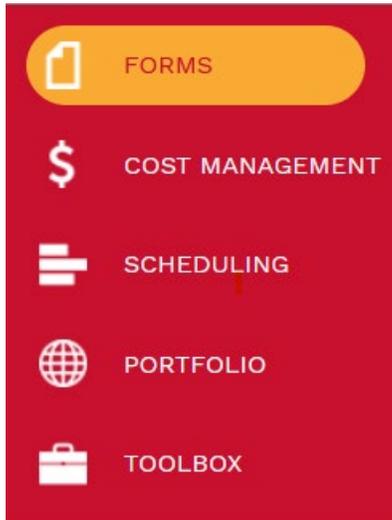




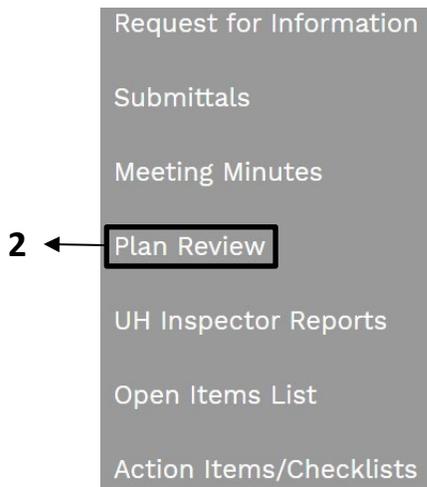
**PM Web Quick Reference**  
**Initiating Design Review**

**Allows A/E to upload Drawing & Specifications for  
Design Review Process**

1- Click on **Forms**.



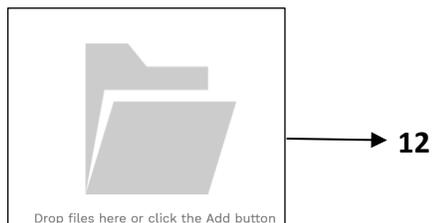
2- Select **Plan Review**.



- 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 project, coordinate with Project Manager 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*	<b>4</b>	1000263-Interim - Nick Merry Test	▼
Set #*	<b>5</b>	003	
Description	<b>6</b>	Schematic Design Set	
Status / Revision	<b>7</b>	Draft	▼
Distribution List	<b>8</b>	Capital Project	▼
Deliverable*	<b>9</b>	1.0	90% Schematic Design

- 11- Click on the **Attachments tab** in the top navigation bar.
- 12- Drag files to the 'Drop files here...'

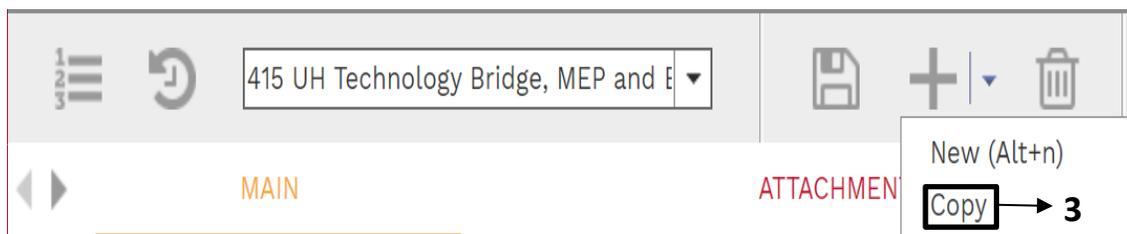


- 13- Click on the **workflow tab** in the top navigation bar.
- 14- Click on **SUBMIT**.
- 15- Click on **SAVE**.
- 16- Process Complete.



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



- 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

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Project\*

Set #\* **4**

Description **5**

Status / Revision

Distribution List **6**

Deliverable\* **7**

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

Edit + Add  Add Items  Delete  Refresh  Export To Excel  Layouts

SHEET #	REVIEWER	REVIEWER'S COMMENTS	DESIGN TEAM RESPONSE	COMMENT STATUS	ATTACHMEN
<input type="checkbox"/>	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

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ACTIONS

▶ SUBMIT

→ 10

9

**11- Design team shall continue to enter responses and comment statuses until all comments resolved**