# ProjectDox Basic User Guide

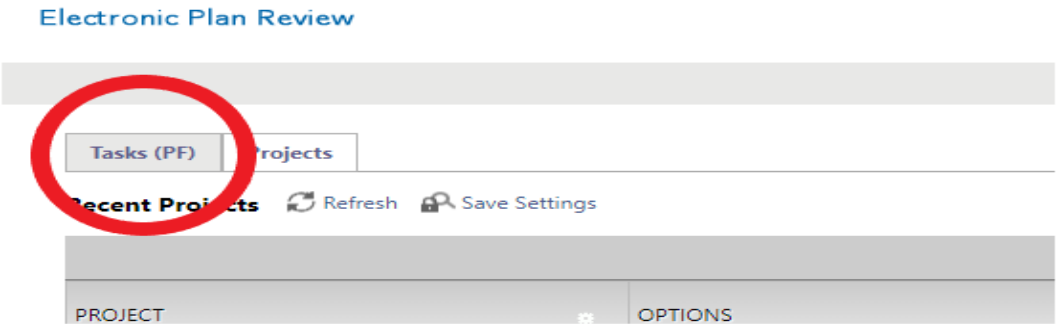
ProjectDox is a web-based electronic plan and document workflow solution that allows citizens and government personnel to initiate and complete the construction plan submission, review, and approval process online, rather than using a manual paper-based process, thus replacing the traditional paper-based review method.

1) How to open a project/permit portal to upload plans:

- ***APPLY!*** Visit www.medfordoregon.gov \ Apply For a Permit \ Building Permits. Email the application to building@cityofmedford.org, Staff will process and open a portal for upload. You will receive an invite to our ProjectDox online review system. Haven't received it? Check your junk mail, sometimes it likes to go there first.
  - Tips on file formatting requirements for documents: Review will not begin until files are uploaded to ProjectDox and meet the following requirements.
    - ✓ Plan sheet files are to include **only one (1) sheet per file** (not multiple sheets in one file).
    - ✓ Supporting documents such as specifications, calculations, etc. are to each be in a combined file (all specs in one file, structural calculations in one file, etc.) Name the supporting documents simply. For example: TRUSS CALCS
    - ✓ Drawing file names to contain the sheet designation (number) and sheet description only; NO OTHER INFORMATION TO BE INCLUDED. Example: CS – COVER SHEET, A.1-FLOOR PLAN. **If you are uploading revised files, they MUST be named exactly the same as the files originally uploaded.**
    - ✓ Correct Orientation – typically landscape for plans (see below for rotating PDF's)
      - PDF Rotation: Please rotate any PDF's to be oriented such that they can easily be reviewed (plans should typically be landscape). Rotate PDF's by using **"Ctrl" + "Shift" + "R"** simultaneously on the keyboard. After rotating the PDF, save the current orientation by **SAVING** the document.

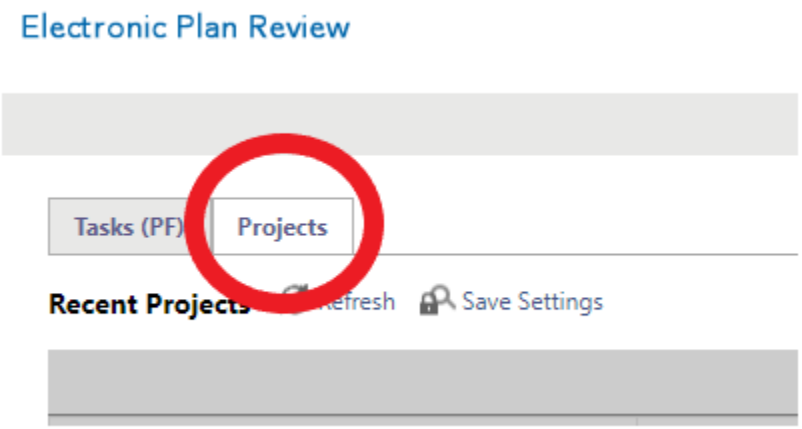
2) Do you have a task to perform?

- Once logged in to ProjectDox, click on the **"Tasks"** tab on the top left to show all of the tasks.

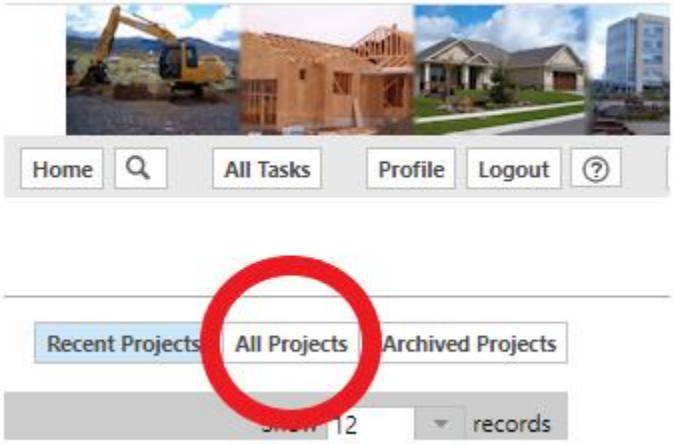


3) Need to find a project that does not have a task associated with it:

- Click On the **"Projects"** tab on the top left.



