

[HTTPS://REDDEER-AB-CA.AVOLVECLOUD.COM/PROJECTDOX/INDEX.ASPX](https://reddeer-ab-ca.avolvecloud.com/projectdox/index.aspx)

PROJECTDOX APPLICANT QUICK GUIDE

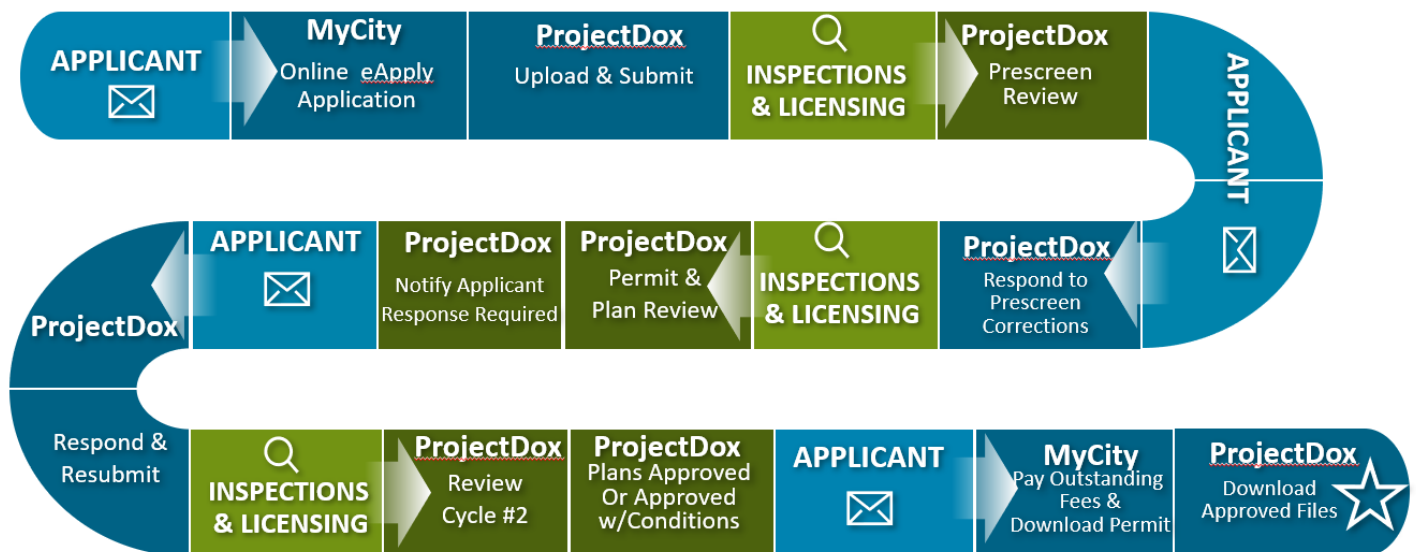
The City uses ProjectDox software to review plans submitted for Development Permits and Building Permits.

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

BEFORE YOU BEGIN – KNOW THE DOCUMENTS REQUIRED FOR EACH PROJECT

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

EAPPLY & EPLANS OVERVIEW



PERMIT SUBMISSION

Applicants are required to submit their permit application through MyPermits using their MyCity account:
<https://mycity.reddeer.ca/tempest/eapplypermits#!>

Once the permit application is submitted, the applicant will receive an email to upload the required documents and plans into our ProjectDox system.

NOTIFICATION & LOGGING INTO PROJECTDOX

**** If you're a new user to ProjectDox, you will receive two email from NoReply@reddeer.ca:**

1. **Welcome to Online Submission for the City of Red Deer** email
 - a. This email contains a “verification code” which is used for a first time login to ProjectDox. After logging in using the verification code, you’ll need to complete the process of setting up your account including setting your choice of password.
2. **Upload and Submit Task Request** email
 - a. Notifies you of a task on your project to upload and submit your required documents to complete your permit application. If this is the first time using ProjectDox, you must first complete the steps in #1.

