

Covered in this Document:

- Using the Discussion Board
- Replying to Checklist Items
- Viewing and Responding to Changemarks

Using the Discussion Board


The Discussion Board feature is used within the ProjectDox platform as a central communication tool for all parties involved in the life cycle of a project.

For example, questions about payments, contractors/inspectors or any other discussion regarding the project can be discussed in a place accessible by all involved in the project.

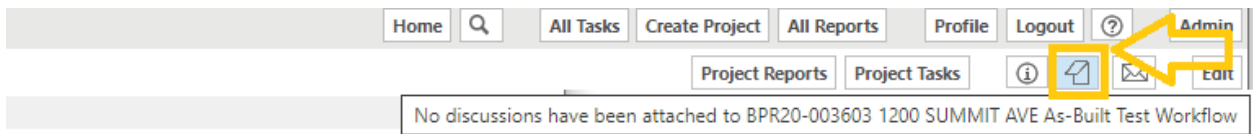
It allows messages to be written, stored, and emailed between members of the project, so the history of correspondence about a file or project is easily accessible within ProjectDox.

Starting a Discussion

To create a topic for discussion, follow the steps below.

 You must use **Internet Explorer** as your web browser for full ProjectDox Functionality.

1. Click the **Discussion Board** icon for the desired project.
 - a. The icon will be yellow if discussions already exist within the project.



ProjectFlow Task List

Start Workflow Refresh Save Settings Quick Filter: Prescreen Assign Review

Show all tasks for all users

TASK	PROJECT	INSTAN...	GROUP	ASSIGN...	STATUS	PRIORITY
Assign to Upload	BPR20-003603 1200 SUMMIT AVE As-Built	1200 Summit Ave Building ...	Review Coordinator	Individual	Accepted	Medium

2. Click the **Add Topic** button

<https://planreview.stpaul.gov/ProjectDoxWebUI/Topic/ListTopics?ProjectID=396> - Internet Explorer

Discussion Topics

Project: SPR20-034884 375 JACKSON ST Site Plan Production Update Test

Add Topic

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
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Communication Tools in ProjectDox

3. Enter a descriptive title into the *Topic* field.
4. Select a category which fits the topic you are creating.

https://planreview.stpaul.gov/ProjectDoxWebUI/Topic/ListTopics?ProjectID=308 - Internet Explorer

Discussion Topics

Project: BPR20-020638 375 JACKSON ST

Topic:

Category:

Comment:

Save Save and Prepare Email Manage Participants Cancel

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

5. Click **Save**.



Topics cannot be edited or deleted once they have been posted to the Discussion Board.

Creating a Comment in a Topic

1. Once the *Discussion Topics* dialog is open, click **Add Comment**.

Discussion Topics

Project: BPR20-020638 375 JACKSON ST

Add Topic

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS
+	Building Plan Review Question	General	Mary Matthews	Active

1 - 1 of 1 records

2. Enter comments in the **Add Comment** dialog box.

The screenshot shows a discussion board interface. At the top right, there is a 'Show 5 records' dropdown. Below this is a table with columns: OPTIONS, DISCUSSION TOPIC, CATEGORY, LEADER, DISCUSSION STATUS, and DATE/TIME. The table contains one row with the following data: 'Close Topic' (under OPTIONS), 'Building Plan Review Question' (under DISCUSSION TOPIC), 'General' (under CATEGORY), 'Mary Matthews' (under LEADER), 'Active' (under DISCUSSION STATUS), and '7/21/2020 11:25:17 AM' (under DATE/TIME). Below the table are buttons for 'Manage Participants', 'Add Comment', and 'Save'. A comment box is open, containing the text: 'Where can I find a list of documents that are required for my plan review? Thank you!'. Below the comment box are buttons for 'Save' and 'Save and Prepare Email'.

3. Click **Save**.



Comments cannot be edited or deleted once they have been posted to the Discussion Board. Comments cannot be added to discussions that are closed.

Excluding a User or Group from a Discussion

By default all users see the discussion board. Discussion administrator can exclude users or groups. To exclude a participant or group to a discussion topic:

1. Click the **Manage Participants** button. The Manage Participants dialog box will display

The screenshot shows the 'Manage Participants' dialog box. It has a table with columns: OPTIONS, DISCUSSION TOPIC, CATEGORY, LEADER, DISCUSSION STATUS, and DATE/TIME. The table contains one row with the following data: 'Close Topic' (under OPTIONS), 'Building Plan Review Question' (under DISCUSSION TOPIC), 'General' (under CATEGORY), 'Mary Matthews' (under LEADER), 'Active' (under DISCUSSION STATUS), and '7/21/2020 11:25:17 AM' (under DATE/TIME). Below the table are buttons for 'Manage Participants', 'Add Comment', and 'Save'. The 'Manage Participants' button is highlighted with a yellow box.

