



COMMUNITY DEVELOPMENT DEPARTMENT

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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

Open Project

or

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>

electronic PLAN REVIEW

CITY OF CUPERTINO, CA - TERMS AND CONDITIONS OF USE

Your access to and use of the City of Cupertino's ("City") ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to

CITY OF CUPERTINO
ePLANS

E-mail:

Password:

Login

[Forgot your password?](#)

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VIDEO SERIES
GETTING STARTED || ACCEPTING A TASK || DOWNLOADING APPROVED PLANS

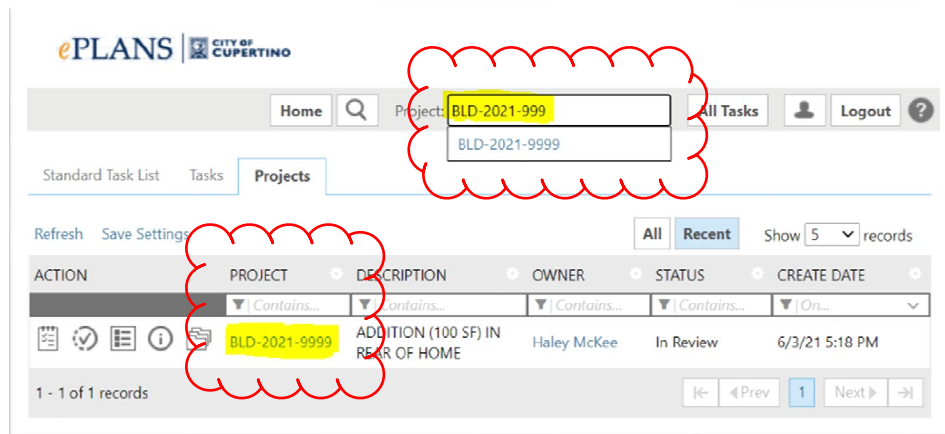
ProjectDox To install ProjectDox components

To create a desktop shortcut

To add ProjectDox to your favorites

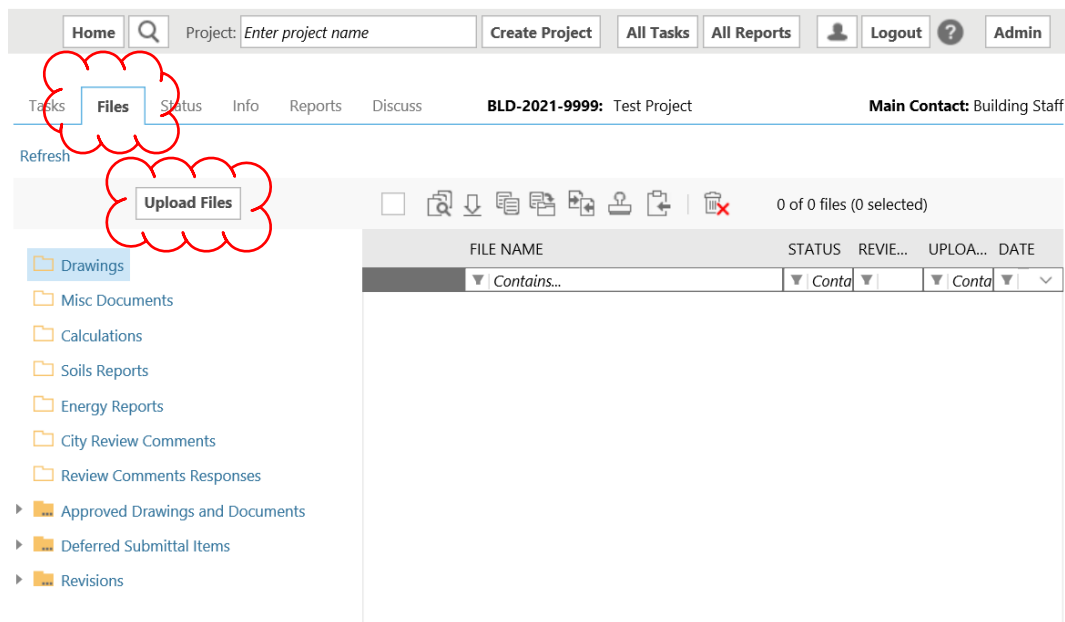
STEP 2 – LOCATE PROJECT:

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.

Folder: BLD-2021-9999 Drawings

Browse For Files or drag files into this area.

Start Upload

A06.01 Construction BMP.pdf	0B/2.67MB	✖
C01.01 Site Survey.pdf	0B/734.14KB	✖
EN-0 CalGreen Residential Checklist.pdf	0B/1.55MB	✖
S0.1 Structural Cover Sheet.pdf	0B/717.68KB	✖
S0.2 General Notes.pdf	0B/757.46KB	✖
S1.0 Typical Details.pdf	0B/834.22KB	✖
S1.1 Typical Details.pdf	0B/782.40KB	✖
S1.2 Typical Details.pdf	0B/611.18KB	✖

Orange files are new uploads
Blue files are new version uploads
Red files appear to be same as previously uploaded (will likely be discarded)

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.

Home Project: Enter project name Create Project All Tasks All Reports Logout Admin

Tasks Files Status Info Reports Discuss BLD-2021-9999: Test Project Main Contact: Building Staff

Refresh

Upload Files 1 of 1 files (0 selected)

FILE NAME	STATUS	REVIE...	UPLOA...	DATE
Contains...	Conta		Conta	
BLD20210163-A2.1 EXT ELEV.pdf	New	SEAN	HATCH	2/3/22 3:50 PM

Drawings (26 - 26 New)
Misc Documents (4 - 4 New)
Calculations (1 - 1 New)
Soils Reports (1 - 1 New)
Energy Reports (1 - 1 New)
City Review Comments
Review Comments Responses
Approved Drawings and Documents
Deferred Submittal Items
Revisions

Orange files are new uploads
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Red files appear to be same as previously uploaded (will likely be discarded)

IMPORTANT! Step 6 – COMPLETE APPLICANT WORKFLOW TASK:

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

Home Project: Enter project name

Tasks Files Status Info Reports Discuss **BLD-2021-9999: Test Project** **Main Contact:** Building Staff

Show all tasks for all users Show records

Quick Filter:

ACTION	TASK	PROJECT	GR...	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED
<input type="button" value="Accept"/>	Upload and Submit	BLD-2021-9999	Applicant	FirstInGroup	Pending	Medium	10/19/22 4:32 PM	2/3/22 3:32 PM

1 - 1 of 1 records

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.

UPLOAD AND SUBMIT

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-2021-9999

Select the destination folder to upload your files: [Learn how](#)
Select arrow next to folder to expand folder list.

- Drawings (26 - 26 New)
- Misc Documents (4 - 4 New)
- Calculations (1 - 1 New)
- Soils Reports (1 - 1 New)
- Energy Reports (1 - 1 New)
- City Review Comments
- Review Comments Responses
- ▶ Approved Drawings and Documents
- ▶ Deferred Submittal Items
- ▶ Revisions

STEP 2 of 3: Check to confirm you have completed this task and are now ready to submit

Confirmation

*All files for this project have been uploaded *Required

STEP 3 of 3: Click the “Submit” button below to complete your 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.