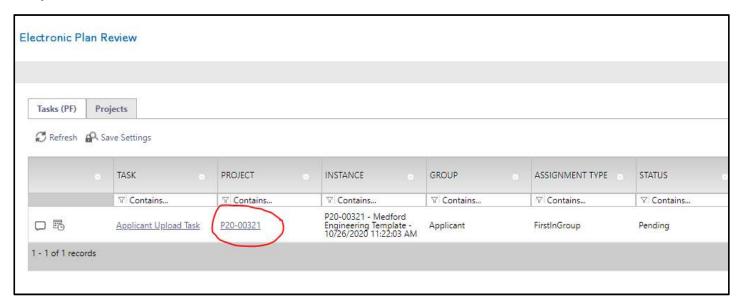
## ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW APPLICANT'S GUIDE

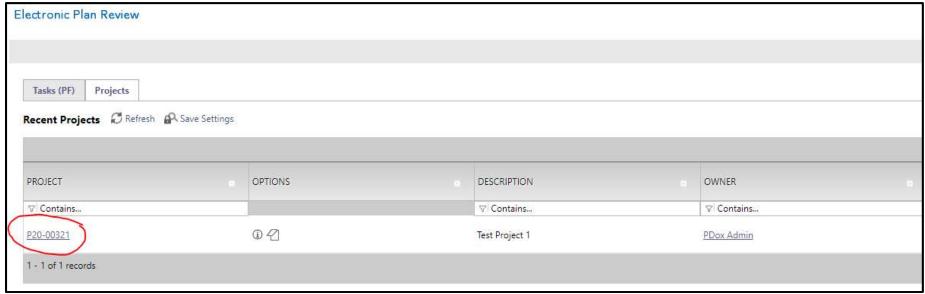
## APPENDIX F PROJECTDOX INSTRUCTIONS

## **HOW TO REVIEW UNRESOLVED CHANGEMARKS**

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

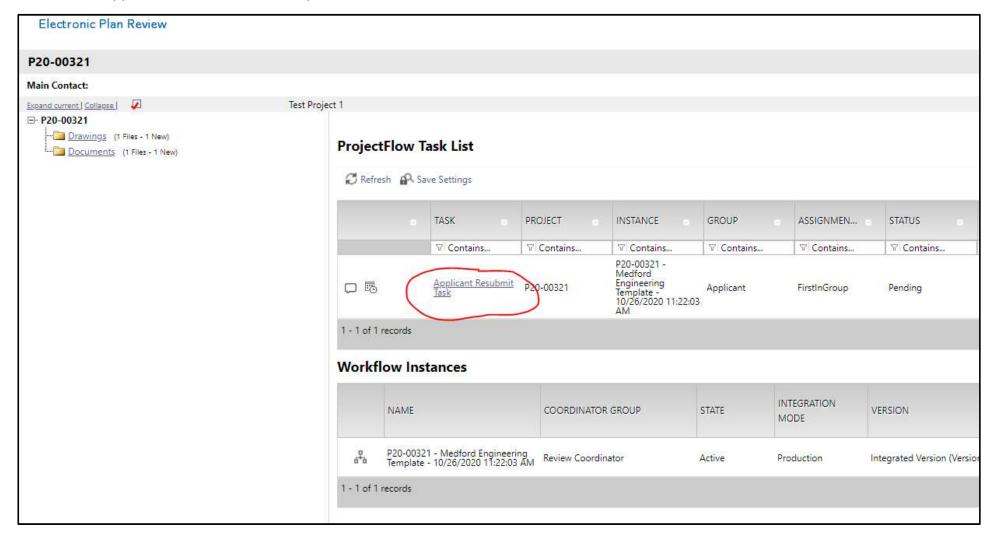
**NAVIGATE TO THE PROJECT** – To open the project screen, click on the project number in the "PROJECT" column on the "Tasks (PF)" tab or the "Projects" tab.



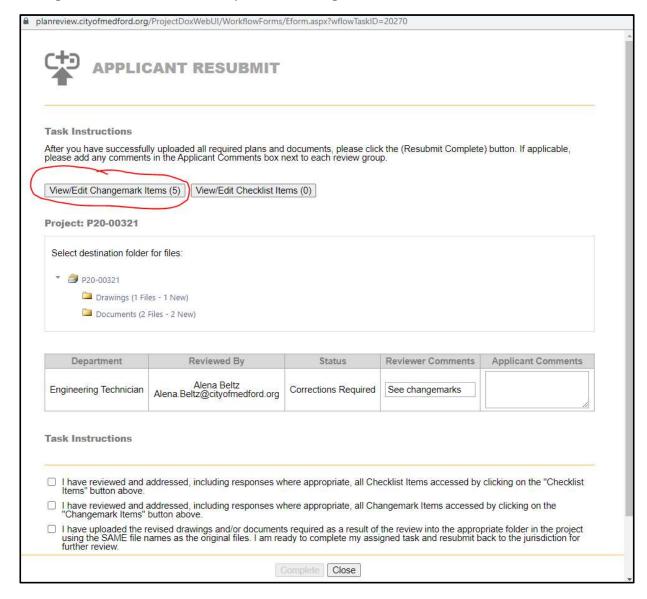


<u>UNRESOLVED CHANGEMARKS</u> – During second and third reviews, city staff will "resolve" all "changemarks" that have been addressed. Applicants will then be asked to address all "changemarks" that are still identified as "unresolved".

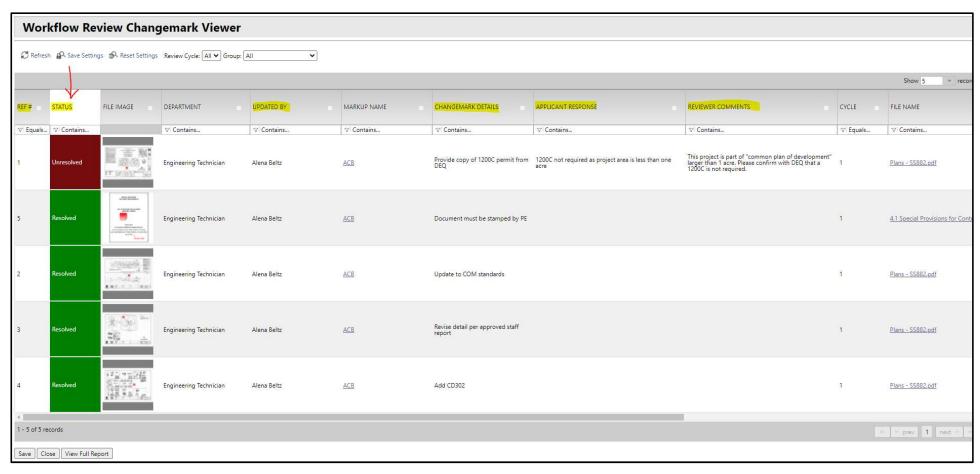
<u>FIND CHANGEMARKS - OPEN "APPLICANT RESUBMIT TASK" E-FORM</u> –To find "Changemarks", make sure that pop-ups are enabled and then click on the "Applicant Resubmit Task" to open the E-Form.



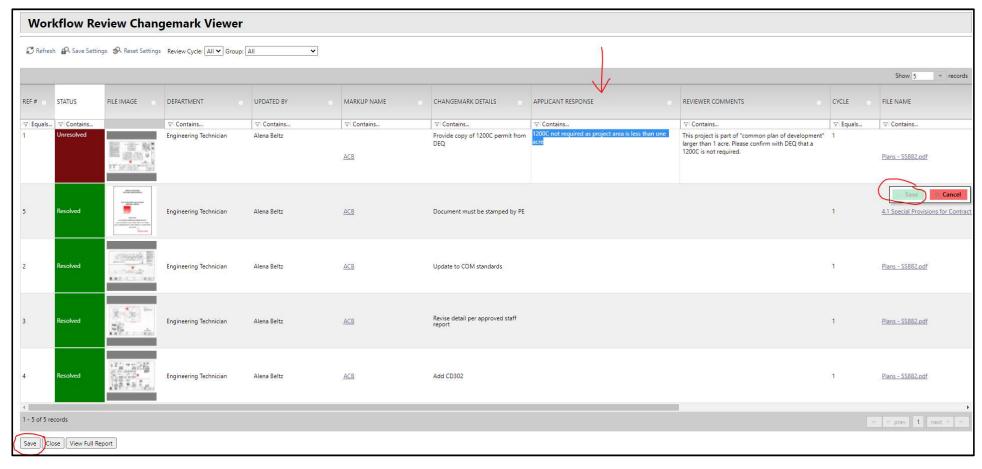
<u>FIND CHANGEMARKS - OPEN THE "CHANGEMARK VIEWER"</u> – Once the Applicant Resubmit E-Form window is open, click the "View/Edit Changemark Items" button to open the "Changemark Viewer".



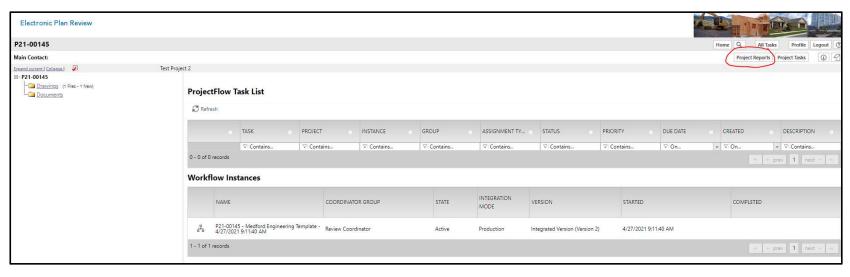
<u>OPEN THE "CHANGEMARK VIEWER" – SORT AND FORMAT COLUMNS</u> – The "Changemark Viewer" provides a list of all changemarks that reviewers have made on each plan or document. The default view may not show all needed columns, but columns can be dragged into view. To review unresolved changemarks, it is suggested that the following columns be dragged to the left: REF #, STATUS, UPDATED BY, MARKUP NAME, CHANGEMARK DETAILS, REVIEWER COMMENTS, APPLICANT COMMENTS. The "STATUS" column indicates if the changemark is resolved or unresolved. Clicking the top of the STATUS column a few times will sort the column and bring all unresolved changemarks to the top of the list.

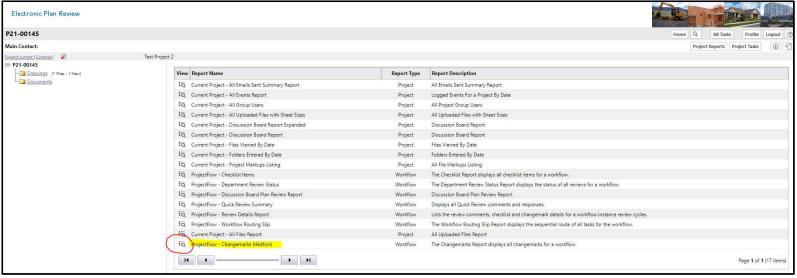


REVIEW UNRESOLVED CHANGEMARKS AND PROVIDE A RESPONSE – During the second or third review cycle, city staff determine if a changemark can be resolved. If not, it is left unresolved indicating that it still needs to be addressed. At that time, city staff may make additional comments in the "REVIEWER COMMENTS" field. The original comment from when the changemark was created (usually during the first review cycle) is located in the "CHANGEMARK DETAILS" field. To view the changemark on the plan or document, click the link in the "MARKUP NAME" field – this will open a new window with the plan or document where the changemark is located. Once the Applicant has reviewed each unresolved changemark, they need to provide a comment or note in the "APPLICANT RESPONSE" fields. To do this, click in the each field, type the response, then click the green "save" button on the right-hand side of the screen. Then BEFORE CLOSING THE CHANGEMARK VIEWER WINDOW, click the "Save" button at the bottom of the window.

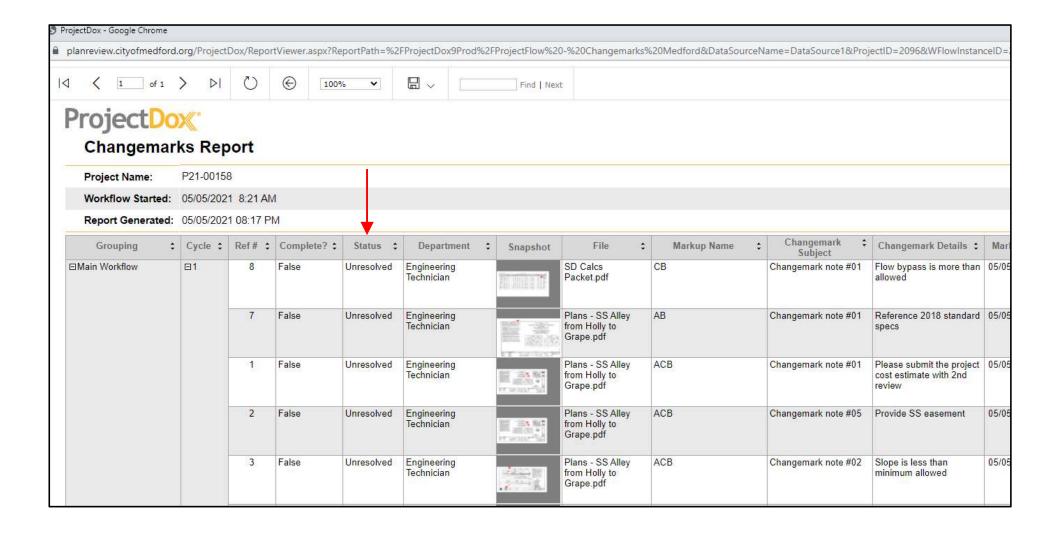


<u>CHANGEMARK REPORT</u> – If the "Applicant Resubmit Task" is not available to be clicked on, unresolved changemarks can still be viewed by opening the changemarks report. To get to the reports, from the Project screen, click on the "Project Reports" button on the top right side of the screen. Then find the report named "ProjectFlow – Changemark Medford" and click on the magnifying glass symbol next to the report name.





<u>SORT CHANGEMARK REPORT FOR UNRESOLVED CHANGEMARKS</u> – Unresolved changemarks can be found by clicking the top of the "Status" column to sort the "Unresolved" changemarks to the top.



## **NEXT STEPS:**

Go to Appendix G for **How to Upload Revised Plans and Documents**Go to Appendix H for **How to Complete the Applicant Resubmit Task**