



OAKVILLE

Town of Oakville: ProjectDox Applicant Guide for Sign Permits

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What is ProjectDox?

ProjectDox is a web-based solution that lets customers review and respond to a permit application. ProjectDox creates an online, virtual project workspace which enables people from many different locations and disciplines to share the same information at the same time, facilitating communication and increasing productivity.

Here's what ProjectDox does to enable online project information management:

- All the shared project information (documents, drawings, annotations, and project email) is centralized in one location, so it becomes visible, accessible, and usable by everyone who has been invited to the project.
- The user-friendly interface makes it easy for users at all technical skill levels to complete their tasks in ProjectDox.
- ProjectDox enables multiple users access to the same information at the same time, enhancing team collaboration.
- Automation features make sure that when actions take place in the workspace, those who need the updated information can be informed immediately.
- Tools for interacting with information, such as view and markups, online discussions, and group email, make interacting with information timely, meaningful and productive for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, emails, forms, annotations, and markups, plus much more.

Key concepts you need to know

Task: An assignment in the workflow process.

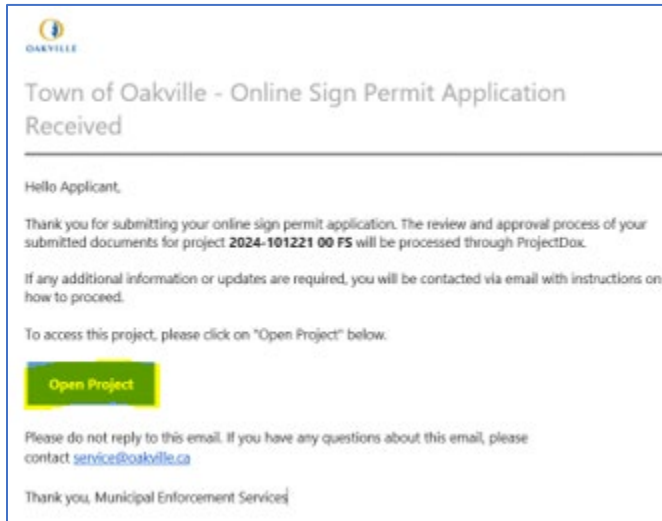
eForm: Online electronic form designed to capture, validate, and submit data.

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 jurisdiction.

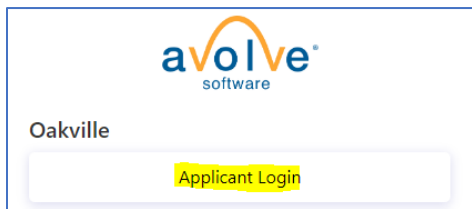
Completing a Task: The completion of a task confirms the fulfilment of the requested actions. Completing a task is the only way the jurisdiction will receive notification that you are finished. Once a task is complete no further work may be done until another task is received and accepted.

Accessing your project on ProjectDox

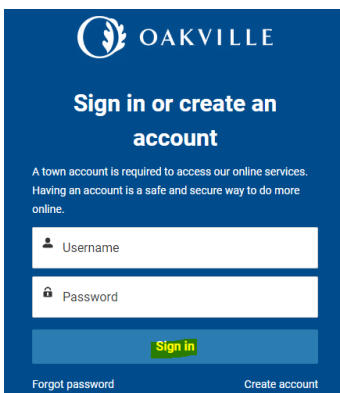
1. Once a sign permit application has been submitted via the town's online services, you will receive an email notification containing a link to access your project in ProjectDox. Click on **Open Project** button.



2. You will be directed to the ProjectDox login page. Click on the **Applicant Login** button.

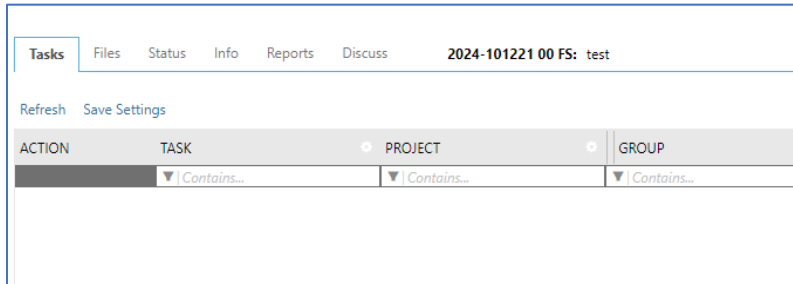


3. If you are not already logged into your town's online services account, you will be directed to the Town of Oakville online services login page. Enter your Town of Oakville login credentials and click the **Sign In** button. ProjectDox uses the same login credentials.



