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# Paperless Permit Instructions: Add a User

Revised June 2023



City of Salinas

COMMUNITY DEVELOPMENT DEPARTMENT

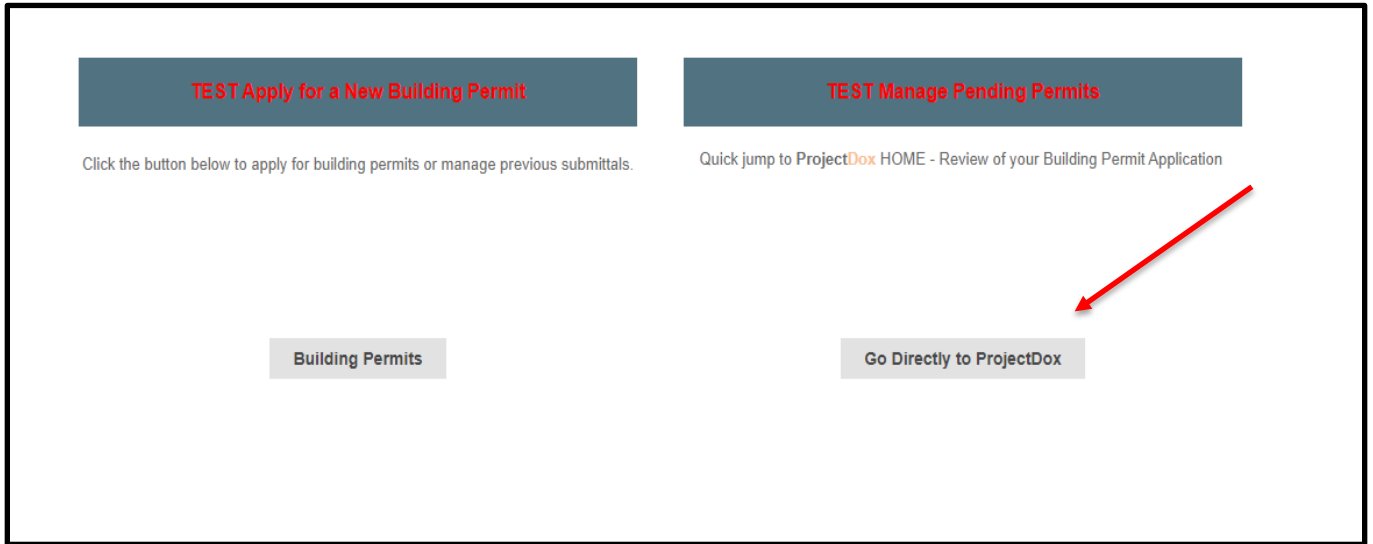
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# Paperless Portal Instructions