**** If you've logged into ProjectDox before, you will receive one email from NoReply@reddeer.ca:**

1. **Upload and Submit Task Request** email.
 - a. Notifies you of 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 **LOGIN** or **OPEN PROJECTDOX**

OR

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

1. Enter in your e-mail.
2. Enter in your password. (NOTE: If this is your first time, use the “verification code” that was provided in the Welcome email.)
3. Click Login.
4. NOTE: If this is your first time logging in, you will be prompted to setup your choice of password and also to add information to your ProjectDox profile.

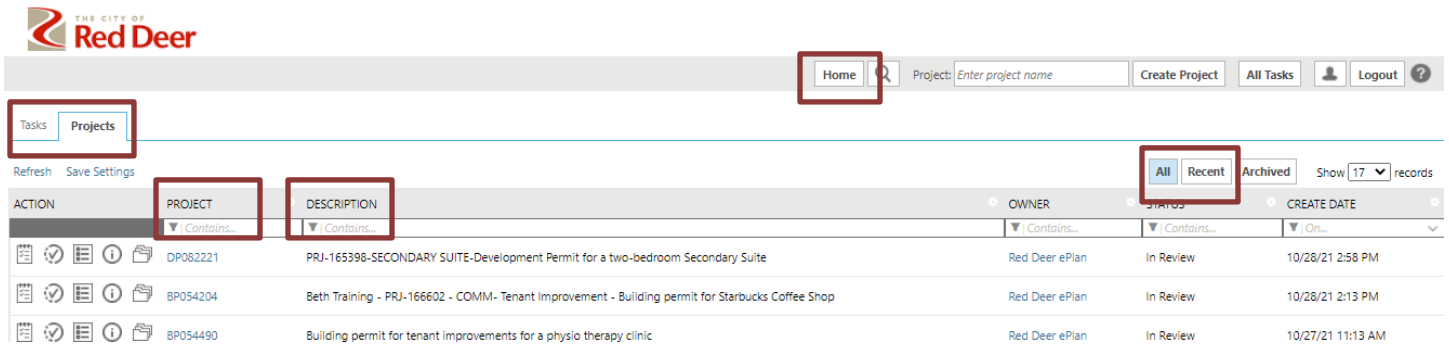
DASHBOARD VIEW VS. PERMIT VIEW

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













- In this permit view:
 - There are several tabs along the top near to the left.
 - TASKS, FILES, STATUS, INFO, REPORTS, DISCUSS & REVIEWS
- 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:
 - The “Dashboard view” is a quick glance of projects and tasks that you have to complete.
 - Alternatively, click the **VIEW ALL PROJECTS** button which takes you to the “Home” page.
 - There are 2 tabs:
 - Tasks and Projects
 - Under the **TASKS** tab you will see:
 - ALL tasks waiting for you to complete. If there are no tasks showing on this page, that means you have none to complete.
 - Under the **PROJECTS** tab, you will see:
 - ALL the projects which are associated with your ProjectDox email address that you login with.
 - You can view all projects or recent projects by clicking on the All or RECENT buttons on the upper right side.
 - You can also search for a specific project by entering the permit number under the PROJECT column header or by typing the address of the project under the DESCRIPTION column header.



The screenshot shows the ProjectDox Applicant Dashboard. At the top left is the City of Red Deer logo. To the right is a navigation bar with a 'Home' button, a search bar labeled 'Project: Enter project name', and buttons for 'Create Project', 'All Tasks', 'Logout', and a help icon. Below the navigation bar are tabs for 'Tasks' and 'Projects'. The 'Projects' tab is active, showing a table of projects. The table has columns for 'ACTION', 'PROJECT', 'DESCRIPTION', 'OWNER', 'STATUS', and 'CREATE DATE'. The 'PROJECT' and 'DESCRIPTION' columns have dropdown menus. The 'STATUS' column has buttons for 'All', 'Recent', and 'Archived'. The 'CREATE DATE' column has a 'Show' dropdown set to '17 records'. The table lists three projects: DP082221, BP054204, and BP054490.

