

ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW
APPLICANT'S GUIDE

APPENDIX D
PROJECTDOX INSTRUCTIONS

HOW TO CHECK THE REVIEW STATUS

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

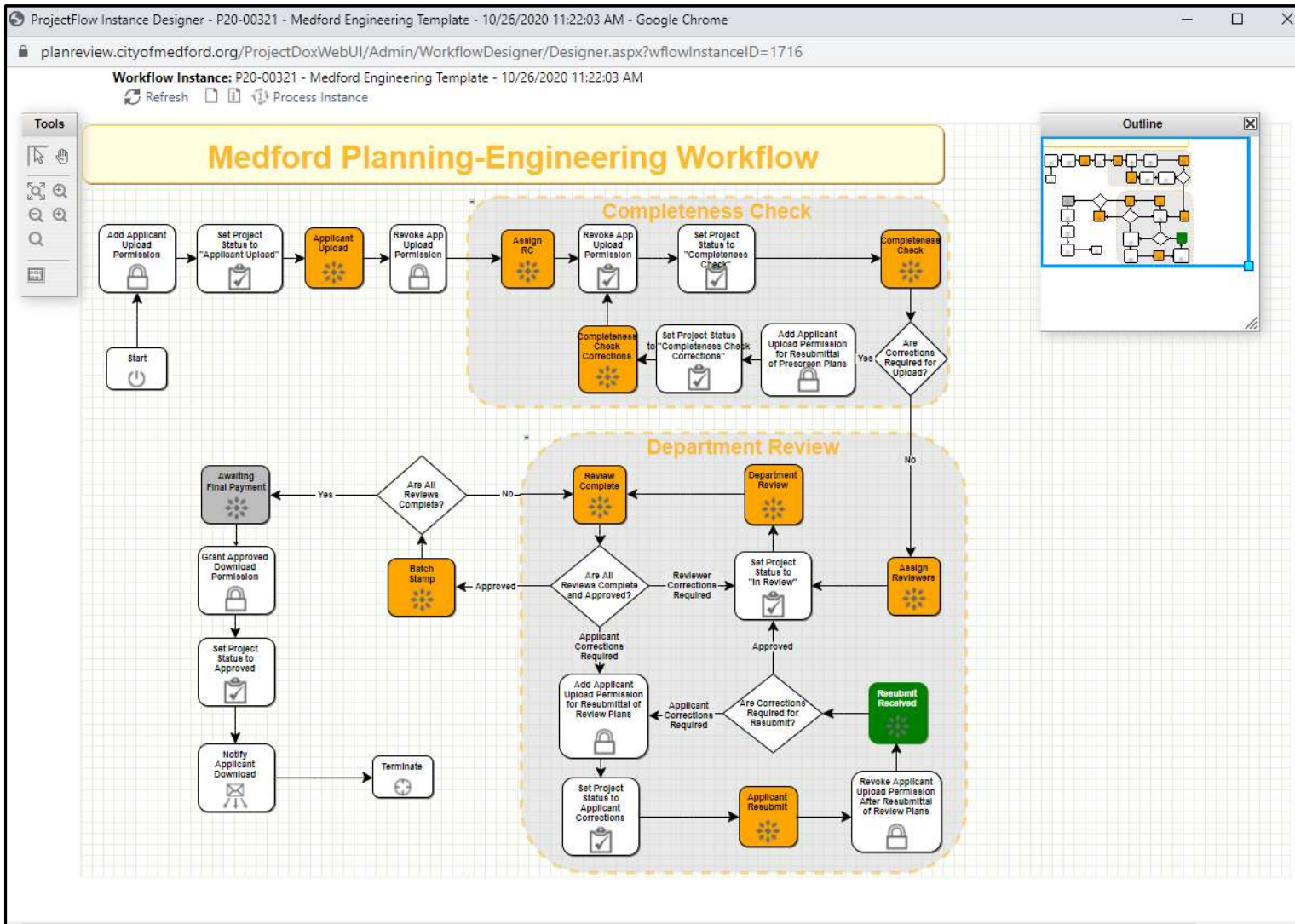
NAVIGATE TO THE PROJECT – Search for the project on the “Projects” tab and then click on the “PROJECT” number link. The project may already be listed, if not, click on “All Projects” and type the project number into the “PROJECT” column.