Choose the “Go Directly to ProjectDox” tab

- Once logged in go directly to ProjectDox



Choose which project you would like to open

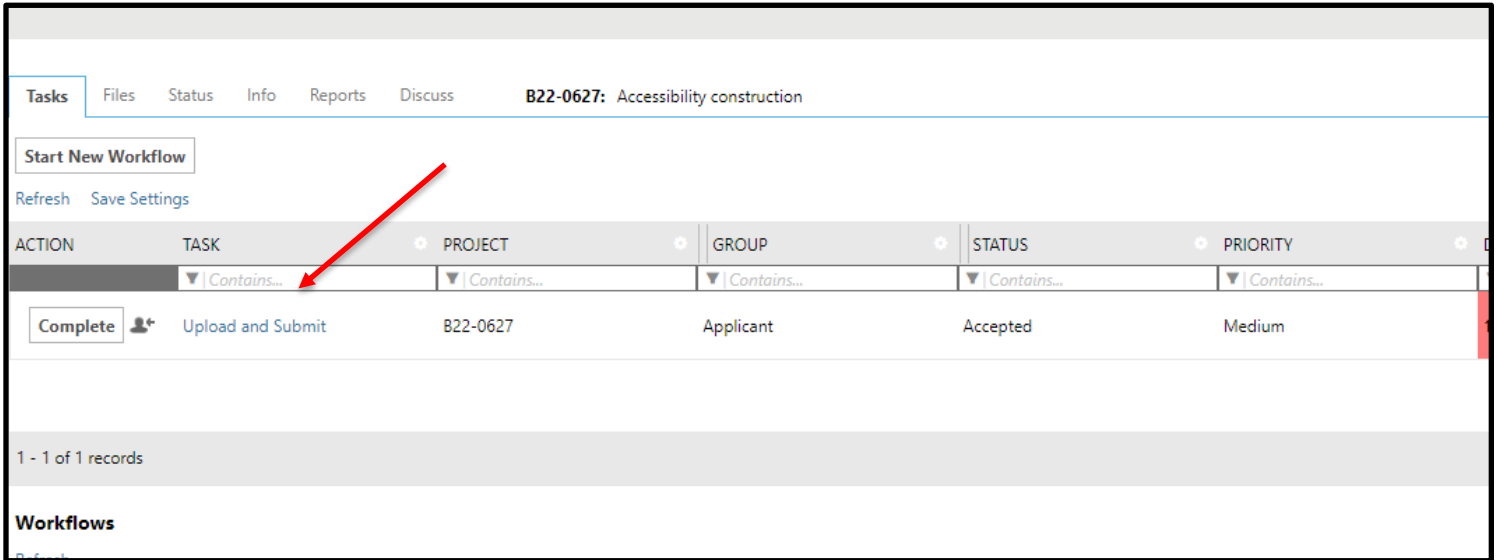
- Click on the permit number to open the project.

The screenshot shows a table with the following columns: ACTION, PROJECT, LOCATION, DESCRIPTION, OWNER, and STATUS. A red arrow points to the permit number "P23-0005" in the PROJECT column.

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS
	P23-0005	511 APACHE CIR	remove and replace taknless water heater	Salinas Creator	Approved

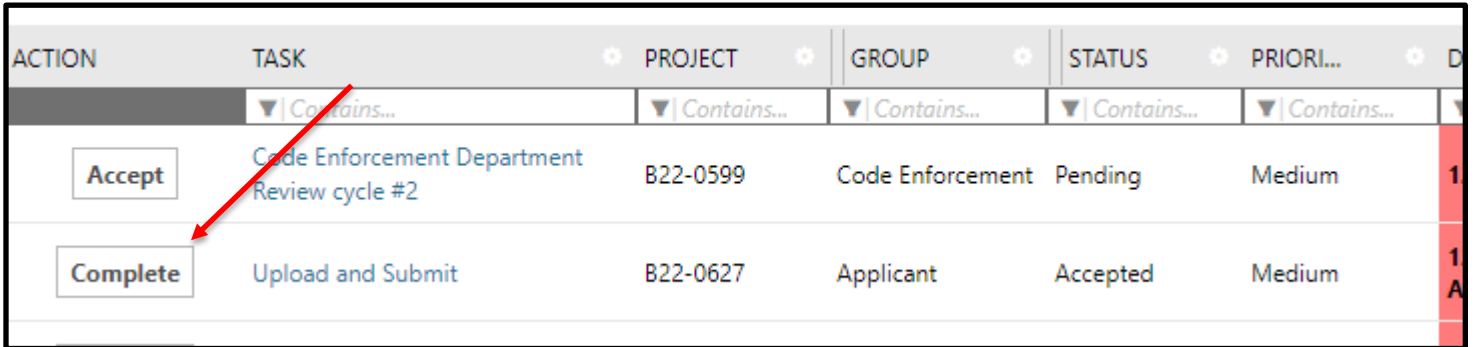
Click on the “Upload and Submit” Link or the “Complete Box”.

- These are located in the “Action” column and the “Task” column.