2. Select a group to exclude or click + to exclude an individual of a group.

The screenshot shows the 'Manage Participants' dialog box. It has a table with columns: GROUP. The table contains two rows with the following data: '+ DSI - Building Plan Review' and '+ DSI - Electrical'. Below the table is a pagination bar showing '6 - 10 of 36 records' and navigation buttons: '< prev 1 2 3 4 5 next >'. Below the pagination bar are buttons for 'Save' and 'Close'. The 'Save' button is highlighted with a yellow box.

3. Click **Save**.



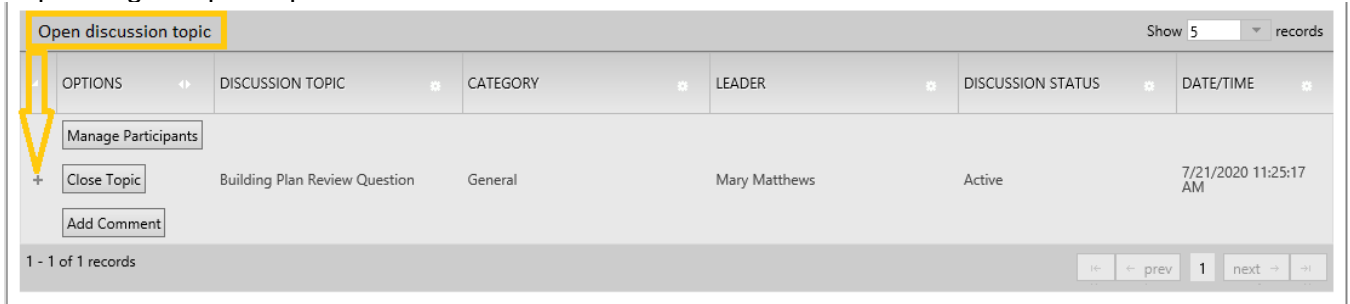
The owners are the only individuals allowed to exclude participants from their topics.

Communication Tools in ProjectDox

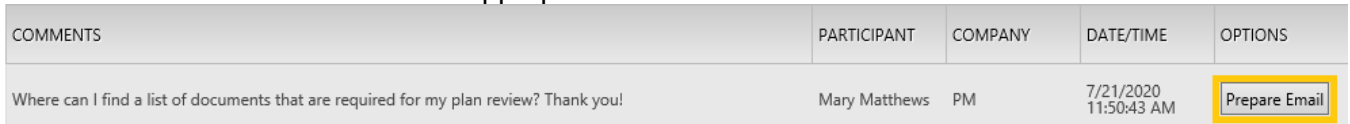
Preparing an Email

Once a comment is created, an email notification can be sent to individuals or groups by:

1. Expanding an open topic +

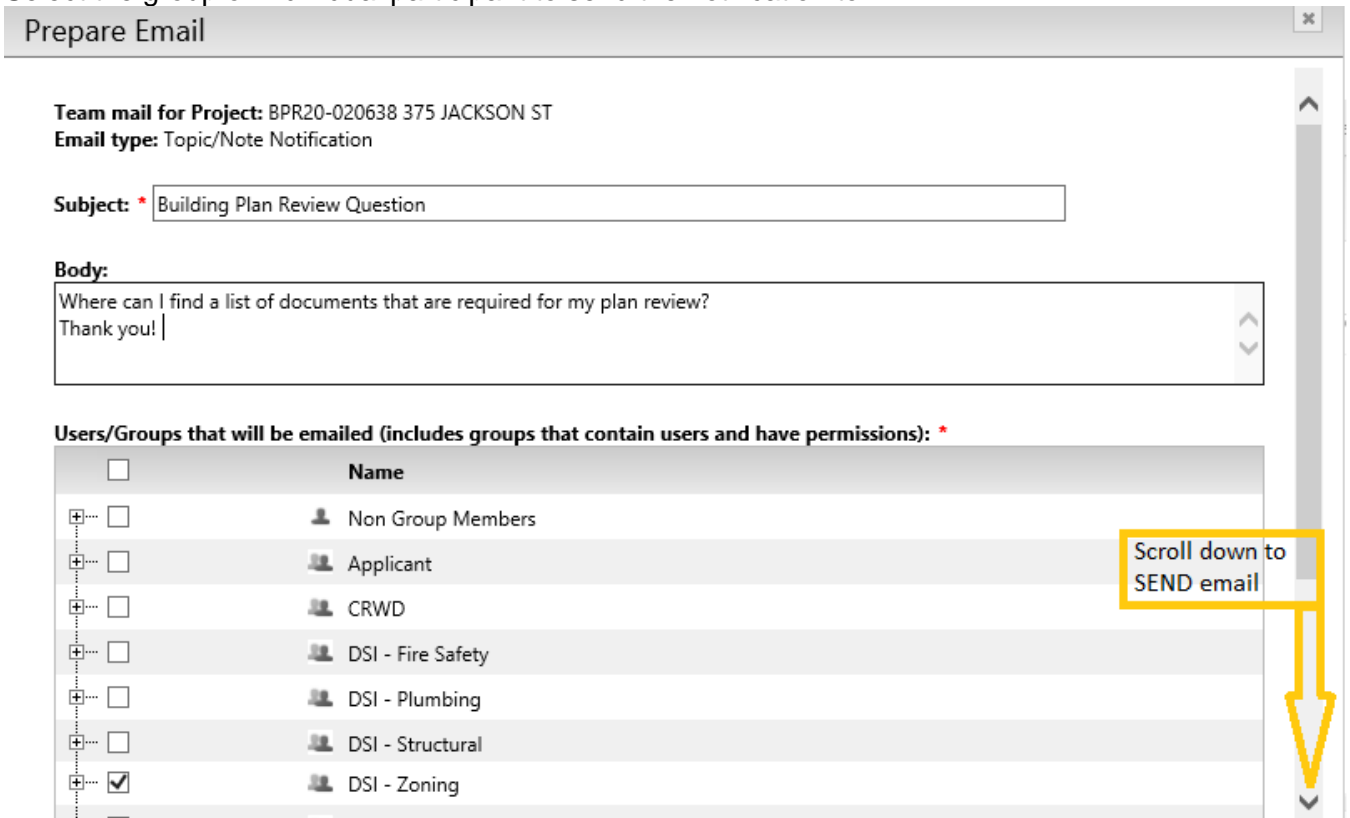


2. Click PREPARE EMAIL next to the appropriate comment.

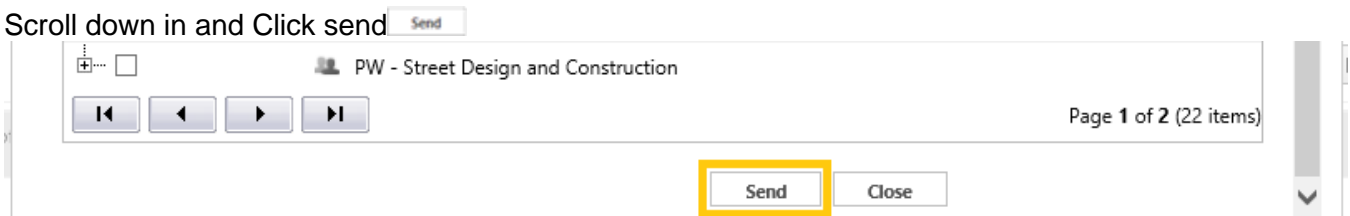


The *Prepare Email* dialog box will display.

3. Select the group or individual participant to send the notification to.



4. Scroll down in and Click send



5. Recipients will receive an email with your discussion board message

Replying to Checklist comments

If corrections are required following the review of your uploaded documents and drawings, you will receive an email notification from The City requesting edits.

Attention:

You have been assigned to resubmit information on Project:
SPR19-006348 375 JACKSON ST DSI Office Project
 Please [Login to ProjectDox](#) to begin your task.

Project:	SPR19-006348 375 JACKSON ST DSI Office Project
Task:	Prescreen Corrections
Project Access Login to ProjectDox	

1. Log into Electronic Plan Review by clicking on the link in the email
2. Click on the Tasks Tab
3. Click on the Applicant Resubmit Task and accept

SPR20-003377 375 JACKSON ST

Home | Search | All Tasks | Create Project | All Reports | Profile | Logout

Main Contact: Project Reports | Project Tasks

Expand current | Collapse

SPR20-003377 375 JACKSON ST

- Drawings
- Documents
- Approved Plan Set
- Reviewer Attachments
- Internal Only
- As Builts

ProjectFlow Task List

Refresh | Save Settings | Quick Filter: Prescreen | Assign | Review

Show all tasks for all users

TASK	PROJECT	INSTANCE	GROUP	ASSIGN...	STATUS	PRIORITY
Applicant Resubmit Task	SPR20-003377 375 JACKSON ST TEST	SPR20-003377 375 JACKSON ST TEST - Site Plan Review -	Applicant	FirstInGroup	Accepted	Medium
Group Management	SPR20-003377 375 JACKSON ST TEST	SPR20-003377 375 JACKSON ST TEST - Site Plan Review -	Applicant	FirstInGroup	Pending	



If you do not see your Task, try clicking either the Project Tasks button or Refresh.

