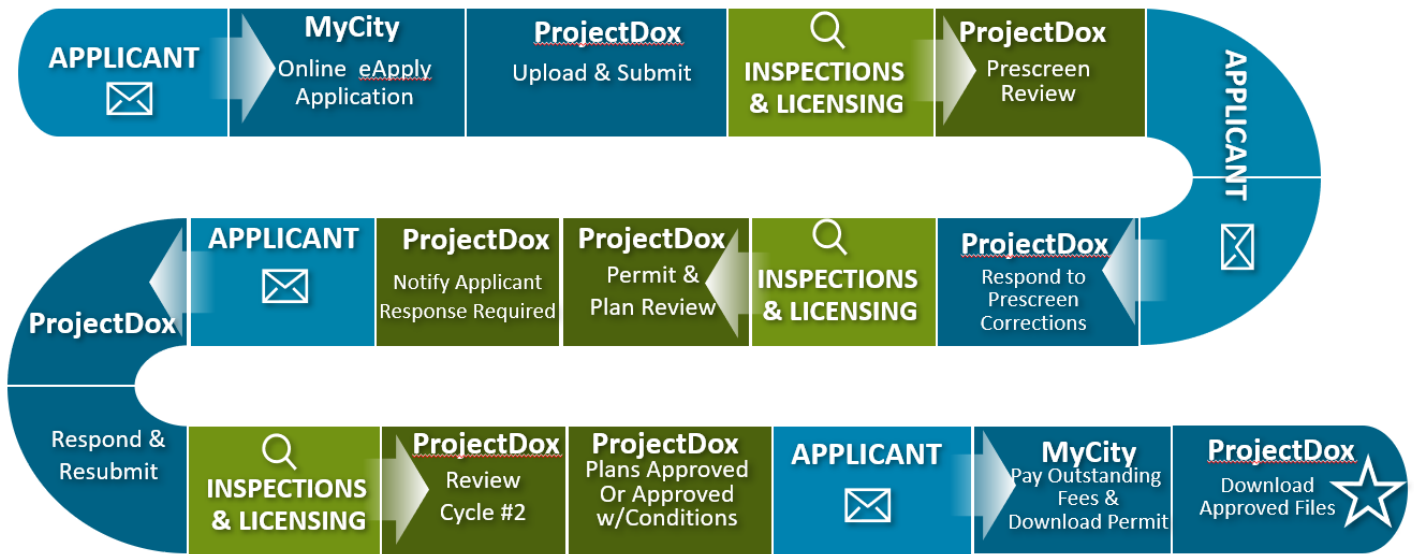# PROJECTDOX APPLICANT QUICK GUIDE

The City uses ProjectDox software to review plans submitted for Development Permits and Building Permits.

This document provides basic information for applicants on uploading plans and documents, reviewing comments, and responding.

EAPPLY & EPLANS OVERVIEW

PERMIT SUBMISSION

Applicants are required to submit their permit application through MyPermits using their MyCity account. Once the permit is submitted, the applicant will receive an email to upload the required documents and plans into our ProjectDox system.

The required documents and plans for each type of permit are found on checklists on the specific permit pages of www.reddeer.ca/permits.

NOTIFICATION & LOGGING INTO PROJECTDOX

You will receive two emails from *inspections@reddeer.ca*:

1. **Project Invite** email
    a. Notifies you have been added to the project for your permit application
    b. If this is the first time using our system, your **Project Invite** email will contain a temporary password.
2. **Upload and Submit Task** email
    a. Notifies you have a task on your project to upload and submit your required documents to complete your permit application.

To login to ProjectDox:

From an email message click the button that says **START TASK** or **OPEN PROJECT**

OR

Visit https://reddeer-ab-ca.avolvecloud.com/ProjectDox/

1. Enter in your e-mail.
2. Enter in your password., If this is your first time, use the temporary password that was provided in the Project Invite email.
3. Click Login.
4. If this is your first time, you will be prompted to complete your profile information and change your temporary password.

DASHBOARD VIEW VS. PERMIT VIEW

If you logged in by clicking on START TASK or OPEN PROJECT from an email, you are in the actual permit.

- In this permit view:
    o There are several tabs along the top near to the left.
        ▪ TASKS, FILES, STATUS, INFO, REPORTS, DISCUSS & REVIEWS
    o There's a HOME button, a SEARCH field, as well as other buttons and features.

If you logged into ProjectDox from the link above, you will be on your DASHBOARD (home screen).

