# 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.**
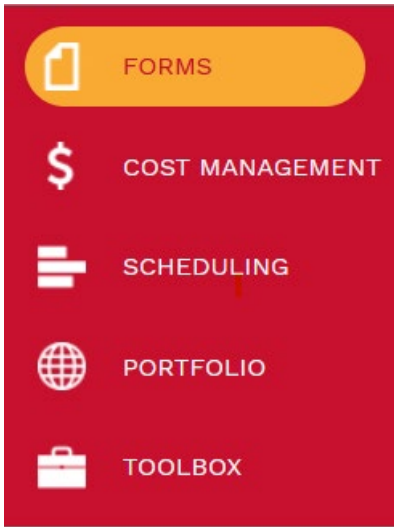


**2-** Select **Plan Review.**
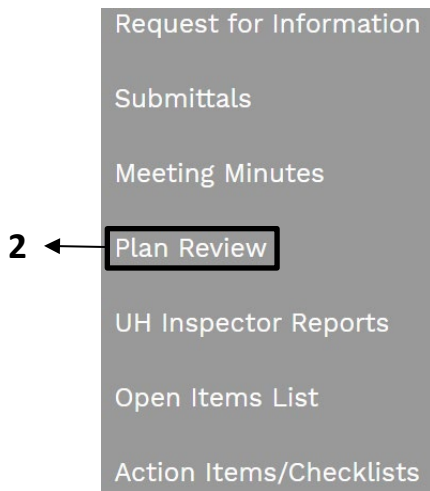
3- Click on the ➕ in the top menu.

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- **Status field** – Reflects current status.

8- **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.

9- **Deliverable field** – Select the appropriate deliverable from the drop-down menu. Only use the **X.0** deliverables for routing design reviews.

10- Click on the **Save** icon in the header.

| | | |
|---|---|---|
| Project* | **4** | 1000263-Interim – Nick Merry Test ▼ |
| Set #* | **5** | 003 |
| Description | **6** | Schematic Design Set |
| Status / Revision | **7** | Draft ▼ |
| Distribution List | **8** | Capital Project ▼ |
| Deliverable* | **9** | 1.0 - 90% Schematic Design ▼ |

11- Click on the **Attachments tab** in the top navigation bar.

12- Drag files to the 'Drop files here…'

MAIN     ATTACHMENTS  → **11**     WORKFL

➕ Add

→ **12**

Drop files here or click the Add button
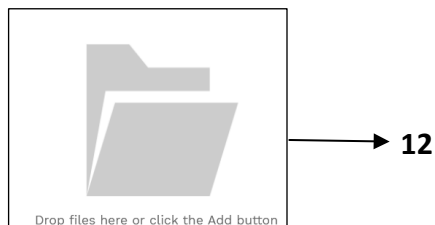
**13**- Click on the **workflow tab** in the top navigation bar.
**14**- Click on **SUBMIT.**
**15**- Click on **SAVE.**
**16**- Process Complete.

MAIN          ATTACHMENTS (9)          WORKFLOW

ACTIONS

**13**

SUBMIT   ➔ **14**

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 drop-down list next to the **+Add button.**
**3-**   Select **Copy** from the drop-down list.

415 UH Technology Bridge, MEP and E ▼

MAIN                ATTACHMEN

New (Alt+n)

Copy  ➔ **3**

4- **Set #\*** field – copies previous set #.  Optional field.
5- **Description** field - add **"Comment Resolution"** to the description.
6- **Distribution List** field – Do not change.  Retain distribution list selection from original record.
7- **Deliverable\*** field – From the drop down menu, select the appropriate **X.1 - … Comments** deliverable.
8- Click on **Save** icon in the top header**.**

| MAIN | ATTACHMENTS |
|---|---|

| | | |
|---|---|---|
| Project* | | Nick Merry Test  - Nick Merry Test ▼ |
| Set #* | **4** | 003 |
| Description | **5** | SD 100% Testing  Comment Resolution |
| Status / Revision | | Draft  ▼  1 |
| Distribution List | **6** | Capital Project  ▼ |
| Deliverable* | **7** | 1.1 - S0% Schematic Design Commen ▼ |

Drag a column header and drop it here to group by that column

| ✎ Edit | ➕ Add | ☐ Add Items | 🗑 Delete | ♻ Refresh | X Export To Excel | ⊞ Layouts |
|---|---|---|---|---|---|---|

| SHEET # | REVIEWER | REVIEWER'S COMMENTS | DESIGN TEAM RESPONSE | COMMENT STATUS | ATTACHMEN |
|---|---|---|---|---|---|
| | | | | | |
| | Vendor | My comments | Comment incorporated in DD set | Closed | (0) |
| | Vendor | Another comment | | | (0) |

9- Click on the **workflow tab** in the top navigation bar.
10- Click on the **submit button**.

| ◀ ▶ | MAIN | ATTACHMENTS (9) | WORKFLOW |
|---|---|---|---|

ACTIONS

**9**

▶ SUBMIT ➝ **10**

11- **Design team continues to enter responses and comment statuses until all comments are resolved.**