The screenshot shows the 'Electronic Plan Review' application interface. At the top, there are navigation links for 'Home', 'All Tasks', and 'Profile'. Below this, there are two tabs: 'Tasks (PF)' and 'Projects', with 'Projects' being the active tab. Under the 'Projects' tab, there are buttons for 'Recent Projects' and 'All Projects', with 'All Projects' being highlighted. A table below shows a list of projects with columns for PROJECT, OPTIONS, DESCRIPTION, OWNER, STATUS, and CREATE DATE. The first row shows project 'P20-00321' with description 'Test Project 1' and owner 'PDox Admin'. A red arrow points to the 'Projects' tab, and a red circle highlights the 'All Projects' button.

OPEN THE WORKFLOW IMAGE – From the project page, click on the “lobster” symbol under “Workflow Instances”.

The screenshot shows the project page for 'P20-00321'. The page title is 'Electronic Plan Review' and the project name is 'P20-00321'. There are navigation links for 'Home', 'All Tasks', 'Profile', and 'Logout'. Below this, there are buttons for 'Project Reports' and 'Project Tasks'. The page is divided into two main sections: 'ProjectFlow Task List' and 'Workflow Instances'. The 'ProjectFlow Task List' section shows a table with columns for TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT TY..., STATUS, PRIORITY, DUE DATE, CREATED, and DESCRIPTION. The 'Workflow Instances' section shows a table with columns for NAME, COORDINATOR GROUP, STATE, INTEGRATION MODE, VERSION, STARTED, and COMPLETED. The first row in the 'Workflow Instances' table shows a lobster icon, which is highlighted with a red circle. The lobster icon is a small symbol used to represent a workflow instance.

WORKFLOW IMAGE – The project status within the “workflow” is shown highlighted in green.



OPEN PROJECT REPORTS – If the Workflow Image shows the project is in “Department Review” it means that city staff are actively reviewing the project. To see which staff members have completed their review tasks, open the “Department Review Status” report by clicking the “Project Reports” button in the upper right corner of the project screen.

Electronic Plan Review

P20-00321

Main Contact:

Expand current | Collapse | Test Project 1

P20-00321

- Drawings (1 Files - 0 New)
- Documents (2 Files - 0 New)

ProjectFlow Task List

Refresh

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

0 - 0 of 0 records

Workflow Instances

NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE	VERSION	STARTED	COMPLETED
P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active	Production	Integrated Version (Version 2)	10/26/2020 11:22:04 AM	

1 - 1 of 1 records

Electronic Plan Review

P20-00321

Main Contact: Expand current | Collapse | Test Project 1

Drawings (1 Files - 0 New)
Documents (2 Files - 0 New)

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report Expanded	Project	Discussion Board Report
	Current Project - Discussion Board Report	Project	Discussion Board Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist items for a workflow.
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displays the status of all reviews for a workflow.
	ProjectFlow - Discussion Board Plan Review Report	Workflow	Discussion Board Plan Review Report
	ProjectFlow - Quick Review Summary	Workflow	Displays all Quick Review comments and responses.
	ProjectFlow - Review Details Report	Workflow	Lists the review comments, checklist and changemark details for a workflow instance review cycles.
	ProjectFlow - Workflow Routing Slip	Workflow	The Workflow Routing Slip Report displays the sequential route of all tasks for the workflow.
	Current Project - All Files Report	Project	All Uploaded Files Report
	ProjectFlow - Checklist Items with Milestones	Workflow	The Checklist Report displays all checklist items for a workflow.

Page 1 of 2 (23 items)

CHECK DEPARTMENT REVIEW STATUS – The Department Review Status Report shows each reviewer’s status for each of the review cycles. Clicking on the + next to the Cycle number will open a display listing all reviewers who were assigned a task during that review cycle. If a reviewer’s status is blank, they have not completed their review task yet.

ProjectDox
Department Review Status Report

Project Name: M21-00084
Workflow Started: 03/08/2021 10:19 AM
Report Generated: 05/04/2021 05:00 PM

Cycle	Department	Reviewer	Email	Status	Reviewer Comments	Applicant Comments
1						
2						
3	Engineering Technician	Alena Beltz	Alena.Beltz@cityofmedford.org	No Review Required		
	Transportation Manager	Karl MacNair	Karl.MacNair@cityofmedford.org	Corrections Required	See comments back.	
	Utility Engineer	Roger Thom	roger.thom@cityofmedford.org			
	City Engineer	Alex Georgevich	alex.georgevitch@cityofmedford.org			