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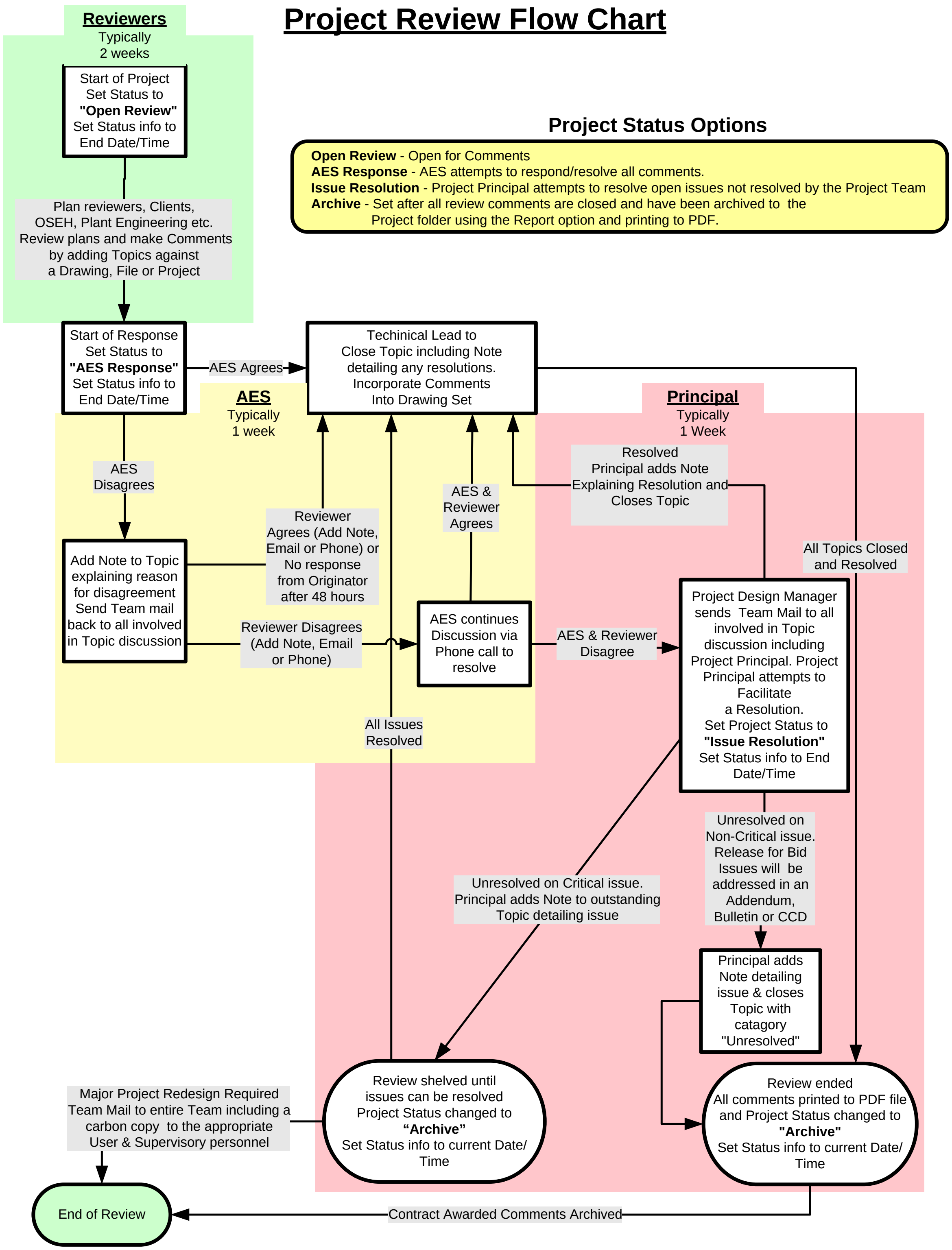
ELECTRONIC REVIEW PROCESS

Overview



General

All projects to be released for Bid/Construction require a pre-bid/pre-construction construction document review. Pre-Bid reviews are done via the web, using the ProjectDox on-line software in coordination with the Review Matrix.

