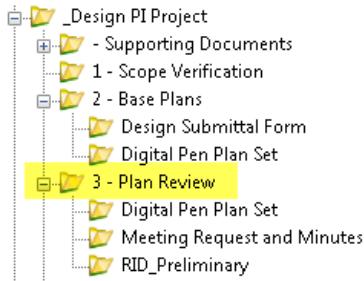
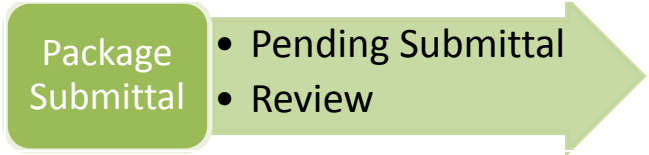


The Plan Review ProjectWise Process

Folder:



Workflow:

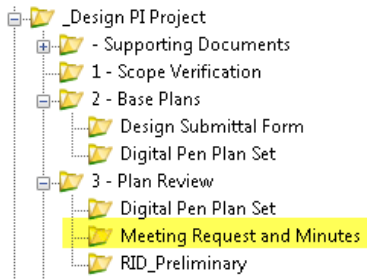


State:	The Plan Review – Pending Submittal	
PPMS Task:	3580 – Develop Preliminary Plans	
Step	Action	
1	<p><i>Design Team</i> – Create PDF of:</p> <ul style="list-style-type: none"> Plan Set and name “JN_Plans_Preliminary.pdf” Proposal and name “JN_Proposal_Preliminary.pdf” Supporting Documents and name “JN_SupportingDocuments.pdf” <p><i>NOTE: ROW must be included in plan set.</i></p>	
2	<p><i>Design Team</i> – Add PDFs created in step 1 into the ‘3 – Preliminary Plans’ folder.</p>	
3	<p><i>Design Team</i> – Are all Preliminary Plan Review related files in the system? Yes, then:</p> <ul style="list-style-type: none"> Highlight all files located in the ‘3 - Preliminary Plans’ folder. Then right click and select Change State. Select Next. 	
4	<p><i>Design Team</i> – Click on OK in the ‘Change Document to State’ window</p>	
5	<p><i>Design Team</i> – Add the Project Manger’s email address into the system generated email.</p> <p><i>NOTE: Leave MDOT-DesignPlanReview address in email. Also, you only need to send one email (close out of the other ones).</i></p>	

State:	The Plan Review – Review	
PPMS Task:	3580 – Develop Preliminary Plans	
Step	Action	
1	<p><i>Project Manager</i> – Upon receipt of email, review proposal, plans and supporting document packages.</p>	
2	<p><i>Project Manager</i> – If files are ready for review, create a Digital Pen Set.</p>	

The Plan Review ProjectWise Process

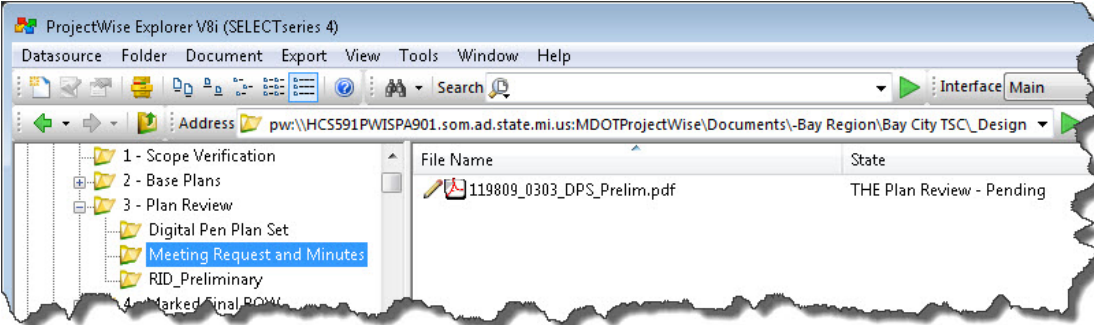
Folder:



Workflow:

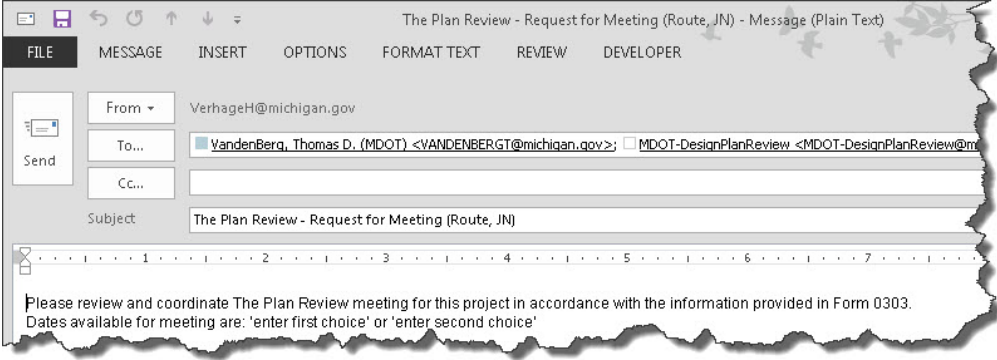
The
Plan
Review

- Pending
- Request for Meeting
- Assigned to Reviewer
- Schedule and Distribution
- Ready for Review
- PM Comment Review
- Ready for Meeting
- Draft Meeting Report Pending
- Final Report Distribution
- Final Meeting Report

State:	The Plan Review – Pending
PPMS Task:	3580 Develop Preliminary Plans
Step	Action
1	<p><i>Project Manager</i> – Update and Save the ‘JN_0303_DPS.pdf’ file, located in ‘- Supporting Documents’ folder.</p> <p><i>NOTE: This is a “living” form. The Project Manager will update this form at each milestone.</i></p>
2	<p><i>Project Manager</i> – Print ‘JN_0303_DPS.pdf’ to PDF and apply the naming convention of ‘JN_0303_DPS_Prelim.pdf’.</p>
3	<p><i>Project Manager</i> – Add file created in step 2 into the ‘Meeting Request and Minutes’ Folder.</p> <p><i>NOTE: This file will be used to trigger the rest of the The Plan Review workflow process.</i></p> 
4	<p><i>Project Manager</i> – Ready to coordinate The Plan Review meeting date with QA Review Manager? Yes, then:</p> <ul style="list-style-type: none"> • Single Left click on the ‘0303_DPS_Prelim.pdf’ located in the ‘Meeting Request and Minutes’ folder. • Then right click and select Change State. • Select Next.
5	<p><i>Project Manager</i> – Click on OK in the ‘Change Document to State’ window</p>

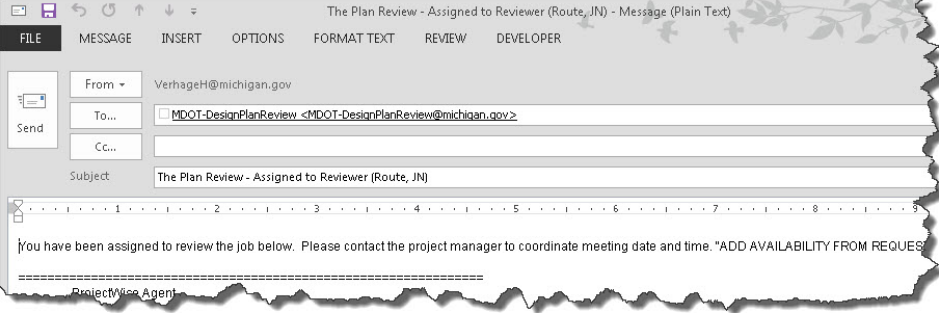
6

Project Manager –
This email is to coordinate with QA on a date for the meeting. Enter Route and JN in subject. Enter dates available into the body of the system generated email.



NOTE: The Project Manager is NOW responsible for scheduling The Plan Review Meeting. This email is only to coordinate dates with QA Reviewer, NOT for them to schedule it.

NOTE: Leave all addresses in email.