PROJECTDOX- APPLICANT USER GUIDE

- Once logged in, you will be able to access the project Tasks, Files, Status, Info and Reports.



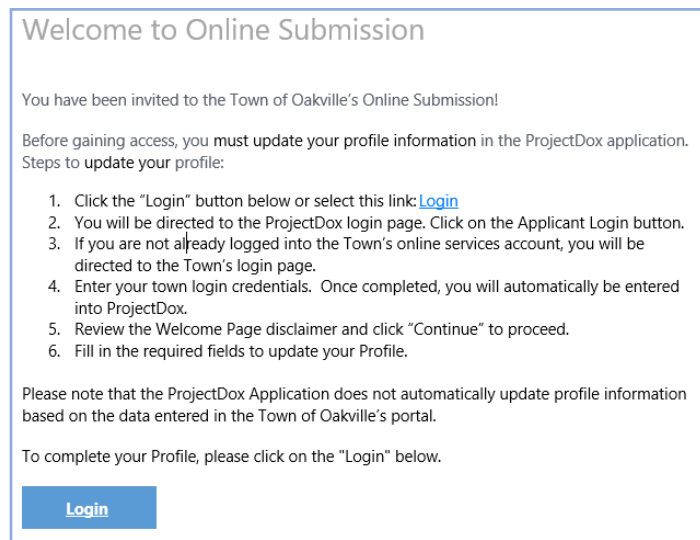
The screenshot shows the ProjectDox user interface. At the top, there are navigation tabs: "Tasks" (selected), "Files", "Status", "Info", "Reports", and "Discuss". To the right of these tabs is the text "2024-101221 00 FS: test". Below the tabs are two buttons: "Refresh" and "Save Settings". Below these buttons is a table with the following header:

ACTION	TASK	PROJECT	GROUP
	▼ Contains...	▼ Contains...	▼ Contains...

First time users

If this is the first time you have submitted a sign permit application, in addition to the "Sign Permit Application Received" email, you will also receive a "Welcome to the Town of Oakville's Online Submission."

- Follow the instructions in the email to access your ProjectDox profile.



Welcome to Online Submission

You have been invited to the Town of Oakville's Online Submission!

Before gaining access, you must update your profile information in the ProjectDox application. Steps to update your profile:

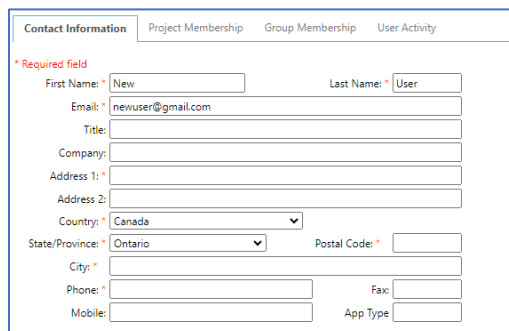
1. Click the "Login" button below or select this link: [Login](#)
2. You will be directed to the ProjectDox login page. Click on the Applicant Login button.
3. If you are not already logged into the Town's online services account, you will be directed to the Town's login page.
4. Enter your town login credentials. Once completed, you will automatically be entered into ProjectDox.
5. Review the Welcome Page disclaimer and click "Continue" to proceed.
6. Fill in the required fields to update your Profile.

Please note that the ProjectDox Application does not automatically update profile information based on the data entered in the Town of Oakville's portal.

To complete your Profile, please click on the "Login" below.

[Login](#)

- Update the required information in your ProjectDox profile.



The screenshot shows the "Contact Information" tab of the ProjectDox profile update form. The form includes the following fields:

- First Name: * New
- Last Name: * User
- Email: newuser@gmail.com
- Title:
- Company:
- Address 1: *
- Address 2:
- Country: * Canada
- State/Province: * Ontario
- Postal Code: *
- City: *
- Phone: *
- Mobile:
- Fax:
- App Type:

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- Once completed you will be able to access all of your project information and any tasks assigned to you.

