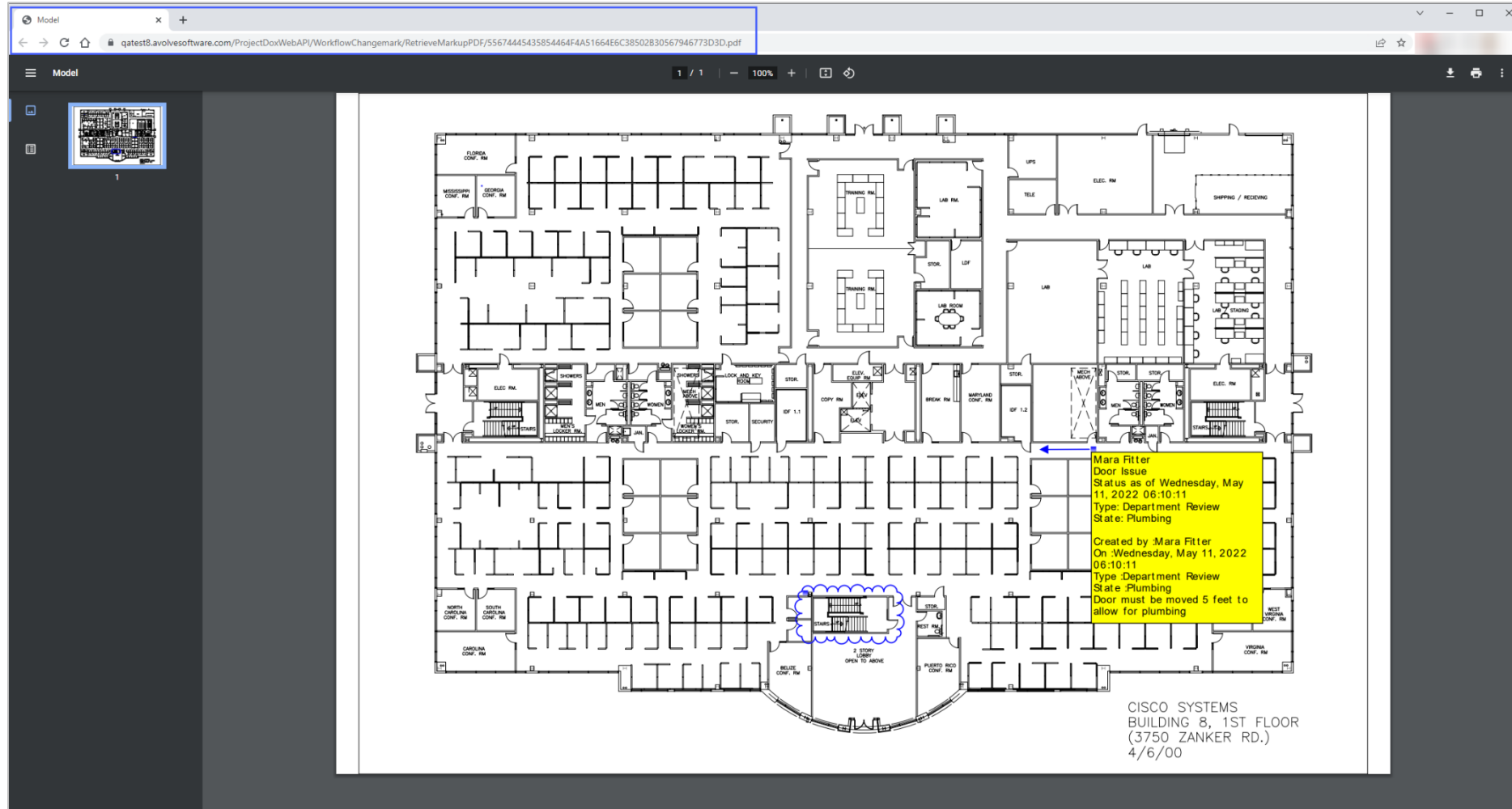
- Single XLSX file
- Multiple XLSX files by department/trade (as ZIP)

