

ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW
APPLICANT'S GUIDE

APPENDIX G
PROJECTDOX INSTRUCTIONS

HOW TO UPLOAD REVISED PLANS AND DOCUMENTS

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

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
▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...
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
▽ Contains...		▽ Contains...	▽ Contains...
P20-00321	 	Test Project 1	PDox Admin


1 - 1 of 1 records

UPLOADING REVISED FILES (VERSIONING) – Revised files must be uploaded as new “Versions” of the existing files. ProjectDox will automatically “Version” the file if it has the **EXACT** same file name as the file that already exists in ProjectDox. Other than that important naming convention, uploading revised files is the same process for uploading new files. Once on the project page, click on the folder that contains the existing file that will be “versioned” over – so for the revised plan set, click on the “Drawings” folder.



Electronic Plan Review

P20-00321



Main Contact:



Expand current | Collapse |  Test Project 1

P20-00321

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


ProjectFlow Task List

 Refresh  Save Settings

	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMEN...	STATUS
	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...
 	Applicant Resubmit task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup	Accepted

1 - 1 of 1 records

Workflow Instances

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

1 - 1 of 1 records

Once in the folder, click the “Upload Files” button to open the file upload window (make sure that pop-ups are not blocked).

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 - SS882.pdf
10/26/2020 2:46:54 PM, 8.8 MB
Alena Beltz

ProjectFlow Task List

Refresh Save Settings

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMEN...	STATUS
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
Applicant Resubmit Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup	Accepted

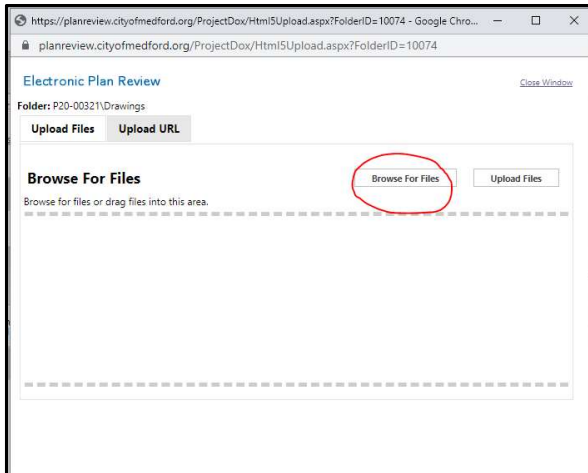
1 - 1 of 1 records

Workflow Instances

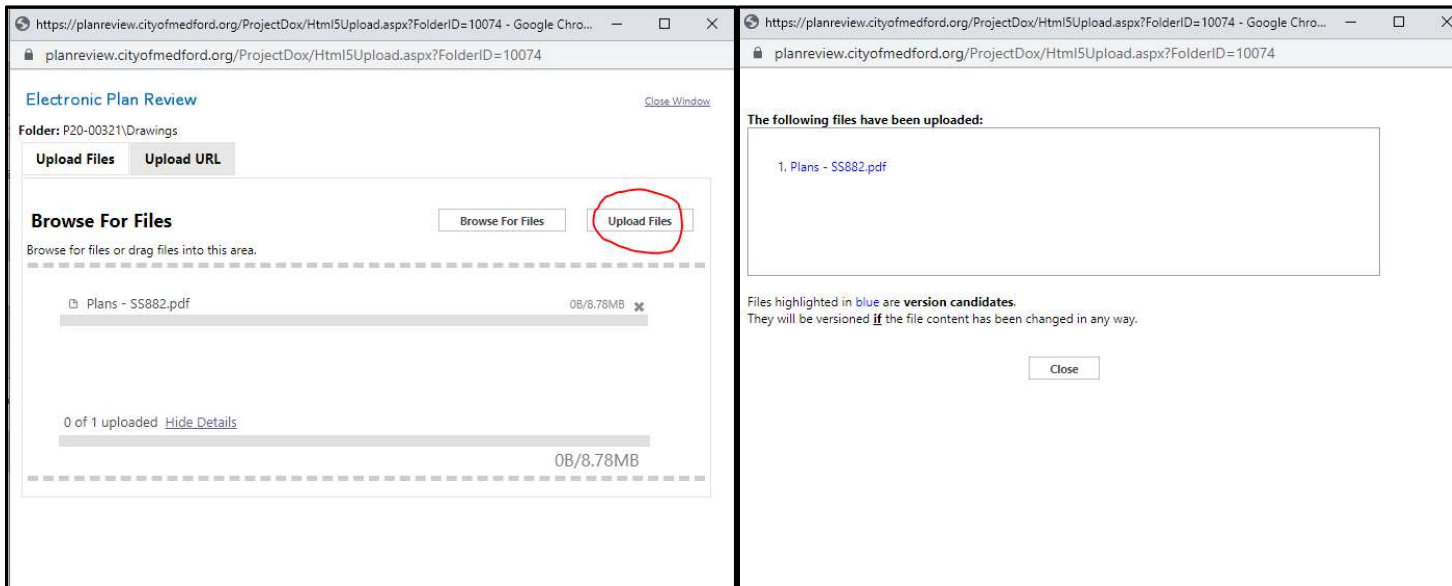
NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE	VERSION
P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Review Coordinator	Active	Production	Integrated Version (V

1 - 1 of 1 records

Browse for files



Once the "Upload Files" button is clicked, another window will open listing the uploaded files and the "Versioned" files will be shown in blue. If revised files did not "Version" correctly, the Applicant should contact engplanreview@cityofmedford.org to remove the file that didn't "Version" and to get help with the versioning process.



CHECK “VERSIONED” FILES – Once revised files are uploaded as new “Versions”, the file will be marked by a red “V2” (or “V3”, etc) and when clicking on the file, the newest version will open automatically. If the revised file did not version correctly and is instead listed as a separate file, then the Applicant should contact engplanreview@cityofmedford.org to remove the file that didn’t “Version” and get help with the versioning process.

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 - SS802.pdf **V2**
 10/27/2020 9:02:46 AM, 8.6 MB
 Alena Beltz, testing

ProjectFlow Task List

Refresh Save Settings

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMEN...	STATUS
Applicant Resubmit Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup	Accepted

1 - 1 of 1 records

Workflow Instances

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

1 - 1 of 1 records

NEXT STEPS:

Go to Appendix E for **How to Review and Respond To Comments**.

After all comments have been responded to, go to Appendix H for **How to Complete the Applicant Resubmit Task**.