- In the Dashboard view:
    o Click the **HOME** button.
    o There are 2 tabs:

- Tasks and Projects
  - Under the **TASKS** tab you will see:
    - ALL tasks waiting for you to complete.
  - Under the **PROJECTS** tab, you will see:
    - ALL the projects which are associated with your ProjectDox account.
    - You can view all projects or recent projects by clicking on the buttons on the upper right side.
    - You can also search for a specific project by entering the permit number under the PROJECT field or by typing a portion of the name of the project under the DESCRIPTION field.
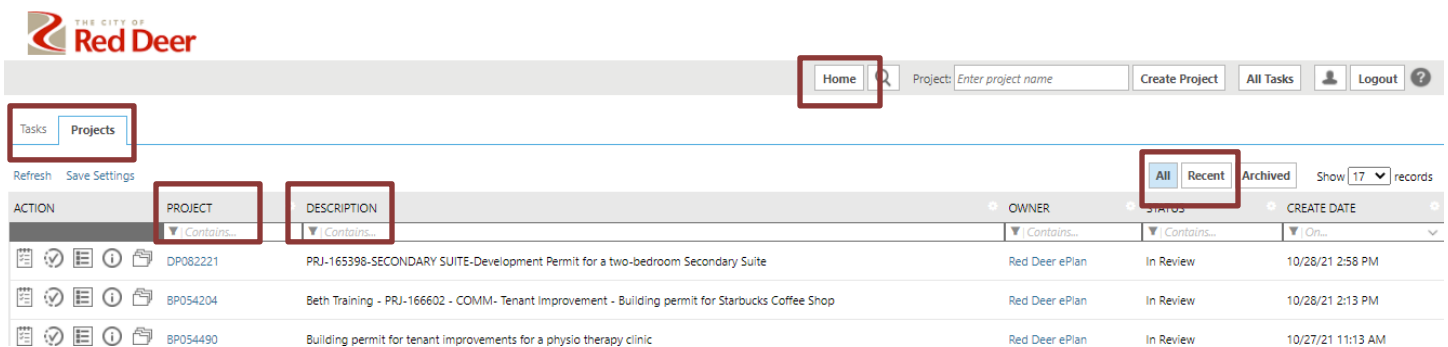
UPLOAD & SUBMIT

Once you have submitted your online permit application, a permit folder will be created in The City's permitting system as well as a project in ProjectDox for document and plan submission and review.

If you logged in by clicking on START TASK or OPEN PROJECT from the email, you are in the actual permit to submit documents and plans.

If you logged into the ProjectDox website, you will need to click HOME and then the TASKS tab.

1. Click **ACCEPT** under the ACTION column or **UPLOAD AND SUBMIT** under the TASK column.
   - This will assign the task to you for completion.

- A pop-up window will come up.
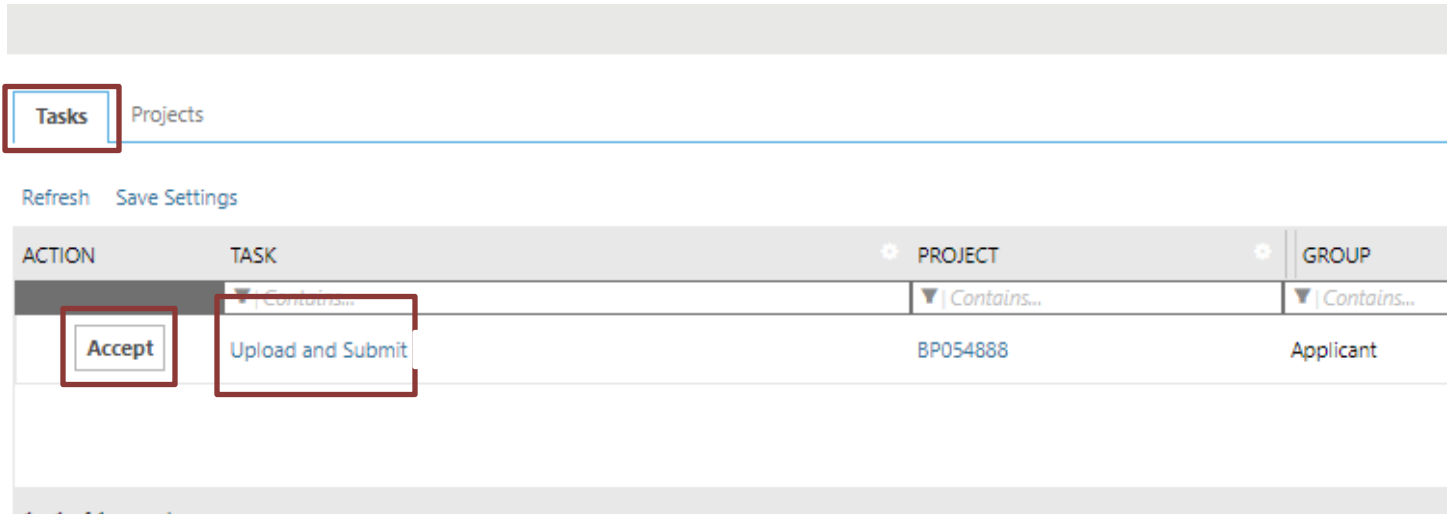
This is where you will upload your documents and drawings.

