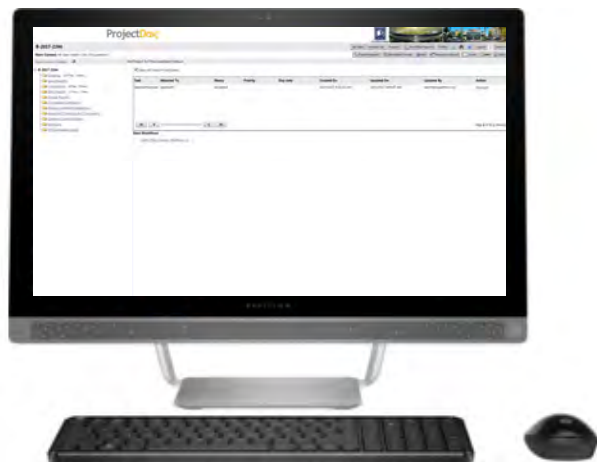
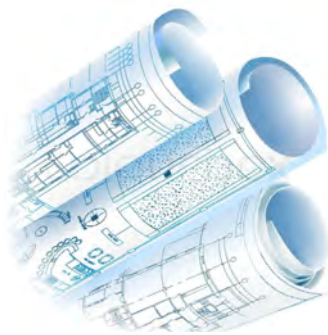


# Applicant User Manual

## Electronic Plan Review System



ProjectDox

CITY OF CUPERTINO  
BUILDING DEPARTMENT  
10300 TORRE AVENUE • CUPERTINO, CA 95014-3255  
TELEPHONE: (408) 777-3228 • FAX: (408) 777-3333



CUPERTINO  
*Eplans*

## Introduction

The City of Cupertino is proud to introduce ProjectDox – the Electronic Plan Submittal and Review process now available for Building Department submittals. This user-friendly, innovative, web-based, paperless process will allow for the electronic submission of all your plan related documents.

### Benefits Include:

- Reduced overall costs (paper, printing, transportation, storage space).
- Reduced time (delivery of documents and re-submittal documents).
- Increased efficiency and responsiveness in customer service (enhanced team work, communication and collaboration).
- Support for green initiatives.

In the following pages, we will provide you with all the details and information you need to join us in transforming the way you do business in our City.

Best Wishes,

*The City of Cupertino Building Department*

### Web-Enabled Collaboration



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## Best Practice Checklist

To help make your use of the system successful, please see the list below:

- All drawing files shall be single page PDF files...no multi-page drawing files will be accepted.
- All supporting documents can be submitted as multi-page PDF, Word, Excel or other.
- Please follow our file naming standard. Refer to page 5.
- *All revised sheets must be named the same as the previously submitted sheets.*
- Ensure all revisions to plans are “clouded”.
- A *scale bar* is required on all drawings.
- Clean and purge all extraneous layers from the drawings.
- Minimize the number of layers included in the drawings (100 or less recommended).
- Minimize the amount of hatching and/or convert to a less processor-intensive format type.
- Save drawing calibration settings to each drawing sheet.
- If upload performance is slow, restrict the number of files and/or size not to exceed *100MB per upload*.
- Drawings shall be saved and submitted in *landscape* view.
- A project team member can be removed from the ProjectDox system and access to client files rescinded when the City is notified.

# File Naming Standards

To maintain a consistent method for naming your drawing plan sheets and document files, please see the information below:

All PDF plan sheet files should be named according to how they are listed in the Drawing Index provided on the Title/Cover Sheet of the plan set.

- **Drawing Files:** Each sheet/page of the drawing shall be uploaded as a separate PDF file and in landscape view. Drawing files will be rejected if uploaded as a multi-page document or incorrect orientation.
- **Supporting Document Files:** All supporting documents required as part of the application submission, e.g., Soil Reports, Structural Calculations, Energy Calculations, Calgreen Checklist, and Special Inspection Form, shall be uploaded as individual multipage PDF documents.

**IMPORTANT:** Please limit the number of characters in the file name to 25 characters or less – abbreviations are acceptable. Do not include “-“(dashes) or special characters in the file name.

Sheet:	Sheet Title/Name	=	ProjectDox File Name
C1.0	Site Plan	=	C1.0 Site Plan
A1.0	Floor Plan	=	A1.0 Floor Plan
A2.0	Roof Plan	=	A2.0 Roof Plan

# New User Login Instructions

Once a permit application has been processed and applicable fees paid, a ProjectDox Invitation email will be sent to the contact/applicants e-mail address provided at submittal. The invitation email will provide a link to the ProjectDox site and a temporary password to be used to sign in for the first time. Below is an example of the invitation email.

**Hello Applicant:**

Welcome to the City of Cupertino's electronic plan check system called ProjectDox. This project invitation has been sent to you in response to your permit request. A project has been created in ProjectDox to allow you to electronically upload your drawings for plan review. To get started on your project you will first need to login and create a permanent password. Please follow the instructions below:

- Click the Project Access link below
- Enter your User Login and Temporary Password
- Complete the required entries to create your permanent password.

User Login	<input type="text"/>
Temporary Password	<input type="text"/>
<input type="text"/>	
Project Permit #	<input type="text"/>
Plan Check Coordinator	<input type="text"/>
Plan Check Coordinator's Email	<input type="text"/>
<input type="text"/>	
<input type="text"/>	
<a href="#">Project Permit Access Link</a>	

An email with the subject "Prescreen Review Task Assignment" will also be sent to you. Please follow the instructions on the email to access your project and upload the required plan sheets and documents.

If you have any problems gaining access to the ProjectDox system or have questions related to this permit and the plan review process, please contact our Permit Technicians at (408) 777-3228 or via Email.

**(Invitation Email)**

To access ProjectDox, complete the following steps:

1. To sign in either click on the *Project Permit Access Link* in assignment email or go to the login page for ProjectDox at the following web address:

<https://eplanreview.cupertino.org/ProjectDox/>



(ProjectDox Login Page)

2. On the login page type in your Email and Temporary Password provided to you in the Invitation Email. Click the Login button to begin.
3. The screen below will pop up requesting you to create a permanent password and a security question and answer to use if you forget your password. When the information is complete hit the save button on the right (not shown in screen shot #3).

**Change Password:**  
 New password:\*   
 Confirm new password:\*

**Password Reset Question & Answer:**  
 Security question: \*   
 Security answer: \*

**Profile Information**

Contact Information	User Metadata	Project Membership	Group Membership
* Required field			
First Name: *	Alice	Last Name: *	Architect
Email: *	<input type="text"/> <input checked="" type="checkbox"/> HTML format <span style="font-size: small;">i</span>		
Title:	<input type="text"/>		
Company:	<input type="text"/>		
Address 1:	<input type="text"/>		
Address 2:	<input type="text"/>		
City:	<input type="text"/>		
State/Province:	<input type="text"/>	Postal Code:	<input type="text"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
Mobile:	<input type="text"/>	Pager:	<input type="text"/>
Stamps:	<input type="text"/> <span style="font-size: small;">i</span>		
Language: *	en	<input type="text"/>	

(Password Creation Screen)

# Prescreen Review Task Assignment

Every time a permit is applied for with the Building Department that requires plan review, the applicant/contact will receive a *Prescreen Review Task Assignment* email from ProjectDox. This email is to notify the applicant that a task has been assigned to upload a projects plans and documents into the electronic plan review system. Below is an example of the Precreen Review Task Assignment email.

