



CITY OF SANTA ANA  
PUBLIC WORKS AGENCY  
DEVELOPMENT ENGINEERING

# AVOLVE-PROJECTDOX ELECTRONIC PLAN CHECK APPLICANT USER GUIDE MAPPING OVERVIEW

A screenshot of the ProjectDox login interface for the City of Santa Ana. The page has a white background with a blue header. At the top left is the City of Santa Ana logo. To its right is the text "City of Santa Ana". Below this is a welcome message in a box: "Welcome to our website. If you continue to browse and use this website you are agreeing to comply with and be bound by the following terms and conditions of use, which together with our privacy policy govern...". Below the message is a placeholder "[add'l text, etc.]". On the left side, the text "The City of Santa Ana" is displayed. To the right of this text are two input fields: "E-mail:" and "Password:". Below the password field is a "Login" button. To the right of the login button is a link "Forgot your password?". At the bottom of the page, there is a footer with copyright information: "© 2022 Avolve Software. ProjectDox (Version 9.2.8.909) and ProjectFlow (Version 9.2.8.917) are trademarks of Avolve Software. All rights reserved." and the Avolve Software logo. Below the footer is a link "Getting Started in ProjectDox". At the very bottom, there is a box containing the ProjectDox logo and a link "To add ProjectDox to your favorites Click here".

## **Apply for an Electronic Plan (E-Plan) Check with Public Works**

### **Step 1: Submit an Inquiry**

To initiate a request to submit for e-plan check, you must email [pwa-projectdox@santa-ana.org](mailto:pwa-projectdox@santa-ana.org) with the subject line indicating project address and plan check type. Ex. Project Address - Streets

Please make sure to also include the following information.

Note: All fields are required to advance the process – do not delete or modify.

<b>Applicant Contact Info</b>	
First Name:	Test
Last Name:	Engineer
Company:	Company A
Email:	CosaTestAvolve@gmail.com
Phone:	XXX-XXX-XXXX
<b>Project Info</b>	
Project/Site Address:	TEST Mapping 081324
Customer's Project Reference #:	TEST Mapping
Project Description:	TEST Mapping

### **Step 2: Create Your Account**

Once you submit your inquiry, Public Works Staff will review. If your inquiry has been approved, you will be invited to create an account with Avolve-ProjectDox.

# PROJECT INVITE

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Hello Test,

You have been invited to participate in the plan review for project: **TEST 081822**, as a member of the **Applicant** group.

**TIP: Complete Setup Now**  
Your temporary password will expire quickly. You must complete your setup before you can upload files or complete any tasks.

Your login: [CosaTestAvolve@gmail.com](mailto:CosaTestAvolve@gmail.com)  
Temporary password: **2AE4AA8**

Please complete your account setup now, click on "Login" below.

**Login** To complete your setup

Once logged in, you will be prompted to change your password.

## Profile Information

### Welcome to ProjectDox.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

#### Change Password:

New password:\*

Confirm new password:\*

#### Password Reset Question & Answer:

Security question:\*

Security answer:\*

*Password must contain at least one each of: uppercase letter, lowercase letter, number, special character from: \$@!%\*#?& Password length: 10-15 characters.*

- Contact Information**
- User Metadata
- Project Membership
- Group Membership
- User Activity

\* Required field

First Name: \*  Last Name: \*

Email: \*

## Step 3: Upload Your Plans

You will receive an email to access the project that the Coordinator has created to upload your documents.

## PROJECT INVITE

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Hello Test,

You have been invited to participate in the plan review for project: **TEST Mapping 081324**, as a member of the **Applicant** group.

Your login is: [CosaTestAvolve@gmail.com](mailto:CosaTestAvolve@gmail.com)

To access this project, please click on "Open Project" below.

**Open Project**

To access this project

You will also receive an email to upload and submit your plans.

## UPLOAD AND SUBMIT

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Hello Test,

You have a task to complete to start your plan review.