- Documents are typically anything in written format. Land Title, NECB, Heat Loss, Letter of Authorization, schedules etc.
- Drawings are any type of plan, site plan, architectural plans, mechanical drawings, etc.
- Before uploading, make sure your files are named as required, see
- All drawings are required to be uploaded as single pages and not one package.
- Checklists and naming standards for the required documents and drawings for each type of permit can be found on The City's permit pages at https://www.reddeer.ca/permits.

2. To upload, click the desired folder, either **UPLOAD DRAWINGS** or **UPLOAD DOCUMENTS.**
3. You can either browse for the files on your computer or drag them from the folder on your computer into the file upload screen.
4. Click **START UPLOAD.**

5. You will be able to see all your uploaded files.

Uploaded files:

Select folder to open file list.

▸ 📁 Drawings (1 - 1 New)

📁 Documents

📁 Approved
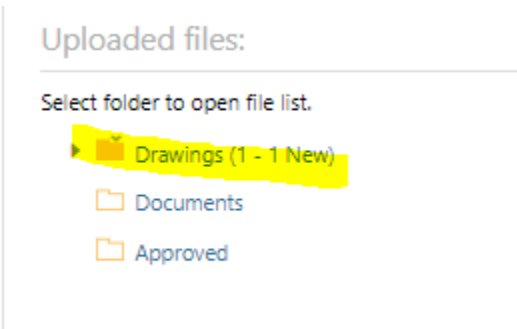
6. Once you have all the documents and drawings that you want/need uploaded, check the confirmation box and click SUBMIT.

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: Check all to confirm you have completed this task and are now ready to submit

[Submit] [Close]

** This will now remove the project from your task queue and move the project onto City Administration for review.

PRESCREEN CORRECTIONS

Once you have uploaded your documents and drawings, Inspections & Licensing will complete a prescreen review to ensure you have uploaded all the required documents and the application is complete. If you are missing documents or uploaded an incorrect file, you will receive an email notification and prescreen corrections task.

1. Click **ACCEPT** under the ACTION column or **PRESCREEN CORRECTIONS** under the TASK column.

- This will assign the task to you for completion.
- A pop-up window will come up.

2. Click on **REVIEW COMMENTS** to see what you have missed and why your application is incomplete.

3. You will need to respond to each comment and potentially upload new documents or drawings.

4. Follow the same steps as the UPLOAD & SUBMIT procedure.

RESPOND AND RESUBMIT

Your project has flowed through the plan review through Inspections & Licensing. Multiple people may have reviewed the documents and plans submitted. You are now required to resubmit documents or information. You may be missing information, or the drawings need to be revised before the plans can be approved.

1. Click **ACCEPT** under the ACTION column or **RESPOND AND RESUBMIT** under the TASK column.
   - This will assign the task to you for completion.
   - A pop-up window will come up.
2. Review Step 1 of 4 – Resolve Review Comments.
   - Click **REVIEW COMMENTS.** This will show you what is required to be revised.
   - You will need to make a comment on every item which is red and says UNRESOLVED. This may also involve uploading new plans as required.

OutstandingFeeAmount 0

STEP 1 of 4: Check all to confirm you have completed this task ar

Resolve Review Comments

Unresolved Comments: 4
Info Only Comments: 0
Files with Markups: 2
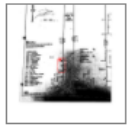
Plan Review: Review Comments

Review and respond online.

