

APPLICANT QUICK GUIDE

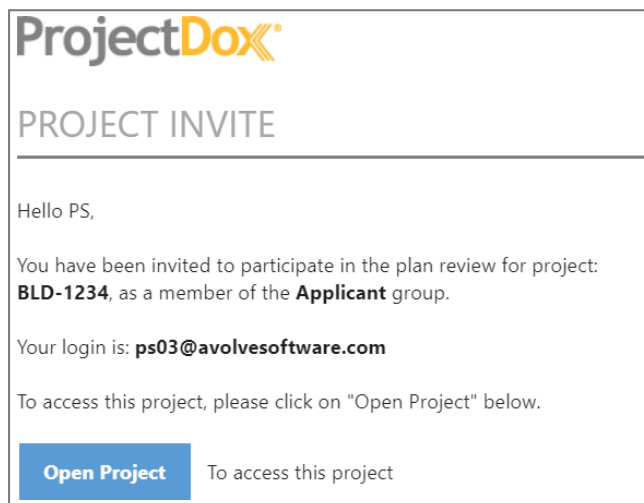
Access to ProjectDox

Your ProjectDox account will be created by the system upon processing of your first application by the City of Knoxville for plans review. Any subsequent applications will add another project to your existing account. Once the project has been created you will receive an email notification containing a link to the project.

Accounts will be created based on the email address provided in the application and you will only be able to access projects in its associated account.

- **Note: It is highly recommended that businesses and firms use a general company email address for their plans review account.** This will keep all projects consolidated into a single location and ensure ready access to your files and tasks in the case of staff absence or turn-over. The system does not provide a means to transfer projects from one account to another.

Example invitation:



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. Be mindful of the password rules established by the system – in addition to the typical character limitations there is also a minimum and maximum character count.

APPLICANT QUICK GUIDE

Login to ProjectDox

If this is your first time logging into the system you will click the **Login** button and enter the Verification Code from the email. Click **Continue**.

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 *

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 *

Verification Code *

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

You will only have to complete this process once. Any future project will use the same login and password combination.

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. The workflow controls the flow of the project and will adjust the permissions of a user based on the projects location within the workflow.

Task: An assignment in the workflow process. The task will determine when you are able to interact with the project and is how the system knows to move the workflow on to the next step.

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. The user who accepts the task is responsible for completing all associated actions, including uploading files and making necessary corrections requested by the City of Knoxville.

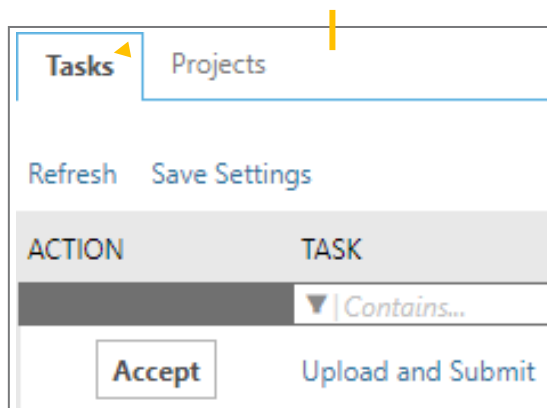
Completing a Task: The completion of a task confirms the fulfillment of the requested actions. Completing a task is the **only** way the City of Knoxville will receive notification that you are finished and is necessary to keep the project moving. Only the associated user can complete an assigned task.

- **Note:** 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. There are multiple ways that you can begin your task:

1. Click **Start Task** within the email to open the ProjectDox login screen in your browser. Once logged in, your task will open.
2. You can also accept and open the task by clicking on **Accept** or the **Upload and Submit** link on the Home Page Tasks tab.



APPLICANT QUICK GUIDE

Step 1: To Upload, select the desired folder.

Task Instructions [Learn how](#)

Please follow the steps below:

STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required

File Upload for: BLD - 1234 [?](#)

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

Uploaded files:

No files uploaded yet.

The system has two locations where documents may be uploaded – a drawings folder and a documents folder.