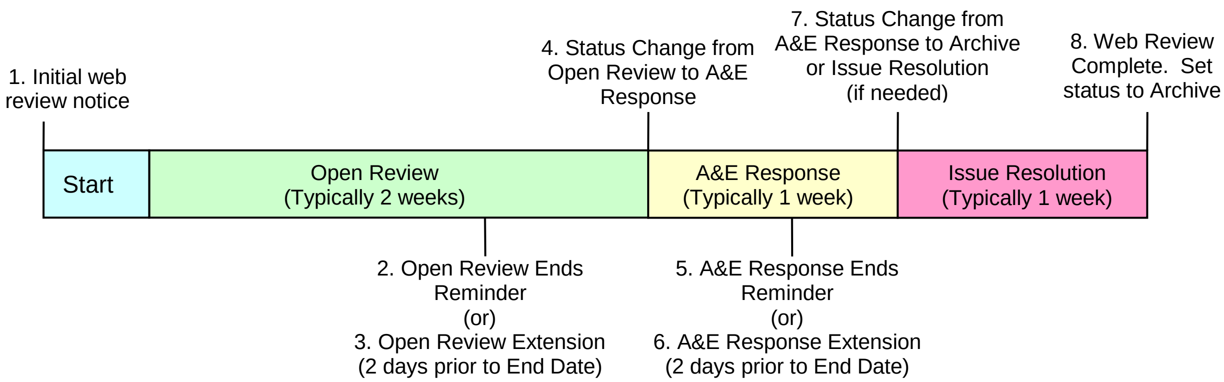
Related tools

- Review Matrix - link available on the login screen of ProjectDox.
    - Reminder - the Review Matrix updated on a continual basis; please be sure to always use the most current version and note reviewer contact info and scope criteria, as they may change.
- The Design manager, in conjunction with the Review Matrix, will determine who is required to participate in the review process.
- Review email templates can found in the Review Matrix.
- 'How to' help can be found:
    - On the login in screen via the AEC Training Videos, Documentation and Review Matrix link
    - Via the blue question mark  once logged into the ProjectDox program.

ProjectDox Review Process Summary

1. ProjectDox site is created for online - web based review of project.
2. The site is populated with all documents.
3. Drawing print request is sent to FIC.
4. Review participants are determined in coordination with the Review Matrix.
5. The day before review starts, an "Open Review Begins" email is sent out to all participants.
6. Reviewers and team members are invited to Project Dox and permissions set.
7. Reviewers add comments.
8. Open review ends reminder email is sent out 2 days before open review period ends.
9. At end of the open review period, the status in Project Dox is changed from "Open Review" to "A&E Response" and a status change email is sent out.
10. Design Managers and technical leads review comments and responses and close out comments accordingly.
11. IF review comments cannot be completely addressed by the design manager or a conflict arises between design manager and a reviewer's opinion, the department manager is brought into resolve the issue.
12. The status in project dox is changed to "Issue Resolution" and the date is set to the projected date to resolve issues.
13. Once all review comments are closed out the web review is considered complete.
14. The final report of all comments and responses is created.
15. The "Web Review Complete" email is sent out with the PDF report of comments attached.
16. The Project Dox status is set to "Archive" .

Typical review timeline



Available email notification templates

Initial Web Review notice

Open Review Ends Reminder

Open Review Extension

Status Change from A&E Response to Issue Resolution

Web Review Complete

ProjectDox Review folder structure

- Project Data
  - Drawings
  - Documents
  - Specifications
  - Administrative Documents
  - Uploads

Drawings - Project drawing sheets. Converted and uploaded as single sheet PDFs.

Specifications - Project Specifications. THESE MUST be formatted in Book, upload as PDFs.

Documents - Project form, AECtion schedule, and AECtion budget, and a combined set of drawings and combined specification as PDF documents. Note the combined PDF drawing set and specification is for commissioning's use in soliciting an RFP when needed and/or can be shared with FIC to facilitate printing.

Administrative Documents - Any documents that need to be protected from general viewing, such as discipline budget breakdowns. Access to this folder will be given to AEC Reviewers and team members with PA rights. The Design manager should determine what documents are content sensitive and who should have access to them.

Uploads - Any supporting files the Reviewers may need to upload to clarify their issues. These could be photos or product specification sheets etc. This folder will be open for upload by the entire review team.

Review Participants and Duties

Project Administrator Process
A&E Design Manager or DM's assistant/review coordinator

Duties

- ❑ Creates new ProjectDox web review project site.
- ❑ Populates the project with all necessary documents.
- ❑ Requests required printed sets from FIC
- ❑ Invites all members to project and assigns permissions.
- ❑ Sets ProjectDox status Date/Times and sends out notification emails.
- ❑ Closes out completed review.

Create a new ProjectDox Review site

1. Login to Project Dox.
2. Select the "Create Project" button.
3. *Project name* field: name the Project using the full AECtion project number and the AECtion project name. Project number and name to match AECtion exactly followed by the Review phase.

   Project name:
   P0000xxxx (space) Project Name_Review

   *If project will require review of several phases add Prefix to the Review phase descriptor.
   P0000xxxx (space) Project Name_SD Review
   P0000xxxx (space) Project Name_50% Review

   *Time saving hint - If creating review sites for several review phases; a project can be created by copying an existing project. The copied project will have the same folder structure and users/groups of the original existing project.

4. *Description* field: description should list the full building number and name to match AECtion exactly

   Description:
   100xxxx (space) Building Name
5. Select template: Review
6. Fill in additional information fields. Contact should be the Design Manager.
7. *Status* field: use pull down to select "Review, Open "
8. *Status info* field: input date when open review period ends
   Status Info:
   Open Review period ends Day, Month DD, 20XX
9. Save the Project.