**ProjectDox**  
**Prescreen Review Task Assignment**

---

**Attention SEAN:**

You have been assigned a task on Project: **B-2017-2244**

Please [Login to ProjectDox](#) to upload the required plan sheets and documents and complete your workflow task.

Project:	<b>B-2017-2244</b>
Description:	<b>Test Project for PDox Applicant Manual.</b>
Task:	<b>ApplicantUpload</b>
Assigned by:	<b>SEAN HATCH</b>

[Project Access](#) | [Login to ProjectDox](#)

To help ensure a complete submittal and efficient plan review process, please review our Applicant User Manual for complete instructions. Your submittal will be sent back to you if the following requirements are not satisfied:

- Drawing and Document file types shall be in PDF.
- Drawing sheet file names should be as follows: SHEET NUMBER – SHEET TITLE.
- Save each drawing sheet as a separate file.
- Make sure drawing sheets are in landscape orientation.
- A graphic scale is required on all plan sheets.
- Licensed Architects and Engineers in the State of California are required to sign and seal documents and plans submitted for public record.
- To access your project, please follow the instructions below:

1. Click on the Project link in your "Active Task List".
2. Click on the desired document or drawings folder.
3. Click the "Upload Files" button and then click the "Browse for Files" button to locate and attach your plan sheets and documents. Once all sheets or documents have been selected for upload, click the "Upload Files and Save Metadata" button.
4. To complete your task, click on the "Workflow Portals" button and click on your task labeled "ApplicantUpload". This will open the Eform in separate window and here you will click the button labeled "Upload Complete" and this will start the plan review process.

If you have any problems gaining access to the ProjectDox system or have questions related to this permit and the plan review process, please contact our Permit Technicians at (408) 777-3228 or via [Email](#).

## (Task Assignment Email)

Login into ProjectDox as described in the instructions above. The ProjectDox main screen will open and this is where you will find your assigned projects.



**Active Projects List**

Project	Options	Description	Owner	Status	Create date
B-2017-2244		Test Project for PDox Applicant Manual.	Project Admin	Prescreen	10/5/2017 7:09:49 AM
B-2017-2243		Addition	Project Admin	Resubmit Request	10/4/2017 8:51:30 AM

Page 1 of 1 (2 items)

**Standard Workflow Task List**

Project Name	Task	Attached To	Status	Priority	Due date	Created On	Updated On	Updated By
B-2017-2244	ApplicantUpload	Applicant	Pending			10/5/2017 8:31:10 AM	10/5/2017 8:31:10 AM	
B-2017-2243	ApplicantResubmit	Applicant	Accepted			10/4/2017 9:09:21 AM	10/5/2017 9:28:04 AM	seanH@cupertino.org

Page 1 of 1 (2 items)

**(ProjectDox Main Screen)**

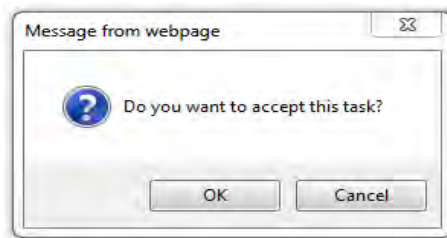
The main screen has two areas which serve different functions.

- a. The *upper portion of the screen* is the **Active Projects List**. This is where your most recently visited projects will be listed with the most recent located at the top.
- b. The *lower portion of the screen* is the **Standard Workflow Task List**. This is where the projects that are assigned to you and need action are listed with the newest being at the top of the list.

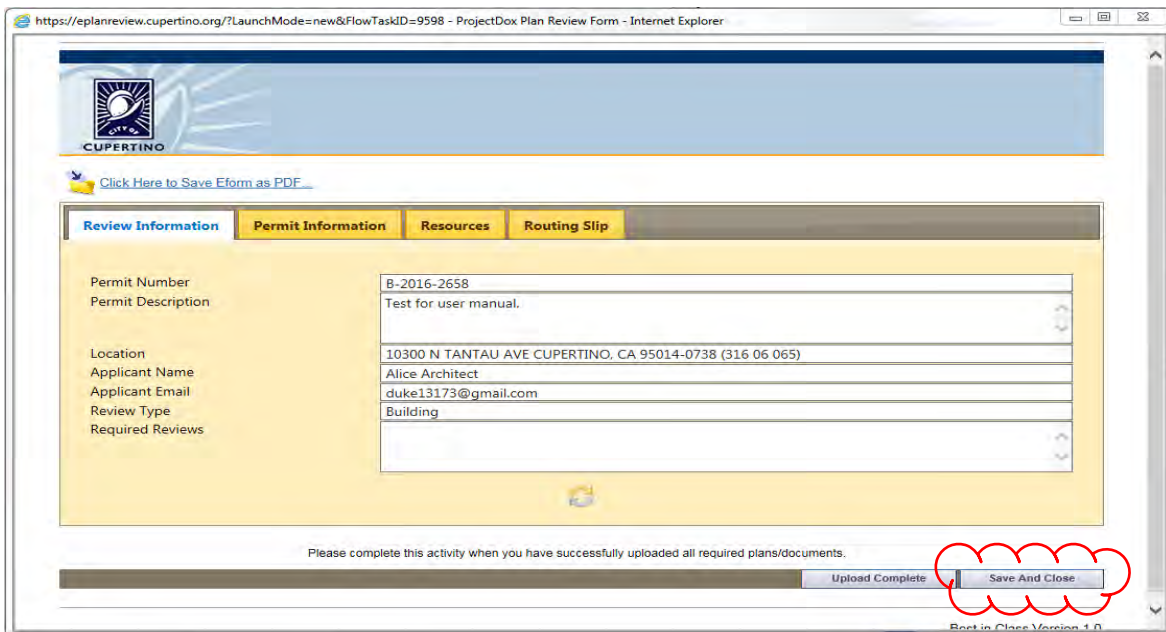
# Accepting Assigned Task

The projects in the *Standard Workflow Task List* are the projects that are awaiting action from the applicant to either upload plans and documents and/or to retrieve corrections and upload corrected plans and documents for plan approval.

1. Prior to uploading plans, the project task needs to be accepted by the applicant. To do this, click on the ApplicantUpload under the Task heading in the Standard Workflow Task List.
2. After clicking a message window will appear asking if you want to accept the task. Click on the OK button.



3. Then the Eform will open up in a separate window. The Eform contains information about the project that can be reviewed. At this point, the Eform can be saved and closed by clicking the Save and Close button located in the lower right hand corner of the form. You have now accepted the Applicant/Upload task.