State:	The Plan Review – Request for Meeting
PPMS Task:	
Step	Action
1	QA Review Manager – Upon receipt of email, review Proposal, Plans and Supporting Documents packages.
2	QA Review Manager – If ready to assign a reviewer, then: <ul style="list-style-type: none"> • Single Left click on the ‘0303_DPS_Prelim.pdf’ located in the ‘Meeting Request and Minutes’ folder. • Then right click and select Change State. • Select Next.
3	QA Review Manager – Click on OK in the ‘Change Document to State’ window
4	QA Review Manager – Add the Reviewer’s email address into the system generated email. <p><i>NOTE: Do not forget to switch this email to HTML format and include the File’s URN.</i></p> 

State:	The Plan Review – Assigned to Reviewer	
PPMS Task:		
Step	Action	
1	<i>QA Reviewer</i> – Upon receipt of email, proceed with coordinating meeting date and time with Project Manager.	
2	<i>QA Reviewer</i> – Once there is an agreed upon date: <ul style="list-style-type: none"> • Single Left click on the '0303_DPS_Prelim.pdf' located in the 'Meeting Request and Minutes' folder. • Then right click and select Change State. • Select Next. 	
3	<i>QA Reviewer</i> – Click on OK in the 'Change Document to State' window	
4	<i>QA Reviewer</i> – Add the Project Manager's email address into the system generated email. <i>NOTE: Add Route and JN to Subject line.</i>	

State:	The Plan Review – Scheduling and Distribution	
PPMS Task:		
Step	Action	
1	<i>Project Manager</i> – Upon receipt of email, proceed with scheduling meeting date and time with reviewers.	
2	<i>Project Manager</i> – Once you ready to initiate the meeting appointment: <ul style="list-style-type: none"> • Single Left click on the '0303_DPS_Prelim.pdf' located in the 'Meeting Request and Minutes' folder. • Then right click and select Change State. • Select Next. 	
3	<i>Project Manager</i> – Click on OK in the 'Change Document to State' window	
4	<i>Project Manager</i> – Please do the following to the system generated email: <ul style="list-style-type: none"> • File > Save (this will save the email into your Drafts Outlook cabinet) • Close the system generated email • Go into your Outlook Drafts cabinet • Highlight 'The Plan Review Meeting for (CS - JN)' email • Copy and Paste body of email into a newly created Meeting email <ul style="list-style-type: none"> ○ Add internal and external meeting attendees <ul style="list-style-type: none"> ▪ Use the Contact List located in the '-Supporting Documents' Reference Set. This list includes all Region and Central Office reviewers as well as MDOT-RIDSupport@michigan.gov. <p><i>NOTE: Have ROW? Remember to invite ROW staff.</i></p> <ul style="list-style-type: none"> ○ Review body of email and update all meeting specific information (see highlighted text below) 	

THE PLAN REVIEW MEETING ON: "ENTER ROUTE" CS: "ENTER CN" JNs: "ENTER JNs HERE"; "ENTER LOCATION DESCRIPTION HERE".

Work entails: "ENTER INFORMATION HERE"

The Plan Review Meeting on this project has been scheduled for "ENTER DATE HERE". "ENTER QA REVIEWER" will oversee this meeting and meet interested personnel at MDOT's "ENTER LOCATION AND STREET ADDRESS HERE" at "ENTER TIME HERE".

This project will be using the pilot digital pen process for reviewing the plans. Please make sure plans are printed from the Digital Pen Plan Set folder (Digital Pen Plan Set) in ProjectWise and that all plan comments are done using a digital pen. See the attached file for additional instructions.

non-MDOT invitees: This project will be using Adobe commenting to review the plans which are located in MDOT's ProjectWise. For access into MDOT's ProjectWise system, please notify the Project Manager.


All digital pen comments need to be placed in ProjectWise by 4:00 pm, "ADD DATE HERE" for the "ENTER PROJECT MANAGER" to do comment cleanup and redistribute a commented set of prints to all meeting attendees by "ADD DATE HERE" meeting.