ACTION	PROJECT	DESCRIPTION	OWNER	STATUS	CREATE DATE
   	DP082221	PRJ-165398-SECONDARY SUITE-Development Permit for a two-bedroom Secondary Suite	Red Deer ePlan	In Review	10/28/21 2:58 PM
   	BP054204	Beth Training - PRJ-166602 - COMM - Tenant Improvement - Building permit for Starbucks Coffee Shop	Red Deer ePlan	In Review	10/28/21 2:13 PM
   	BP054490	Building permit for tenant improvements for a physio therapy clinic	Red Deer ePlan	In Review	10/27/21 11:13 AM

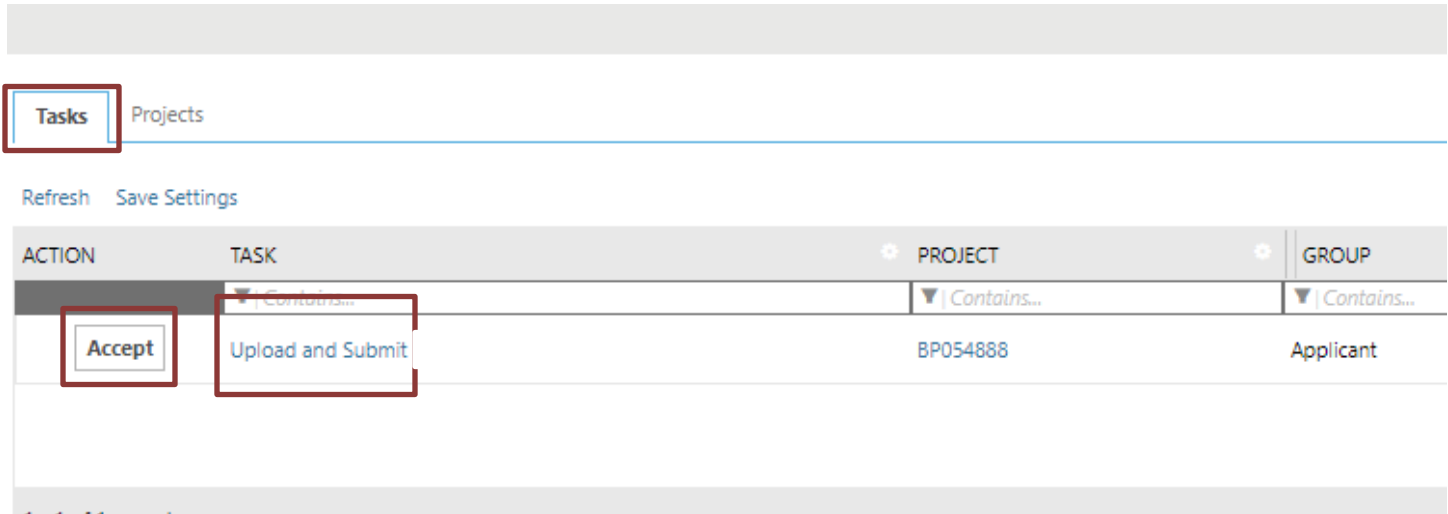
UPLOAD & SUBMIT

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. Review the following webpage for Document Upload Requirements: <https://www.reddeer.ca/city-services/permits-and-inspections/projectdox-requirements/>

If you logged in by clicking on **LOGIN** 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 look on the "dashboard" page for the permit you just created and click on the task on the right side or alternatively, click **VIEW ALL PROJECTS** button 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



ACTION	TASK	PROJECT	GROUP
Accept	Upload and Submit	BP054888	Applicant

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:
<https://www.reddeer.ca/media/reddeerca/city-services/permits-and-licenses/eapply/BP-DP---Plan-and-Document-Submission-Standards.pdf>
- **All drawings are required to be uploaded as individual files and not grouped together in one packaged file of drawings and documents.**
- 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 on the desired folder, either **DRAWINGS** or **DOCUMENTS**.
3. Click on the **UPLOAD FILES** button and click **BROWSE FOR FILES**. Browse for the files on your computer.
4. Once the files are selected from your computer, click **START UPLOAD**.



