NEW USER INVITATION

After you submit your application, a staff member will create your project in ProjectDox and an invitation email (see below) will be sent to the user to upload the plans. A temporary password will be included in the new user email.

ProjectDox Applicant Upload Task Assignment

Attention Nathan Chavez:

Welcome to City of Carmel's Electronic Plan Review process. This invitation has been sent to you in response to your application. An EPR (Electronic Plan Review) has been created to allow you to upload your drawings and documents for processing.

To access your new Electronic Plan Review project, follow the instructions below:

1. Very Important! Please review the [link for EPR APPLICANT USER HELP] in its entirety before starting the process. Failure to follow the appropriate submittal guidelines may result in delay or rejection of your application!
2. Click the Project Access [link for ProjectDox EPR site]
3. Enter your Login (email address) and password
4. Click on the Project link on the "Active Projects" page
5. Click on the "Drawings" folder
6. Click the "Upload Files" button and follow the instructions to upload your plans and/or plats. Please ensure the use of the required file naming conventions (see [EPR APPLICANT USER HELP]).
7. Click the "Documents" Folder
8. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the use of the required files naming conventions (see [EPR APPLICANT USER HELP]).

Sample Invite Email

TO COMPLETE YOUR SUBMISSION TO CITY OF CARMEL YOU MUST PERFORM THE BELOW STEPS

9. Once all plans/documents have been uploaded to the appropriate folder(s) click on the "Workflow Portals" button.
10. Click the "Applicant Upload" link under the task column. The Due Date for this task is **4/13/2017 3:00:34 PM**.
11. **Click "OK" to accept the task.**
12. **An electronic form will display. Click on the "Upload Complete - Notify City of Carmel" button to complete the submission of your plans and documents.**

Supported file types: DWG, PDF, JPEG, DOC, DOCX, DXF

Login:	Joe.Doe@somewhere.com
Temporary Password:	BHGP57NC
Project:	PZ12120026PP
Group:	Applicant
Project Owner:	Jane Doe
Owner's Email:	Jane.Doe@here.com
Login to ProjectDox	

If you have any problems or questions, or do not have access to the specified folder, please contact the **Project Administrator**.

Please do not reply to this email.

Notes:
- ProjectDox uses pop-up windows (browser windows with no toolbars). If you login but no ProjectDox window appears, you probably have a pop-up blocker installed that is preventing the main project window from opening. You need to allow pop-ups for the ProjectDox site (pop-up blockers can be configured to allow pop-ups for specified sites. Please see the ProjectDox System Use Requirements document for a step-by-step guide).

- The login page has an MSI (Microsoft Silent Install) link for quick and easy downloading and installation of all necessary ProjectDox ActiveX controls. Click the Install ProjectDox Components link to run the installation. Alternatively, your network administrator or IT department may use other methods to install the components.

LOGGING IN & CREATING USER PROFILE

1. From the invitation email, click on the link **Login to ProjectDox**. This will open a web browser and take you directly to the login screen. You can also open a web browser and type in the City of Carmel's ProjectDox URL:

https://eprcrm.aspgov.com/projectdox/

2. Type in your full email and then type or paste the temporary password provided into the Password Field and click **Login.** *The password is case sensitive.

3. You will be taken to your User Profile, you will need to:
• Reset your password
• Create a security question and answer
• Enter some additional information about yourself
4. Fill in all of the required fields (those marked with a red asterisk * and highlighted) and click **Save**.

You can return to this screen at any time by clicking on the **Profile** button on the Main Toolbar. Logging into ProjectDox every time after, you will use the password that you entered in your User Profile page.

After logging in, you will be taken to your home page. If you ever forget your password, click on the **Forgot Your Password?** link next to the "Login" button. The use of the "Forgot Your Password?" link requires that the user has logged in at least once and no longer has a temporary password associated to their account.