

City of Tyler

Development Services

ProjectDox Getting Started Guide



PROJECTDOX Getting Started Guide

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Introduction

The City of Tyler's goal is to be the Best Managed City in the US. To that end, the Development Services departments have partnered with several vendors to offer electronic plan application, submittal, credit card payments, and electronic plan review (ProjectDox).



What is ProjectDox Review?

ProjectDox is a web-based electronic plan and document workflow solution that allows citizens and City staff to initiate and complete the development plan submission, review and approval process on-line as opposed to a manual in-person and paper-based process.

Unlike the current paper system, ProjectDox allows for several cost and time saving efficiencies including:

- Upload of documents electronically from the convenience of your office, 24 hours 7 days a week
- Simultaneous review of the plans by all professional and trade disciplines
- City reviewer mark-ups are made directly on the plans to provide direction and clarity as to any items which require correction
- Re-submission of corrected plans electronically from the convenience of your office
- Real-time return of your approved stamped plans once the fees are paid
- Access to e-copies of approved plans during Inspections

Reading and following these instructions will make the electronic plan distribution and review process more efficient for every participant in the permit process. Although every new system normally requires some effort to learn how to use it, the simplicity of ProjectDox will make the benefits of conversion immediately apparent.

We hope that you find this Getting Started Guide to be helpful in conjunction with other written materials and video links available on our web page [Development Review Portal](#). As always we welcome and value your feedback on the system and our service performance.

How Does ProjectDox Work?

When an applicant (architect, engineer, homeowner, business owner or agent) submits an application requiring drawings, ProjectDox will invite the applicant to the newly created project by email to upload the electronic drawings and all relevant schedules and documents. City review staff will then have simultaneous access to the review the plans and note any corrections directly on the plans for absolute clarity. Applicants are notified via email of any requested corrections and the updated plans are electronically resubmitted to the City. When the plans are in order and all fees are paid, applicants can then download the approved stamped plans.

What Technology Do I Need to Use ProjectDox?

As a web-based system, ProjectDox requires Internet Explorer Version 11 or greater running on a Windows operating system. Active X and Silverlight will also be needed.

Drawing Submittal

Development Services has developed a specific process (and file formats) for uploading documents into ProjectDox. Each page of the plan set should be a separate pdf or dwg file and named according to the standard file naming conventions outlined below. Other documents should also be named according to the standard naming conventions but can be a multi-page documents as needed, for example, a scanned engineer's report as a word document, a scanned certification report as a .pdf.

Applicants will receive an email with a link to the ProjectDox website and establishing a new password I.D. and password (illustration below).

Invitation

Hello New Applicant:

You have been added to the ProjectDox database and as a new member to the project listed below.

Login:	New.Applicant@MyEmail.net
Temporary Password:	CFC5493
Project:	Tyler Development Phase1 Block A Section 105
Group:	Applicant
Invited by:	Development Services Intake
Project Owner:	Intake Coordinator
Owner's Email:	Intake@TylerTexas.gov
Login to ProjectDox	

Contact the Project Owner or a Project Administrator if you have questions regarding this project. Please do not reply to this email.



Upload Files

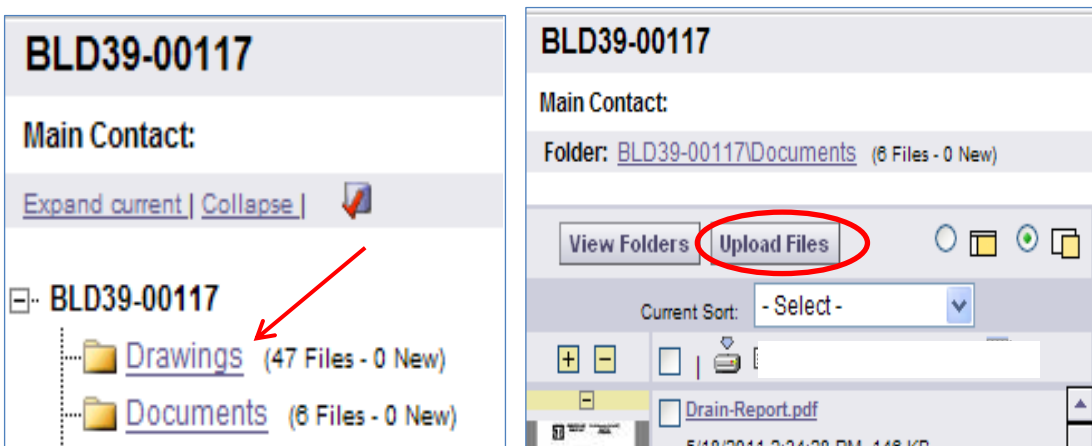
Please upload the applications and drawings into their appropriate discipline subfolder(s).

Select the folder where you want to upload your file.

Click the Upload Files button (next to View Folders). You may need to grant permission to install the ActiveX Upload Control. The best practice is to initially click the Install ProjectDox Components link on the login page to install all required ActiveX controls before you begin to work.

In the Select Files for Uploading dialog, browse and select the files you want to upload to the current folder. You can select multiple files using your Shift or Ctrl keys.

PLEASE NOTE: The maximum size FILE NAME is limited to 70 CHARACTERS.



Files can be uploaded into ProjectDox by selecting the Projects button on the main page, and then selecting the Folder in the left-most column.