4. The Applicant Resubmit eForm will display

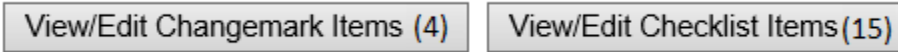
Task Instructions

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

[View/Edit Changemark Items \(2\)](#) | [View/Edit Checklist Items \(4\)](#)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
DSI - Board of Zoning Appeals	Mary Gleich Mary.Gleich@ci.stpaul.mn.us	Corrections Required	Please review changemarks and not met checklist items	

5. Read any Comments that may be in the Discussion Comments section
6. Click on the View/Edit Checklist Items button to view all reviewer checklist items



7. Scroll to the right and click in the box below the Applicant Response column next to the comment to address and respond to the checklist request
 - o Checklist items can have three statuses:
 - Met/Note: Confirmation of acceptance or information for your reference
 - Not Met: An item that must be changed/addressed BEFORE plans are approved

planreviewtest.stpaul.gov/ProjectDoxWebUI/User/WorkflowReview/WorkflowReviewChecklistInstancesViewer?groupID=21946&wf

Workflow Review Checklist Item Viewer

Selected Checklist Items for All Review Cycles

Review Cycle: All Save Settings Reset Settings

REF #	STATUS	PERMIT TY...	DEPARTMENT	COMMENT TEXT	APPLICANT RESPONSE
1	Not Met	Site Plan	Review Coordinator	Please submit an Erosion Control Plan including measures such as silt fences, inlet protection, rock construction entrance and street cleaning, Storm water pollution prevention plan	Sorry we missed that item. It has been uploaded.

1 - 1 of 1 records

Save Cancel

Stop editing and update

8. Click Save after typing each response
 - o When all responses have been added, click on Save at the bottom of the task window
 - o Select Close
9. Upload any new or corrected files

Viewing and Responding to Changemarks

Reviewers may also add Changemarks directly on your drawings or documents. The Changemark viewer brings all comments on all plans together in one table view

The Workflow Review Changemark Viewer displays **All** cycles by default

1. Select individual Review Cycles by using the dropdown menu (A)
2. To view a plan, as submitted without changemarks, click on the link (B) in the File Name column
3. To view a plan with changemarks, click on the link (C) in the Markup Name column

Workflow Review Changemark Viewer

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

REF #	STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED BY	FILE NAME	MARKUP NAME
2	Unresolved		DSI - Board of Zoning Appeals	2	Mary Gleich	C0-0 - Survey - 30 Baker St E.pdf	MGM
1	Unresolved		DSI - Board of Zoning Appeals	2	Mary Gleich	A001 - Architectural Site Plan - Humboldt HS Addition.pdf	MGM

1 - 2 of 2 records

Save Close View Full Report

4. Review the changemarks by clicking on the View/Edit Changemark Items button.
 - Click on the “Markup Name” to open the Drawings with the Changemarks details.

- Survey - 30 Baker St E.pdf V1

The screenshot shows a drawing viewer interface. On the left is a site plan drawing with a pink rectangular highlight on a specific area. On the right is a comment panel titled "Exterior Fire Resistance". The comment is from Mary Gleich, dated 11/22/19, 1:46 PM. The text of the comment reads: "Provide the required fire resistance rating on exterior walls based on the fire separation distance. (2015 MSBC Table 601)". Below the comment, it shows "0 replies".

Communication Tools in ProjectDox

5. Be sure to add an Applicant Response next to each Changemark. This will let the reviewers know that it has been addressed and where to find the correction.



Click the **Save** button after typing your response and again at the bottom of the page before closing





6. Once the drawings have been modified/corrected, upload them into the Electronic Plan Review system.

Note: Corrected files must have the **SAME NAMES** as the originally submitted files.

- Check the boxes at the bottom of the screen

Project: SPR19-006348 375 JACKSON ST DSI Office Project

Select destination folder for files:

- ▼  SPR19-006348 375 JACKSON ST DSI Office Project
 -  Drawings (24 Files - 24 New)
 -  Documents
 -  Reviewer Attachments

- 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.

- Then click the Resubmit Complete button

Note: The Resubmit Complete button will not display until the checkboxes have been checked.

Once the Review Complete button has been clicked, the Project has been sent back to DSI to continue the Plan Review process, and you will no longer have access to add additional files