Pre-screen corrections

If during the pre-screen review of our sign permit application corrections are needed, you will receive an email notification for the Pre-screen Corrections task. Click **Start Task** from your email.

Pre-screen Corrections for Sign Permit Required

Hello New,

The files you uploaded for your sign permit application for project **2024-101292 00 FS : test** has not met the requirements for pre-screen acceptance.

You are required to respond and resend the file corrections in order for the town to continue reviewing your application. .

Additional instructions and **How to Videos** can be found on the task page.

TIP: Getting through Pre-screen
Please review all submission requirements and use "Add Comment" to respond to any town requests.

You may also receive requests to upload updated files. When uploading new versions, please make sure to maintain the exact same filename as the previous submission but append "version" at the end. For instance, if you previously submitted "file.pdf," name the new version "file-v2.pdf"

To review and resubmit, please click on "Start Task" below.

Start Task To submit your updates for **2024-101292 00 FS : test**

We will continue the review of your application once the resubmission is received. Please note that if we do not receive these items within 30 days of this email, we may cancel your application and you may have to begin the application process again, including payment of required fees.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Step 1: Respond to comments provided by the town. 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				

PROJECTDOX- APPLICANT USER GUIDE

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

Step 2: Upload New or Versioned Files (if requested).

- a) Select **New Files** to upload any additional new file into this project as requested.
- b) Select **Versioned Files** to upload files as new version updates for files previously submitted and received.

The screenshot shows a web interface for uploading files. At the top, there are two tabs: 'Versioned Files' (selected) and 'New Files'. Below the tabs, there is a question: 'Are your updated files named exactly the same as the prior versions?' with 'Yes' and 'No' buttons and a 'Learn how' link. A red asterisk note below reads: '* "name-v2.pdf" is not an "exact" file name match to "name.pdf"'. Another instruction says: 'Please click appropriately for the type of files you are uploading.' with a 'Learn how' link. At the bottom, there are two buttons: 'Upload Drawings' and 'Upload Documents'.

Select the desired folder you want to upload the document(s) to:

- a) Select **Upload Drawings** to upload a drawing/plan document only. i.e. Drawings showing the proposed sign.
- b) Select **Upload Documents** to upload any supporting documents only. i.e. Letter of authorization from property owner.

The screenshot shows a 'Task Instructions' section with a 'Learn how' link. It says 'Please follow the steps below:'. Below that, it says 'STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required'. The file upload target is 'File Upload for: BLD - 1234' with a dropdown arrow. Below this, there is an instruction: 'Please click appropriately for the type of files you are uploading.' with a 'Learn how' link. At the bottom, there are two buttons: 'Upload Drawings' and 'Upload Documents'. Below the buttons, it says 'Uploaded files:' and 'No files uploaded yet.'

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

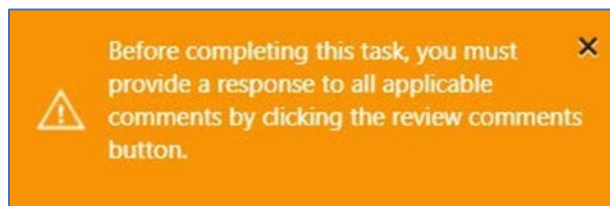
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Step 3: Confirm all requirements have been met and click **Submit**.

The screenshot shows a confirmation step. At the top, it says 'STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit'. Below this is a 'Confirmation' section with a dropdown arrow. A checkbox is checked, and the text reads '*I have completed all Prescreen requests *Required'. Below this, it says 'STEP 4 of 4: Click the "Submit" button below to complete your task'. At the bottom right, there are two buttons: 'Submit' and 'Save for Later'.

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.



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

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Pre-screen Completed for Sign Permit

Hello New,

The prescreening of files uploaded for project **2024-101292 00 FS : test** is now complete.

Your application will now proceed for the Sign By-Law review. You will be contacted via email if additional corrections or information is required.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Respond and resubmit (corrections required)

If during the Sign By-Law Review, Building Review or any other department reviews, further information or corrections are required, you will receive an email with instructions for to complete the Respond and Resubmit task. Click on **Start Task** in the email.