Review Information	Permit Information	Resources	Routing Slip
Permit Number	B-2016-2658		
Permit Description	Test for user manual.		
Location	10300 N TANTAU AVE CUPERTINO, CA 95014-0738 (316 06 065)		
Applicant Name	Alice Architect		
Applicant Email	duke13173@gmail.com		
Review Type	Building		
Required Reviews			

(Eform)

# Uploading Permit Plans/Documents

1. To upload the plans/documents for a project click on the permit number in the Standard Workflow Task List under the Project name header to enter into the project.

The screenshot shows the ProjectDox interface. At the top, there's a navigation bar with 'ProjectDox' logo and 'CUPERTINO' branding. Below that, a navigation menu includes 'Back', 'Forward', 'Projects', 'Site-Wide Reports', 'Profile', 'Logout', and 'Admin'. The main content area is divided into two sections:

**Active Projects List**

2 recently entered project(s) out of 2 for SEAN HATCH (seanH@cupertino.org)

Project	Options	Description	Owner	Status	Create date
B-2017-2244		Test Project for PDoX Applicant Manual.	Project Admin	Prescreen	10/5/2017 7:09:49 AM
B-2017-2243		Addition	Project Admin	Resubmit Request	10/4/2017 8:51:30 AM

**Standard Workflow Task List**

Project Name	Task	Attached To	Status	Priority	Due date	Created On	Updated On	Updated By
B-2017-2244	ApplicantUpload	Applicant	Pending			10/5/2017 8:31:10 AM	10/5/2017 8:31:10 AM	
B-2017-2243	ApplicantResubmit	Applicant	Accepted			10/4/2017 9:09:21 AM	10/5/2017 9:28:04 AM	seanH@cupertino.org

(ProjectDox's Main Page)

2. This will take you into the project's main screen and the location of the different folders for uploading the required plans and documents.

The screenshot shows the ProjectDox interface for a specific project, B-2016-2658. The main contact is Alice Architect. The page is divided into two main sections:

**Project Info**

Project Name:	B-2016-2658
Description:	Test for user manual.
Project Image:	
Map Config Name:	
Location:	10300 N TANTAU AVE CUPERTINO, CA 95014-0733 (310 06 065)
Applicant:	Alice Architect
Applicant's Email:	duke13173@gmail.com
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Project Admin
Owner's Email:	Admin@boomcutersoftwareinc.com
Project Admins:	Steve Alexander, SEAN HATCH, Project Admin
Status:	Prescreen
Status Info:	Plan Review has been activated in MAGNET.
Project Start/End:	Start: 9/7/2016 7:42:44 AM   End: 3/7/2017 7:42:39 AM
Pass-Through:	.mov .wmv .avi .htm .html .install .config .mp4
Versioning:	Enabled for this project.

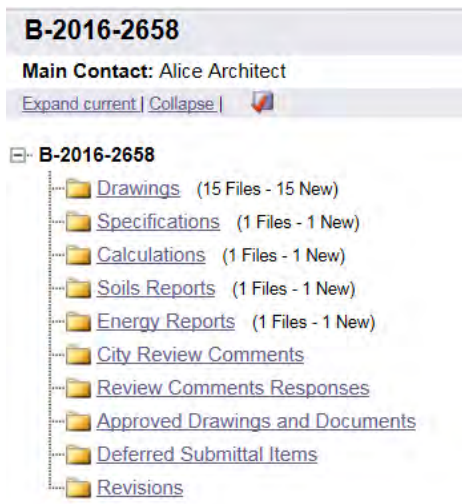
**Reports**

On the left side, there is a file explorer showing the project structure:

- B-2016-2658
  - Drawings (20 Files - 20 New)
  - Specifications (1 Files - 1 New)
  - Calculations (1 Files - 1 New)
  - Soils Reports (1 Files - 1 New)
  - Energy Reports (1 Files - 1 New)
  - City Review Comments
  - Review Comments Responses
  - Approved Drawings and Documents
  - Deferred Submittal Items
  - Revisions

(Permit/Project Main Page)

The permit information to be submitted and uploaded in the permit folders shall be organized per the following instructions:



**Drawings Folder:** The individual PDF plan sheets shall be uploaded to this folder.

**Specifications Folder:** This folder shall contain any product or equipment specifications, the CalGreen Form, Special Inspection Form, Grant Deeds, etc.

**Calculations Folder:** This folder shall contain the structural calculations for any portion of the project that requires design calculations.

**Soils Reports Folder:** This folder shall contain the soils report and soils review letters when required.

**Energy Reports Folder:** The separate energy compliance report or documents shall be located in this folder.

3. To begin, click on the title of the folder that you wish to upload information. A message will appear notifying you that currently there are no files in the folder and provide you with instructions. When you are ready to upload Click the Upload Files button.



No files currently exist in **Drawings**.

To upload files into this folder

- (1) Click the Upload button below
- (2) Follow the instructions in the pop-up window

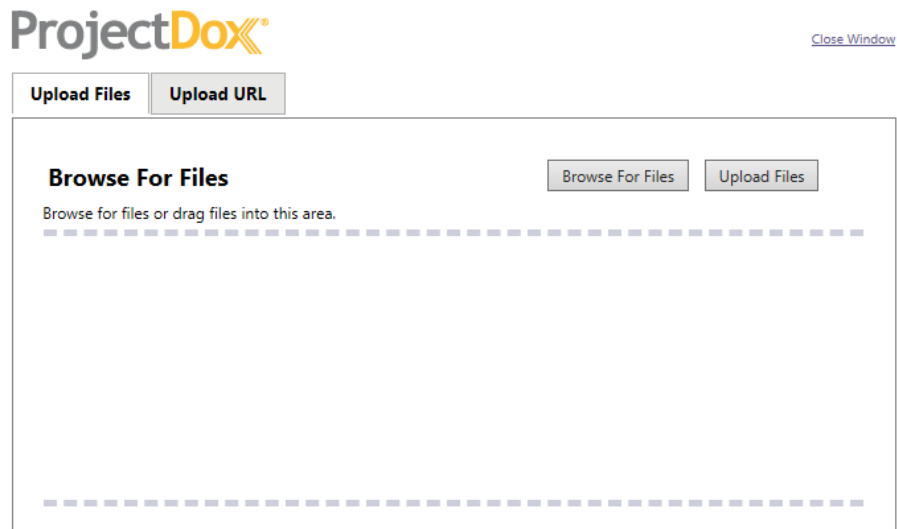
Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.

[View Folders](#)

[Upload Files](#)

(Folder Message)

4. A separate upload screen will open allowing you to browse and select the plan sheets or documents to be uploaded.



(File Upload Screen)

5. The files can be located using the Browse for Files button or the files can be dragged and dropped into the space between the two dotted lines.
6. Once all of the files have been selected or placed in the upload screen then click the Upload Files button and the system will upload the files to the desired folder. The screen will change and list the files that have been successfully uploaded.
7. To close the upload window Click the Close button located at bottom center. To continue to upload to the different files you will click the View Folders button (See screen shot below) and the file schematic will appear and show the number of files in each folder.



## B-2017-3000

Main Contact: Sean Hatch

Folder: [B-2017-3000\Drawings](#)

Test Project for PDox Applicant Manual.