STEP 2 of 4: Check all to confirm you have completed this task a

						Please enter your responses ❓
☐ 🗔 (0 selected)				Add Comment / Ask Question		
☐	Ref.# 1	Customer Service	Beth McLachlan	12/23/21 3:38 PM		Proper plans have been uploaded
	Unresolved	You are missing the site plan and the house plan you uploaded does not match the address you applied for.				
	Comment					
		Responded by: Beth McLachlan - 12/23/21 4:07 PM I have uploaded the site plan and re-uploaded the house plans				
☐	Ref.# 2	Inspections & Licensing - Development Officer	Beth McLachlan	1/4/22 11:04 AM	Cycle 1	New site plan uploaded
	Unresolved	The site plan is no legible, please resubmit a zoomed in version of the area where the addition is being constructed.				
	Comment					
☐	Ref.# 3	Setbacks	Inspections & Licensing - Development Officer	Beth McLachlan	1/4/22 11:05 AM	Cycle 1	New site plan uploaded
	Unresolved	[Site Plan.pdf]	Site Plan.pdf		⬇ ⊘	
	Markup		Cannot read numbers, please resubmit.			
☐	Ref.# 4	Height	Inspections & Licensing - Development Officer	Beth McLachlan	1/4/22 11:07 AM	Cycle 1	Added height to plan
	Unresolved	[Plans.pdf]	Plans.pdf		⬇ ⊘	
	Markup		Please provide overall height			

Respond here to each comment

- You can also review the marked-up drawings.
    i. Click on the FILES tab.
    ii. Click on the Drawings Folder.
    iii. If there are marked-up drawings to review you will see this symbol. ✒!
    iv. Click on the symbol, you can open the drawings to the file comments.

3. Review Step 2 of 4 – Uploading new documents and plans
    - Review whether you need to upload new versions of the files or new files.
        i.   New versions would be when you have made changes on the existing plans.
        ii. New files are something completely brand new that you haven't previously submitted.
    - Follow the remaining areas to confirm you have responded to all comments and uploaded any documents required and click **SUBMIT.**

ACCESSING THE APPROVED PLANS

Once Inspections & Licensing has completed the review of your project, the plans will be stamped and available in ProjectDox after your permit is approved and issued. The permit will still be completed through your MyCity account. You do not have an approved permit until you have received the permit and placard via email from Inspections & Licensing.

1. To access your stamped plans, make sure you are on your dashboard (home screen) and you are in the PROJECTS tab.
2. Locate the project in the list. You can search by project (permit number), description, etc.
3. Under the STATUS column you will see the status as approved and this symbol
    - This is how you will know you have plans to review.

4. Click the symbol and it will take you to the files tab in the project.
5. Look at the left side at the different folders and you will see an 'Approved' folder. Click into it.
6. You can view the stamped files or download them by clicking the down arrow on the toolbar.
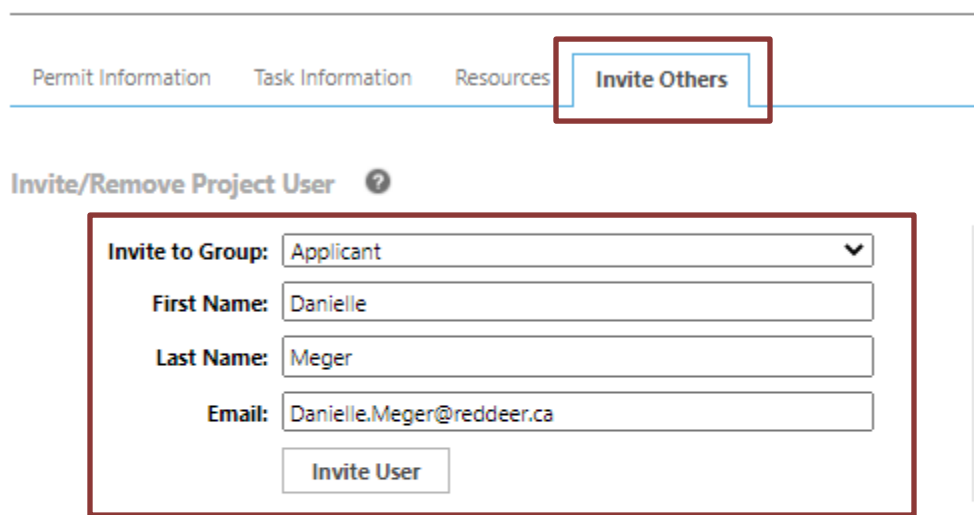
OTHER COMMON QUESTIONS AND HELPFUL INFORMATION

1. **Q: How do I add someone else from my office to the project?**

    Follow these steps:

    i.   When you are in the UPLOAD & SUBMIT task you can add another person to the project.
    ii.   Select the INVITE OTHERS tab.
    iii.   Enter their first and last name and email address, click INVITE USER.
    iv.   They will receive an email inviting them to the project and they will be able to view and complete tasks.
    v.   Complete your upload of the drawings and documents, click SUBMIT.

