

Adding Submittal Reviewers

RMS 3.0 Government Mode

It is important to remember that all GA transmittals need to have at least one reviewer added and at least 10% of all FIO transmittals must be reviewed.

Any GA transmittals that does not have a reviewer assigned will default to the assigned project engineer. Any FIO transmittal that does not have a reviewer will be “F” coded and out-processed by the next business day.



From the main “Contract Menu” select “Submittals”.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection Back Refresh Help

Contract Menu ★ Mark As Favorite

Government Action Items
0 High 0 Medium 84 Low

Contractor Action Items
0 High 6 Medium 0 Low

My Action Items
0 High 0 Medium 0 Low

Administration Finances QA/QC **Submittals** Schedules Closeout Import/Export Contract Reports

Contract Description Enter award description and funding sources. Contract location should be entered.	Contract Status Enter status/delay codes. Update Issues and Phase.	Contract Personnel Assign PDT and view User Roles.	Contract Documents Identify and send documents to PCF.
Contract File Identify and send documents to PCF.	Contract Setup Determine how contract is to be managed by QA and QC staff. Setup submittal register.	P2 Projects Link RMS Contract to P2 Project.	Correspondence Create, edit, and view, Letters and Memos.
Request for Information Respond to RFIs from Contractor.	Contract User Entries Insert data for District generated macros for reporting.	Prime Contractor Identify Contractor for payment purposes and view Contractor Staffing.	Subcontractors Identify Subcontractors, POC's, and Trades.
Contractor Insurance Track General, Auto, and Workman's Comp Insurances.	Contractor Payrolls Enter or Review Contractor Payrolls for Department of Labor reporting purposes.	Labor Interviews Conduct Labor Standard Interviews for Davis-Bacon Compliance.	Action Item Control Control selection, severity and responsible parties for contract action items.

Client:WPF.RMS->ContractMenuView Notifications



Select "Submittal Reviewers"

The screenshot displays the RMS - Resident Management System interface for the contract 'KOD014 Replace Buskin River Waterline'. The interface includes a navigation bar with 'Government Mode Home', 'Contract Selection', 'Back', 'Refresh', and 'Help' buttons. Below this is a 'Contract Menu' section with a 'Mark As Favorite' option. The main content area features three action item summary cards: 'Government Action Items' (0 High, 0 Medium, 84 Low), 'Contractor Action Items' (0 High, 6 Medium, 0 Low), and 'My Action Items' (0 High, 0 Medium, 0 Low). A horizontal menu below these cards includes 'Administration', 'Finances', 'QA/QC', 'Submittals', 'Schedules', 'Closeout', 'Import/Export', and 'Contract Reports'. The 'Submittals' menu item is selected, and a sub-menu is displayed with four options: 'Specification Sections', 'Submittal Register', 'Transmittal Log', and 'Submittal Reviewers'. A black arrow points from the text 'Select "Submittal Reviewers"' to the 'Submittal Reviewers' option in the sub-menu. The 'Submittal Reviewers' option has a description: 'Select Personnel to review transmittal items sent for review by the Contractor.' The bottom of the interface shows the client path 'Client\WPF\RMS->ContractMenuView' and a 'Notifications' area.



Submittal items that have not been assigned to a reviewer will be marked as <Not Set>.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection
Contract Menu

Back Refresh Help

Register 01- Main Register
Click to select another Register

This view allows for batch type operations on submittal register items. Click on the UPDATE button to access these operations such as replacing invalid reviewers or replacing one reviewer with another. You can also change the Reviewers and Review Days for submittal items directly in the data grid below.

