

CITY OF SANTA ANA PUBLIC WORKS AGENCY DEVELOPMENT ENGINEERING

# AVOLVE-PROJECTDOX ELECTRONIC PLAN CHECK APPLICANT USER GUIDE GENERAL OVERVIEW

| Ci                        | ty of So  | nta Ana  |
|---------------------------|---|--|
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|                           | Getting St  | arted in ProjectDox  |
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### Apply for an Electronic Plan (E-Plan) Check with Public Works

### Step 1: Submit an Inquiry

To initiate a request to submit for e-plan check, you must email <u>pwa-projectdox@santa-ana.org</u> with the subject line indicating project address and plan check type.

Please make sure to also include the following information.

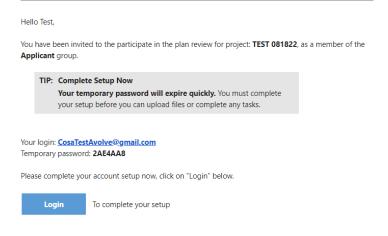
Note: All fields are required to advance the process – do not delete or modify.

| Applicant Contact Info                        |  |
|---|--|
| First Name:                                   | Test                                     |
| Last Name:                                    | Engineer                                 |
| Company:                                      | Company A                                |
| Email:  | CosaTestAvolve@gmail.com                 |
| Phone:  | XXX-XXX-XXXX                             |
| Project Info                                  |  |
| Project/Site Address:                         | TEST General 071823                      |
| Customer's Project Reference #:               | TEST General 071823                      |
| Project Description:                          | TEST General 071823                      |
| Plan Check Type:                              | Plan                                     |
| Project Contractor, if known:                 | Contractor Name                          |
| Duration for Lane Closure Projects:           | Time                                     |
| Is this a regular or accelerated plan check?: | Please put either regular or accelerated |

### Step 2: Create Your Account

Once you submit your inquiry, Public Works Staff will review. If your inquiry has been approved, you will be invited to create an account with Avolve-ProjectDox.

PROJECT INVITE



Once logged in, you will be prompted to change your password.

### **Profile Information**

#### Welcome to ProjectDox.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

| Change Password:             |                                | Password Reset Ques       | tion & Answer:                                    |                           |
|------------------------------|--------------------------------|---------------------------|---|---------------------------|
| New password:*               |                                | Security question: *      |   |                           |
| Confirm new password:*       |                                | Security answer: *        |   |                           |
| Password must contain at lea | st one each of: uppercase lett | er, lowercase letter, num | ber, special character from: \$@\$!%*#?& Password | length: 10-15 characters. |

| Contact Informat | ion User Metadata       | Project Membership | Group Membership | User Activ |
|------------------|-------------------------|--------------------|------------------|------------|
| * Required field |                         |                    |                  |            |
| First Name: *    | Applicant               | Last Name: * Nar   | me               | J          |
| Email: *         | cosatestavolve@gmail.co | om                 |                  |            |
|                  |                         |                    |                  | 1          |

### Step 3: Upload Your Plans

You will receive an email to access the project that the Coordinator has created.

# **PROJECT INVITE**

Hello Test,

You have been invited to the participate in the plan review for project: **TEST General 071823**, as a member of the **Applicant** group.

Your login is: CosaTestAvolve@gmail.com

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

Open Project To access this project

You will also receive an email to upload and submit your plans.

# UPLOAD AND SUBMIT

Hello Test,

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 <u>click here</u> and then select "forgot password".

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

### Start Task

To submit your files for TEST General 071823 : TEST General 071823

### When logged in, you will see the following on your dashboard.

| Tasks   | Files  | Status Info  | Report | TEST Ger          | neral 0 | 71823: TEST General | 071 | 323        |              |                |   |                |   |                     |
|---------|--|--------------|--------|-------------------|---------|---------------------|-----|------------|--------------|----------------|---|----------------|---|---------------------|
| Refresh | Refresh Save Settings Quick Filter: Select One  All Overdue Priority Show 19  record |              |        |                   |         |                     |     |            |              |                |   |                |   |                     |
| ACTION  |  | TASK         |        | PROJECT           |         | GROUP               |     | STATUS     | PRIORITY     | DUE DATE       |   | CREATED        |   | DESCRIPTION         |
|         |  | ▼   Contains |        | ▼   Contains      |         | ▼   Contains        |     | ▼ Contains | ▼   Contains | ▼   On         | ~ | ▼   On         | ~ | ▼   Contains        |
| Ad      | cept   | Upload and S | ubmit  | TEST General 0718 | 323     | Applicant           |     | Pending    | Medium       | 8/8/23 4:27 PM |   | 7/18/23 4:27 P | M | TEST General 071823 |

Click the Accept button to start the task of uploading and submitting your plans.