THE CITY OF
Red Deer

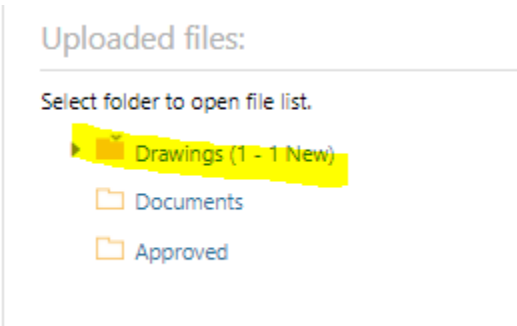
Folder: BP054888\Drawings

[Browse For Files](#) or drag files into this area.

[Start Upload](#)

[Close Window](#)

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



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

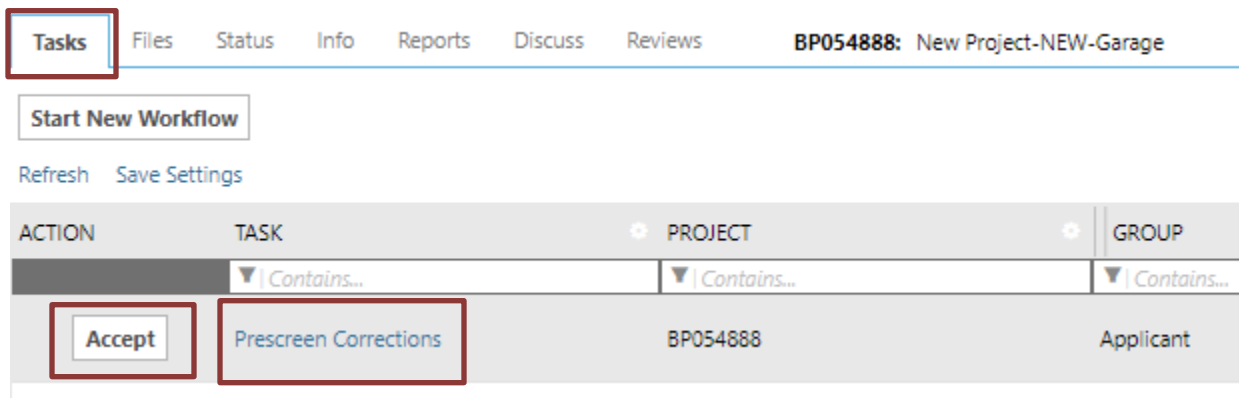
STEP 3 of 3: Check all to confirm you have completed this task and are now ready to submit

** 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 an application prescreen review to ensure you have uploaded all the required documents and review if the application is complete. If you are missing documents or uploaded an incorrect file, you will receive an email notification stating “Prescreen Review Request” and also prescreen corrections task.

1. Click the **OPEN PROJECT** button in the email. (Login if prompted)
2. Click **ACCEPT** under the ACTION column or **PREScreen CORRECTIONS** under the TASK column.



The screenshot shows the 'Tasks' tab selected in the top navigation bar. Below the navigation bar, there is a 'Start New Workflow' button and links for 'Refresh' and 'Save Settings'. A table displays task information with columns: ACTION, TASK, PROJECT, and GROUP. In the first row, the 'Accept' button in the ACTION column and the 'Prescreen Corrections' link in the TASK column are highlighted with red boxes. The PROJECT column shows 'BP054888' and the GROUP column shows 'Applicant'.

ACTION	TASK	PROJECT	GROUP
Accept	Prescreen Corrections	BP054888	Applicant

- This will assign the task to you for completion.
 - A pop-up window will come up.
3. Click on **REVIEW COMMENTS** button to review the comments posted by the Inspections & Licensing staff for information about what your permit application is missing.

STEP 1 of 4: Check all to confirm you have completed this task and are now ready to submit

Resolve Review Comments ?

