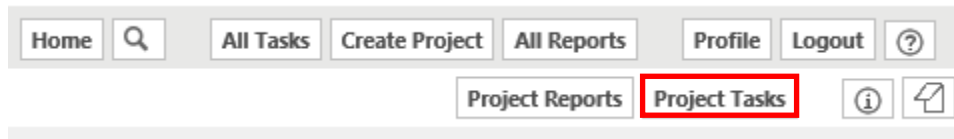




I. Project Invite

1. To invite another user into the ProjectDox project, you will need to log into the ProjectDox system and go into the applicable project. Once you have clicked on a specific project, click on “Project Task” button to see your task.

NOTE: You can only perform this function if there is an open task available for you.

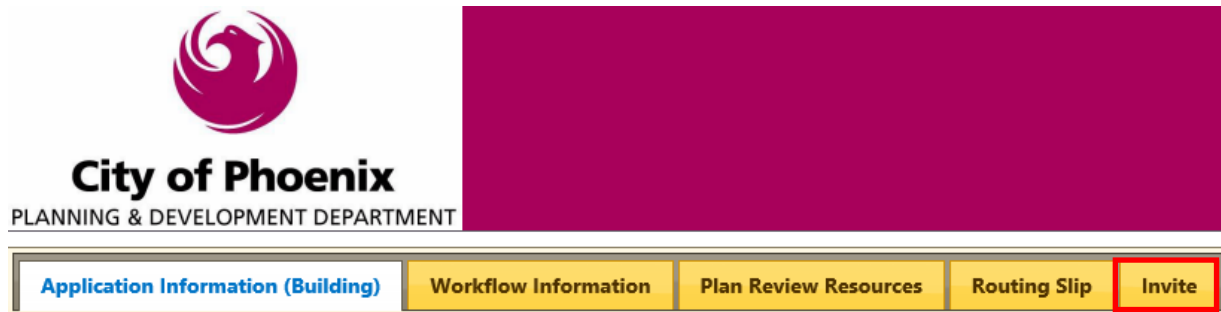


2. Click on the Task to open the Eform. (Any task will work. The following example is using the ApplicantResubmit task)

Task	Attached To	Status
ApplicantResubmit	APPLICANT	Pending

Below the table is a pagination control with buttons for first, previous, next, and last, along with a scroll bar.

3. When the Eform window appears, click on the “Invite” tab.

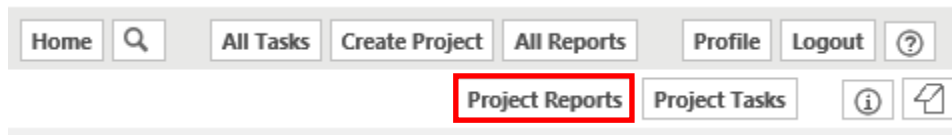


- Fill in the first and last name, email address, and any comments regarding the invitation. Click “Invite” to send the invitation. “User Invited” will appear after “Invite” is clicked.



NOTE: You can add as many users as you would like by typing in new information and clicking “Invite”. Invited users will only have access to view files and cannot upload any new files or complete project tasks.

II. Invite Email Verification

- To verify if the email has been sent, close out of the Eform and click on “Project Reports”.



- Click on the view icon  next to “Current Project – All Emails Sent Summary Report”.

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report

- This report will show all emails sent from the project with the User Name, Sent Date, and Email Address.



Current Project - All Emails Sent Summary Report

Plan Number–Plan Type

User Name	Sent Date	Email Address
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- The email sent will look like the one below. If the invited user has never accessed the ProjectDox system, they will get a temporary password as shown below.

Project Invitation

Welcome to the City of Phoenix electronic plan review system. You have been granted view access to project: **Plan Number-Plan Type**

Click the Access Link below. Log in with your e-mail account, **bob@buildingnew.com** and enter your password.

User Login	bob@buildingnew.com
Temporary Password	753D895
Project #	Plan Number-Plan Type
Coordinator	P&D Department
Email	DoNotReplyProjectDox@phoenix.gov
Additional Info	You have been invited to this project as requested.
Login in to ProjectDox	