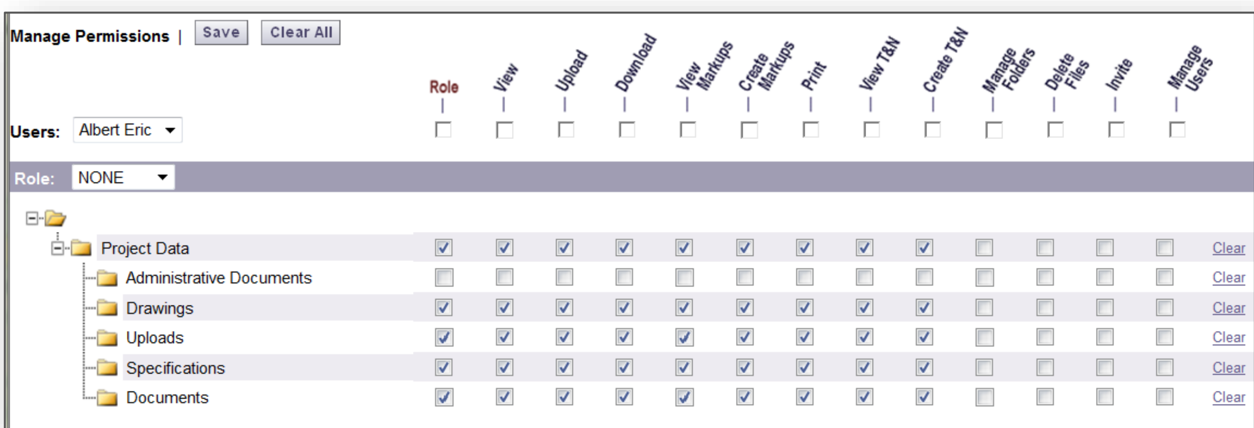
Populate the Project

1. Convert CAD sheet files to full size Portable Document Format (PDF). Each sheet should be saved as its own separate file. Save the PDF files of the sheet drawings in the Project folder under ...\Design\Document Review\Web Review\Drawings
2. Convert CAD sheet files to a full size combined Portable Document Format (PDF) set, name file using the project number and Review Dwg Set (ie. P1234 ReviewDwgSet.pdf). Save the PDF file in the Project folder on the 'G' drive, under ...\Design\Document Review\Web Review\Documents.
   a. Note: This file is for commissioning's use in soliciting an RFP when needed and/or can be shared with FIC to facilitate printing.
3. Locate all Supporting Documents or get them from Project Design manager if they have not already copied them to the proper "Web Review" sub-folder. Copy all Supporting Documents to ...\Design\Document Review\Web Review\Documents.
   Supporting documents include:
   AECtion Budget Cap sheet
   Project form (PX form)
   AECtion Schedule

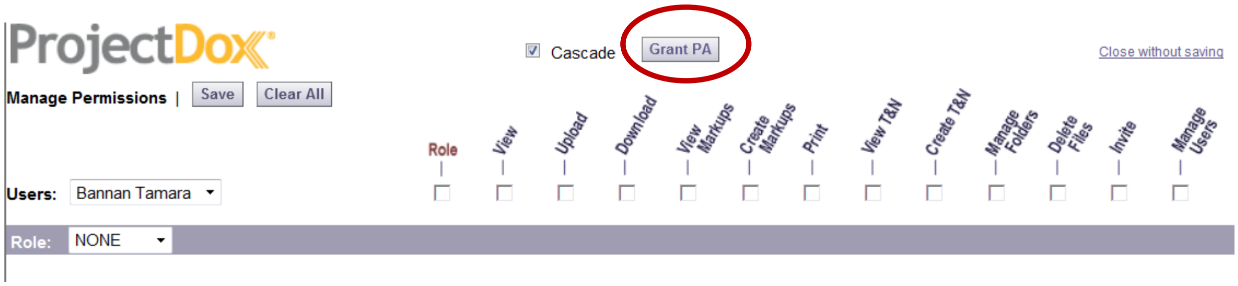
4. Determine if there are any content sensitive documents that should only be viewed by certain individuals in the Review team. Copy these documents (if any) to ...\Design\Document Review\Web Review\Administrative Documents.
    a. Content sensitive documents may include:
        i. Discipline Budget breakdown
5. Convert each disciplines specification word documents into separate Portable Document Format (PDF). BE SURE to that they are in 'book' format when you convert them to PDF. Save the PDF specification files in the Project folder under ...\Design\Document Review\Web Review\Specifications.
6. Create a combined specification book, to include all disciplines, in Portable Document Format (PDF) and name file using the project number and Review Spec (ie. P1234 ReviewSpec.pdf). Save the combined PDF specification file in the Project folder on the 'G' drive under ...\Design\Document Review\Web Review\Documents.
    a. Note: This file is for commissioning's use in soliciting an RFP when needed and/or can be shared with FIC to facilitate printing.
7. Once all documents have been collected and saved to the proper folders in the project folder on the 'G' drive, open ProjectDox and upload the information to the corresponding folders.

Invite Review Team Members & Assign Permissions

1. Refer to Review Matrix (available on the ProjectDox log in screen) to determine the complete list of required reviewers and their roles
    a. Those to be listed in the "TO" line per the Review Matrix are to receive Standard Reviewer permissions.
        i. Standard Reviewer group typically include plan reviewers, client stake holders, and additional reviewers per the Review Matrix, such as FM Global, OSEH, ITComm, etc.
    b. Those to be listed in the "CC" line per the Review Matrix are to be granted PA rights.
        i. Reviewers given PA rights typically include the design team, project manager, discipline managers, Wade Fields, and Mike Contrera.
    c. Note: If an individual's name cannot be found under the 'All User' tab, use the 'New User' tab to create a new user.
2. Invite & Assign permissions:
    a. **Standard Reviewer permissions**:
        i. Use the pull down "Reviewer" role, but REMOVE access (via checkmarks) to the Administrative Documents folder.
        ii. When you Save, the person will receive an automatic invite email.



    b. **PA Rights:** Use the Grant PA tool.