**Download** **Close**

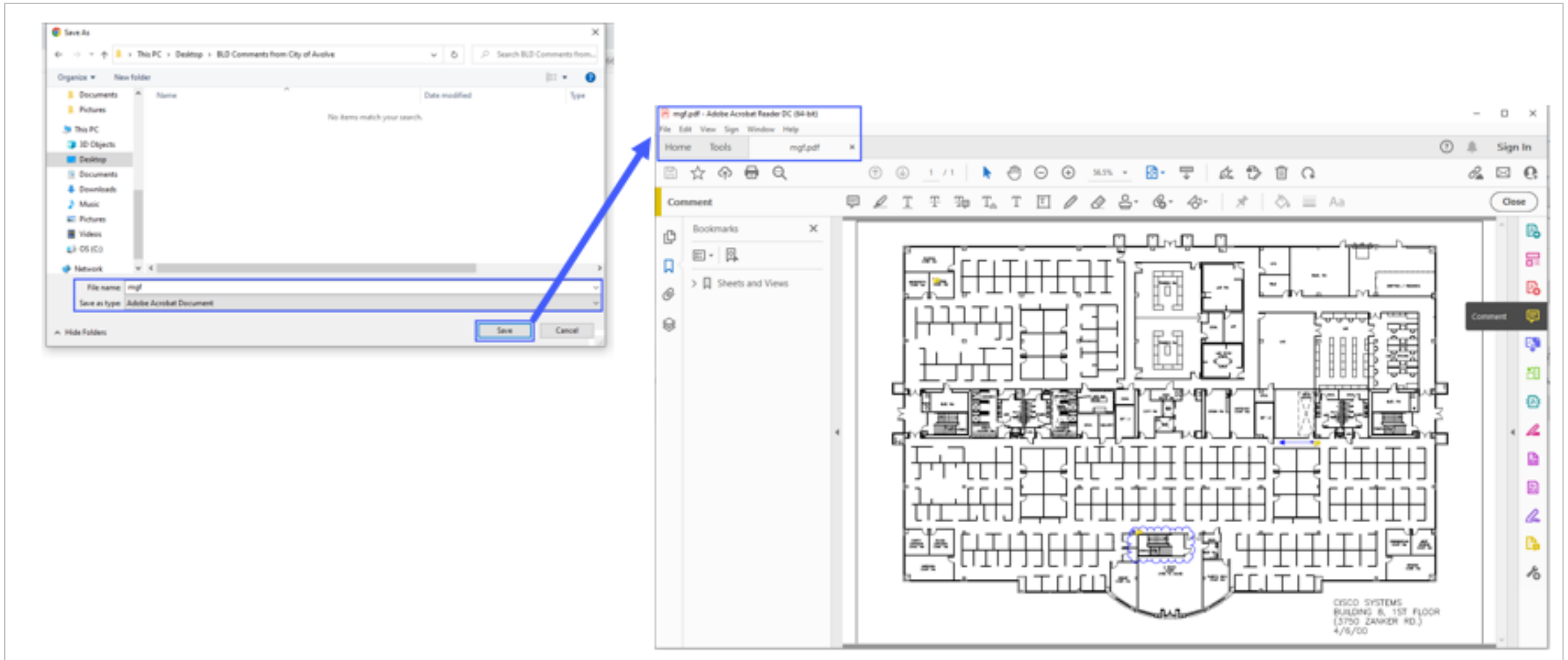
# Applicant – Export/Import Review Comments

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.	<a href="#">open</a>			1	Unresolved

# Applicant – Export/Import Review Comments



# Applicant – Export/Import Review Comments



# 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:**

<b>Review Comments</b> <i>Review and respond online.</i>	<b>Export to Excel</b> <i>Review and respond in Excel, then upload your responses.</i>	<b>Import Excel Responses</b>	<a href="#">Watch Video</a>
---	---	-------------------------------	-----------------------------