Respond and Resubmit for Sign Permit Required

Hello New,

The town's comments are now available for **2024-101292 00 FS : test**.

Your response and requested file corrections are required for the town to continue reviewing your application.

Additional instructions and **How to Videos** can be found on the task page.

NOTE: Your review can be expedited if new versions are uploaded properly.

TIP: Naming new file versions

You may also receive requests to upload updated files. When uploading new versions, please make sure to maintain the exact same filename as the previous submission but append "version" at the end. For instance, if you previously submitted "file.pdf," name the new version "file-v2.pdf".

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

Start Task

To submit your corrections
for **2024-101292 00 FS : test**

We will continue the review of your application once the resubmission is received. Please note that if we do not receive these items within 30 days of this email, we may cancel your application and you may have to begin the application process again, including payment of required fees.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

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.*


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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.# 2	Move door left	Mechanical	Preeti Schatzman	3/10/21 4:46 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.

Upload New or Versioned Files.

- Select **New Files** to upload any additional new file into this project as requested.
- Select **Versioned Files** to upload files as new version updates for files previously submitted and received.

Versioned Files | New Files

Are your updated files named exactly the same as the prior versions? [Learn how](#)

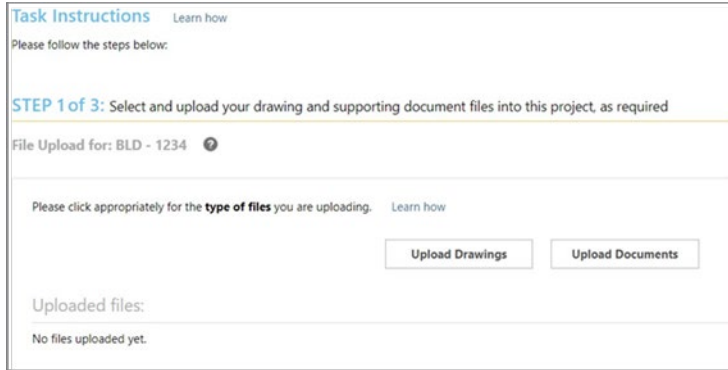
** "name-v2.pdf" is not an "exact" file name match to "name.pdf"*

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

Select the desired folder you want to upload the document(s) to:

- Select **Upload Drawings** to upload a drawing/plan document only. i.e. Drawings showing the proposed sign.
- Select **Upload Documents** to upload any supporting documents only. i.e. Letter of authorization from property owner.

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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.

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

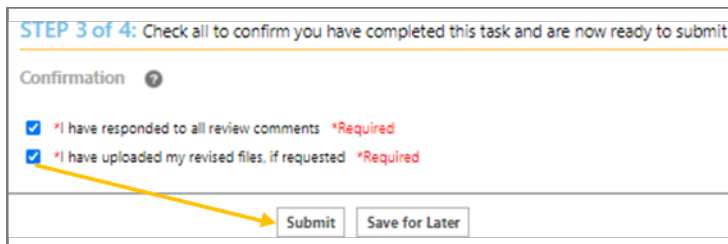


ProjectDox [Clear Window](#)

Folder: Civil TextDrawings

or drag files into this area.

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



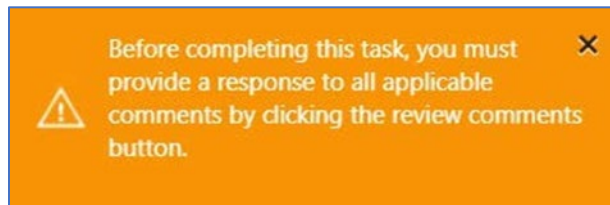
STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit

Confirmation [?](#)

*I have responded to all review comments *Required

*I have uploaded my revised files, if requested *Required

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.



The Review and Respond task can be repeated as many times as necessary until all corrections have been submitted. You will receive an email when your review is complete.

PROJECTDOX- APPLICANT USER GUIDE

Sign By-Law Review Completed for Sign Permit

Hello New

The Sign By-Law review of the files uploaded for project - **2024-101292 00 FS : test** has been completed.

Your application will now proceed for any additional town reviews as required.