1. When you click on a folder, there will be an “Upload Files” button to select.
2. Browse your directory to select drawing files to upload. Select file and click “Open”.
3. After you have selected your files, click “Upload Now” button.

File Name Standards

Only searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files and reference drawings only). Other acceptable document types include .bmp, .jpg, .png, .docx

Design Web Format (DWF) files is the only acceptable drawing file form for the ProjectDox. Files must be 2D DWF file print ready, i.e. setup properly for printing with title block, no extra data outside the print page area, etc. The DWF must be saved as Auto CAD version 10 or lower format. ProjectDox does not support 3D DWF files.

Border Standards

A 3” X 3” area must be reserved at the **upper left** corner of **ALL** drawings for the **APPROVAL STAMP**. Please leave the lower right corner completely blank on all drawings (with exception of the border). This is applicable to all sheet sizes.

Development Services ProjectDox Review Quick Reference Guide #1:

How to Upload Files

After receiving an e-mail invitation to join a project, applicants are granted temporary rights to upload plans and documents into the system.

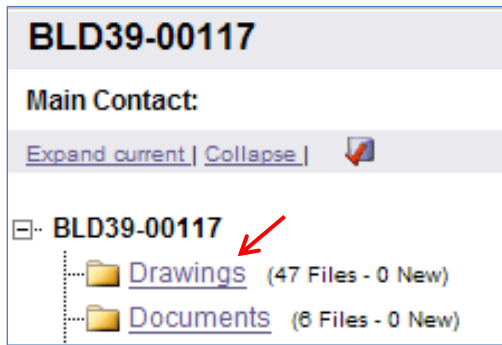


Figure 1

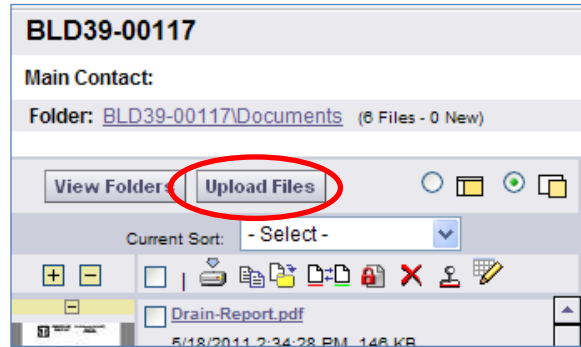


Figure 2

Upload Files

The e-mail invitation includes a link to the specific project. After opening the project within ProjectDox Review, select the appropriate folder to upload your documents (*Figure 1*). Plans must be uploaded in the Drawings folder, and all other file types go to the Documents folder.

If prompted, grant permission to install the ActiveX Upload Control.

Note: All documents must meet our Electronic Plan Review Submittal Standards.

Click **Upload Files** (*Figure 2*). At the *Select Files for Uploading* window, browse to the files on your computer.

Select multiple files using the Shift or Ctrl keys or drag and drop files into the *Upload* window list. Click "open" to upload the files to the ProjectDox Review folder.

File names are limited to 70 characters and must meet our file standard naming conventions and file types (see below).

Delete a file from the upload list by selecting and pressing *Delete*.

Click **Upload Now** to transfer the files to the project folder.

Upload Folders

Applicants can upload entire folders/subfolders at the same time. Each individual file within the folder structure).

Click **Upload Files** (*Figure 2*). Cancel the *Select Files for Uploading* window.

Click **Select Folders** (Red arrow, Figure 1).

Navigate to the folder on your computer. Indicate if subfolders should be included in the upload. If both folders and subfolders are selected, all files will be sent to a single folder within the ProjectDox Review destination folder. The original folder's structure is not recreated.

Naming Conventions

Plans/documents must use City of Tyler naming conventions. Resubmittals will automatically be rejected if named differently than the original submittal.

Upload Individual Sheets

Plans must be provided as individual sheets in pdf format. However, the individual pdf files may be bundled into a single zip file to expedite the uploading process.

Development Services ProjectDox Review Quick Reference Guide #2:

How to Log In

1. E-mail Invitation

We send a temporary password via e-mail along with a link to your project. *If you do not receive the e-mail as expected, check your spam folder for mail from ProjectDoxReview@TylerTexas.Go.*

2. Browser Requirements

Since ProjectDox Review is a web-based application, no special software is needed. However, only runs in **Internet Explorer** (IE) version 11 or greater. It will not run in any other browser such as Google Chrome, Firefox etc.

3. Disable Pop-Up Blockers

Since ProjectDox Review displays plans in pop-up windows, the browser's pop-up blockers must be disabled. If ProjectDox Review does not open after logging in, a pop-up blocker has prevented the main project window from opening. Pop-up blockers will allow you to disable blocking for specific websites. Check these links for pop-up information:

4. Create ProjectDox Review Profile

The e-mail's "*ProjectDox Review Login*" link opens the login screen. Enter your e-mail address and temporary password. If you already have an account but forgot your password, click "*Forgot your Password?*" for help.

5. Create a New Password

To keep your information secure, please create a new password after entering your contact information at the "Profile" screen. The passwords are encrypted. Please enter a security question when prompted, and be sure to save the data.

6. Install ProjectDox Review Components

a. ActiveX

At the login screen (*below*), click the "Install ProjectDox Review Components" link to install the necessary ActiveX components. If prompted to install additional Active X components later, please do so.

b. Desktop Shortcuts

Send a shortcut to your desktop or add ProjectDox Review to your Favorites