View Folders Upload Files


Current Sort: - Select -

- [A1.0 General Info.pdf](#)  
11/28/2017 6:43:53 AM, 369 KB  
SEAN HATCH
- [A1.1 Arch Site Plan.pdf](#)  
11/28/2017 6:43:55 AM, 206 KB  
SEAN HATCH
- [A2.0 Demo Plans.pdf](#)  
11/28/2017 6:43:56 AM, 126 KB  
SEAN HATCH
- [A2.1 Floor Plans.pdf](#)  
11/28/2017 6:43:58 AM, 324 KB  
SEAN HATCH

**Project Info** Reports

**Project Name:** B-2017-3000

**Description:** Test Project for PDox Applicant Manual.

**Project Image:** 

**Map Config Name:**

**Location:** 10300 Torre Ave

**Applicant:** Sean Hatch

**Applicant's Email:** [seanH@cupertino.org](mailto:seanH@cupertino.org)

**Phone:** 408-777-3231

**Cell Phone:**

**Pager:**

**Project Owner:** [SEAN HATCH](#)

**Owner's Email:** [seanH@cupertino.org](mailto:seanH@cupertino.org)

**Project Admins:** Steve Alexander, SEAN HATCH, Gael Baughman

**Status:** Resubmit Request

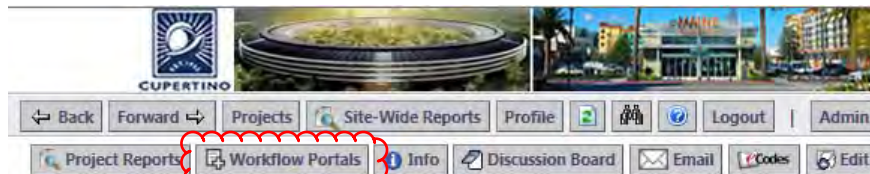
**Status Info:**

(View Folders Screen)

# Completing the ApplicantUpload Task

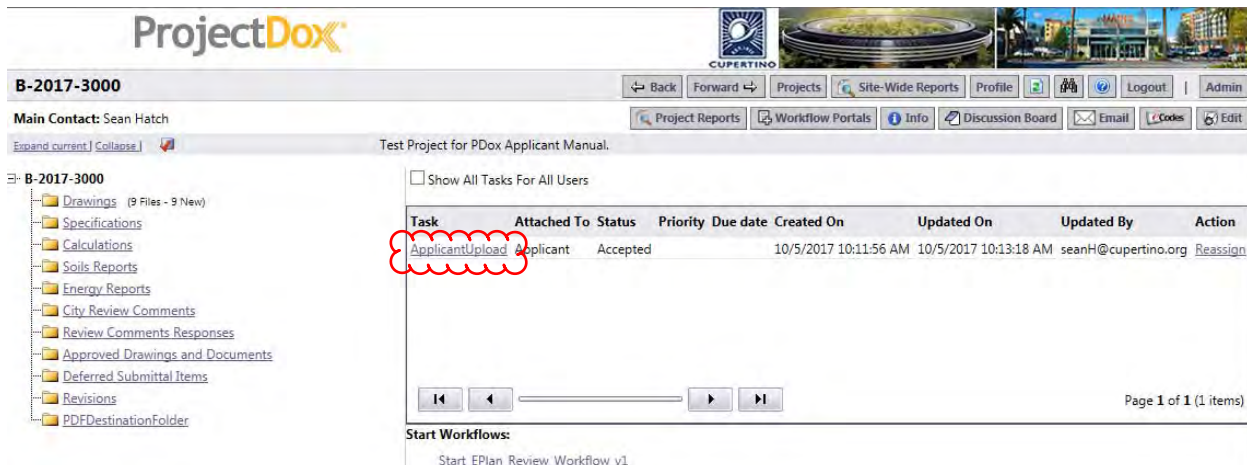
Once all of the plan sheets and documents have been uploaded into the applicable folders it is important to complete the *ApplicantUpload* task in the workflow to begin the plan review process.

1. To open the workflow *Click* on the *Workflow Portals* button in the upper right hand corner.



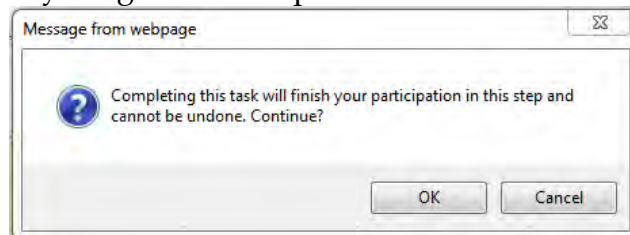
(ProjectDox Navigation Buttons)

2. The workflow window will open displaying the ApplicantUpload task to be completed. To complete, Click on the ApplicantUpload under the Task heading which will open the Eform in a separate window.



(Project Workflow)

3. Click the Upload Complete button at the bottom of the Eform. A separate message window will appear making sure that you want to complete the task (See screen shot below). If everything has been uploaded Click the OK button to continue.



The electronic plan review system will now notify the Permit Technicians to prescreen/review the uploaded plan sheets and documents.

# Prescreen Correction Request

If a required plan sheet or document is missing or the upload was not done per the directions the Cupertino Permit Technician's will reject the submittal. If rejected the applicant will receive another email notification requesting corrections be made to the uploads. See screen shot below.

**ProjectDox<sup>®</sup>**  
**Prescreen Correction Request Task Assignment**

---

**Attention SEAN:**

Your plan review submission for Application: **B-2017-3000-Test Project for PDox Applicant Manual**. is incomplete or requires modifications prior to beginning the plan review process. An explanation of required modifications will be provided in the projects Eform, which is accessed through task in the Workflow Portal.

Please note that the plan review process will not begin until the corrections and/or modifications have been completed and uploaded to the ProjectDox system and the ApplicantUpload task in the workflow is marked as Upload Complete.

When corrected plans and or documents are ready for re-submittal, please Login to ProjectDox and follow the complete instructions provided within the Applicant User Manual.

Please be advised when re-submitting drawings and/or documents:

- All corrected plan sheets and documents must be uploaded using the same file names as originally submitted.
- Drawing and Document file types shall be in PDF.
- Drawing sheet file names should be as follows: SHEET NUMBER – SHEET TITLE.
- Save each drawing sheet as a separate file.
- Make sure drawings sheets are in landscape orientation.
- A graphic scale is required on all plan sheets.
- Licensed Architects and Engineers in the State of California are required to sign and seal documents and plans submitted for public record.

Project:	<b>B-2017-3000</b>
Description:	<b>Test Project for PDox Applicant Manual</b>
Task:	<b>CorrectionComplete</b>
Assigned by:	<b>SEAN HATCH</b>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you have any problems gaining access to the ProjectDox system or have questions related to this permit and the plan review process, please contact our Permit Technicians at (408) 777-3228 or via [Email](#).

**(Prescreen Correction Email)**

1. To see what correction need to be made the applicant will need to sign into ProjectDox and select the project in question. Once the project is located the applicant will *click* on the **Workflow Portals button** to open the workflow. *Click* on the **CorrectionComplete task** in the workflow to open the *Eform* and see the message from the Permit Technicians in the comment box at bottom of *Eform* (see screen shot below).



