



ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW
APPLICANT'S GUIDE

APPENDIX B:
PROJECTDOX INSTRUCTIONS
HOW TO UPLOAD NEW PLANS AND DOCUMENTS
AND
COMPLETE THE “APPLICANT UPLOAD TASK”

<https://planreview.cityofmedford.org/ProjectDox/>

IS IT TIME FOR “APPLICANT UPLOAD”? – When an “Applicant Upload Task” has been assigned, the task will be listed on the “Tasks” tab. The purpose of this task is for the Applicant to upload all plans and documents that are required for review.

The screenshot shows the 'Electronic Plan Review' interface. At the top, there are two tabs: 'Tasks (PF)' and 'Projects'. The 'Tasks (PF)' tab is selected and circled in red. Below the tabs are 'Refresh' and 'Save Settings' buttons. A table displays the task information:

	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TY
	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...
 	Applicant Upload Task	P21-00145	P21-00145 - Medford Engineering Template - 4/27/2021 9:11:40 AM	Applicant	FirstInGroup

1 - 1 of 1 records

NAVIGATE TO THE PROJECT – To open the project screen, click on the **project number** in the “PROJECT” column on the “Tasks (PF)” tab or the “Projects” tab.

Electronic Plan Review

Tasks (PF) Projects

Refresh Save Settings

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS
Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup	Pending

1 - 1 of 1 records

Electronic Plan Review

Tasks (PF) Projects

Recent Projects Refresh Save Settings

PROJECT	OPTIONS	DESCRIPTION	OWNER
P20-00321		Test Project 1	PDox Admin

1 - 1 of 1 records

PREPARE TO UPLOAD FILES – When uploading plans and documents to ProjectDox, the **file names are extremely important**. To avoid issues, do not include dates or the words “draft” in the file name (unless it is the Draft Final Plat) because revisions to plans and documents will need to be uploaded with the EXACT same name as the initial file uploaded (see [Appendix G](#) for How to Upload Revised Plans and Documents).

File names should be simple and clearly describe what the document is. Upload files to ProjectDox as outlined:

Drawings Folder

- Public Improvement Plan Set
 - Upload all sheets in one combined pdf file.
 - Use the Project Name as the title and do not include dates. For example: “Clearview Subdivision Phase 4” or “Smith Road Street Improvements”.
 - For first submittal, plans do not need to be stamped and signed.

Documents Folder


- All files except for the public improvement plan set should be uploaded to the Documents Folder
- Each file should be uploaded separately
- Use the document name and avoid dates. For example: “Voltage Drop Calculations”, “Draft Final Plat”, “Supplemental Fire Plan”, and “Geotech Report”.

UPLOAD FILES – Once on the project page, click on one of the folders (“Drawings” or “Documents”) to upload files. Once in the folder, click the “Upload Files” button to open the file upload window (make sure that pop-ups are not blocked). Browse for files and then Upload.

Electronic Plan Review




P20-00321

Main Contact:




[Expand current](#) | [Collapse](#) | 

Test Project 1






☰ P20-00321

-  Drawings
-  Documents
-  Approved

ProjectFlow Task List


 Start Workflow  Refresh  Save Settings

Show all tasks for all users

TASK	PROJECT	INSTANCE	GROUP
 Contains...	 Contains...	 Contains...	 Contains...
 Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE
 P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active

1 - 1 of 1 records

Electronic Plan Review

P20-00321

Main Contact:

Folder: [P20-00321\Drawings](#) Test Project 1

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](#)

ProjectFlow Task List

Start Workflow Refresh Save Settings

Show all tasks for all users

TASK	PROJECT	INSTANCE	GROUP
Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE
P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active

1 - 1 of 1 records

https://planreview.cityofmedford.org/ProjectDox/HtmlUpload.aspx?SessionID=&InitialEntry=true... - x

https://planreview.cityofmedford.org/ProjectDox/HtmlUpload.aspx?SessionID=&InitialEntry=true&FolderID=10074

Electronic Plan Review [Close Window](#)

Folder: P20-00321\Drawings

[Upload Files](#) [Upload URL](#)

Browse For Files

Browse for files or drag files into this area.