Note: All fixed signs require a Structural Exam by the Building Department. Other department reviews may also be required dependant on the sign type and/or location. Only once all required reviews have successfully been completed will you receive approval for your sign permit.

You will be contacted via email if additional corrections or information is required.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Congratulations! Approved plans ready for download

Once all required town reviews have successfully been completed, you will receive an email notification directing you to download and save your approved plans and sign permit.

NOTE: The email will also provide instructions on how to submit the “As Built” documents using your [online town account](#), within six months of permit issuance.

DOWNLOAD APPROVED FILES

Hello

Congratulations, your approved plans and permit for your sign permit are ready for download.

To download your approved files, click on “Download” below. You will be redirected to your project portal and your approved files can be found in the Decision folder within the Files tab.

Note for all fixed sign permits: Within six month of the date of the permit issuance, you must submit your “As Built” documents consisting of:

1. A letter sealed by a Professional Engineer (PEO) or Architect (OAA) confirming that the sign has been installed to the permit specifications.
2. Photos of the installed sign.

Submit these items through your [online town account](#) and selecting the “As Built” button beside the sign permit on the “My Permits and Applications” page.

Download

To access your approved plans
for **2024-101203 00 FS : test*application**

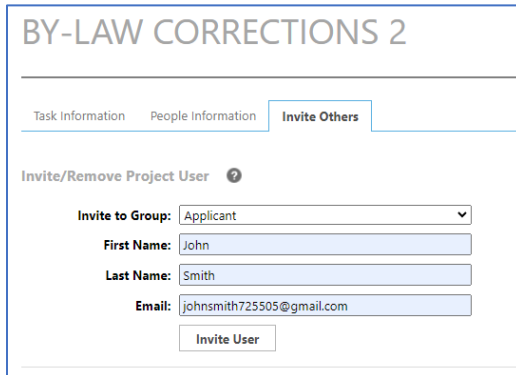
Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Other considerations

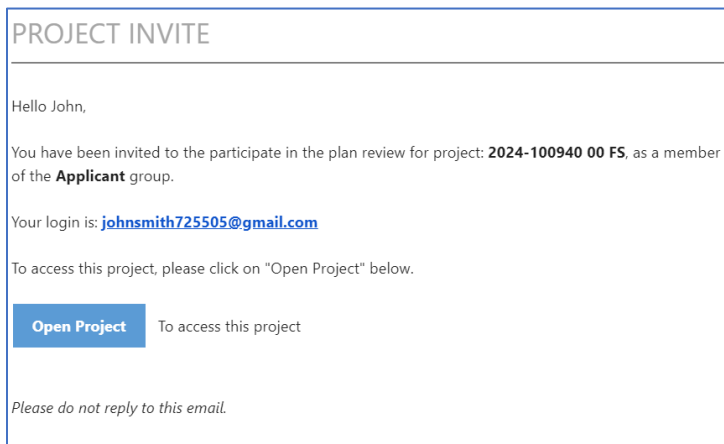
Inviting Others to Participate

If you require to invite others into your project to answer any town questions/requests, you can do so by selecting the **Invite Others** tab in an assigned task. Enter the invitee's name and email address and then select **Invite User**.



The screenshot shows a web interface for a project titled "BY-LAW CORRECTIONS 2". At the top, there are three tabs: "Task Information", "People Information", and "Invite Others", with "Invite Others" being the active tab. Below the tabs, there is a section titled "Invite/Remove Project User" with a help icon. The form contains the following fields: "Invite to Group" with a dropdown menu set to "Applicant"; "First Name" with the text "John"; "Last Name" with the text "Smith"; and "Email" with the text "johnsmith725505@gmail.com". At the bottom of the form is a button labeled "Invite User".

The person you have invited will receive an email notification with the project invite information.



The screenshot shows an email titled "PROJECT INVITE". The content of the email is as follows: "Hello John," followed by "You have been invited to the participate in the plan review for project: 2024-100940 00 FS, as a member of the **Applicant** group." Below this, it says "Your login is: johnsmith725505@gmail.com". Then, "To access this project, please click on 'Open Project' below." There is a blue button labeled "Open Project" with the text "To access this project" next to it. At the bottom, it says "Please do not reply to this email."

NOTE: This person will need to create a Town of Oakville online services account in order to be able to participate in the project review.