**B-2017-3000**

Main Contact: Sean Hatch

Test Project for PDox Applicant Manual.

Show All Tasks For All Users

Task	Attached To	Status	Priority	Due date	Created On	Updated On	Updated By	Action
CorrectionComplete	Applicant	Pending			10/5/2017 11:30:39 AM	10/5/2017 11:30:39 AM		
PreScreenReview	Review Coordinator	Complete			10/5/2017 11:29:23 AM	10/5/2017 11:30:39 AM	seanH@cupertino.org	
ApplicantUpload	Applicant	Complete			10/5/2017 10:11:56 AM	10/5/2017 11:29:23 AM	seanH@cupertino.org	

Page 1 of 1 (3 items)

Start Workflows:  
[Start EPlan Review Workflow v1](#)

**(CorrectionComplete Workflow)**

- Once the corrections have been made to the uploaded documents the applicant will then need to result the CorrectionComplete task in the workflow. This is done by clicking on the CorrectionComplete task in the workflow and this will open up the Eform again to result. This time the box will need to be checked which states: "I have uploaded the corrected documents and/or drawing as indicated below." At this time the CorrectionsComplete button will become available to result the task.

*Note:* Until the plan sheets and documents are provided or uploaded correctly, this process can happen several times.

Click Here to Save Eform as PDF...

**Review Information** | Permit Information | Resources | Checklist Report (0) | Routing Slip

Permit Number: B-2017-3000  
 Permit Description: Test Project for PDox Applicant Manual.  
 Location: 10300 Torre Ave  
 Applicant Name: Sean Hatch  
 Applicant Email: seanH@cupertino.org  
 Review Type: Building  
 Required Reviews:

[VIEW INTAKE CHECKLIST \(0\)](#)

I have uploaded the corrected documents and/or drawings as indicated below.

The naming of the plan sheets and documents does not comply with the standard. Please revise and re-upload.

Corrections Complete | Save And Close

**(CorrectionComplete Eform)**

# Retrieving Plan Check Corrections

Once all of the reviewing departments have completed their reviews and there are corrections required to be made to the plan sheets and documents, the applicant will receive a notification email from ProjectDox. This is to notify the applicant that corrections are required and the ApplicantResubmit workflow task is now active.

**ProjectDox**  
**Applicant Resubmit Task Assignment**

---

**Attention SEAN:**

Your plan review submission for Project: **B-2017-3000 - Test Project for PDox Applicant Manual.** has been reviewed and corrections have been requested from the reviewing departments. You may review the comments and drawing markups by accessing the projects Eform within the ProjectDox site

When corrected plans and/or documents are ready for re-submittal, please [Login to ProjectDox](#) and follow the instructions provided within the Applicant User Manual.

Please be advised when re-submitting plans and/or documents:

- All corrected plan sheets and documents must be uploaded using the same file names as originally submitted.
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested.
- Please make corrections and resubmit **as soon as possible**. Permit applications are valid for 180 days from date of submittal.
- For any questions pertaining to the plan review corrections, please contact the specific plan reviewer responsible for the comment in question. The specific reviewer for each of the reviewing departments can be found on the projects eForm.

Project:	<b>B-2017-3000</b>
Description:	<b>Test Project for PDox Applicant Manual.</b>
Task:	<b>ApplicantResubmit</b>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

If you have any problems gaining access to the ProjectDox system or have questions related to this permit and the plan review process, please contact our Permit Technicians at (408) 777-3228 or via [Email](#).

(Applicant Resubmit Task Email)

1. To review the correction letters from the reviewing departments, *click* on the **Project Access** link in notification email and login to ProjectDox. Once logged in the projects/permits main page will automatically open.
  - a. *Or* the applicant can login as discussed above and select the project in the **Standard Workflow Task List** located at the bottom of the ProjectDox main page. To enter the project you *click* on the permit number located under the **Project Name** header.

Standard Workflow Task List

Project Name	Task	Attached To	Status
<a href="#">B-2017-3000</a>	<a href="#">ApplicantResubmit</a>	Applicant	Pending
<a href="#">B-2017-2023</a>	<a href="#">DepartmentReview</a>	Building	Pending
<a href="#">B-2017-2021</a>	<a href="#">DepartmentReview</a>	Building	Pending
<a href="#">B-2017-1130</a>	<a href="#">DepartmentReview</a>	seanH@cupertino.org for Building	Pending
<a href="#">B-2017-2018</a>	<a href="#">DepartmentReview</a>	Building	Pending
<a href="#">B-2017-2013</a>	<a href="#">DepartmentReview</a>	Building	Pending
<a href="#">B-2017-2012</a>	<a href="#">DepartmentReview</a>	seanH@cupertino.org for Building	Accepted

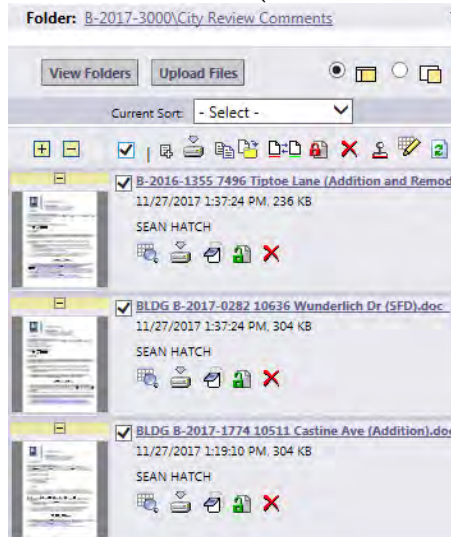
(Standard Workflow Tast List)


- Once the project’s main page is open the file schematic on the left has a folder named City Review Comments and this is where all the corrections letters will be uploaded for review and response.

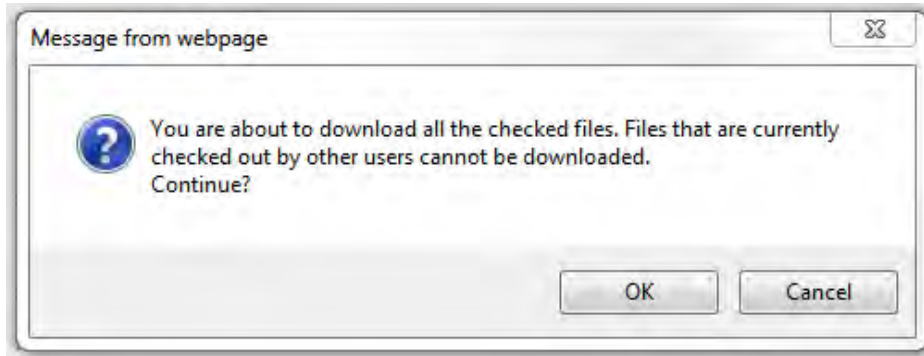


(Project File Schematic)