UPLOAD AND SUBMIT

Permit Information   Task Information   Resources   **Invite Others**

Invite/Remove Project User ❓

Invite to Group: Applicant ✔

First Name: Danielle

Last Name: Meger

Email: Danielle.Meger@reddeer.ca

Invite User

STEP 1 of 3: Check all to confirm you have completed this task and are now ready to

File Upload for: BP055215 ❓
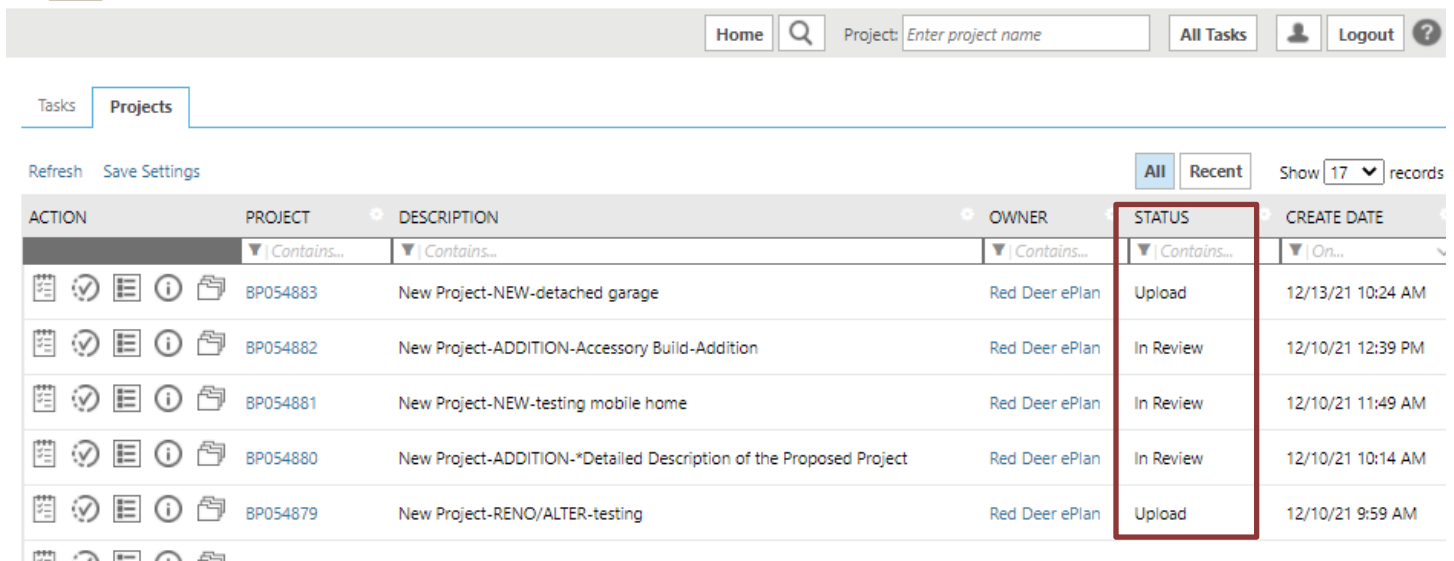
Please click appropriately for the **type of files** you are uploading.   Learn how

Upload Draw

2. Q: What is the status of my project?

Follow these steps:

    i.   Make sure you are on the PROJECTS tab.
    ii.   You can search by permit number, description, date created.
    iii.   You can find the status of the project under the STATUS column.

    iv.   Common statuses are:

- Upload – the applicant needs to upload documents and plans.
- Prescreen – the project is waiting for Customer Service staff to review the submission.
- Prescreen Corrections – Customer Service has reviewed the submission and something is missing/incorrect. The applicant needs to respond and resubmit.
- In Review – the project is being reviewed by the Project Coordinator (SCO or Development staff).
- Resubmit – the project has been sent back to the applicant with comments and the applicant needs to respond and resubmit.
- Stamp and Approve – the review has been completed by the Project Coordinator and the project is waiting for final approval and stamping of the plans.
- Approved – the plans have been approved in ProjectDox.
      Be sure to check your MyCity account to see if the permit has been issued.

❖ If there is a down arrow beside the status, the applicant can download the approved plans.

3. **Q: Why am I not able to make changes in my project?**

At certain points a project is locked to prevent a user from making changes while the documents and plans are being reviewed.

If the project is at a status other than the ones below, then the project will be locked. Refer to question 2 about finding the status.

- Upload
- Prescreen Corrections
- Resubmit
- Approved