



APPLICANT QUICK GUIDE

This document is a high-level quick reference guide. It is not intended to replace training or provide in-depth instruction.

Access to ProjectDox: <https://margate-fl-us.avolvecloud.com/Portal/>

Logging into ProjectDox (first time)

The screenshot shows the login page of the City of Margate Online Application System. At the top, the Margate logo and the tagline 'Together We Make It Great' are displayed. Below that, the text 'Welcome to the City of Margate, FL Online Application System' is shown. The main section is titled 'Login' and contains fields for 'E-mail:' and 'Password:', both with placeholder text. There is a checkbox for 'Manage profile' with a help icon, a 'Login' button, and a 'Forgot password?' link. At the bottom, a message says 'You need an account to submit and manage applications. Don't have an account?' followed by a 'Create Account' button.

Click on **Create Account**

The screenshot shows the 'Create Your Account' form. The header includes the Margate logo and the tagline 'Together We Make It Great'. The form consists of several text input fields with required markers (*): 'First Name', 'Last Name', 'Email', 'Confirm Email', 'Phone', 'Additional Phone', 'Company Name', 'Address 1', 'Address 2', 'Country' (with 'United States' selected), 'Province/State', 'City', 'Postal Code/Zip Code', 'New Password' (with a note about password requirements: 'Password must not contain special characters, must contain at least one digit, one upper case letter, one lower case letter, and must have at least 8 but no more than 10 characters.'), and 'Confirm Password'. At the bottom are 'Create My Account' and 'Cancel' buttons.

Complete the required information (*) to create your account



APPLICANT QUICK GUIDE

Application Process

Select Permit Type by choosing from the drop down list:

Start New Application Request

To start a new application request:

- Select an application type
- Provide an application name
- Click the button below

Type: * **Select Request Type**

Project Name: * **Select Request Type**

- Building Permit
- Building Permit Revision
- Development Services Application
- Engineering Permit
- Engineering Permit Revision

Enter a unique Project Name, limited to 100 characters.

Click Start Application Process

Start Application Process

Terms And Conditions

The next screen will take you to the Terms and Conditions.

Please carefully read all the terms and conditions.

If you accept them, check the box next to "I have read, understand, and agree to the above terms and conditions" and click the button "Accept & Start My Application":

I have read, understand, and agree to the above terms and conditions

Accept & Start My Application [Back To My Home Page](#)

Complete all required fields within the application, which are indicated with a red asterisks (*)



APPLICANT QUICK GUIDE

If invited to an existing project, you will receive an email notification containing a link to the project.

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PROJECT INVITE

Hello PS,

You have been invited to participate in the plan review for project: **BLD-1234**, as a member of the **Applicant** group.

Your login is: **ps03@avolvesoftware.com**

To access this project, please click on "Open Project" below.

Open Project To access this project

If this is your first time logging in, you will receive an additional email with a verification code that is required to set up your account.

Initial Login to ProjectDox

Click the **Login** button and enter the Verification Code from the email. Click **Continue**.

Verification Code *

Enter the verification code that you received via email to complete the account verification process.

Continue **Resend Code**

Fill in the required information, including your new password. Click **Create My Account**.

Create Your Account ? March 2, 2021

First Name *

Last Name *

Email *

Confirm Email *

Phone * X

Additional Phone X

Company Name

Address 1 *

Address 2

Country * United States

Province/State *

City *

Postal Code/Zip Code *

New Password *
Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@#\$%^#%. Password length: 10-15 characters.

Confirm Password *

Create My Account **Cancel**



APPLICANT QUICK GUIDE

Key Concepts You Need to Know

Workflow: Sequential set of business activities starting from Upload and Submit to downloading the approved plans.

Task: An assignment in the workflow process.

eForm: Online electronic form designed to capture, validate, and submit data.

Accepting a Task: Accepting a task is an important part of the electronic plan review process. Accepting a task provides access to that task's eForm. The user who accepts the task is responsible for completing the associated actions, including uploading files and making necessary corrections requested by the City.

Completing a Task: The completion of a task confirms the fulfillment of the requested actions. Completing a task is the only way the City will receive notification that you are finished. Once a task is complete no further work may be done until another task is received and accepted.

Upload and Submit

You will receive an email with a link to start your Upload and Submit task. Click **Start Task** within the email to open the ProjectDox login screen in your browser. Once logged in, your task eForm will open.

You can also accept the task and open the eForm by clicking on **Accept** or the Upload and Submit link on the Home Page Tasks tab.

A screenshot of the ProjectDox software interface. At the top, there are two tabs: 'Tasks' (which is selected and highlighted in blue) and 'Projects'. Below the tabs are two buttons: 'Refresh' and 'Save Settings'. The main area is a table with two columns: 'ACTION' and 'TASK'. The 'ACTION' column contains a button labeled 'Accept'. The 'TASK' column contains a button labeled 'Upload and Submit'. The 'Upload and Submit' button is highlighted with a yellow box.

Review the submittal requirements as outlined by the City and upload to the appropriate folder(s).



APPLICANT QUICK GUIDE

Step 1: Upload your files.

STEP 1 of 3:

* Drawings **MUST** be uploaded single-page/ landscape orientation with correct Naming Convention to "Drawings" folder.
Maximum document size 24x36
* Documents **MUST** be uploaded with the correct Naming Convention to "Supporting Documents" folder

File Upload for: ENG-1042 [?](#)

Please click appropriately for the **type of files** you are uploading. [Watch video](#)

[Upload Drawings \(Plans, Surveys\)](#) [Upload Supporting Documents](#) [Upload Permit Applications,Contracts](#)

Uploaded files:

Select folder to open file list.