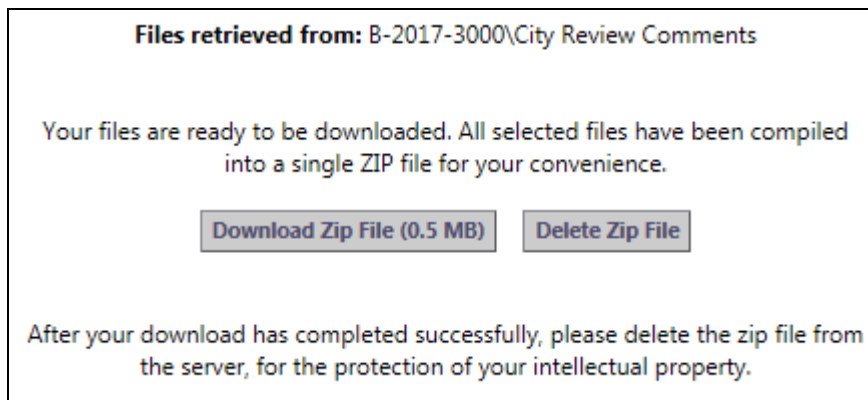
- Click on the City Review Comments label and the folder schematic will be replaced with the list of documents within that folder (See screen shot below).



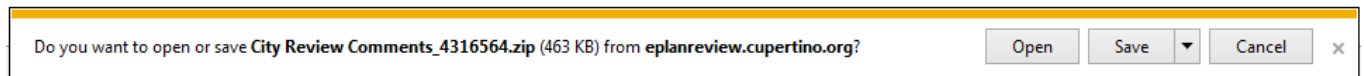
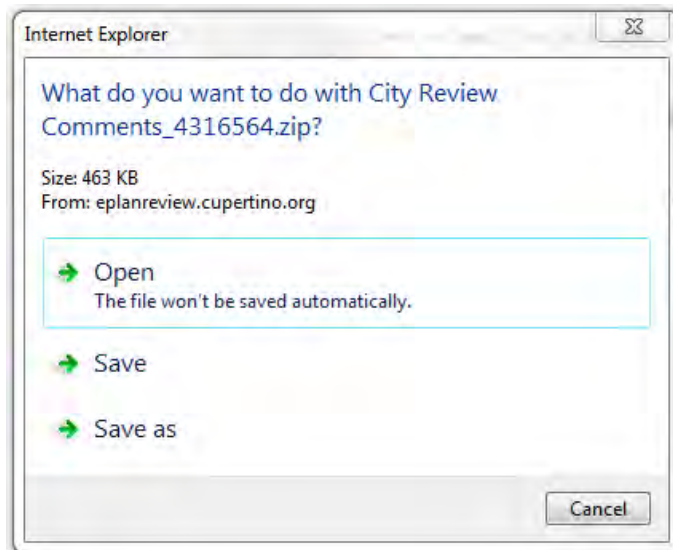
- To download the correction letters click on the box next to the title of each document and then click the down load icon  at the top. A message window will open with the following message, click OK button.



- If there are multiple documents ProjectDox places the documents into a zip file for opening. The main page of the project/permit will be replaced with the following message:

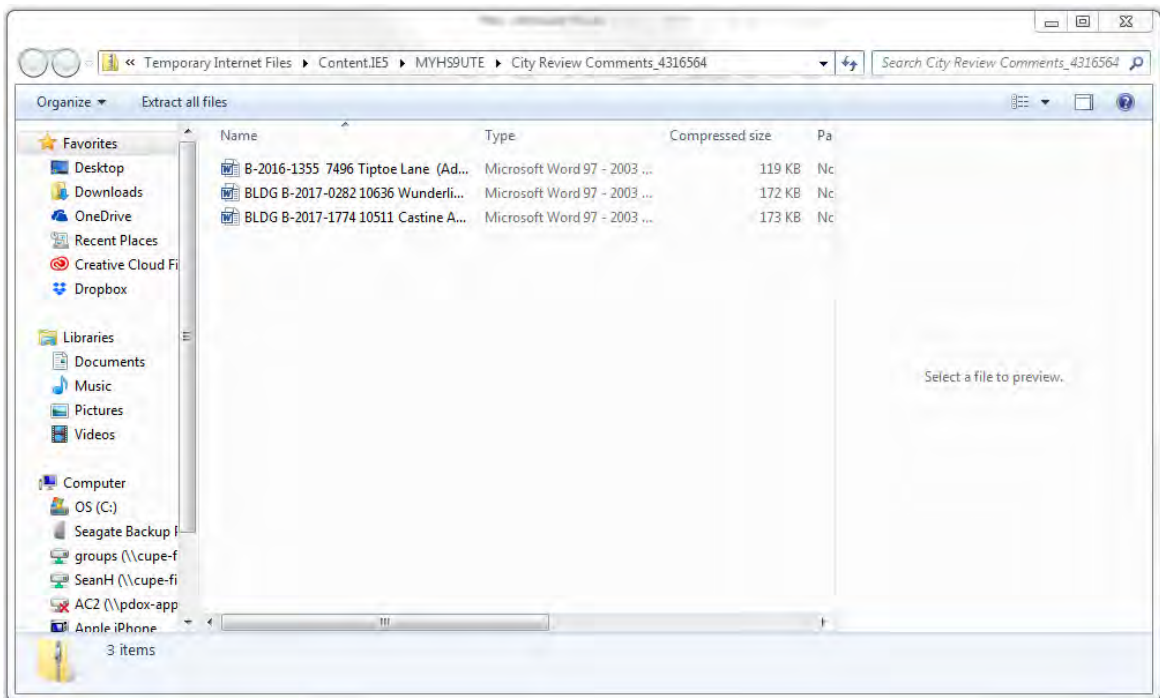


- Click on the Download Zip File. The following pop up messages will be asked to either open or save the zip file. The best practice is to select Open in both pop up messages and then a temporary internet files window will open listing all correction letters.



(Pop up messages for downloading documents)

7. From the Temporary Internet Files window each plan review letter can be viewed and/or saved for use will making the requested corrections.



(Temporary Internet Files Window)

**Note:** The *ApplicantResubmit* task in the workflow does not need to be resulted until the corrected plans/documents have been uploaded (see next section).