Unresolved Comments: 1

Info Only Comments: 0

Files with Markups: 0

Plan Review:

Review Comments

[Learn how](#)

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

Refresh Learn how

<input type="checkbox"/> (0 selected) Add Comment / Ask Question					Please enter your responses ?
<input type="checkbox"/>	Ref.# 1	Customer Service	Beth McLachlan	12/23/21 3:38 PM	I have uploaded the site plan and re-uploaded the house plans
	Unresolved	You are missing the site plan and the house plan you uploaded does not match the address you applied for.			
	Comment				

- Follow the same steps as the [UPLOAD & SUBMIT](#) procedure.

RESPOND AND RESUBMIT

If you received an email notification stating “Resubmit Review Request”, that means that one of the Inspections & Licensing staff have determined during the Plan review process that you need to submit additional plans or revised plans before the plans can be approved.

- Click **OPEN PROJECT** from the email that you received. (Login if prompted)
- 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.
- Review ALL 4 steps on this page**
 - Step 1 of 4 – Resolve Review Comments, Upload required documents, Confirm all required documents are uploaded, click SUBMIT.
 - 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

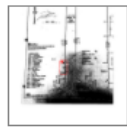


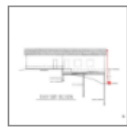


Review and respond online.

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


☐

(0 selected)

Add Comment / Ask Question

Please enter your responses

<input type="checkbox"/>	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	<p><i>Responded by: Beth McLachlan - 12/23/21 4:07 PM</i></p> <p>I have uploaded the site plan and re-uploaded the house plans</p>					
<input type="checkbox"/>	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						
<input type="checkbox"/>	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	 			
	Markup		Cannot read numbers, please resubmit.				
<input type="checkbox"/>	Ref.# 4	Height	Inspections & Licensing - Development Officer	Beth McLachlan	1/4/22 11:07 AM	Cycle 1	Added height to plan
	Unresolved		Plans.pdf	 			
	Markup		Please provide overall height				

Respond here to each comment

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

Home

Project:

Create Project

All Tasks

Logout

Tasks

Files

Status

Info

Reports

Discuss

Reviews

DP082350: PRJ-165689 - Development Permit for a 10 Unit Multiple Family Building

Main Contact: Beth McLachlan

Refresh

Upload Files

4 of 4 files (0 selected)

Drawings (4 - 0 New)

Documents (4 - 0 New)

Approved (2 - 0 New)


FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
▼ Contains...	▼ Contains...	▼	▼ Contains...	▼ On...
<input type="checkbox"/> 4506 47A Ave - Civic Engineering - Al-Terra.pdf			Beth McLachlan	11/18/21 11:33 AM
<input type="checkbox"/> 4506 47A Ave - Elevation Plan.pdf			Beth McLachlan	11/18/21 11:33 AM
<input type="checkbox"/> 4506 47A Ave - Floor Plans.pdf			Beth McLachlan	11/18/21 11:33 AM
<input type="checkbox"/> 4506 47A Ave - Site Plan.pdf			Beth McLachlan	11/18/21 11:33 AM

4. Review Step 2 of 4 – Uploading new documents and plans

- Review whether you need to upload revised versions of the files or new files.
 - New versions would be when you have made changes on the existing plans.
 - 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.

- To access your stamped plans, make sure you are on your dashboard (home screen), and you are in the PROJECTS tab.
- Locate the project in the list. You can search by project (permit number), description, etc.
- 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.