A new window will appear with three steps:

- 1) Upload your plans
- 2) Confirm plans have been uploaded
- 3) Click Submit

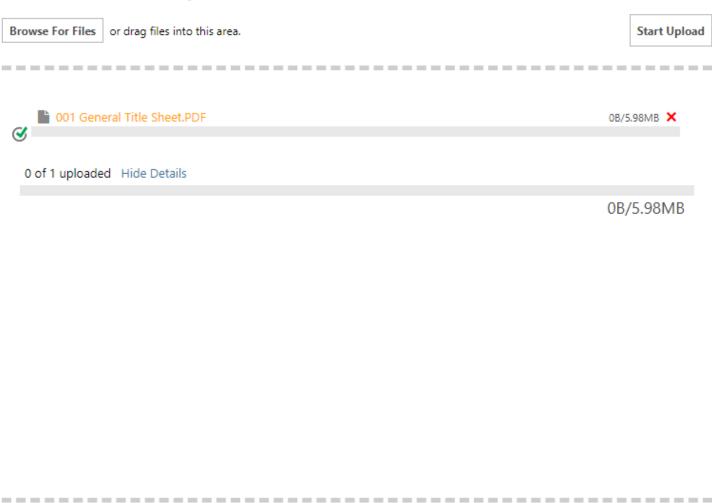
### UPLOAD AND SUBMIT

Task Information Invite Others **Task Information** TEST General 071823 Project Name: Project Description: TEST General 071823 Workflow: Public Works Workflow Current User Login: Test Applicant (CosaTestAvolve@gmail.com) Task Due Date: 8/8/23 4:27 PM **Task Instructions** 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: TEST General 071823 🛛 😰 Please click appropriately for the type of files you are uploading. Upload Drawings **Upload Documents** Uploaded files: No files uploaded yet. 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: Click the "Submit" button below to complete your task

When you click on Upload Drawings, a new window will appear.

#### Folder: TEST General 071823\Drawings



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

Ready to start upload
 Remove, fix, re-select to start upload.

IMPORTANT: All plans need to be in PDF format.

Please refer to the City website for plan guidelines.

Once completed, you will receive an email confirming the upload of your plans.

# UPLOAD COMPLETED

Hello Test,

The following files have been received for project - TEST General 071823 : TEST General 071823

Files received:

1.001 General Title Sheet.PDF

### Step 4: Prescreen Review / Initial Payment

Once the Coordinator has completed the prescreen review, you will be notified to come to the City counter to do initial payment.

IMPORTANT: Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

### Initial Payment Due

Hello Test,

You have an important task to complete by 8/29/2023 4:33:55 PM.

To begin, please select "Start Task" below.

Start Task

To complete your task for **TEST General 071823 : TEST General 071823** 

### **Task Instructions**

Please pay initial payment Due.

Initial Payment Verification 🛛 🚱

Add Comment

DISCUSSION COMMENT

Please come to the counter to pay initial plan check fees.

After you have completed in-person payment, please confirm payment online.

### Click the Accept button to start task.

| Tasks   | Files     | Status Inf   | fo Repor | s TEST General      | 071823: TEST General | 071823   |              |                  |          |                 |         |                     |
|---------|-----------|--------------|----------|---------------------|----------------------|----------|--------------|------------------|----------|-----------------|---------|---------------------|
| Refresh | Save Sett | ings         |          |                     |                      |          | Quick Fi     | Iter: Select One | <b>~</b> | All Overdue Pr  | riority | Show 19 🗸 records   |
| ACTION  |           | TASK         |          | PROJECT             | GROUP                | STATUS   | PRIORITY     | DUE DATE         |          | CREATED         |         | DESCRIPTION         |
|         |           | ▼   Contain  | 15       | ▼   Contains        | ▼   Contains         | Contains | ▼   Contains | ▼   On           | $\sim$   | ▼   On          | $\sim$  | ▼   Contains        |
| A       | ccept     | Initial Paym | ient Due | TEST General 071823 | Applicant            | Pending  | Medium       | 8/29/23 4:33 PM  |          | 7/18/23 4:33 PM |         | TEST General 071823 |

A new window will appear.

Click on Add Comment and input the MCT #.

Initial Payment Verification

| Comment: * | MCT # | Save | Cancel |
|------------|-------|------|--------|
|            |       |      |        |
|            |       |      |        |

Then, click on Initial Fees Paid to complete the task.

### Step 5: E-Plan Check Begins

After initial payment has been received, the Coordinator will start assigning reviewers to begin the e-plan check at the City.

You will receive an email notifying you the prescreen review has completed and that the e-plan check is in progress.

Hello Test,

Congratulations, the next step in your review is beginning.

The prescreening of files uploaded for project - **TEST General 071823 : TEST General 071823** is completed.

You will be notified when the review is complete and if any additional response is required.

### Step 6: E-Plan Check Ends / Final Payment

When the e-plan check has completed, you will receive an email to come to the City counter to pay final plan check fees

# Final Payment

Hello Test,

You have an important task to complete by 8/29/2023 4:37:57 PM.

To begin, please select "Start Task" below.

Start Task To complete your task for TEST General 071823 : TEST General 071823

IMPORTANT: Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

Please confirm payment online to receive digitally approved plans.

Click the Accept button to start task.

A window will appear with three steps:

- 1) Add comment regarding final payment
- 2) Confirm that all fees have been paid
- 3) Click Submit

| STEP 2 of | <ol> <li>Check the box</li> </ol> | k to confirm you are | ready to submit |
|-----------|-----------------------------------|----------------------|-----------------|
|-----------|-----------------------------------|----------------------|-----------------|

| Confirmation 2   |                       |
|--|-----------------------|
| *All fees have been paid *Required                                 |                       |
|  |                       |
| STEP 3 of 3: Click the "Submit" button below to complete your task |                       |
|  |                       |
|  | Submit Save for Later |
| the Comment section, input MCT # to confirm final payment.         |                       |
| STEP 1 of 3: Respond to comments, as needed                        |                       |

| Discuss Final Payment | 0 |             |
|-----------------------|---|-------------|
| Comment: * MCT #      |   | Save Cancel |

### **Step 7: Approved Stamped Plans**

You will receive an email stating that your approved plans are ready for download.

To access the approve plans, go to the projects dashboard.

Click on the Approved link and a new window will appear.

You will be taken to the files section of the project.

The plans will be in the Approved folder.