UPDATE **Submittal Items** Search Settings Export

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

Section	Item No	Description	SD No	Info Only	Primary Reviewer	Review Days
> 01 19 40.00 29	1	Equipment Schedule	01	FIO	<Not Set>	30
01 32 01.00 10	1	Project Scheduler Qualifications	01	GA	<Not Set>	30
01 35 26	1	Accident Prevention Plan	01	GA	<Not Set>	30
01 35 26	2	Activity Hazard Analysis	01	GA	<Not Set>	30
01 35 26	3	Crane Critical Lift Plan	01	GA	<Not Set>	30
01 35 26	4	Crane Operators	01	GA	<Not Set>	30
01 35 26	5	Confined Space Entry Permit	07	FIO	<Not Set>	30
01 35 26	6	Hot Work Permit	07	FIO	<Not Set>	30
01 35 26	7	License Certificates	07	FIO	<Not Set>	30
01 35 26	8	Certificate of Compliance	07	FIO	<Not Set>	30
01 50 00	1	Construction Site Plan	01	GA	<Not Set>	30
01 50 00	2	Traffic Control Plan	01	GA	<Not Set>	30
01 50 00	3	Backflow Preventer Tests	06	FIO	<Not Set>	30
01 50 00	4	Backflow Tester	07	FIO	<Not Set>	30
01 50 00	5	Backflow Preventers	06	FIO	<Not Set>	30
01 74 19.01 29	1	Waste Management Plan	01	GA	<Not Set>	30
01 74 19.01 29	2	Records	11	FIO	<Not Set>	30
01 78 00	1	Warranty Management Plan	03	FIO	<Not Set>	30
01 78 00	2	Warranty Tags	03	FIO	<Not Set>	30
01 78 00	3	Final Cleaning	03	FIO	<Not Set>	30
01 78 00	4	Spare Parts Data	03	FIO	<Not Set>	30
01 78 00	5	Preventative Maintenance	08	FIO	<Not Set>	30

Client:WPF.RMS.Views.Submittals.SubmittalReviewerSelection -> SubmittalReviewerSelectionView

Notifications



The following slides shows the many options on how to assign submittal reviewers.



Option 1: Update each item one at a time.



Click on the right hand side of the Primary Reviewer to bring up the drop down menu to access the staff look up.

Testing Project
[J4000672] W911KB-00-C-024A

Register 01 - Main Submittal Register

This view allows for batch type operations on submittal register items. Click on the UPDATE button to access these operations such as replacing invalid reviewers or replacing one reviewer with another. You can also change the Reviewers and Review Days for submittal items directly in the data grid below.

Section	Item No	Description	SD No	Info Only	Primary Reviewer	Review Days
01 19 40.00 29	1	Concrete Anchor Block Location Survey	06	GA	<Not Set>	30
01 35 26	1	Crane Operators	01	GA	<Not Set>	30
01 35 26	2	Reports	06	FIO	<Not Set>	30
01 35 26	3	Crane Reports	06	FIO	<Not Set>	30
01 35 26	4	Certificates of Compliance	07	FIO	<Not Set>	30
01 78 00	1	Record Drawings	11	GA	<Not Set>	30
01 78 00	2			GA	<Not Set>	0
03 20 02	1	Fabrication and Placement	02	GA	<Not Set>	30
03 20 02	2	Materials	03	FIO	<Not Set>	30
03 20 02	3	Welding	03	FIO	<Not Set>	30
03 20 02	4	Zinc-Coated (Galvanized) Reinforcing	03	FIO	<Not Set>	30
03 20 02	5	Test, Inspections and Verifications	06	FIO	<Not Set>	30
03 23 00	1	Installation Drawings	02	GA	<Not Set>	30
03 23 00	2	Prestressing Method and Equipment	03	GA	<Not Set>	30
03 23 00	3	Materials Disposition Records	03	FIO	<Not Set>	30
03 23 00	4	Stressing Tendons and Accessories	06	FIO	<Not Set>	30
03 23 00	5	Prestressing Operations Records	03	FIO	<Not Set>	30