**TIP: Are you a New User?**

**First complete your account setup (required)**, if you haven't already. Open the separate invite email you received, or to request a new password [click here](#) and then select "forgot password".

To begin, please click on "Start Task" below.

**Start Task**

To submit your files  
for **TEST Mapping 081324 : TEST Mapping**

When logged in, you will see the following on your dashboard.

The screenshot shows a dashboard with a navigation bar (Tasks, Files, Status, Info, Reports) and a main content area. The main content area displays a table with columns: ACTION, TASK, PROJECT, GROUP, ASSIGNMENT TYPE, STATUS, PRIORITY, DUE DATE, CREATED, and DESCRIPTION. The table contains one row with the following data: ACTION: Accept; TASK: Upload and Submit; PROJECT: TEST Mapping 081324; GROUP: Applicant; ASSIGNMENT TYPE: FirstInGroup; STATUS: Pending; PRIORITY: Medium; DUE DATE: 9/3/24 12:24 PM; CREATED: 8/13/24 12:24 PM; DESCRIPTION: TEST Mapping. Above the table, there are filters for 'Quick Filter: Select One', 'All', 'Overdue', 'Priority', and 'Show 17 records'.

Click the Accept button to start the task of uploading and submitting your plans.

A new window will appear with three steps:

- 1) Upload your plans
- 2) Confirm plans have been uploaded
- 3) Click Submit

Please make sure to upload the correct required initial documents depending on the Mapping project type.

Follow below “Initial Submittal Documents” requirements:

## Agreements

Initial Submittal Documents:

1. Draft Agreement.
2. A title report current within 60 days.
3. A copy of each document referenced in the exhibits such as deeds, records of survey, parcel map, etc.
4. Improvement Plan associated area.
5. Initial review fee payment.

## Easement Dedication

Initial Submittal Documents:

1. Legal Description and Plat.
2. A title report current within 60 days.
3. A copy of each document referenced in the exhibits such as deeds, records of survey, parcel map, etc.
4. Improvement Plan associated with the easement.
5. Initial review fee payment.

## **Lot Line Adjustment**

### Initial Submittal Documents:

1. Lot Line Adjustment documents processed by the Planning and Building Agency.
2. A title report current within 60 days.
3. A copy of each document referenced in the exhibits such as deeds, records of survey, parcel map, etc.
4. Draft Grant Deeds to record after the Lot Line Adjustment.
5. Draft Reciprocal Easement Agreement (If applicable).
6. Initial review fee payment.

## **Voluntary Lot Merger**

### Initial Submittal Documents:

1. Voluntary Lot Merger documents processed by the Planning and Building Agency.
2. A title report current within 60 days.
3. A copy of each document referenced in the exhibits such as deeds, records of survey, parcel map, etc.
4. Initial review fee payment.

## **Street Vacation**

### Initial Submittal Documents:

1. Completed application.
2. Documents listed in the application.
3. Street Vacation processing fee.

## **Subdivision (Final Tract and Parcel) Maps**

### Initial Submittal Documents:

1. Approved Tentative Map.
2. Subdivision Map.
3. Grading Plan.
4. Utility Plan.
5. Street Improvement Plan.
6. Fire Master Plan
7. A title report current within 60 days.
8. A copy of each document referenced in the exhibits such as deeds, records of survey, parcel map, etc.
9. A letter stating the cost for the setting of the survey monuments, prepared by the Land Surveyor or Civil Engineer authorized to practice Land Surveying in the State of California.
10. Improvement Security Estimate for all public improvements.
11. Initial review fee payment.

# UPLOAD AND SUBMIT

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Task Information

[Invite Others](#)

## Task Information

**Project Name:** TEST Mapping 081324

**Project Description:** TEST Mapping

**Workflow:** Public Works Workflow

**Current User Login:** Test Applicant (CosaTestAvolve@gmail.com)

**Task Due Date:** 9/3/24 12:24 PM

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## Task Instructions

Please follow the steps below:

**STEP 1 of 3:** Select and upload your drawing and supporting document files into this project, as required

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File Upload for: TEST Mapping 081324 [?](#)

Please click appropriately for the **type of files** you are uploading.