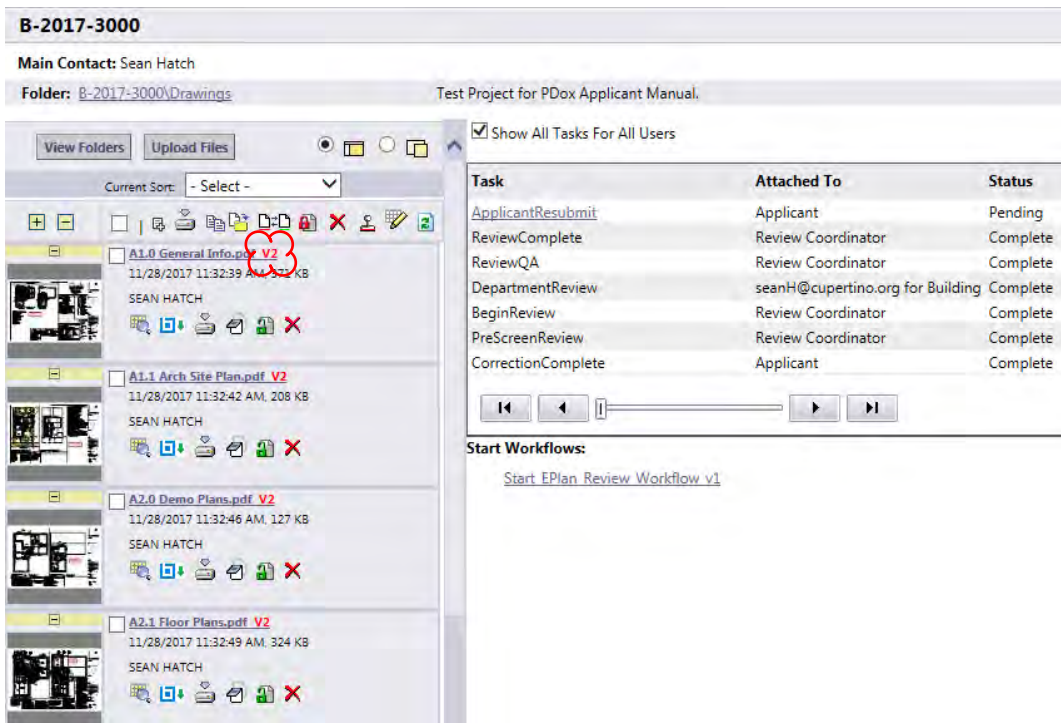


# Resubmittal of Corrected Plans/Documents

Once you have updated your drawings and documents as requested and clouded all the changes, upload your revised plan sheets and documents as previously described in the Uploading Permit Plans and Documents section of manual.

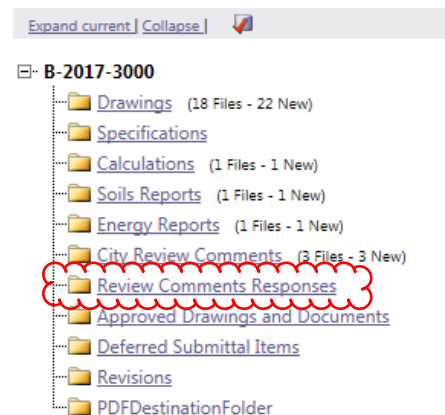
**IMPORTANT:** File names **must** be the same as previously submitted.

1. When the revised plan sheets are successfully uploaded, all revised plan sheets and or documents will be illustrated as follows with a version number.



**IMPORTANT:** If you do not see a red V2 or V3 etc., depending on the number of re-submittals, your files were not named the same and must be resubmitted.

2. To help expedite the review of the correction plan sheets and documents a response letter that addresses each of the correction items will need to be provided. This response letter will need to be uploaded to the Review Comments Responses folder for the reviewing departments to access.



(Project File Schematic)

- Once all revised plan sheets and response letters have been uploaded to ProjectDox, the *ApplicantResubmit* task in the workflow needs to be resulted. This can be done by *clicking* on the *ApplicantResubmit* task in the workflow to open the *Eform* to result.

**B-2017-3000**

Main Contact: Sean Hatch

Expand current | Collapse |

Test Project for PDox Applicant Manual.

Show All Tasks For All Users

Task	Attached To
ApplicantResubmit	Applicant
ReviewComplete	Review Coordinator
ReviewQA	Review Coordinator
DepartmentReview	seanH@cupertino.org for Building
BeginReview	Review Coordinator
PreScreenReview	Review Coordinator
CorrectionComplete	Applicant

Start Workflows:  
[Start EPlan Review Workflow v1](#)

**(Workflow Task)**

- At the bottom of the *Eform* are *Task Instructions* that need to be read and the boxes checked before the *Complete button* will activate to allow applicant to result the workflow task to send back to city to route the corrections for review.

DEPARTMENT REVIEW - Review Cycle:

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	BUILDING	SEAN HATCH SEANH@CUPERTINO.ORG  CORRECTIONS REQUIRED <div style="border: 1px solid gray; padding: 5px; width: fit-content;">             See City Review Comments folder for plan review correction letter for the building department.           </div> <input type="checkbox"/> PLAN REVIEW AND/OR ASSIGNMENT COMPLETE

**Task Instructions**

- I have reviewed and addressed the Checklist Comments provided on the "Checklist" tab above. Please click on the tab and review each item. Each comment will be indicated as **Met** or **Not Met**. If you would like to export a list of the comments to Excel, click on the "Export to Excel" link in the upper right hand corner of the popup window.
- I have addressed all of the items listed in the Changemarks section above that were identified during the Plan Review.
- I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. I am ready to complete my assigned task.

**(Bottom of Eform)**

# Retrieving Approved Plans and Documents

Once all the reviewing departments have approved the plans and documents the applicant will be notified by the Permit Technicians to pay remaining permit fees and have the permit issued. Once the permit is issued the applicant will receive a Plan Review Approval Notification email to sign into ProjectDox and retrieve the approved plans and documents. Sample of the email below.

**ProjectDox<sup>®</sup>**  
**Plan Review Approval Notification**

---

**Attention SEAN:**

**Thank you for using the City of Cupertino electronic plan check system.**

Congratulations, your Permit Application B-2017-3000 has passed the plan review process..

- To access the approved drawings and documents for the field, please login to ProjectDox at link below.
- Locate the Project in the ProjectDox system and select the project name link.
- The approved documents can be found in the project folder labeled "Approved Drawings and Documents".
- Here you can select and download to print the required one complete set of plans and copy of documents to be on site for the construction and inspection process.
- The required minimum plan sheet size shall be 24"x36".
- The Title sheet of the plan set shall be printed in color to clearly show the RED Approval Stamps.

Project:	<b>B-2017-3000</b>
Description:	<b>Test Project for PDox Applicant Manual.</b>
Task:	<b>NotifyDownload</b>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

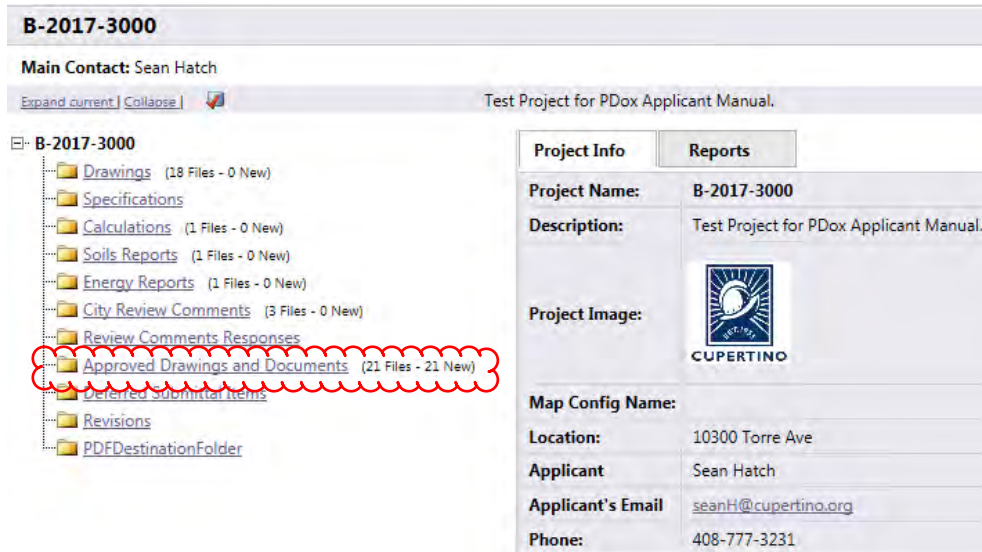
If you have any problems gaining access to the ProjectDox system or have questions related to this permit and the plan review process, please contact our Permit Technicians at (408) 777-3228 or via [Email](#).