KOD014 Replace Buskin River Waterline
[J4001410] W911KB-17-C-0017

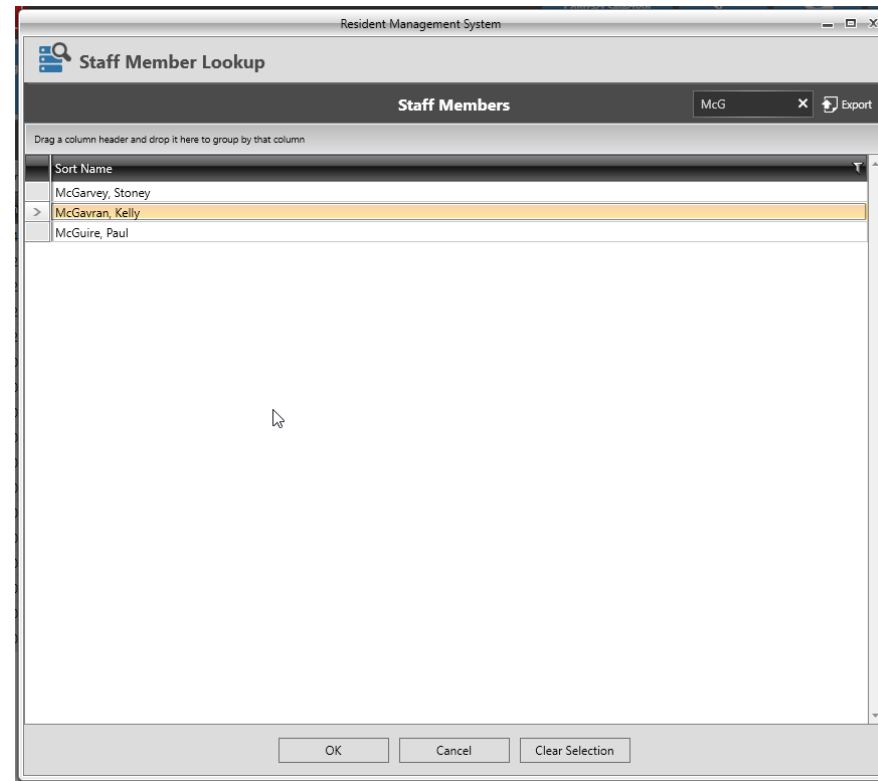
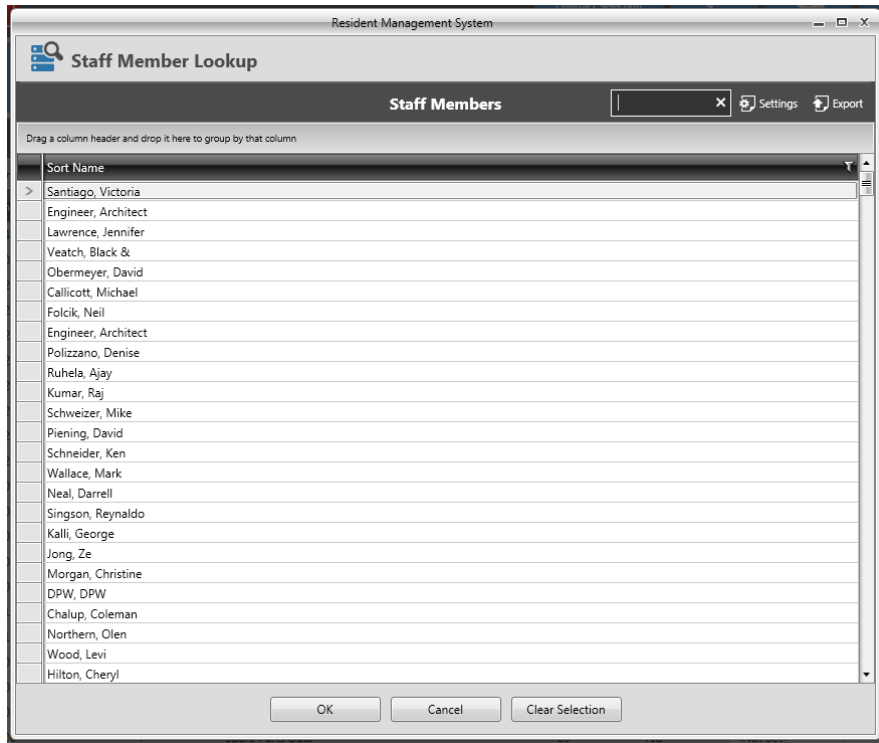
Register 01 - Main Register

This view allows for batch type operations on submittal register items. Click on the UPDATE button to access these operations such as replacing invalid reviewers or replacing one reviewer with another. You can also change the Reviewers and Review Days for submittal items directly in the data grid below.