ProjectDox
Cascade
Grant PA
Close without saving
Manage Permissions | Save Clear All
Role
View
Upload
Download
View Markups
Create Markups
Print
View T&N
Create T&N
Manage Folders
Delete Files
Invite
Manage Users
Users: Bannan Tamara
Role: NONE

Status change and email notifications

1. Status change and email notifications are located in the "Review Matrix" to be copied and pasted into email form.
    a. Open Review Period
        i. Set yourself a reminder in Outlook to send an email 2 days prior to the end of the Open Review. See Email form 2 - Open Review Ends Reminder.
        ii. Before changing status to A&E Response be sure the entire review team has added a Project Level note indicating they have finished their review. If necessary you may extend the Open Review period to allow all reviewers time to finish.
    b. If a reviewer requests that the Open Review period be extended, approval must be given by the Design Manager.
    c. At the end of the Open review, change the status to "Review, Response". See A&E Response Process below.
    d. The A&E Response Process:
        i. Set Project Status to: "Review, Response"
        ii. Set the Status Info to: " Response period ends Weekday, Month DD, 20XX"

The Project Closeout Process

1. At the end of the A&E Response, if there are no Unresolved issues (all Topics are closed).
2. Set the Status Info to: "Month DD, 20XX (Current Day)
3. Go to any notepad, click Reports, Click the down arrow and select the report "Topics & Notes - File Level & Project Level (All)"
4. Sort the report by Status by clicking on one of the underlined status headings. Verify there are no "OPEN" issues that have not been closed. They should be at the top. Then, sort the report by Drawing number by clicking on one of the underlined drawing numbers.
5. Print the report using the Adobe PDF print driver and save the Report in the Project Folder using the Project number as the name of the file.
    G:\...Project\Design\Document Review\Web Review\Comments\PXXXXCompleted web review comments & responses.pdf
6. Send out a Team mail. See Email form (Web Review Complete)
7. Set Project Status to: "Archive". Once status is set to "Archive", the project will automatically archive the following night.
8. At the end of the A&E Response, if there are issues that cannot be closed.
    1. Set Project Status to: "Issue Resolution"
    2. Set the Status Info to: "Issue Resolution period ends Friday, Month DD, 20XX.
    3. Send Change of Status email. See Email form (Status Change from A&E Response to Issue Resolution)
    4. The Department manager at this time should attempt to resolve all open issues.
    5. If there are still issues that cannot be resolved after the end of the "Issue Resolution " period, depending on the Critical nature of the issue you will either extend the "Issue Resolution" until resolved or change the status to "Archive" , send the job in for re-design and the review will be repeated after the issues are resolved.

Design Manager Process

Typically lead Architect or Engineer

Duties

- ❑ Identify all person's to participate in the Review process including clients, stakeholders, standard reviewers, and internal project team members. Use the Review Matrix to help determine required reviewers.
- ❑ Reminder for projects involving Infrastructure work outside of the main project area:

    Overview Statements:
    The review is intended to be technical and administrative in nature. Because infrastructure projects are funded through central administration, they pose a challenge in identifying who the client is. Activities of infrastructure projects often effect building occupants due to the fact that their areas of work, or business operations, will be disrupted during the construction.

    Building occupants effected by the construction activities of the infrastructure projects will normally not be qualified to perform a technical review of the construction documents.

    Process:
    Prepare a separate meeting invitation to include parties that will be effected by the construction activities of the project. For example; if the construction calls for a pipe to be run through the ceiling space of an area the appropriate departmental contact for the area where the pipe will be run should be included in this meeting.

    At this meeting detail how the project will affect those included in the gathering. For example; the construction will include a new electrical distribution panel which will require a power outage, or the replacement of the roof will require that a fume hood exhaust fan be shut down and that a tar kettle will be located in a certain area. Specific technical issues such as the size of wires, or the cfm of a fan system will be left to the technical review team and need not be detailed with this group.

- ❑ Define all Documents to be included in the review. Create required PDF files of CAD drawings and specifications or delegate to drafting assistant.
    - o These files should be COPIED to the following folder structure and put in the appropriate sub-folders. G:\BLD# - Sample Building\Projects\Pxxxx…\Design\Document Review\Web Review
- ❑ Define all review period dates.
- ❑ Monitor all discussions pertaining to comments during the "Open Review" and "Response" period.
- ❑ Review all comments and responses.
- ❑ Respond to and Close own discipline's comments.
- ❑ Review consulting Architectural & Engineering firms responses and when in agreement with all responses/ resolutions give them permission to officially Close Out topics
- ❑ Is final word on Cross-Discipline issues.
- ❑ Consult with Department Manager on comments that reveal a significant issue or conflict.
- ❑ At the end of the review period, verify that all comments have been appropriately closed by all disciplines/ consultants.