Upload Drawings

Upload Documents

Uploaded files:

No files uploaded yet.

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

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Confirmation [?](#)

\*All files for this project have been uploaded \*Required

**STEP 3 of 3:** Click the "Submit" button below to complete your task

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Submit

Save for Later

When you click on Upload Documents, a new window will appear.

Folder: TEST Mapping 081324\Documents

**Browse For Files**

or drag files into area below.

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**Orange** files are **new uploads**

**Blue** files are new **version uploads**

**Red** files appear to be same as previously uploaded (**will likely be discarded**)

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IMPORTANT: All plans and documents need to be in PDF format.

Please refer to the City website for plan guidelines.

Once completed, you will receive an email confirming the upload of your plans/Documents.



# UPLOAD COMPLETED

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Hello Test,

The following files have been received for project - **TEST Mapping 081324 : TEST Mapping**

Files received:

1. 001 Title Sheet.pdf
2. 010 Signing and Striping Plan Broadway.pdf
3. 023 Planting Plan.pdf
4. 024 Planting Plan.pdf
5. 005 Street Improvement Plan v2.pdf

## Step 4: Prescreen Review / Initial Payment

Once the Coordinator has completed the prescreen review, you will be notified to come to the City counter to do initial payment.

**IMPORTANT:** Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

## Initial Payment Due

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Hello Test,

You have an important task to complete by **9/24/2024 12:37:30 PM**.

To begin, please select "Start Task" below.

**Start Task**

To complete your task  
for **TEST Mapping 081324 : TEST Mapping**

## Task Instructions

Please pay initial payment Due.

### Initial Payment Verification ?

Add Comment

Show 5 records

DISCUSSION COMMENT	PARTICIPANT	CREATED
Please come to the counter to pay initial plan check fees.	Natividad Melendez	8/13/24 12:37 PM

1 - 1 of 1 records

◀ Prev 1 Next ▶

After you have completed in-person payment, please confirm payment online.

Click the Accept button to start task.

A new window will appear.

Click on Add Comment and input the MCT #.

### Initial Payment Verification ?

Comment: \*

Save

Cancel

Then, click on Initial Fees Paid to complete the task.

### Step 5: E-Plan Check Begins

After initial payment has been received, the Coordinator will start assigning reviewers to begin the e-plan check at the City.

You will receive an email notifying you the prescreen review has completed and that the e-plan check is in progress.

# PRESCREEN COMPLETED

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Hello Test,

Congratulations, the next step in your review is beginning.

The prescreening of files uploaded for project - **TEST Mapping 081324 : TEST Mapping** is completed.

You will be notified when the review is complete and if any additional response is required.

## Step 6: E-Plan Check Ends / Final Payment

When the e-plan check has completed, you will receive an email to come to the City counter to pay final plan check fees

## Final Payment

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Hello Test,

You have an important task to complete by **9/24/2024 12:44:33 PM**.

To begin, please select "Start Task" below.

**Start Task**

To complete your task  
for **TEST Mapping 081324 : TEST Mapping**

**IMPORTANT:** Please keep track of the Miscellaneous Cash Transaction Number (MCT #) for payment verification purposes.

Please confirm payment online to receive digitally approved plans.

Click the Accept button to start task.

A window will appear with three steps:

- 1) Add comment regarding final payment
- 2) Confirm that all fees have been paid
- 3) Click Submit

**STEP 2 of 3:** Check the box to confirm you are ready to submit

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**Confirmation** 

\*All fees have been paid \*Required

**STEP 3 of 3:** Click the "Submit" button below to complete your task

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In the Comment section, input MCT # to confirm final payment.

**STEP 1 of 3:** Respond to comments, as needed

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**Discuss Final Payment** 

Comment: \*

MCT #

**Step 7: Approved Documents**

You will receive an email stating that your Documents are approved.

The Documents will be in the Approved folder.