**Import Responses** [x]

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

**Browse for File**

**Close**

**Import Results** [x]

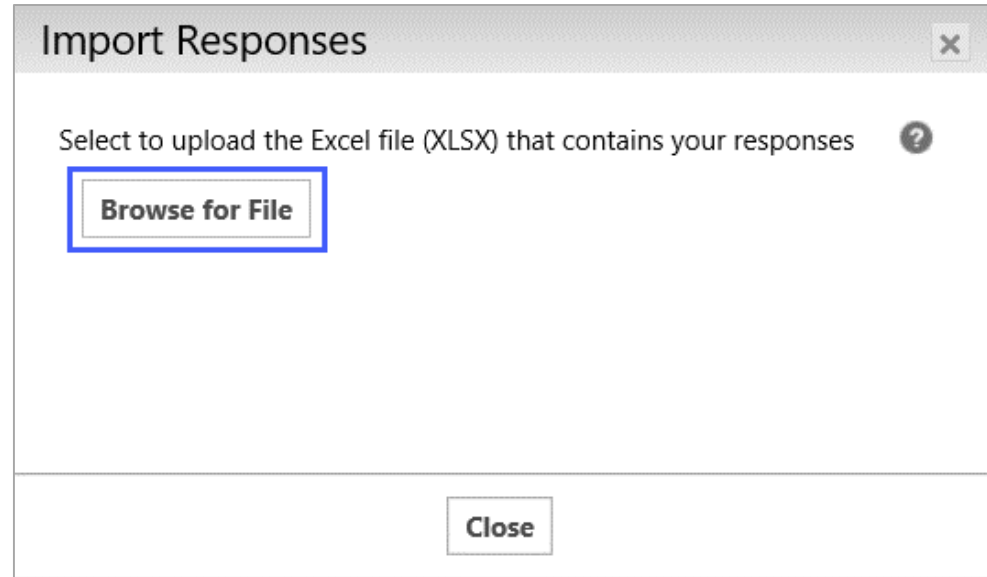
1 file(s) imported into Review Comments.

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

**Import Multiple** **Close**



# Applicant – Export/Import Review Comments




# Respond and Resubmit - eForm

Follow the steps:

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

---

Version Upload for: zWally PA 2021-11-09 001 

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?**   [Learn how](#)

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

Uploaded files:

Select folder to open file list.

- ▶  Drawings (9 - 2 New)
- ▶  Documents (1 - 0 New)
-  Approved

2021112401127

# Applicant - Upload Versioned Files

**Resolve Review Comments**

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

Plan Review:

**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?   [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**

**ProjectDox** Upload File Versions

Project: BLD - 20220512 001

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

- Drawings\1st floor plan.pdf
- Drawings\A2-2 2nd floor Proposed Addition 100380704.pdf
- Drawings\C004 - SITE.pdf
- Drawings\L003 - LIGHTING.pdf


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

# Respond and Resubmit - eForm

Follow the steps:

**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

---

# ProjectDox

## Final Documents

# Applicant - Final Payment Email



DoNotReplyESCAProd@avolvecloud.com



## Final Payment

---

Hello [REDACTED]

You have an important task to complete by **2/25/2024 12:17:04 PM**.

To begin, please select "Start Task" below.

**Start Task**

To complete your task  
for [REDACTED] - Grading E -  
**Grading**

*Please do not reply to this email.*

# Final Payment Task

## FINAL PAYMENT

**Task Information** Permit Information Fees Information

### Task Information

**Project Name:** B24-0027 ProjectDox TRAINING case  
**Project Description:** Final Payment - 03142024  
**Coordinator:** Avolve API  
**Review Cycle:** 2  
**Current User Login:** Kathleen Heaps (kheaps@escondido.org)  
**Task Due Date:** 3/25/24 10:47 AM

### Task Instructions [Watch video](#)

Please follow the steps below:

Make a payment in our [City of Escondido Permit & License Portal](#) site.

Complete the payment process using this link AND return to the task to complete and submit.

**STEP 1 of 3:** Respond to comments, as needed

### Discuss Final Payment [?](#)

[Add Comment](#)

Show  records

DISCUSSION COMMENT	PARTICIPANT	CREATED
Due to changes in the scope of this project, additional fees are due. Please navigate to the portal to pay fees. Thank you!	Tanya Stillman	3/11/24 10:47 AM