Technical Lead Process

Typically Architecture, Mechanical, Electrical technical leads

Duties

- ❑ Create required PDF files of CAD drawings and specifications, obtain required printed sets from FIC.
- ❑ Review all discipline specific comment strings.
- ❑ Do NOT close topics until the "Open Review" period is over.
- ❑ Monitors discussions on discipline specific topics.
- ❑ Coordinates Cross-Discipline issues with Design Manager.
- ❑ At the end of the "Open Review" period, review all topics/issues pertaining to your discipline.
- ❑ Respond to discipline specific comments.
    - o If you agree with the comments, add a note indicating your agreement and close topics with the appropriate Close Topic code.
    - o If you do not agree, add a note explaining why and send a Team Mail to all those involved in the particular Topic discussion.

  - If you have not heard back from the Originator of the Topic within 48 hours either by additional notes, Phone calls or Email, consider the issue closed and close out the topic with the appropriate Close Topic code.
  - If there is still disagreement consult with the project's Design Manager.
  - If an agreement is reached, document the agreement via an additional Note and close the Topic with the appropriate Close Topic code.
  - If there is still no agreement then the Design Manager will work with the Department Manager and Reviewer to reach a resolution.
- ❑ Be sure all Topics for your discipline have either been Closed or are awaiting "Issue Resolution" at the end of the Response period.

Outside Architect & Engineer Process

Architectural or Engineering firm working on the project

Duties

- ❑ Reviews all discipline specific comment strings.
- ❑ Reply to all discipline specific comments early in the Response period to allow Design Manager time to review your responses. Reply should include intended action code, but Do Not close out the topic.
  - o If you agree with the comments, add a note indicating your agreement and intent to incorporate comment.
  - o If you do not agree with a topic, add a note explaining the decision to disapprove and/or provide a solution to the problem and send a Team mail back to the reviewer, design manager and anyone else in the Topic discussion. The review will have 48 hours to respond back.
  - o If the issue is complex/critical you should coordinate with the Design manager directly and respond via phone, email, or in person meeting. If the issue is resolved add a note detailing the conclusion. If an agreement cannot be reached by the end of the Response period the issue will be escalated to the A&E Department Manager to be discussed and resolved outside of ProjectDox. The Project status will be changed by the Design Manager to "Issue Resolution".
- ❑ Continue to monitor discussion thread on discipline specific topics during the response period.
- ❑ Coordinates Cross-Discipline issues with Technical leads and Project Design Manager.
- ❑ At the end of the response period, coordinate with Design Manager for permission to officially close out all comments.
- ❑ Once permission is received, Close out comments pertaining to your discipline with the appropriate Close Topic - Action Code.

Reviewer Process

Client(s), standard reviewers as determined using the Review Matrix, and anyone else with a stake in the project that the Design Manager determines should review the project.

Duties

- ❑ Review Plans and Specifications and comment on errors/omissions etc.
  - o **Upload support documentation for additional clarity if necessary.**
- ❑ Follow up with discussion threads, Emails or Phone calls until issues are resolved.

General Procedure

1. Once notified you have been invited to a project, log into Project Dox. Review the Project Information screen. Take note of the End of Open Review date.
2. Review Project Documents as appropriate (Specifications, Drawings, Budget etc.)
3. Make comments by Adding a topic and selecting the proper CATEGORY. Be sure your topic is descriptive enough to locate it at a later date (see Making Comments below).
   a. Note: If using a group email login be sure to include your name with each comment as the "author" will appear as the generic group login name.
   b. Note: Upload additional information if necessary to help clarify any comments. This may include equipment specifications, photos etc. Be sure to include the files and location in your Comment string. (See Uploading files below)
   c. Note: Do not close out your own topics. During the A&E Response Period, the design team will review comments and officially close out each topic using the 'Close Topic' action codes.
4. Once you have completed your review and entered all comments, you MUST do the following:
   a. Add a project level note. Click the notepad on the project screen or at the top right of your screen.

   b. Select Category - z - My Open Review Complete.
   c. Enter Done in the subject and Done in the Body.
   d. Hit Save.
   e. Note: This will help the Project Design Manager verify that all reviewers have completed their part of the review.
5. Monitor your topics near the end of the A&E Response period. A&E will close out each topic using the 'Close Topic' action codes. If A&E agrees with your comment and closes there is no further action on your part. If A&E does not agree they will add a note explaining their decision.
   a. If you do not agree with their response and feel that the issue warrants further discussion contact the Design manager or Technical lead via email, phone, or meeting in order to resolve the conflict.
6. After the Open Review period has ended, check your comments for final close out responses. If there are still any critical outstanding issues that you feel need further attention contact the Design manager immediately.

Making Comments

1. The subject line should identify the issue in brief. Do not use Generic subjects.
   Proper Ex) Roof drain detail does not match specifications
   Incorrect Ex) Change notice