Tasks **Projects**

Refresh Save Settings

All Recent Archived Show 17 records

ACTION	PROJECT	DESCRIPTION	OWNER	STATUS	CREATE DATE
    	BP054894	New Project-NEW-property owner - full build-new	Red Deer ePlan	Upload	12/24/21 11:15 AM
    	BP054893	New Project-RENO/ALTER-Full Build - Renovation	Red Deer ePlan	Upload	12/24/21 11:10 AM
    	BP054892	New Project-NEW-Secondary Suite- NEW	Red Deer ePlan	Upload	12/24/21 11:10 AM
    	BP054891	New Project-NEW-testing	Red Deer ePlan	Upload	12/24/21 10:45 AM
    	BP054890	New Project-NEW-MultiFamily-NEW	Red Deer ePlan	Upload	12/23/21 4:10 PM
    	BP054889	New Project-RENO/ALTER-Apartment Renovation	Red Deer ePlan	Upload	12/23/21 3:20 PM
    	BP054888	New Project-NEW-Garage	Red Deer ePlan	Approved 	12/23/21 2:40 PM
    	BP054886	New Project-RENO/ALTER-Addition/Renovation	Red Deer ePlan	In Review	12/22/21 9:10 AM
    	BP054885	New Project-NEW-Detached Dwelling	Red Deer ePlan	In Review	12/22/21 9:00 AM
    	BP054884	New Project-NEW-Detached Dwelling with front attached garage, basement	Red Deer ePlan	In Review	12/22/21 8:50 AM

- Click the symbol and it will take you to the files tab in the project.
- Look at the left side at the different folders and you will see an 'Approved' folder. Click into it.
- You can view the stamped files or download them by clicking the down arrow on the toolbar.

Tasks **Files** Status Info Reports Discuss Reviews **BP054888: New Project-NEW-Garage**

Refresh

Upload Files

2 of 2 files (0 selected)

FILE NAME

Contains...

Plans.pdf

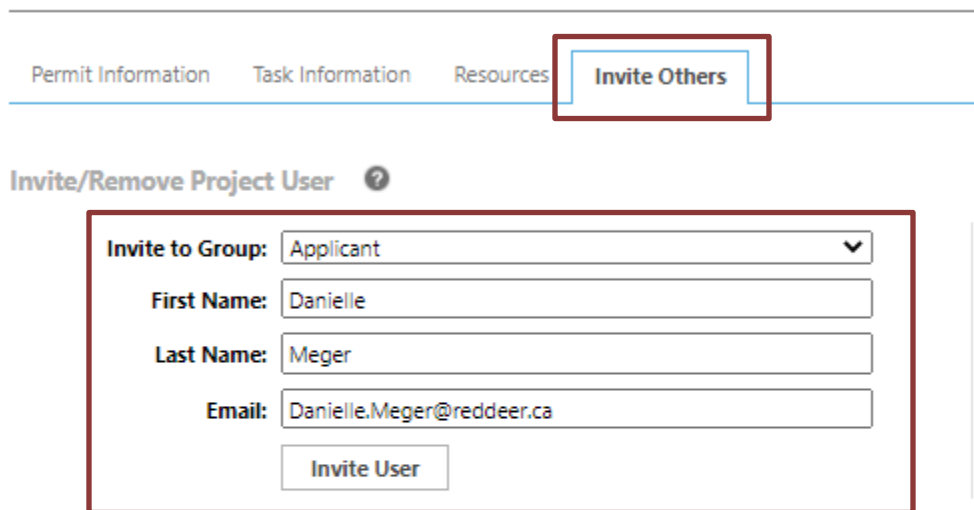
Site Plan.pdf

OTHER - COMMON QUESTIONS AND HELPFUL INFORMATION**1. Q: How do I add someone else with a different email address 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.



<div> Home <input type="text" value="Project: Enter project name"/> All Tasks Logout </div>					
<div> Tasks Projects </div>					
<div> Refresh Save Settings <div> All Recent </div> <div> Show 17 records </div> </div>					
ACTION	PROJECT	DESCRIPTION	OWNER	STATUS	CREATE DATE
	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...	▼ On...
    	BP054883	New Project-NEW-detached garage	Red Deer ePlan	Upload	12/13/21 10:24 AM
    	BP054882	New Project-ADDITION-Accessory Build-Addition	Red Deer ePlan	In Review	12/10/21 12:39 PM
    	BP054881	New Project-NEW-testing mobile home	Red Deer ePlan	In Review	12/10/21 11:49 AM
    	BP054880	New Project-ADDITION-*Detailed Description of the Proposed Project	Red Deer ePlan	In Review	12/10/21 10:14 AM
    	BP054879	New Project-RENO/ALTER-testing	Red Deer ePlan	Upload	12/10/21 9:59 AM

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 the project is locked in ProjectDox 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