Upload Drawings: This is where drawings (site plan, floor plans, civil drawings, and construction details) should be uploaded. These files must be uploaded as single-page PDF files and the file name must follow the naming convention set by the system. The naming convention provided by the software vendor is as follow:

- One or two characters from the allowed prefix list and three digits (optional period and two digits), dash, sheet name.
 - Examples: A100-Lower Floor Plan, A100.05-Lower Floor Plan
 - Allowed prefixes: • A: Architectural • S: Structural • E: Electrical • P: Plumbing • M: Mechanical • C: Civil • AS: Architectural Site Plan • LS: Life Safety • FP: Fire Protection • L: Landscaping • G: General/Cover Sheet

Upload Documents: This is where miscellaneous documents (correspondence, support photos, truss packages, engineering specifications, flow calculations) should be uploaded. These documents may be uploaded as multi-page PDF files and are not required to follow the same naming requirements as drawings.

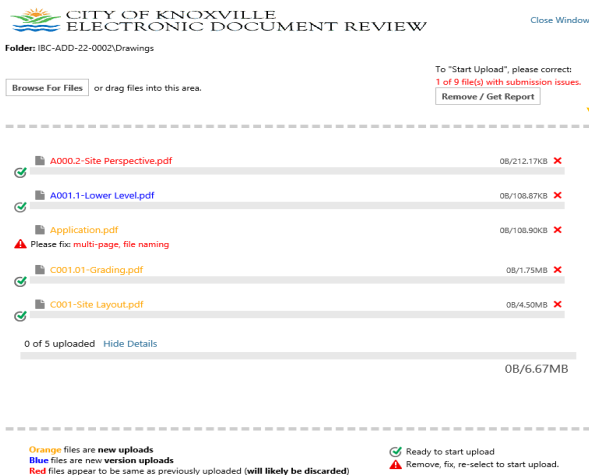
FILE NAME	STATUS
<input type="checkbox"/> A100 - lower floor plan.pdf	New
<input type="checkbox"/> a100.05-lower floor plan.pdf	New
<input type="checkbox"/> A100-lower floor plan.pdf	New

APPLICANT QUICK GUIDE

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



The system will evaluate the files you are attempting to upload against both the submission guidelines and files currently uploaded into the project. File names will be color-coded based on the comparison against currently uploaded files and flagged if there are errors.



Orange file names: Orange files have file names the system does not recognize and will be denoted as a new submittal.

- **Note:** If your file name is orange and you know it is a revision then you should delete the file and upload after correcting the name. Uploading a revision with a new file name will cause project delays and may result in additional review fees.

Blue file names: Blue file names are recognized as revisions to an existing file and will be flagged as such.

Red file names: Red file names mean the supplied file is identical to the file with the same name already uploaded.

Flagged files: Flagged files failed to meet submittal standards and must be deleted to continue the upload process. The system will generate a report to help you identify the problem.


APPLICANT QUICK GUIDE

Step 2: Confirm all files have been uploaded.

Once you have confirmed all files are uploaded you confirm this on your eForm.

- **Note:** Additional files cannot be uploaded into the project once you complete your task and 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: Complete your task by clicking Submit.

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

You will get a confirmation receipt for your upload by email after completing your task.

UPLOAD COMPLETED

Hello Rob,

The following files have been received for project - **IBC-ADD-2**

Files received:

1. A000.2-Site Perspective.pdf
2. A001.1-Lower Level.pdf
3. A001.2-Foundation.pdf
4. A001.3-Elevation.pdf
5. A001.4-Floor Plan.pdf
6. A001.5-Roof Plan.pdf

Your files are now in queue for processing by the project administrator. This is a cursory evaluation of your documents to determine if the upload meets all requirements for forwarding to review staff.

APPLICANT QUICK GUIDE

Prescreen Corrections

If corrections are needed, you will receive an email notification for the Prescreen Corrections task. There are multiple ways that you can begin your task:

1. Click **Start Task** within the email to open the ProjectDox login screen in your browser. Once logged in, your task will open.
2. You can also accept and open the task clicking on **Accept** or the **Prescreen Corrections** link on the Home Page Tasks tab.