   Proper Ex) Finish in Room 1035 should be Plaster not Paneling
   Incorrect Ex) Finish issue
2. Describe your issue in detail in the Body of the Topic.
   Proper Ex) Check the size of the Roof drain in the North east corner of this sheet. The specs call for a 6" drain not a 4" drain.
   Incorrect Ex) The roof drain is the wrong size.
3. If using a group email login be sure to include a name with the comment as the "author" will appear as the generic group name.
4. When making comments/notes be sure to use discretion in your wording. Follow proper meeting etiquette. Remember, the entire review team including project owners will be able to read your comments.
5. When you are done with your comment, hit the SAVE button at the bottom of your screen. If you want to send an email to the entire review team or just one member to notify them of you comment you can hit the SAVE and Prepare Email button instead. At this time you can select what team members you want to email or select all to email everyone (use discretion with sending Team mails to all).
6. Once the Open Review period is over the Project Status will be changed to Response. The discipline leads will review all comments. Those that they agree with will be closed with the appropriate Closeout code. They may add a note with details if necessary.
7. If the Discipline lead is in disagreement with a topic they should add a note explaining their decision to disapprove and/or provide a solution to the problem and send a Team mail back to you and anyone else in the Topic discussion. At this time you have 48 hours to respond back. If the issue is complex/critical you should respond via phone, email, or in person meeting. If the issue is resolved the Discipline lead should add a note detailing the conclusion and close the topic with the appropriate close out code. If you cannot come to an agreement by the end of the Response period the issue will be escalated to the Design manger and Department Manager to be discussed and resolved outside of Project Dox. The Project status will be changed to "Issue Resolution".

Department Managers Process

A&E Architectural, Mechanical, Electrical, Civil Managers (as applicable)

Duties

- ❑ Reviews Budget
- ❑ Reviews drawings and specifications.
- ❑ Attempt to resolve/expedite any outstanding/unresolved issues/topics at the end of the A&E Response period. This may include issues such as finding additional funding, resolving technical issues or settling a dispute. Issues should be resolved via emails, phone calls or group meetings and the final result noted in ProjectDox.
- ❑ If the department manager resolves the issue then a final Note to the Topic explaining the resolution to include all pertinent information should be added. The Topic should then be closed with the appropriate close topic code.

- If the issue is not significant enough to put the project on hold, the Department manager may decide to close the issue as "Unresolved". A note should be added to the disputed explaining when and how issue will be resolved. Topic. Example: The Topic should be closed with the "Unresolved" code.
- If an issue is too significant to move the project forward without resolution the Department manager can decide to put the project on hold for the time being to have additional time to resolve the issue. The project status is set to "Not Ready for Release" and the entire team is notified via a Team mail of the status change. The topics in dispute should NOT be closed until the final decision is made. Once all issues are resolved, the project Status should be set to "Archive" and the Status info field should be changed to the current Date and Time.
- If the issue cannot be resolved and warrants a Major Project Redesign then the Review is ended.
- The Design Manager needs to provide a formal announcement to the User explaining the situation and should copy the appropriate Supervisory personnel - i.e., Department Manager.

I.T. Administrator Process

AEC Information Technology staff

Duties

- Coordinate and Manage Server Application Upgrades, Installations and Maintenance.
- Coordinate and Manage Server Database Upgrades, Installations and Maintenance.
- Coordinates with I.T. staff outside of A.E.C. (other departments, Contractors etc.) to assure the necessary programs are installed properly for review members outside of A.E.C.
- Coordinates all technical issues with Project Dox developers.
- Archive completed review projects.

CONSTRUCTION/ ELECTRONIC SUMBITTAL SITE

Related Tools

- 'How to' help can be found via the blue question mark once logged into the ProjectDox program.
- 'How to' create and apply an electronic submittal stamp can be found in this procedure under Electronic Submittal Stamp.
- Related information: UM Master specifications, Division 1, section 013300 - Submittal Procedures

Create a new ProjectDox Construction Site

- Design Manager (or delegated assistant) will create and populate site after Bids are received.
  - **Project name:**
    P0000xxxx (space) Project Name_Construction
    Example
    P00005210 Renovate first floor lab_Construction
  - **Description:**
    Building Number (space) Building Name
  - **Template type: IMPORTANT! - Do not forget to select template type**
    Construction Set
  - **Contact:**
    Design Manager
  - **Status:**
    Construction

Typical Site members

- Project team - Design Manager and design team
- Project Manager
- General Contractor's team members (NO sub-contractors!)
- ITSCOM
- FIC
- Commissioner (when applicable)

Permissions

- The Design Manager (and delegated assistant) and Project Manager will be given PA rights
- Design Team
  - Members: Design team and Commissioner
  - Role: Design Team
  - Folder Access: All folders
  - Permissions: View, Upload, Download, Print, and Topic&Notes
- Contractor's Team
  - Folder Access: All folders
  - Role: Contractor
  - Permissions: View, Upload, Download, & Print
  - Folder Access: All folders
- ITScom is included if project contains ITComm scope.
  - Members: "Reviewer ITcom" (ITcomWebReview@umich.edu)
  - Role: ITSCom
  - Folder Access: *Construction Document*s folders (including related sub folders) ONLY, Not the *Submittals* folder
  - Permissions: View, Upload, Download, and Print
- FIC
  - Note: FIC is included in the template by default, verify access and permissions to folders are correct
  - Members: "AEC-FIC Group" (aec-fic@umich.edu)
  - Role: FIC
  - Folder Access: *Construction Document*s folders (including related sub folders) ONLY, Not the *Submittals* folder
  - Permissions: View, Upload, Download, and Print

Construction Documents

- ❑ Upload PDF of the Construction drawing set and specifications to respective folders.
  - o **Note**:
    - Upload drawing sheets as a combined single PDF file.
    - Upload specifications as a combined single PDF file.
- ❑ Notify (email) FIC that the Construction drawings and specifications area available via Project Dox.
  - o DM or PM to email FIC print request indicating quantity and size of prints and/or spec books required for awarded contractor and design team.
- ❑ Upload CAD files as needed or requested by General Contractor.