Encroachment Fees Due

If during the review of your application it is deemed that the sign encroaches onto town property and therefore additional fees must be paid, you will receive an email notification with direction on how to pay these fees.

NOTE: Fees are to be paid using your [online town account](#),

PROJECTDOX- APPLICANT USER GUIDE

ENCROACHMENT FEES DUE

Hello

In reviewing your permit application, we noticed that your sign encroaches onto town property. As next steps, you are required to pay encroachment fees so that the town can continue our review.

To pay these fees through your [online town account](#), select the "Detail" button beside your permit application on the "My Permits and Application Page". Then select the "Fees and Payment" tab at the top of the page to be directed to the Fees and Payment page.

Once we receive your payment, we will continue the review of your application. If fees are not paid within 30 days, we may cancel your application and you will have to begin the application process again including payment of all required fees.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Application Denied- Eligible for Exception

If your application is denied but it is eligible to apply for an exception to the sign by-law, you will receive an email notification with instructions on how to apply.

NOTE: Use your [online town account](#) to apply for an exception.

NOTICE OF DENIAL - ELIGIBLE FOR EXCEPTION

Hello

Unfortunately we are unable to approve your request for your sign permit as the sign(s) fails to comply with the Town of Oakville sign by-law requirements.

To see why your submission was denied, select the Reports tab within the Project Workspace and click on the Plan Review - Review Comments link to run the report.

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

Open Project

To access this project's Reports tab

You are encouraged to modify your plans to comply with the Sign By-law and resubmit a new application or alternatively you may apply for an Exception to the Sign By-law. Should you decide to apply for an Exception, you must do so within 10 business days of this notice through your [online town account](#) by selecting the "Exception" button beside your permit application on the "My Permits and Application Page". Additional documents and fees will be required.

Erecting a sign without first obtaining a sign permit could result in the sign being removed at the owner's expense as well as a fine up to \$25,000 (first offence) and \$50,000 (subsequent offences) to an individual and fines up to a maximum of \$50,000 (first offence) and \$100,000 (subsequent offences) to a corporation.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

PROJECTDOX- APPLICANT USER GUIDE

Application Denied- Eligible for Appeal

If your application is denied but it is eligible to apply for an appeal to the sign by-law, you will receive an email notification with instructions on how to apply.

NOTE: Use you [online town account](#) to apply for an appeal.

NOTICE OF DENIAL - ELIGIBLE FOR APPEAL

Hello

Unfortunately we are unable to approve your request for your sign permit as the sign(s) fails to comply with the Town of Oakville sign by-law requirements.

To see why your submission was denied, select the Reports tab within the Project Workspace and click on the Plan Review - Review Comments link to run the report.

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

[Open Project](#) To access this project's Reports tab

You are encouraged to modify your plans to comply with the Sign By-law and resubmit a new application or alternatively you may apply for an Appeal to the Sign By-law. Should you decide to apply for an Appeal, you must do so within 10 business days of this notice through your [online town account](#) by selecting the "Appeal" button beside your permit application on the "My Permits and Application Page". Additional documents and fees will be required.

Erecting a sign without first obtaining a sign permit could result in the sign being removed at the owner's expense as well as a fine up to \$25,000 (first offence) and \$50,000 (subsequent offences) to an individual and fines up to a maximum of \$50,000 (first offence) and \$100,000 (subsequent offences) to a corporation.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services

Application Denied

If your application is denied you will receive an email notification on how to access the denial report.

NOTICE OF DENIAL

Hello Steven,

Unfortunately we are unable to approve your request as the sign(s) fails to comply with the Town of Oakville requirements.

To see why your submission was denied, select the Reports tab within the Project Workspace and click on the Plan Review - Review Comments link to run the report.

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

[Open Project](#) To access this project's Reports tab

Erecting a sign without first obtaining a sign permit could result in the sign being removed at the owner's expense as well as a fine up to \$25,000 (first offence) and \$50,000 (subsequent offences) to an individual and fines up to a maximum of \$50,000 (first offence) and \$100,000 (subsequent offences) to a corporation.

Please do not reply to this email. If you have any questions about this email, please contact service@oakville.ca.

Thank you, Municipal Enforcement Services