Step 1: Respond to comments

Prescreen review comments provided by the City of Knoxville will communicate the corrections needed to release your project for plans review. 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.

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

After making the requested corrections, type your response in the text field box. To ask a question of the City of Knoxville, click **Add Comment/Ask Question**.

- **Note:** All comments must be responded to prior to completion of your task.

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. The file name should turn **Orange** when placed in the upload window.
- If there are versioned files, select the file naming option (Yes or No)
 - If Yes is selected, you are confirming that you have a new version of an existing file and have verified that the new file name is exactly the same as the original. Follow the same procedures as initial upload. The file name should turn **Blue** when placed in the upload window.
 - If No is selected, you are indicating that you have a new version of an existing file but cannot confirm that your new file name is exactly the same as the original upload. Select the new file that will be a new version of an existing file. ProjectDox will rename the file upon upload with the same name as prior version. The file name should turn **Blue** when placed in the upload window.

Note: ProjectDox will only verify that the new upload is different from the original file being replaced, nothing else. When using this feature you will need to ensure that you do not accidentally overlay an incorrect sheet, ie placing plumbing revisions over an architectural sheet – failure to do so could result in project delays.

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 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

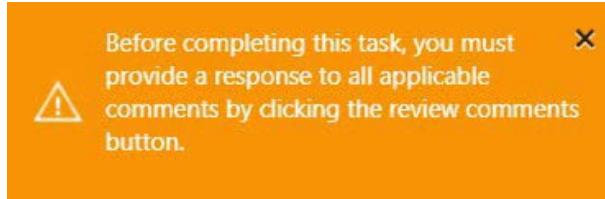
Confirmation ⓘ

*I have completed all Prescreen requests *Required

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

APPLICANT QUICK GUIDE

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



- **Note:** 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 the review cycle is initiated.

Once the review cycle is initiated there is nothing more to do until a new task is received.

Respond and Resubmit (Corrections Required)

After all departments have reviewed your plans, you will receive an email with instructions for your **Respond and Resubmit** task if the plans cannot be approved for permit. Click on the **Start Task** in the email or **Accept** the task in ProjectDox. There are several tasks 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.




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

APPLICANT QUICK GUIDE

Add Comment / Ask Question						Please enter your responses ?
Ref.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:45 PM	Cycle 1	Type your response here.
Unresolved		A1-01 First Floor Plan.pdf				
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.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 PM	Cycle 1	I have made changes and uploaded a new file
Unresolved		A1-01 First Floor Plan.pdf				
Markup		Door is too close to mechanical equipment				

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. The file name should turn **Orange** when placed in the upload window.
- If there are versioned files, select the file naming option (Yes or No)
 - If Yes is selected, you are confirming that you have a new version of an existing file and have verified that the new file name is exactly the same as the original. Follow the same procedures as initial upload. The file name should turn **Blue** when placed in the upload window.
 - If No is selected, you are indicating that you have a new version of an existing file but cannot confirm that your new file name is exactly the same as the original upload. Select the new file that will be a new version of an existing file. ProjectDox will rename the file upon upload with the same name as prior version. The file name should turn **Blue** when placed in the upload window.

APPLICANT QUICK GUIDE

Note: ProjectDox will only verify that the new upload is different from the original file being replaced, nothing else. When using this feature you will need to ensure that you do not accidentally overlay an incorrect sheet, ie placing plumbing revisions over an architectural sheet – failure to do so could result in project delays.

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

- **Note:** If your resubmittal needs corrections, you will receive an email and tasks with required actions necessary before the subsequent review cycle can begin.

Final Payment

Once approved, you will receive an email notification concerning additional fees due. These fees are associated with the transfer of the project from the review phase to the inspection phase. The invoice can be accessed and fees paid using your Citizen Access Account.

IBC-ADD-22-0002 | IBC Addition Permit | 1237 EAST WEISGARBER RD, KNOXVILLE TN 37909 | IBC Residential Building | Ready to Issue | [Pay Fees Due Amend Permit](#)

- **Note:** If another individual or firm will be responsible for the fee payment or inspection phase of the project, you must **Amend Permit** and provide their information and role in the project.