Electronic Submittals

Submittal Procedure

- ❑ Related information: UM Master specifications, Division 1, section 013300 - Submittal Procedures

Shop Drawing/Product Data submittals

- ❑ General Contractor uploads PDF files of submittals to Project Dox into the 'To be Reviewed' folder. The PDF submittal FILE name should include the U of M project number (minus the leading zeros), the specification section number, and a short description of what the submittal is. When uploaded, the Contractor uses the Project Dox 'notify members' option to notify ALL members that they have uploaded submittals to the 'to be reviewed' folder, listing the submittals by the FILE name in the body of the notification email.
  - *Example of email body*
    Submittals for review:
    PXXXX 081700 Door hardware schedule.pdf
- ❑ Discipline leads are responsible for downloading their respective trade related submittals from the Project Dox site and saving them to the appropriate division sub folder in the project folder on the G drive, under Construction/Submittal Log-Shop Drawings/ Division #.
- ❑ The submittals are reviewed and stamped outside of Project Dox.
  - o Recommend using a software program such as Adobe Acrobat Professional that works with PDFs.
    - If marking up a submittal electronically, an electronic stamp can be applied using Adobe Acrobat. Use the create custom stamp tool, to create the submittal drawing stamp.
    - How to create an electronic version of the stamp can be found in the Electronic submittal stamp section of this procedure.
- ❑ Once review of submittal is complete, the final PDF is **PRINTED** as a 'PDF' or the hand marked copy is scanned and saved in the project folder on the G drive. Reviewed submittal file name should include the U of M project number(minus leading zeros), the word REVIEWED, specification section number, and the same short description used in contractor's initial submittal.
  - Example of reviewed file name:
    PXXXX REVIEWED 018700 Door hardware schedule.pdf
  - Note: Using spaces instead of dashes between parts of the file name makes it easier to sort and search through the files
- ❑ The reviewed submittal PDF (or multiple reviewed submittals) is uploaded to the REVIEWED folder under Submittals in Project Dox and the 'notify members' option is used to notify ALL that reviewed submittals have been posted. In the body of the notification email, the list the uploaded submittals by the name of the PDF.
  - *Example of how to list reviewed submittals in email body:*
    Returned submittals:
    PXXXX REVIEWED 081700 Door hardware schedule
- ❑ If returning electronic submittal for a physical samples, note in body of notification email where contractor can pick up returned samples.

- **Note:** FIC no longer tracks/logs submittals in AECtion

Physical Sample Submittals

- Contractor to deliver Physical samples directly to Design Manager and provide corresponding electronic submittal on Project Dox that includes sample transmittal and a digital image illustrating sample characteristics.
- Discipline lead downloads the electronic version of the sample submittal file from Project Dox site and saves it in the appropriate division sub folder of the project folder on the G drive….in Construction/Submittal Log-Shop Drawings/ Division #.
- Samples will be reviewed and officially "returned" electronically via Project Dox.
  - Scan an image of the sample to a PDF and insert into contractor's original electronic submittal and add any necessary comments.
  - Follow procedure for returning reviewed submittals above.
- Return unwanted physical samples directly back to Contractor. If necessary include in body of reviewed submittal notification email where contractor can pick up returned physical samples.
- **NOTE:** If the design manager desires that a unique or special physical sample be saved for archive purposes, they must take the sample to FIC and specifically request that it be saved. In general, FIC will not save typical physical samples for archive.

Close out

- When project is complete and ready for close out:
  - Design manager to verify that all reviewed/stamped project submittals desired for archiving are uploaded to the Submittal/ "Reviewed" folder on Project Dox
  - In Project Dox, change FIC's permissions to include access to the Submittals/Review folder.
    - Note: Do not grant FIC access to submittals folder until end of project. FIC does not what to receive submittal related email notifications.
  - Design manager (or delegated to assistant) to email FIC (aec-fic@umich.edu) that project submittals are ready for download and archive.
    - FIC will then download and save for archive the "Reviewed" submittals to the "I"-drive.
  - If approved O&Ms and/or record drawings are available in Project Dox, indicate in email to FIC, that these documents should also be downloaded and saved for archive to the "I"-drive.

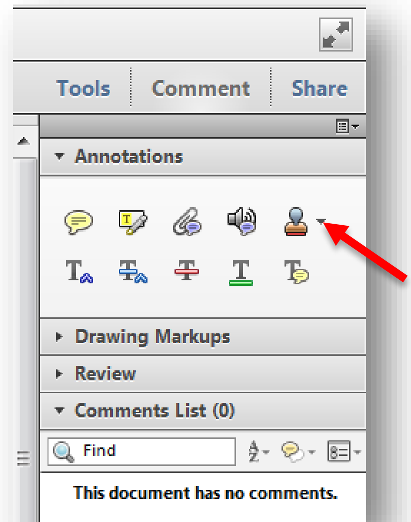
ELECTRONIC SUBMITTAL STAMP

(How to create a submittal stamp electronically using Adobe Acrobat XI Pro software)

General overview

- Open PDF of submittal to be reviewed in Adobe Acrobat Pro. Review and mark-up as necessary using available tools. Use the custom stamp tool to add the electronic version of the reviewed Submittal Stamp and appropriate action code. The custom Submittal Stamp must be created on initial use.