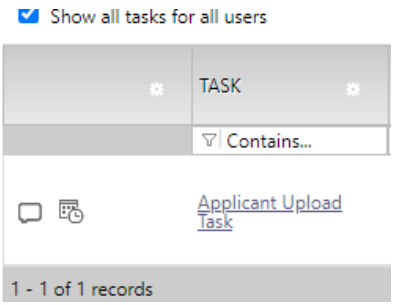

- Then the **"All Projects"** tab at top right to find ALL of your projects.




4) I completed the task, but I am receiving emails telling me that I didn't. This is most likely caused by not successfully finishing the task.

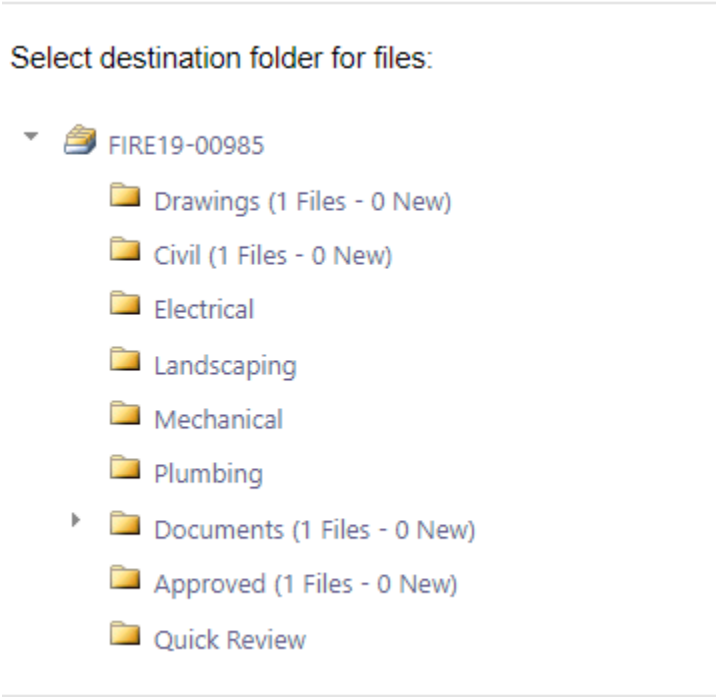
- Do you still have a task in your "Task" list? Refer to number 2 above.

5) It's now time to upload documents.



- Click on the “Applicant Upload Task” hyperlink:

6) After you have uploaded all drawings/documents:



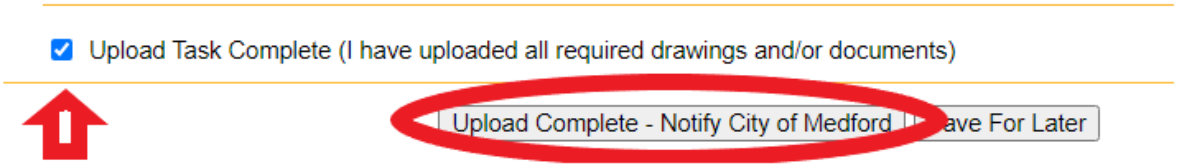

7) A choice must be made under **“Choose a user”** from the drop down menu. When the permit has been approved this will give a local printing company access to your project for the onsite plans or you can choose **“No Printer Required”** if you have the capabilities to print large scale plans.

8) VERY IMPORTANT is the next step. After you **“Choose a user”** the button to the right **“Copy User to Group”** MUST be selected.

You will get a pop-up stating, *“User was copied to group successfully.”* Click on **the “OK”** button.

9) Final series of steps:

- Check the **"Upload Task Complete"** box then click on the **"Upload Complete – Notify City of Medford"** button.




- Click **"OK"** on the pop-up that *says "Completing this task will finish your participation in this step and cannot be undone. Are you sure you want to complete the task?"*

**You have successfully let the City of Medford know your project is ready for review!**

***TIP:*** *Once you have completed your applicant upload task, you will no longer have access to the folders within this project. Why? This is to ensure that no new files are uploaded while review is taking place with various departments.*

10) OOPS! My project is in review, but I forgot some drawings/documentation. What do I do?

- Best practice - ensure you have uploaded all documents pertaining to your project before completing your applicant upload task which will lock you out of the project. Understanding that errors may happen, worst case scenario is that staff will have to terminate the project when it is in review with all departments and send it back to you. This will cause a time delay on getting the project reviewed. Please contact building@cityofmedford.org / 541-774-2350 for help in handling forgotten documents.

11) NOW WHAT? Once all plans/documents have been uploaded and the plan check fee has been paid, we will send your project into review. If there are any questions or corrections needed by the reviewers, you will be contacted by email. For commercial projects you will receive your first round of comments within 15 working days. An average project can take 6-8 weeks. For residential, the average review time is 2-4 weeks.

For any questions please email building@cityofmedford.org or call 541-774-2350.