- Applicant User Guide (2 - 0 New) [?](#)
- Drawings (Plans, Surveys)
- Supporting Documents
- Permit Applications,Contracts

Click Browse for **Files** or drag files into the upload window. Click **Start Upload**. This step may be repeated to add additional files.

ProjectDox

Folder: Gael Test\Drawings

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

[Start Upload](#) [Close Window](#)

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

Step 2: Confirm you have uploaded all required documents.

STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit

Confirmation [?](#)

*Upload Task Complete (I have uploaded all required documents) *Required

Step 3: Complete your task by clicking Submit.

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

[Submit](#) [Close](#)

Receipt of your upload will be confirmed by email.

UPLOAD COMPLETED

Hello PS,

The following files have been received for project - **BLD-1234 : Corner Shop**

Files received:

1. A1-01 First Floor Plan.pdf
2. E-01 Utility.pdf
3. L-01 Grading.pdf



APPLICANT QUICK GUIDE

Prescreen Corrections

If corrections are needed, you will receive an email notification for the Prescreen Corrections task. Click **Start Task** from your email or login to ProjectDox and accept the task.

PRESCREEN CORRECTIONS

Hello PS,

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 **BLD-1234 : Corner Shop**

Step 1: Respond to comments provided by City staff. A summary of the number of comments will be listed. Click **Review Comments**.

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

Resolve Review Comments [?](#)

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

Plan Review: **Review Comments**

Review and respond to the comments.

Add Comment / Ask Question			Please enter your responses ?
Ref.# 1	Coordinator Preeti Schatzman	3/9/21 5:27 PM	Type your response here.
Unresolved	Your submission is missing storm water files.		
Comment			

After making the requested corrections, type your response in the text field box. To ask a question click **Add Comment/Ask Question**. It may be required to respond to all comments.

Step 2: Upload New or Versioned Files.

- If there are New Files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
 - If Yes, follow the same procedures as initial upload
 - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

Versioned Files **New Files**

Are your updated files named exactly the **same*** as the prior versions? Yes No [Learn how](#)

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

Please click appropriately for the type of files you are uploading. [Learn how](#)

Upload Drawings **Upload Documents**



APPLICANT QUICK GUIDE

Step 3 and 4: Confirm all requirements have been met and click Submit.

STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit
Confirmation ?
<input type="checkbox"/> **Responses provided for all comments, additional files (if requested) have been uploaded, and any outstanding items have been addressed. *Required
STEP 4 of 4: Click the "Submit" button below to complete your task
<input type="button" value="Submit"/> <input type="button" value="Close"/>

Note: If all review comments require a response and they have not been provided, you will see the following notification and will not be able to complete your task until required responses have been entered.

Before completing this task, you must provide a response to all applicable comments by clicking the review comments button.

The Prescreen Corrections task can be repeated as many times as necessary until all corrections have been submitted. You will receive an email when your Prescreen review is accepted and review is beginning.

Respond and Resubmit (Corrections Required)

After all required departments have reviewed your plans, you will receive an email with instructions for your Respond and Resubmit task. Click on **Start Task** in the email or Accept the task in ProjectDox.

There are several steps to complete on the eForm, as described below:

Step 1: Resolving Review Comments.

- Click on the **Review Comments** button on the eForm in order to access the Review Comments window

Resolve Review Comments [?](#)

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

Plan Review **Review Comments** **Export to Excel** **Import Excel Responses**

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

- View the reviewer comments and markups
- Click on file name to open the drawing with markups

Add Comment / Ask Question						Please enter your responses ?	
Ref.#	Comment	Type	Reviewer	Date	Cycle	Type your response here.	
Ref.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1	<input type="text"/>	
	Unresolved		A1-01 First Floor Plan.pdf			<input type="button" value="Download"/>	
	Markup		Door is too close to mechanical equipment				
Ref.# 3	Mechanical		Preeti Schatzman	3/10/21 4:47 PM	Cycle 1	No response required.	
	Info Only		Make sure to do the following when re-submitting:				
	Comment		<ul style="list-style-type: none">Item AItem BItem C				

- Add your response in the Applicant Response column

Add Comment / Ask Question						Please enter your responses ?	
Ref.#	Comment	Type	Reviewer	Date	Cycle	Type your response here.	
Ref.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1	<input type="text"/>	
	Unresolved		A1-01 First Floor Plan.pdf			<input type="button" value="Download"/>	
	Markup		Door is too close to mechanical equipment				



APPLICANT QUICK GUIDE

Step 2: Upload New or Versioned Files.

- If there are new files, select the New Files tab and follow the same procedures as the initial upload
- If there are versioned files, select the file naming option (Yes or No)
 - If Yes, follow the same procedures as Upload and Submit
 - If No, select the new file that will be a new version of the existing file. ProjectDox will rename the file upon upload with the same name as prior version

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"

Please click appropriately for the type of files you are uploading. [Learn how](#)

Step 3: Mark the task complete and click Submit.

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

If your resubmittal needs corrections, you will receive an email and task with required actions necessary before the subsequent review can begin.

Final Payment

Once approved, you will receive an email notification and task for any fees due. It is your responsibility to pay all final fees per the City's guidelines.

Mark the task complete and click **Submit**.

Confirmation [?](#)

*All fees have been paid *Required



APPLICANT QUICK GUIDE

Congratulations! Approved Plans Ready for Download

You will receive an email notification directing you to download and save your approved plans.

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DOWNLOAD APPROVED FILES

Hello PS,

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 download and save your approved plans.

Download To access your approved plans for **BLD-1234 : Corner Shop**

Please do not reply to this email.

REMINDER: The Online Help for ProjectDox is available here:

