

**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.

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

UNRESOLVED CHANGEMARKS – 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”.

FIND CHANGEMARKS - OPEN “APPLICANT RESUBMIT TASK” E-FORM –To find “Changemarks”, make sure that pop-ups are enabled and then click on the “Applicant Resubmit 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)

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	Pending

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

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

planreview.cityofmedford.org/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wflowTaskID=20270

**APPLICANT RESUBMIT**

Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button. If applicable, please add any comments in the Applicant Comments box next to each review group.

[View/Edit Changemark Items \(5\)](#) [View/Edit Checklist Items \(0\)](#)

Project: P20-00321

Select destination folder for files:

▼ P20-00321

Drawings (1 Files - 1 New)

Documents (2 Files - 2 New)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Engineering Technician	Alena Beltz Alena.Beltz@cityofmedford.org	Corrections Required	See changemarks	

Task Instructions

- ☐ I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.
- ☐ I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.
- ☐ I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

[Complete](#) [Close](#)

OPEN THE “CHANGEMARK VIEWER” – SORT AND FORMAT COLUMNS – 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.

Workflow Review Changemark Viewer										
Refresh Save Settings Reset Settings Review Cycle: All Group: All										
										Show 5 records
REF #	STATUS	FILE IMAGE	DEPARTMENT	UPDATED BY	MARKUP NAME	CHANGEMARK DETAILS	APPLICANT RESPONSE	REVIEWER COMMENTS	CYCLE	FILE NAME
▽ Equals...	▽ Contains...		▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Equals...	▽ Contains...
1	Unresolved		Engineering Technician	Alena Beltz	ACB	Provide copy of 1200C permit from DEQ	1200C not required as project area is less than one acre	This project is part of "common plan of development" larger than 1 acre. Please confirm with DEQ that a 1200C is not required.	1	Plans - SS882.pdf
5	Resolved		Engineering Technician	Alena Beltz	ACB	Document must be stamped by PE			1	4.1 Special Provisions for Cont
2	Resolved		Engineering Technician	Alena Beltz	ACB	Update to COM standards			1	Plans - SS882.pdf
3	Resolved		Engineering Technician	Alena Beltz	ACB	Revise detail per approved staff report			1	Plans - SS882.pdf
4	Resolved		Engineering Technician	Alena Beltz	ACB	Add CD302			1	Plans - SS882.pdf
1 - 5 of 5 records										
Save Close View Full Report										

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.

Refresh
Save Settings
Reset Settings
Review Cycle: All
Group: All

REF #

STATUS

FILE IMAGE

DEPARTMENT

UPDATED BY

MARKUP NAME






CHANGEMARK DETAILS

APPLICANT RESPONSE

REVIEWER COMMENTS

CYCLE

FILE NAME

1	Unresolved		Engineering Technician	Alena Beltz	ACB	Provide copy of 1200C permit from DEQ	1200C not required as project area is less than one acre	This project is part of "common plan of development" larger than 1 acre. Please confirm with DEQ that a 1200C is not required.	1	Plans - SS882.pdf
5	Resolved		Engineering Technician	Alena Beltz	ACB	Document must be stamped by PE			1	4.1 Special Provisions for Contract
2	Resolved		Engineering Technician	Alena Beltz	ACB	Update to COM standards			1	Plans - SS882.pdf
3	Resolved		Engineering Technician	Alena Beltz	ACB	Revise detail per approved staff report			1	Plans - SS882.pdf
4	Resolved		Engineering Technician	Alena Beltz	ACB	Add CD302			1	Plans - SS882.pdf

1 - 5 of 5 records

prev
1
next

Save
Close
View Full Report

CHANGEMARK REPORT – 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.

The screenshot shows the 'Electronic Plan Review' interface for project P21-00145. The top navigation bar includes 'Home', 'All Tasks', 'Profile', and 'Logout'. A 'Project Reports' button is circled in red. The main content area is titled 'ProjectFlow Task List' and includes a 'Refresh' button. Below this is a table with columns: TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT TY..., STATUS, PRIORITY, DUE DATE, CREATED, and DESCRIPTION. The table shows 0 of 0 records. Below the table is a section titled 'Workflow Instances' with a table showing 1 of 1 records. The workflow instance is for 'P21-00145 - Medford Engineering Template - 4/27/2021 9:11:40 AM' with a 'Review Coordinator' group, 'Active' state, 'Production' integration mode, 'Integrated Version (Version 2)' version, and a start date of '4/27/2021 9:11:40 AM'.

The screenshot shows the 'Electronic Plan Review' interface for project P21-00145. The top navigation bar includes 'Home', 'All Tasks', 'Profile', and 'Logout'. A 'Project Reports' button is circled in red. The main content area is titled 'ProjectFlow - Changemarks Medford' and includes a 'Refresh' button. Below this is a table with columns: View, Report Name, Report Type, and Report Description. The table shows 17 items. The report 'ProjectFlow - Changemarks Medford' is highlighted with a red circle. The report description is 'The Changemarks Report displays all changemarks for a workflow.' The bottom of the page shows 'Page 1 of 1 (17 items)'.

SORT CHANGEMARK REPORT FOR UNRESOLVED CHANGEMARKS – Unresolved changemarks can be found by clicking the top of the “Status” column to sort the “Unresolved” changemarks to the top.

ProjectDox - Google Chrome

planreview.cityofmedford.org/ProjectDox/ReportViewer.aspx?ReportPath=%2FProjectDox9Prod%2FProjectFlow%20-%20Changemarks%20Medford&DataSourceName=DataSource1&ProjectID=2096&WFlowInstanceID=

1 of 1 100% Find | Next






ProjectDox[®]

Changemarks Report

Project Name: P21-00158

Workflow Started: 05/05/2021 8:21 AM

Report Generated: 05/05/2021 08:17 PM

Grouping	Cycle	Ref #	Complete?	Status	Department	Snapshot	File	Markup Name	Changemark Subject	Changemark Details	Mark
Main Workflow	1	8	False	Unresolved	Engineering Technician		SD Calcs Packet.pdf	CB	Changemark note #01	Flow bypass is more than allowed	05/05
		7	False	Unresolved	Engineering Technician		Plans - SS Alley from Holly to Grape.pdf	AB	Changemark note #01	Reference 2018 standard specs	05/05
		1	False	Unresolved	Engineering Technician		Plans - SS Alley from Holly to Grape.pdf	ACB	Changemark note #01	Please submit the project cost estimate with 2nd review	05/05
		2	False	Unresolved	Engineering Technician		Plans - SS Alley from Holly to Grape.pdf	ACB	Changemark note #05	Provide SS easement	05/05
		3	False	Unresolved	Engineering Technician		Plans - SS Alley from Holly to Grape.pdf	ACB	Changemark note #02	Slope is less than minimum allowed	05/05

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**