CITY OF CUPERTINO

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BUILDING DIVISION

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Adding User to Applicant Group to view Project in ProjectDox

Important Notes:

- 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 add new users to a project, please close the Eform and skip to Step 3 to continue.

- *You can only add additional users to the project when the application workflow task is active. If the project is under review, access to the Eform to add users will not be available.*

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.
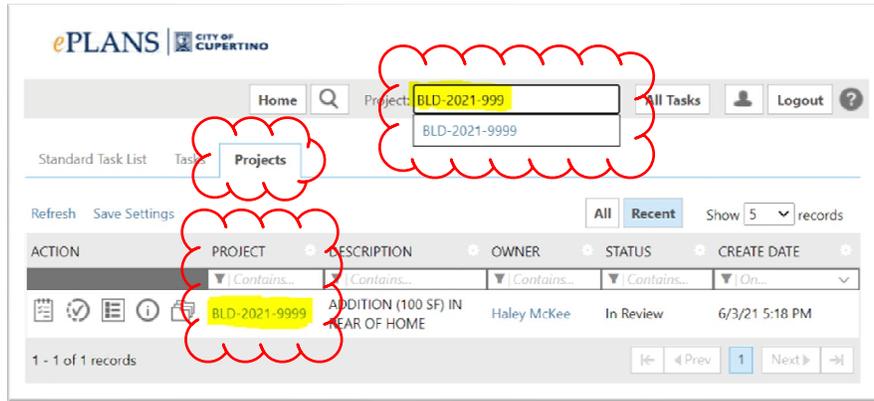

STEP 3 – LOCATE WORKFLOW TASK:

Once you are in your project, click on the "*Tasks*" Tab at the top of the screen. You should see that you have a task available to "*Accept*" or "*Complete*" under the "Action" column (if you have already accepted the task, but not completed it, it will show "Complete"). Click on the "Accept" or "Complete" button*.

*If you have not already accepted the workflow task, you will click "*Accept*".
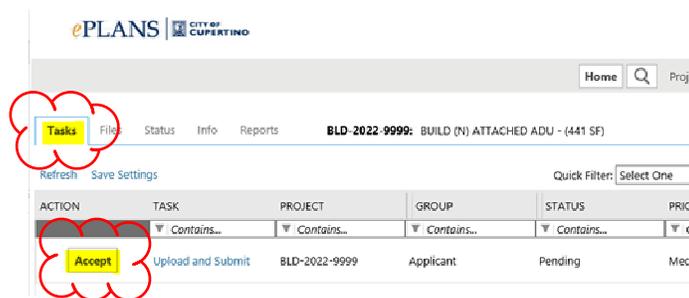
*If you have already accepted the workflow task, click "*Complete*".
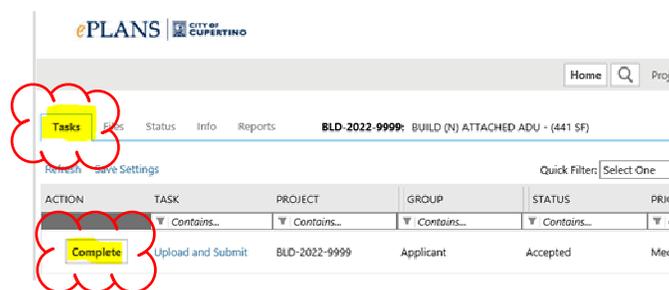
*If you are re-submitting the task columns will state "Respond and Resubmit", but the action column will still have the "Accept" or "Complete" button.

STEP 4 – LOCATE INVITE OTHERS TAB:

A separate window will open, this is the Eform. It will be labeled as "Upload and Submit" or "Respond and Resubmit" depending on the stage in the plan review process. At the top of this window is a tab labeled *"**Invite Others**"*, click on this tab.

UPLOAD AND SUBMIT

| **Permit Information** | Task Information | Invite Others |

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

Submit

STEP 5 – INVITE OR REMOVE USERS:

When you are in the "*Invite Others*" tab you can invite and/or remove project users.

The top drop down provides two options: "Applicant" or "Applicant View Only".

Selecting the "*Applicant*" option provides the invitee with the same permissions/rights that you currently have in ProjectDox.

Selecting the "*Applicant View Only*" will allow the invitee to only be able to view the files but not accept or perform the other application tasks.

To complete the invite process, fill in the name and email and click the "*Invite User*" button. ProjectDox will send an invitation email to the new user.

Removing a user from the project is located in the same location on the right side of the window. Select the name of the user to be removed and click the "*Remove User*" button. The user will no longer be able to locate and view this project within the system.

UPLOAD AND SUBMIT

| Permit Information | Task Information | **Invite Others** |

Invite/Remove Project User ❓

Invite to Group: Applicant / Applicant View Only

First Name:

Last Name:

Email:

Invite User

Remove from Group: Applicant

Name: SEAN HATCH (seanH@cupert ✓)

Remove User

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   ❓