

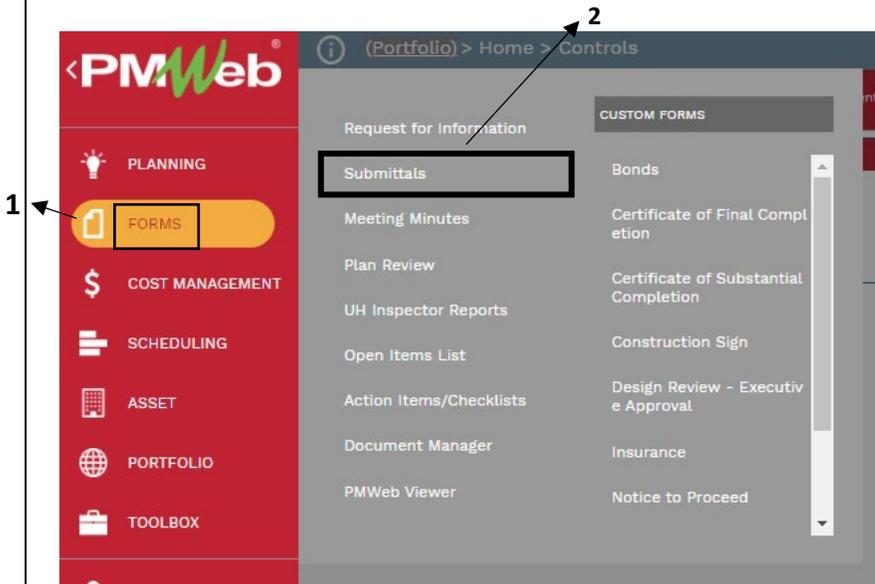
Reviewing Submittals

Overview: Submittals submitted by vendors require review prior response. Specification section requiring UH review will automatically be routed to the appropriate UH reviewer for comment.

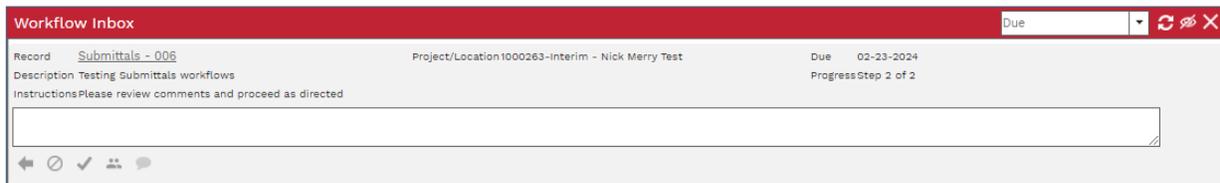
Reference: N/A

1- Click on **FORMS**

2- Click on **Submittals**



3- OR, click on the link provided in the PM Web notification e-mail.



4- OR, select from the Workflow Inbox in your PM Web home screen

Design Team Reviewer

- 5- Select the ATTACHMENTS tab and review the submittal documents.
- 6- Download submittal cover sheet.
- 7- If submittal requires UH review, add draft comments to submittal cover sheet and attach in the ATTACHMENTS tab.
- 8- Under the WORKFLOW tab, select the SUBMIT button.
- 9- Select REVIEW COMPLETED from the ACTIONS list, then click on **SAVE**.
- 10- Proceed to Step 26 or 32.
- 11- If submittal does **NOT** require UH review, add final comments to submittal cover sheet and attach in the ATTACHMENTS tab.
- 12- Under the WORKFLOW tab, select the SUBMIT button.
- 13- Select the appropriate action from the ACTION list (RESUBMIT, RETURN, FINAL APPROVE), then click on **SAVE**.

UH Reviewer

- 14- Review the submittal and draft Design Team comments.
- 15- UHS Reviewers are not required to submit comments. If choosing to comment, select the '**Details**' tab at the bottom.
- 16- Click on the Layouts button to verify the 'Submittals' layout is selected.
- 17- Click on the '**+Add**' button.
- 18- In the 'Sub #' column, enter the submittal number or set number if applicable.
- 19- In the 'UH Reviewer' column, enter your name
- 20- Enter comments in the 'UHS Reviewer Comments' column.
- 21- Click the  **Save** icon in the bottom header bar.
- 22- To add an attachment to the comment line, under the ATTACHMENTS column, click on the (0).
- 23- In the pop up window, drag and drop attachments to the green 'DROP FILES HERE...' box. Then click the 'Save and Exit' button.
- 24- To add additional comments, repeat the above steps.
- 25- Optional, when review is complete, select the 'WORKFLOW' tab at the bottom.
- 26- Select the button next to 'COMPLETE REVIEW' in the 'ACTIONS' box.
- 27- Click the **Save** button.

Additional TEAM Input

- 28- To forward the submittal for input from additional team members with PM Web accounts, under the **WORKFLOW** tab, select the **TEAM INPUT** button

ACTIONS

APPROVE Please review comments and proceed as directed

RETURN

REJECT

WITHDRAW

FINAL APPROVE

DELEGATE

COMMENT

 SAVE

 **TEAM INPUT** (0)

TEAM INPUT

30   

Step

Approver

Request Team Input **27** 

Can Edit Record

Can Edit Notes **28**

Can Edit Attachments

Message **29**

- 29-** In the popup window, select team members to receive edit rights for the record. You can start typing a name to refine the list.
- 30-** Check boxes for edit rights to be given.
- 31-** Enter any comments in the **Message** box
- 32-** Click on the **Save & Exit** button.
- 33- IMPORTANT**, you MUST then click on the **SAVE** button under ACTIONS for the TEAM INPUT to be sent.

Design Team Reviewer

- 34-** Select the 'MAIN' tab at the top.
- 35-** Review any comments provided by UH Reviewers
- 36-** Select all rows to review and click on the **Edit** button in the bottom header bar.
- 37-** In the 'Design Team Response' column, provide comments.
- 38-** In the 'Action Taken' column, select the appropriate action taken.
- 39-** Click the  Update Records icon in the bottom header bar.
- 40-** When all UHS Reviewer comments have been reviewed, update comments on the submittal set cover sheet and include as an attachment labeled as 'Final Design Team Comments'.
- 41-** Select the 'Workflow' tab at the bottom.
- 42-** Select the appropriate action from the ACTION list (RESUBMIT, RETURN, FINAL APPROVE), then click on **SAVE**.
- 43-** Process complete.