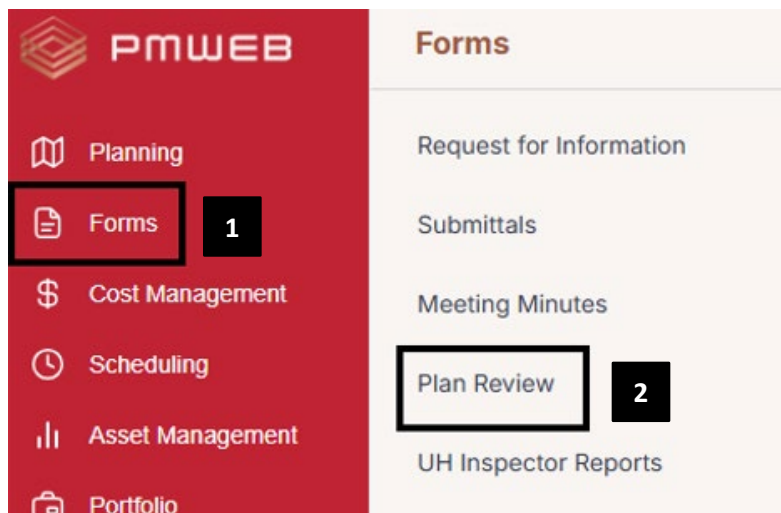


Initiating Design Review

Overview: Design firms are responsible for submitting project plans and specifications in PM Web for UHS review and comment. The initial PM Web record will be locked when the time period for entry of comments is complete. The design firm opens a second record to track response and resolution to comments.

Reference: UHS Design Guidelines Section 3.0: Project Reviews

1. Click on **Forms**.



2. Select **Plan Review**.
3. Click on the **New Record** button.

Plan Review Manager
Manage, edit, and view your Plan Review

Recently Viewed ▾

All Plan Review

Group by: Project Name ▾ Layout: Drawing Lists - Standard ▾

New Record In

Record #	Project #	Description	Status	Category	Created By
Project Name: 545 SERC HVAC and Roof Project					

Header Fields

Project*	Set #*	Description	Distribution List	Deliverable*
PMWeb Pro... PMWeb Pro... ▾	2			2.1 - 90% Sche... Design Com... ▾
Status	Revision			
Approved ▾	0			

4. **Project field** – Select your project from the drop-down menu. (You can also start typing the name of your project in the field and it will come up).
5. **Set # field** – Defaults to the next sequential number. Optional to edit.
6. **Description field** – Provide a brief description as this acts as the primary label for the record.
7. **Distribution List field** – Select **Capital Project** to utilize full routing. For non-capital projects, coordinate with the Project Manager for use of a different distribution list if desired.
8. **Deliverable field** – Select the appropriate deliverable from the drop-down menu. Only use the **X.0** deliverables for routing design reviews
9. **Status field** – Reflects current status.
10. **Revision field** – Optional field.
11. Click on the **Save** button in the header.

Main Notes **Attachments** 12 tions

No attachments found

Select files...

13

Drop files here to upload

12. Click on the **Attachments** tab to add plans and specifications.
13. Drag files to the 'Drop files here to upload' area
14. For large projects, upload the plans as sperate documents broken down by discipline with the discipline in the file name.
15. Click on the **Submit** button in the top right.

Submit Record

Business Process: FPC - Capital Project - Draw 16 View Workflow

Email Details

Additional CC

Email Subject

PMWeb Approval Request: Plan Review - Nick Merry Test - Submission for full s...

Comments

Attachments

Select files... Drop files here to upload

18 Next

16. Click on **View Workflow** to review the workflow.
17. Optional to add addition CC e-mails and/or additional comments. DO NOT add attachments as they only stay with the e-mail notification.
18. After review, click on the **Next** button.
19. The draft e-mail will pop up. Click on the **Submit** button.
20. Process Complete.

After the design review process ends, the AE shall establish a new record to track resolution of review comments.

1. Navigate to the **Plan Review** record for the design.
2. Click on the down arrow next to New Record and select **Copy**.

M001379 - 533 MEL - EHS Office Build-out - M001379 - 533 MEL - EHS Office Build-out Approved

Plan Review: 002 - 100%DD Owner Review

Main Notes Attachments **6** Workflow Notifications

New Record ▾

New Record

Copy

2

3. In the **Deliverable** field select the X.1 option for the design milestone.
4. Click on the **Save** button.

M001379 - 533 MEL - EHS Office Build-out - M001379 - 533 MEL - EHS Office Build-out Draft

Plan Review: 003 - 100%DD Owner Review

Main Notes Attachments **4** Notifications

4

Save

Header Fields

Project*	Set #*	Description	Distribution List	Deliverable*
M001379 - 533 MEL - EHS Office...	003	100%DD Owner Review	Renovation/Refresh	4.1 - 90% Design Development Com
Status	Revision			
Draft	8			

3

5. Click on the **Submit** button in the upper right corner.
6. Click on **View Workflow** to review the workflow.
7. Optional to add additional CC e-mails and/or additional comments. DO NOT add attachments as they only stay with the e-mail notification.
8. After review, click on the **Next** button.
9. The draft e-mail will pop up. Click on the **Submit** button.
10. Process Complete.