This is an automated email notification and this email account is not monitored. Please do not reply to this email.

(Plan Review Approval Email Notification)

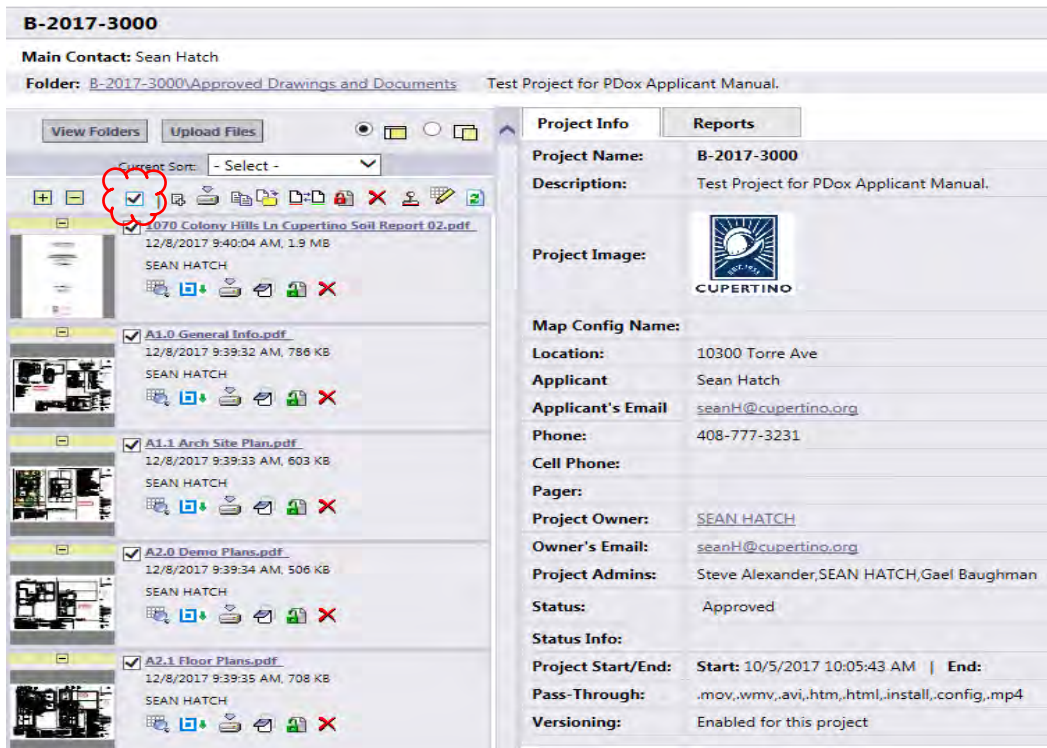


1. Once signed in and project/permit located as discussed above, the stamped and approved permit documents are located in the Approved Drawings and Documents folder.



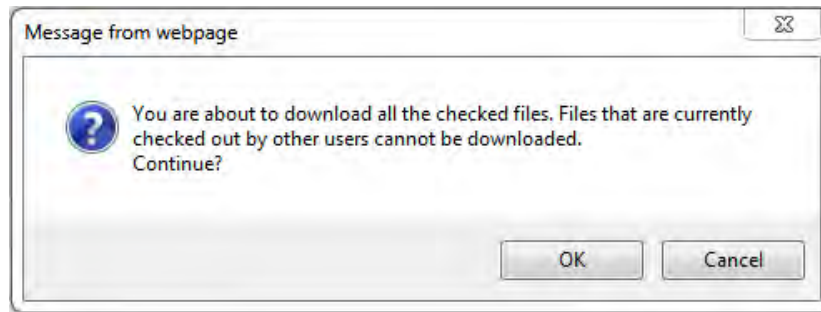
(Approved Drawings and Documents Folder)

2. To retrieve plans click on the Approved Drawings and Documents folder label to open to see all the approved plans and documents. To download you first select all the documents by clicking the box at each document or clicking the box at the top. To download click the download icon (see screen shot below).



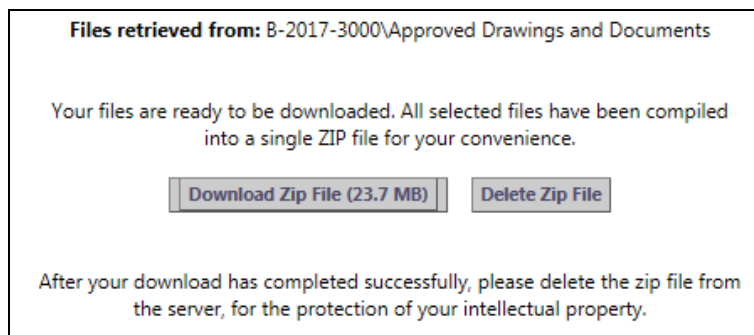
(Approved Drawings Folder)

3. A separate message window will open informing you that files being used by other users will not be downloaded. Click OK.

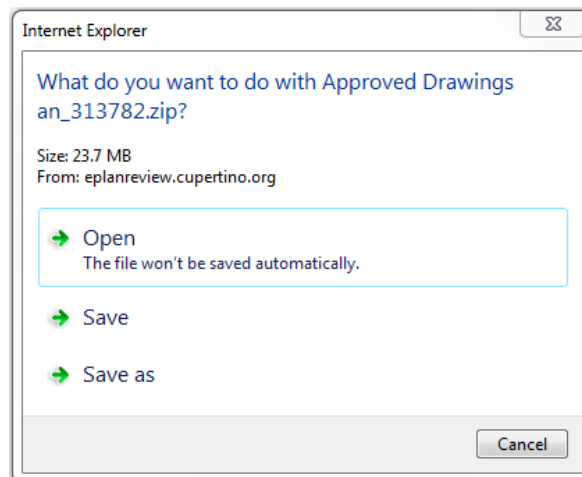


(Message Window)

4. After a few seconds, depending on size of project, the main screen will display the following message with button to Download Zip File. Click the Download Zip File button. Then the user will be prompted two separate times to open the file.



(Message to Download Zip File)



(Two Open File Messages)

5. A window will open with all the checked approved files ready to either open or save. One hard copy of all approved plan sheets and documents will need to be printed out for construction and the inspection process.