Electronic plan and proposal documents can be viewed in MDOT's ProjectWise at the following location:

Document Link:
"ADD DIGITAL PEN PLAN SET LINK HERE"

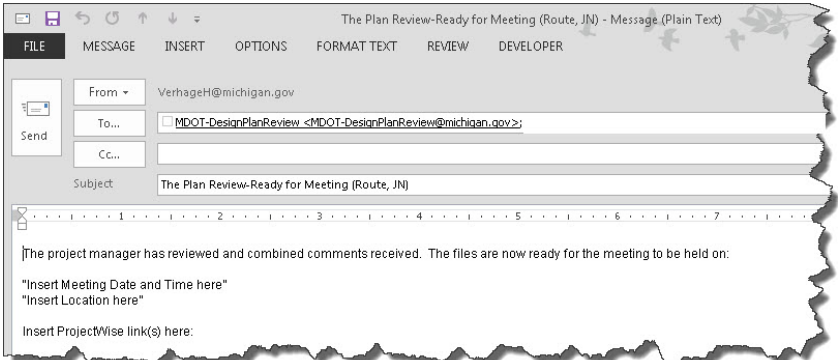
Project Manager: "ENTER NAME AND PHONE NUMBER HERE "

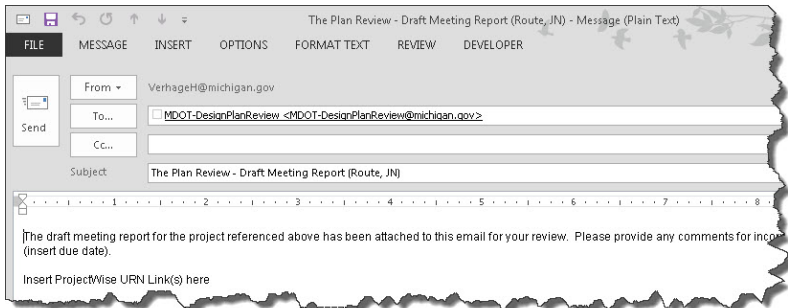
If you have further comments or questions that require discussion, please contact me.
NOTE: Please allow 20 work days for Preliminary Plan Review.

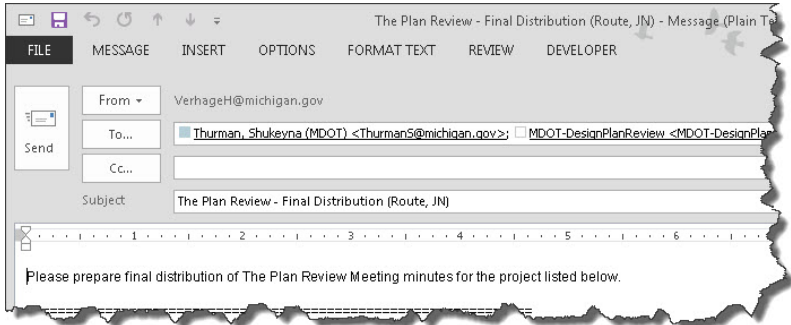


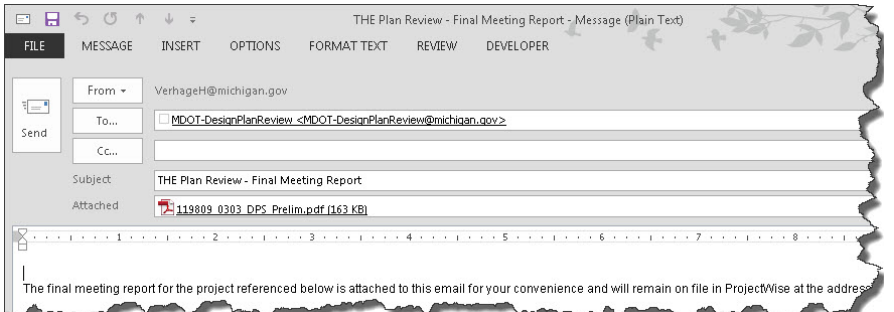
REMINDER: Update RID Checklist then copy it into RID_Preliminary folder along with other RID files for review. Highlight all files than change state to next to submit to RID Review staff.