To Create Custom Stamp

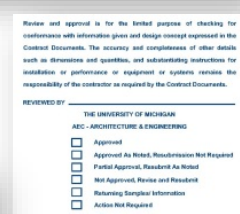


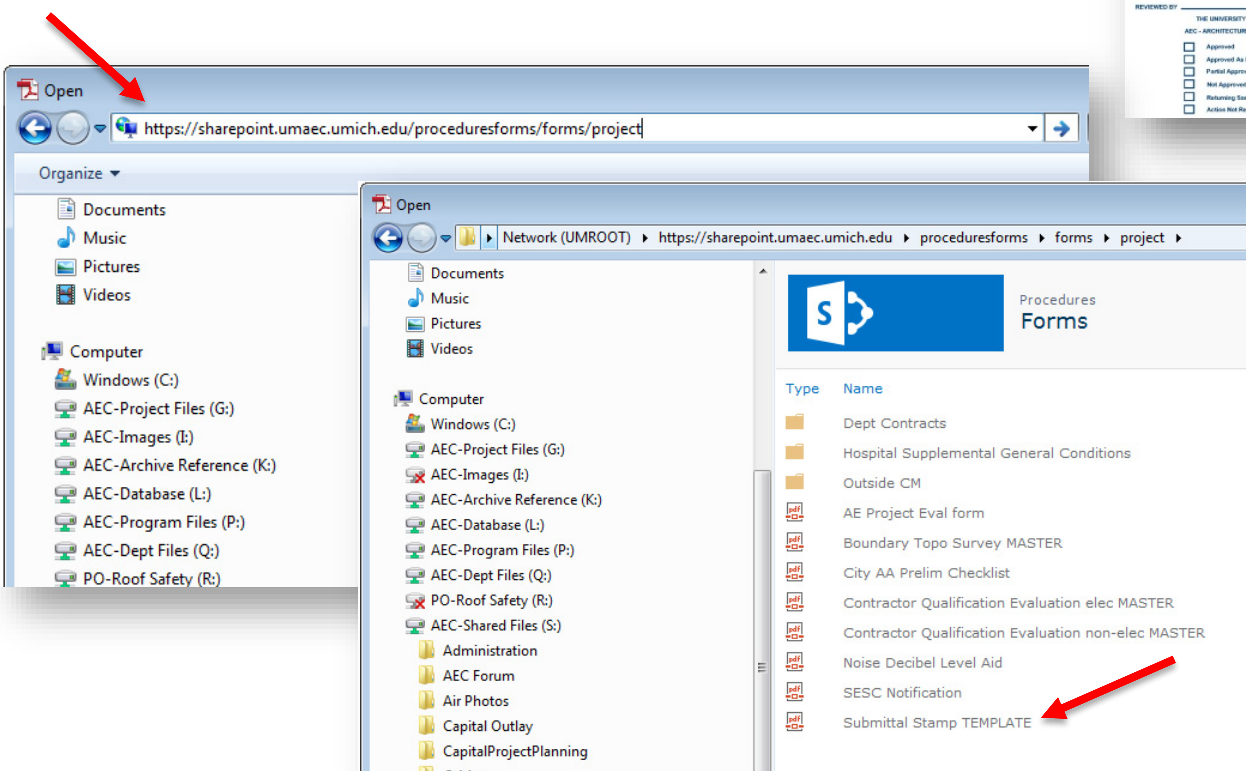
- When used for the first time, the custom submittal stamp must be created. This will only need to be done once. If Adobe software is upgraded, then may need to recreate stamp.

- In the Comment pane, under Annotations, select the stamp drop down arrow and choose Custom stamps - Create Custom Stamp. Use 'Browse' to access SharePoint by typing the following address into the file path: *"https://sharepoint.umaec.umich.edu/proceduresforms/forms/project"* and press enter (if prompted to log in, do so; there may be slight delay while accessing SharePoint).

- Select the *Submital Stamp TEMPLATE.pdf* file from the browser window and click Open, then click OK on the 'Select Image for Custom Stamp' screen. Name the Category: *Submittal Stamp* and Name the stamp: *Submittal Stamp*. Click OK. Once you use the custom Submittal Stamp it can be added to your Favorite stamp list.

- Submittal Stamp Template file location is on SharePoint:
  https://sharepoint.umaec.umich.edu/proceduresforms/forms/project





To apply the submittal stamp

- In the Comment pane, under Annotations, select the Submittal Stamp. Place the stamp in desired location on page. Use the *Add Text Box* tool  (found in the Comments Pane under Drawing Markups) to add reviewer name/ date. Move the typed name/date information into position over the stamp. Mark the action code in a similar manner. Color and font properties can be changed using the *Properties Bar* (short cut: Ctrl +E to open it). When the submittal review is complete (reviewed, marked up, and stamped) **PRINT** the file to the Adobe PDF in order to "lock in" the markups and stamp. Name the file with the UM project number, the word REVIEWED, spec section number, and the short description used in contractor's original submittal.

    Example: PXXXX REVIEWED 087100 Door Hardware.pdf

- *Note: If the Identity/Setup window appears when applying the stamp; check the 'do not show me again' box and cancel out.