



ProjectDox Applicant Update

ProjectDox Information and Training: July 8, 2021

The ProjectDox User Update is your one-stop shop for tips, tricks, reminders, and updates on ProjectDox 9.2.

Topics in this update:

- **Best Practice:** Uploading from the Cloud
- **Informational:** Export and Import Comments with Excel
- **Training:** Training Material

[Check out our previous Weekly Updates!](#)



UPLOADING FROM THE CLOUD

When uploading files to ProjectDox, best practice is to upload files directly from your computer rather than a cloud-based service, such as One Drive and Google Drive. Best practice is to download the files from the cloud drive and upload from your computer's drive. Uploading from a cloud-based service may result in upload file corruption. Most of the time, this happens when multiple files are being uploaded at once. You **will not** receive an error message that the file is corrupt; it will only be discovered when the reviewer opens your file.



EXPORT AND IMPORT COMMENTS WITH EXCEL

Do you prefer writing and responding to markups and comments in Excel? ProjectDox makes this option easy with the choice to export and import the Review Comments List from Excel.

If this option is not available to you, please [email the ePlans team](#) to enable this feature.

The screenshot shows the 'APPLICANT RESUBMIT' interface. At the top, there are tabs for 'Task Information', 'Workflow Report', and 'Group Management'. Below this is a 'Task Information' section with fields for Project Name, Project Description, Coordinator, Review Cycle, Workflow, Current User Login, and Task Due Date. A 'Task Instructions' section follows, with a 'Learn how' link and a note about clicking the 'Resubmit Complete' button. The main section is 'STEP 1 of 4: Respond to all comments, as requested'. Under 'Resolve Review Comments', there are statistics for Unresolved Comments (1), Info Only Comments (0), and Files with Markups (1). A 'Plan Review' section contains a 'Review Comments' button and a red-bordered box containing 'Export to Excel' and 'Import Excel Responses' buttons. A 'Learn how' link is also present.



TRAINING MATERIAL

Want to learn more about ProjectDox 9.2, check out the ProjectDox 9.2 [videos](#) and [user guide](#).



QUESTIONS?

Please email TClePlans@portlandoregon.gov