1 - 1 of 1 records

◀ ⏪ Prev 1 Next ⏩ ▶

**STEP 2 of 3:** Check the box to confirm you are ready to submit


### Confirmation [?](#)

\*All fees have been paid \*Required

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

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

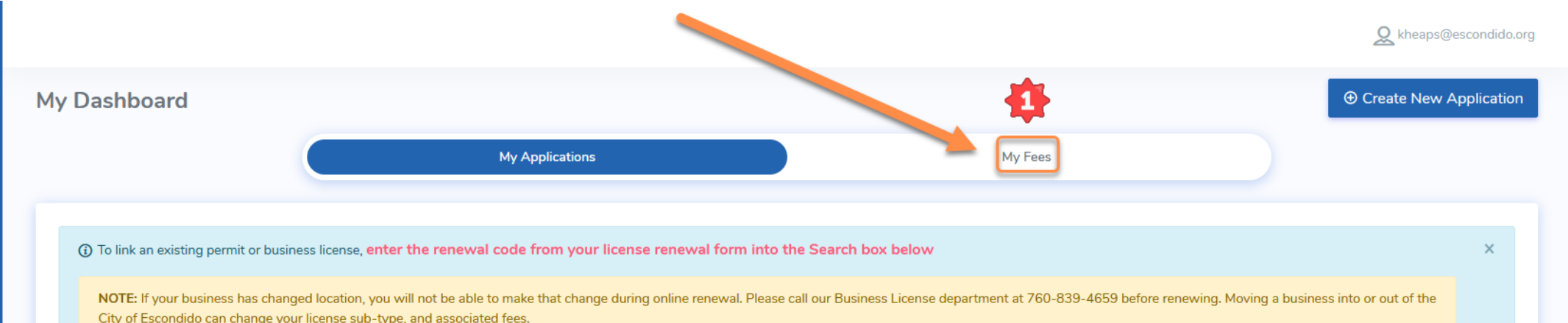
# Completing the Final Fee Payment Task



ESCONDIDO  
City of Choice

NAVIGATION

- Home
- Create New Application
- Incomplete Applications



My Dashboard

kheaps@escondido.org

Create New Application

My Applications

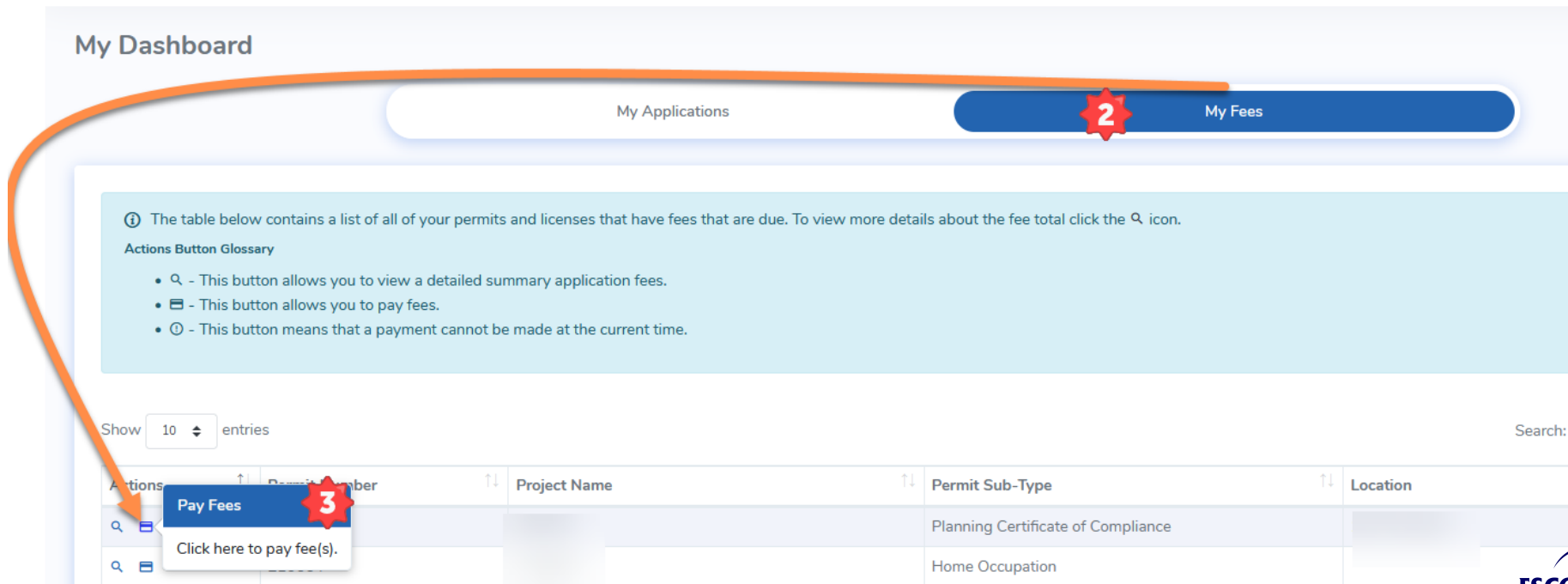
My Fees

To link an existing permit or business license, enter the renewal code from your license renewal form into the Search box below

NOTE: If your business has changed location, you will not be able to make that change during online renewal. Please call our Business License department at 760-839-4659 before renewing. Moving a business into or out of the City of Escondido can change your license sub-type, and associated fees.