The screenshot shows a software interface with a table. At the top, there are tabs for 'Tasks', 'Files', 'Status', 'Info', 'Reports', and 'Discuss'. The current view is 'B22-0627: Accessibility construction'. Below the tabs, there are buttons for 'Start New Workflow', 'Refresh', and 'Save Settings'. The table has columns: ACTION, TASK, PROJECT, GROUP, STATUS, and PRIORITY. The first row has a 'Complete' button in the ACTION column and 'Upload and Submit' in the TASK column. A red arrow points to the 'Upload and Submit' link. Below the table, it says '1 - 1 of 1 records' and 'Workflows'.

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY
Complete	Upload and Submit	B22-0627	Applicant	Accepted	Medium

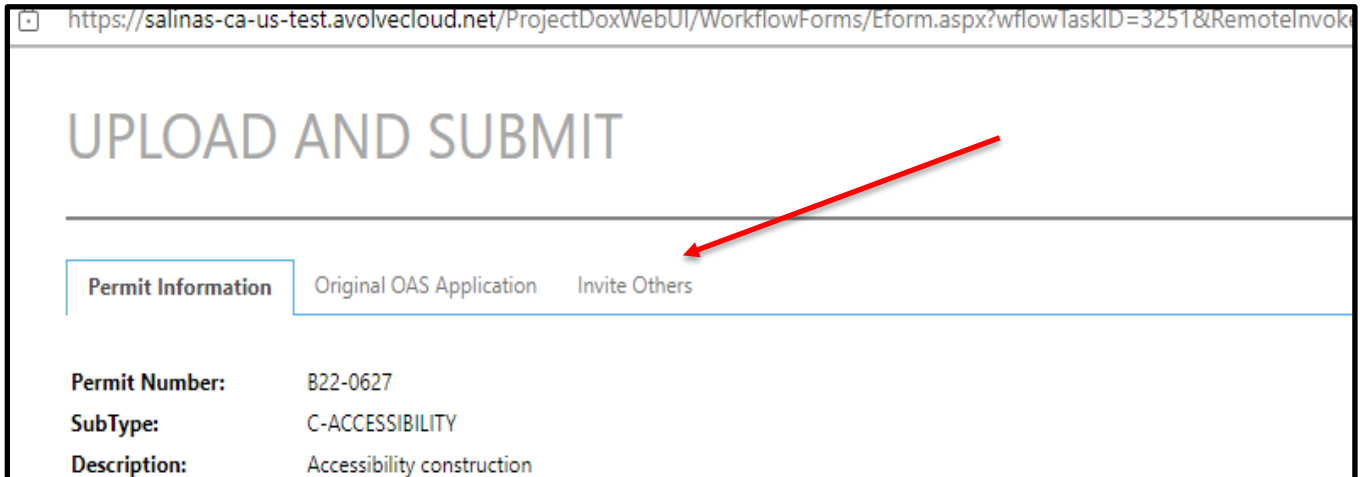


The screenshot shows a software interface with a table. The table has columns: ACTION, TASK, PROJECT, GROUP, STATUS, and PRIORITY. The first row has an 'Accept' button in the ACTION column and 'Code Enforcement Department Review cycle #2' in the TASK column. The second row has a 'Complete' button in the ACTION column and 'Upload and Submit' in the TASK column. A red arrow points to the 'Accept' button.