State:	The Plan Review – Ready for Review
PPMS Task:	3590 – The Plan Review (<i>NOTE: 20 work days for review</i>)
Step	Action
1	<i>The Plan Reviewers</i> – Print dot matrix set, or applicable portions, and comment using the Digital Pen process or Adobe commenting. <i>NOTE: Reviewers in the same office can share the same dot matrix set and pen. Also, it is recommended that comments are not removed from the pens until after the review meeting.</i>
2	<i>The Plan Reviewers</i> – Upload Digital Pen comments into ProjectWise.
3	<i>Project Manager</i> – After the 20 work day review period: <ul style="list-style-type: none"> • Single Left click on the '0303_DPS_Prelim.pdf' located in the 'Design Submittal Form' folder. • Then right click and select Change State. • Select Next.
4	<i>Project Manager</i> – Click on OK in the 'Change Document to State' window. <i>NOTE: No email will be generated.</i>

State:	The Plan Review – PM Review in Progress
PPMS Task:	3600 – Project Manager The Plan Review (5 work days for review)
Step	Action
1	<i>Project Manager</i> – Copy ALL digital pen comment files to the ‘Pre-Construction > Record Plan Set Review Comments’ folder prior to reviewing the files.
2	<i>Project Manager</i> – Review and compile comments on ALL digital pen comment files located under the JN’s ‘3 - Plan Review’ folder.
3	<p><i>Project Manager</i> – Once all comments have reviewed and compiled:</p> <ul style="list-style-type: none"> • Single Left click on the ‘0303_DPS_Prelim.pdf’ located in the ‘Design Submittal Form’ folder. • Then right click and select Change State. • Select Next.
4	<i>Project Manager</i> – Click on OK in the ‘Change Document to State’ window.
5	<p><i>Project Manager</i> - Add all Reviewers’ email addresses into the system generated email.</p> <p><i>NOTE: Do not forgot to switch this email to HTML format and include the File’s URN.</i></p> 

State:	The Plan Review – Ready for Meeting (5 work days for review)
PPMS Task:	
Step	Action
1	<i>Reviewers</i> – Review compiled comments. Reminder: contact Project Manager with any comments prior to the The Plan Review Meeting.
2	<p><i>QA Review</i> – Once the meeting has ocured:</p> <ul style="list-style-type: none"> • Prepare Draft Meeting Notes • Add file into the ‘Meeting Request and Minutes’ folder.
3	<p><i>QA Review</i> – Prepare to send out notification requesting review of draft report:</p> <ul style="list-style-type: none"> • Highlight all files located in the ‘Meeting Request and Minutes’ folder. • Then right click and select Change State. • Select Next.
4	<i>QA Review</i> – Click on OK in the ‘Change Document to State’ window.
5	<p><i>QA Review</i> - Add all applicable email addresses into the system generated email.</p> <p><i>NOTE: Do not forgot to switch this email to HTML format and include the File’s URN. Add Route and JN to Subject line.</i></p> <p><i>NOTE: Only send one email.</i></p> 

State:	The Plan Review – Draft Meeting Report Pending	
PPMS Task:		
Step	Action	
1	<i>Reviewers</i> – Upon receipt of email, review Draft Meeting Report. Reminder: contact QA Reviewer with any comments prior to the due date.	
2	<i>QA Review</i> – Once the due date has ocured: <ul style="list-style-type: none"> • Prepare Final Meeting Notes • Print to PDF and add file into the ‘Meeting Request and Minutes’ folder. 	
2	<i>QA Review</i> – Prepare to send out request to have Final Meeting Report distributed: <ul style="list-style-type: none"> • Highlight all files located in the ‘Meeting Request and Minutes’ folder. • Then right click and select Change State. • Select Next. 	
3	<i>QA Review</i> – Click on OK in the ‘Change Document to State’ window.	
4	<i>QA Review</i> – Add Route and JN <i>NOTE: Do not forgot to switch this email to HTML format and include the File’s URN.</i> <i>NOTE: Only send one email.</i>	

State:	The Plan Review – Final Report Distribution	
PPMS Task:		
Step	Action	
1	<i>QA Admin Assistant</i> – Prepare Final Meeting Report for distribution.	
2	<i>QA Admin Assistant</i> – Prepare to send out Final Meeting Report notification: <ul style="list-style-type: none"> • Highlight Final Meeting report located in the ‘Meeting Request and Minutes’ folder. • Then right click and select Change State. • Select Next. 	
3	<i>QA Admin Assistant</i> – Click on OK in the ‘Change Document to State’ window.	
4	<i>QA Admin Assistant</i> - Add all applicable email addresses into the system generated email.	

State:	The Plan Review – Final Meeting Report	
PPMS Task:		
Step	Action	
1	<i>Preliminary Plan Review workflow process is now complete.</i>	