## \*\*\*NOTE\*\*\*

Return to ProjectDox to complete the Final Payment task.



My Dashboard

My Applications

My Fees

The table below contains a list of all of your permits and licenses that have fees that are due. To view more details about the fee total click the 🔍 icon.

Actions Button Glossary

- 🔍 - This button allows you to view a detailed summary application fees.
- 💰 - This button allows you to pay fees.
- 🕒 - This button means that a payment cannot be made at the current time.

Show 10 entries

Actions	Permit Number	Project Name	Permit Sub-Type	Location
🔍 💰			Planning Certificate of Compliance	
🔍 💰			Home Occupation	


Pay Fees


Click here to pay fee(s).




# Applicant - Download Approved Files Using Email

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

 QATest8@avolvesoftware.com  
To: Mara Fitter

 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.**

 I


## DOWNLOAD APPROVED FILES

---

Hello Mara,

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 save your zipped set of approved plans.


 To access your approved plans  
for **zTraining Batch Stamp 2021-01-11 : Training**





*Please do not reply to this email.*

# Applicant - Download Approved Files Using Dashboard

ProjectDox Dashboard June 27, 2023

**My Projects** 

PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (2)
<a href="#">BLD-TST-20230627</a>	Training Project		First Submission Pending	<span style="background-color: #f4a460; padding: 2px 5px;">Open</span> Applicant Upload
<a href="#">BLD-TST-20230627 001</a>	Training Project		Corrections Requested	<span style="background-color: #f4a460; padding: 2px 5px;">Open</span> Applicant Resubmit Task
<a href="#">BLD-TST-20230627 002</a>	Training Project		Approved 	<span style="background-color: #90ee90; padding: 2px 5px;">Open</span> Download Approved Plans
<a href="#">22000091</a>	TEST-P.DOX 9.2 TEST 397 RES		In Review	



























1 - 4 of 4 records   Prev 1 Next  





[View All Projects](#)

# Applicant - Download Approved Files Using Projects Tab

Standard Task List   Tasks   **Projects**

Refresh   Save Settings   **All**   Recent   Show  records

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
    	▼   Contains...	▼   Contains...	▼   Contains...	▼   Contains...	▼   Contains...	▼   On...
    	BLD-TST-20230627 002		Training Project	Mara Fitter	Approved 	6/27/23 10:12 AM
    	BLD-TST-20230627 001		Training Project	Mara Fitter	Corrections Requested	6/27/23 8:07 AM
    	BLD-TST-20230627		Training Project	Mara Fitter	First Submission Pending	6/27/23 8:03 AM
    	22000091		TEST-P.DOX 9.2 TEST 397 RES	Commercial Building	In Review	12/1/22 12:35 PM

1 - 4 of 4 records     1  

# Applicant - Download Approved Files

**Project Name:** BLD-TST-20230627 002

Click the button below to access your project files to select and download your Approved Plans

[Access Project Files](#)

# Applicant - Download Approved Files

The screenshot shows a software interface with a top navigation bar containing 'Tasks', 'Files', 'Status', 'Info', 'Reports', 'Discuss', and 'BL'. The 'Files' tab is selected and highlighted with a blue box. Below the navigation bar is a 'Refresh' button. A toolbar contains an 'Upload Files' button, a checkmark icon, a download icon (highlighted with a blue box), and other icons. A blue arrow points from the download icon to a list of files. The list has a header 'FILE NAME' and a sub-header 'Contains'. The files listed are:

FILE NAME	Contains
0406 A-2.1.4	
1st floor arc	
1st floor ele	
1st floor pla	
A1-01 First F	

On the left side of the interface, there are folders: 'Documents', 'Drawings (5 - 0 New)', and 'Approved (5 - 0 New)'. The 'Approved' folder is highlighted with a blue box.



Questions?

Please visit the FAQ's

[ProjectDox FAQ's](#)