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORITY
Accept	Code Enforcement Department Review cycle #2	B22-0599	Code Enforcement	Pending	Medium
Complete	Upload and Submit	B22-0627	Applicant	Accepted	Medium

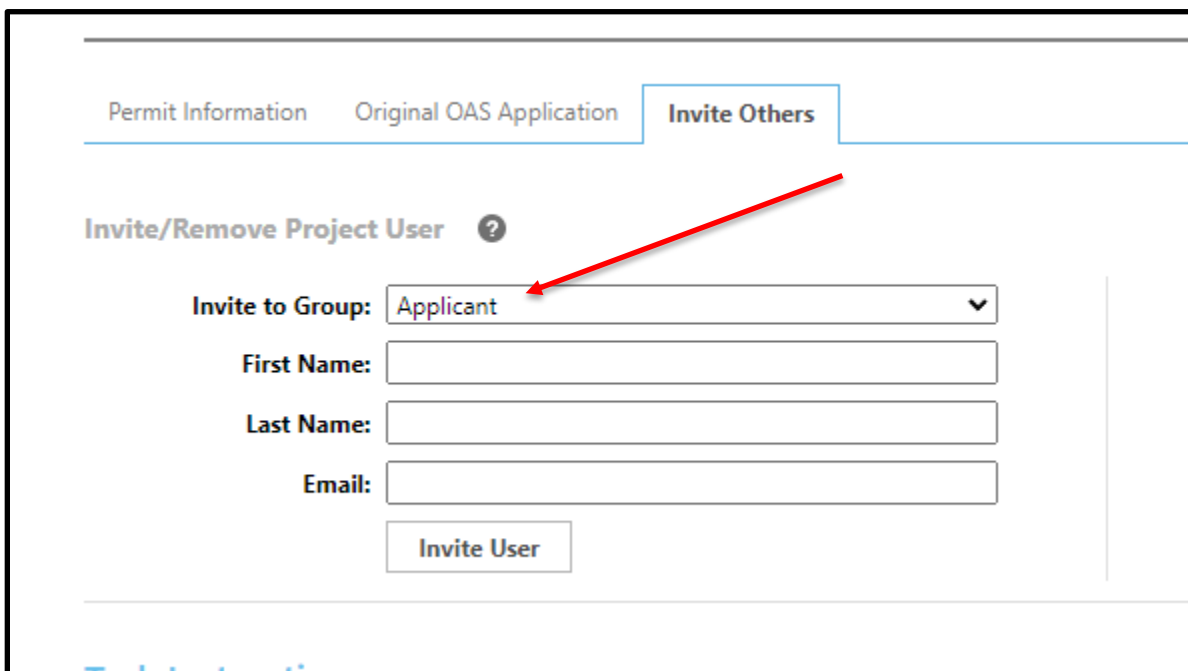
Once the “Upload and Submit” page appears click on the “Invite Others” tab.

- This tab is located next to the “Original OAS Application” tab.



Under the “Invite Others” tab, enter the information who you would like to add.

- If you choose “Applicant”, the person will be able to accept tasks during the permitting process.



- If you choose “Applicant View Only”, the person will not be able to accept tasks during the permitting process.

The screenshot shows a web interface titled "UPLOAD AND SUBMIT". At the top, there are three tabs: "Permit Information", "Original OAS Application", and "Invite Others". The "Invite Others" tab is active. Below the tabs, the section is titled "Invite/Remove Project User" with a help icon. A red arrow points from the "Invite Others" tab to the "Invite to Group" dropdown menu. The dropdown menu is set to "Applicant View Only". Below this are three input fields for "First Name", "Last Name", and "Email". At the bottom of the form is a button labeled "Invite User". To the right of the form, there is a vertical line and the text "Remo".

After entering the person's information click the "Invite User" button.

- The person will begin to receive emails regarding the permit.

The screenshot shows a web interface titled "UPLOAD AND SUBMIT". Below the title are three tabs: "Permit Information", "Original OAS Application", and "Invite Others". The "Invite Others" tab is active. Below the tabs is a section titled "Invite/Remove Project User" with a help icon. The form contains the following elements:

- Invite to Group:** A dropdown menu with "Applicant View Only" selected.
- First Name:** A text input field.
- Last Name:** A text input field.
- Email:** A text input field.
- Invite User:** A button with a red arrow pointing to it from the right.
- Remove:** A button partially visible on the right side of the form.