[Browse For Files](#) [Upload Files](#)

Plans - SS882.pdf 0B/8.78MB

0 of 1 uploaded [Hide Details](#)

0B/8.78MB

NAVIGATE BETWEEN FOLDERS – To get to a different folder (“Drawings” or “Documents”), click on the “View Folders” button.

Electronic Plan Review

P20-00321

Main Contact:

Folder: P20-00321\Drawings
Test Project 1

View Folders
Upload Files

1 of 1 files Current Sort: - Select -

[Plans - 55882.pdf](#)

10/26/2020 2:46:54 PM, 8.8 MB

Alena Beltz

ProjectFlow Task List

Start Workflow
 Refresh
 Save Settings

Show all tasks for all users

	TASK	PROJECT	INSTANCE	GROUP
	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...
	Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE
P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active

1 - 1 of 1 records

REVIEW UPLOAD – Check to make sure each folder contains all the required documents. The number of files contained in each folder is shown on the project screen.

Electronic Plan Review

P20-00321

Main Contact:

Test Project 1

P20-00321

- [Drawings](#) (1 Files - 1 New)
- [Documents](#) (1 Files - 1 New)
- [Approved](#)

ProjectFlow Task List

[Start Workflow](#)
[Refresh](#)
[Save Settings](#)

Show all tasks for all users

	TASK	PROJECT	INSTANCE	GROUP
	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...
	Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant

1 - 1 of 1 records

Workflow Instances

	NAME	COORDINATOR GROUP	STATE
	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active

1 - 1 of 1 records

OPEN “APPLICANT UPLOAD TASK” E-FORM – Make sure that pop-ups are enabled and then click on the “Applicant Upload Task” to open the E-Form.

Electronic Plan Review

P20-00321

Main Contact:

Expand current | Collapse | Test Project 1

P20-00321

- Drawings (1 Files - 1 New)
- Documents (1 Files - 1 New)
- Approved

ProjectFlow Task List

Start Workflow Refresh Save Settings

Show all tasks for all users

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TY...
Applicant Upload Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup

1 - 1 of 1 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE
P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active	Production

1 - 1 of 1 records

COMPLETE “APPLICANT UPLOAD TASK” – Once the e-form is open, complete the “Applicant Upload Task” by clicking the “Upload Task Complete” checkbox and then clicking the “Upload Complete – Notify City of Medford” button. Once this is done, the project will no longer be listed on the Home Screen Tasks Tab.

APPLICANT UPLOAD

Task Instructions

UPLOAD ALL REQUIRED DOCUMENTS:

1. Select destination folder
2. Click "Select Files to Upload" button and upload files
3. Repeat until all files have been uploaded

TO COMPLETE YOUR TASK AND START REVIEW PROCESS:

1. Click the "Upload Task Complete" checkbox
2. Click the "Upload Complete - Notify City of Medford" button. (bottom of page)

FILE NAMING IS IMPORTANT: Please refer to naming convention referenced in the User Guide [here](#)

For additional information and help, please refer to the ProjectDox User Guide [here](#)

Project: P20-00259

Select destination folder for files:

- ▼ P20-00259
 - Drawings (1 Files - 1 New)
 - Documents (6 Files - 6 New)
 - Approved

Upload Task Complete (I have uploaded all required drawings and/or documents)

Upload Complete - Notify City of Medford

VERIFY THAT THE “APPLICANT UPLOAD TASK” IS COMPLETE – The City of Medford will **not** be notified that the project plans and documents are ready for review until the “Applicant Upload Task” has been completed. To verify that this task is complete, check to make sure the task is no longer shown on the project screen and/or the project is no longer listed on the Home Screen Tasks Tab.

Electronic Plan Review

P21-00145

Main Contact: Test Project 2

Expand current | Collapse | [checkmark]

P21-00145

- Drawings (1 Files - 1 New)
- Documents

ProjectFlow Task List

Refresh

TASK	PROJECT	INSTANCE	GROUP	A
Contains...	Contains...	Contains...	Contains...	

0 - 0 of 0 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE	INT	MO
P21-00145 - Medford Engineering Template - 4/27/2021 9:11:40 AM	Review Coordinator	Executing	Pro	

1 - 1 of 1 records

Electronic Plan Review

Home | Search | All Tasks | Profile

Tasks (PF) | Projects

Refresh

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	On...	On...	Contains...

0 - 0 of 0 records

prev 1 next