How to Upload Information for Plan Review in ProjectDox

Important Note: If you are accessing the project using the system generated emails and the

Start Task or **Open Project** buttons. Please note that once you sign into the system using these buttons, the system automatically opens a separate window called the Eform which is used in other processing steps. To upload plan sheets and documents, please close the Eform and skip to Step 3 to continue.

STEP 1 – SIGN INTO PLAN REVIEW SYSTEM:

Log into ProjectDox: https://cupertino-ca-us.avolvecloud.com/Portal/Login/Index/Cupertino-CA-Prod

STEP 2 – LOCATE PROJECT:

Locate the project within ProjectDox. You may see it under the "*Projects*" tab when you log in. *Or* you can type the permit number in the search box located in the upper right side of screen. Wait for it to populate underneath, and then click the blue populated permit number. You can also click the blue permit number listed under the "PROJECT" column if you see your permit there.
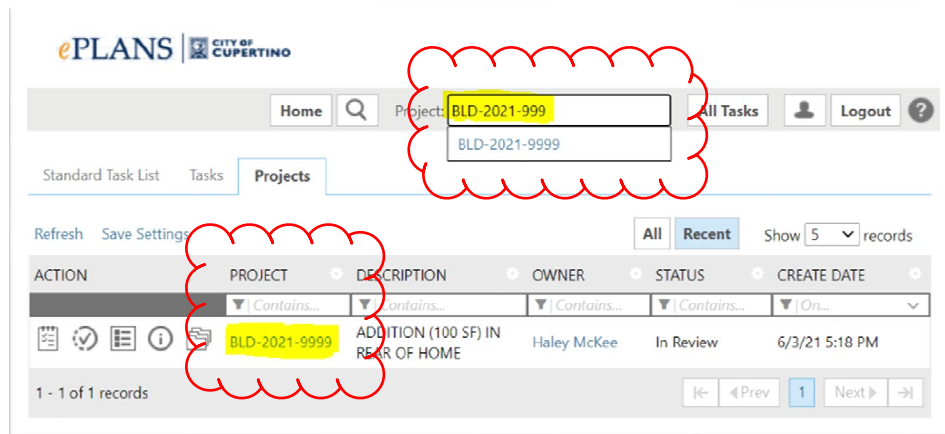
STEP 3 – LOCATE PROJECT FILES:

Once you are in your project, click on the "*Files*" Tab at the top of the screen. This will open the screen showing the available folders for the submittal information to be uploaded.
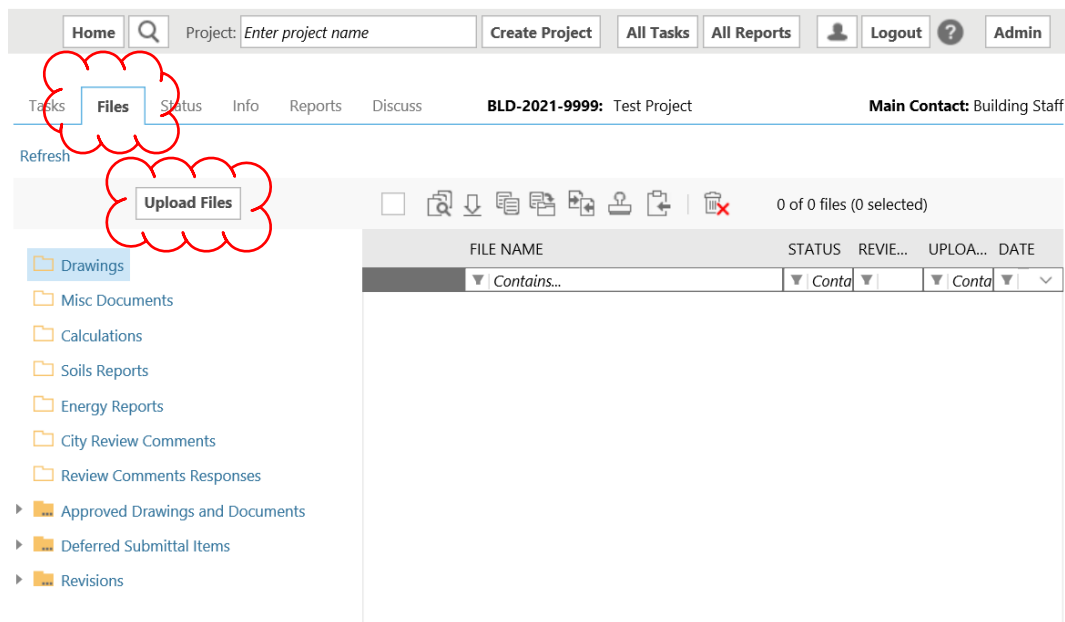
Click on the folder you want to upload into, it will become highlighted. Now Click on the "*Upload Files*" button at the top of the folder tree.

STEP 4 – FILE UPLOAD:

A separate window will open that allows you to *"Browse For Files"* to be uploaded or allows you the ability to drag and drop the files in-between the upper and lower dotted lines. Once all documents have been located, click on the *"Start Upload"* button.

STEP 5 – VIEW UPLOADED FILES:

The upload window will close when the upload is complete. You will now see the file folders again and see the number of documents that have been uploaded into each folder. You will repeat the process for each folder and upload the information applicable to each folder as labeled.

IMPORTANT! <u>Step 6 – COMPLETE APPLICANT WORKFLOW TASK:</u>

Once all the plan sheets and documents have been uploaded for review. The applicant needs to complete their workflow task in the "*Task*" tab.

Click on the "*Accept*" button and a separate window will open, this is the Eform where you will result your Upload and Submit task. First, click the "*Confirmation Box*" in Step 2 of the form to verify a complete upload and then click the "*Submit*" button at the bottom to complete the task.

It is important to complete this task to have the system notify the permit center staff that your submittal is complete and ready to be routed for review and approval. If you do not complete the task the staff have no way of knowing you have uploaded information for review.