Section	Item No	Description	SD No	Info Only	Primary Reviewer	Review Days
01 19 40.00 29	1	Equipment Schedule	01	FIO	<Not Set>	30
01 32 01.00 10	1	Project Scheduler Qualifications	01	GA	<Not Set>	30
01 35 26	1	Accident Prevention Plan	01	GA	<Not Set>	30
01 35 26	2	Activity Hazard Analysis	01	GA	<Not Set>	30
01 35 26	3	Crane Critical Lift Plan	01	GA	<Not Set>	30
01 35 26	4	Crane Operators	01	GA	<Not Set>	30
01 35 26	5	Confined Space Entry Permit	07	FIO	<Not Set>	30
01 35 26	6	Hot Work Permit	07	FIO	<Not Set>	30
01 35 26	7	License Certificates	07	FIO	<Not Set>	30
01 35 26	8	Certificate of Compliance	07	FIO	<Not Set>	30
01 50 00	1	Construction Site Plan	01	GA	<Not Set>	30
01 50 00	2	Traffic Control Plan	01	GA	<Not Set>	30
01 50 00	3	Backflow Preventer Tests	06	FIO	<Not Set>	30
01 50 00	4	Backflow Tester	07	FIO	<Not Set>	30
01 50 00	5	Backflow Preventers	06	FIO	<Not Set>	30
01 74 19.01 29	1	Waste Management Plan	01	GA	<Not Set>	30
01 74 19.01 29	2	Records	11	FIO	<Not Set>	30
01 78 00	1	Warranty Management Plan	03	FIO	<Not Set>	30
01 78 00	2	Warranty Tags	03	FIO	<Not Set>	30
01 78 00	3	Final Cleaning	03	FIO	<Not Set>	30
01 78 00	4	Spare Parts Data	03	FIO	<Not Set>	30
01 78 00	5	Preventative Maintenance	08	FIO	<Not Set>	30



Starting typing in the primary reviewer's name into the search box to narrow down the list. Highlight the reviewer's name and select "OK".



The reviewer will be added.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection
Contract Menu

Back Refresh Help

Register 01: Main Register
Click to select another Register

This view allows for batch type operations on submittal register items. Click on the UPDATE button to access these operations such as replacing invalid reviewers or replacing one reviewer with another. You can also change the Reviewers and Review Days for submittal items directly in the data grid below.

UPDATE Submittal Items Search Settings Export

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

Section	Item No	Description	SD No	Info Only	Primary Reviewer	Review Days
01 19 40.00 29	1	Equipment Schedule	01	FIO	McGavran, Kelly	30
01 32 01.00 10	1	Project Scheduler Qualifications	01	GA	<Not Set>	30
01 35 26	1	Accident Prevention Plan	01	GA	<Not Set>	30
01 35 26	2	Activity Hazard Analysis	01	GA	<Not Set>	30
01 35 26	3	Crane Critical Lift Plan	01	GA	<Not Set>	30
01 35 26	4	Crane Operators	01	GA	<Not Set>	30
01 35 26	5	Confined Space Entry Permit	07	FIO	<Not Set>	30
01 35 26	6	Hot Work Permit	07	FIO	<Not Set>	30
01 35 26	7	License Certificates	07	FIO	<Not Set>	30
01 35 26	8	Certificate of Compliance	07	FIO	<Not Set>	30
01 50 00	1	Construction Site Plan	01	GA	<Not Set>	30
01 50 00	2	Traffic Control Plan	01	GA	<Not Set>	30
01 50 00	3	Backflow Preventer Tests	06	FIO	<Not Set>	30
01 50 00	4	Backflow Tester	07	FIO	<Not Set>	30
01 50 00	5	Backflow Preventers	06	FIO	<Not Set>	30
01 74 19.01 29	1	Waste Management Plan	01	GA	<Not Set>	30
01 74 19.01 29	2	Records	11	FIO	<Not Set>	30
01 78 00	1	Warranty Management Plan	03	FIO	<Not Set>	30
01 78 00	2	Warranty Tags	03	FIO	<Not Set>	30
01 78 00	3	Final Cleaning	03	FIO	<Not Set>	30
01 78 00	4	Spare Parts Data	03	FIO	<Not Set>	30
01 78 00	5	Preventative Maintenance	08	FIO	<Not Set>	30

Client:WPF.RMS.Views.Submittals.SubmittalReviewerSelection - SubmittalReviewerSelectionView

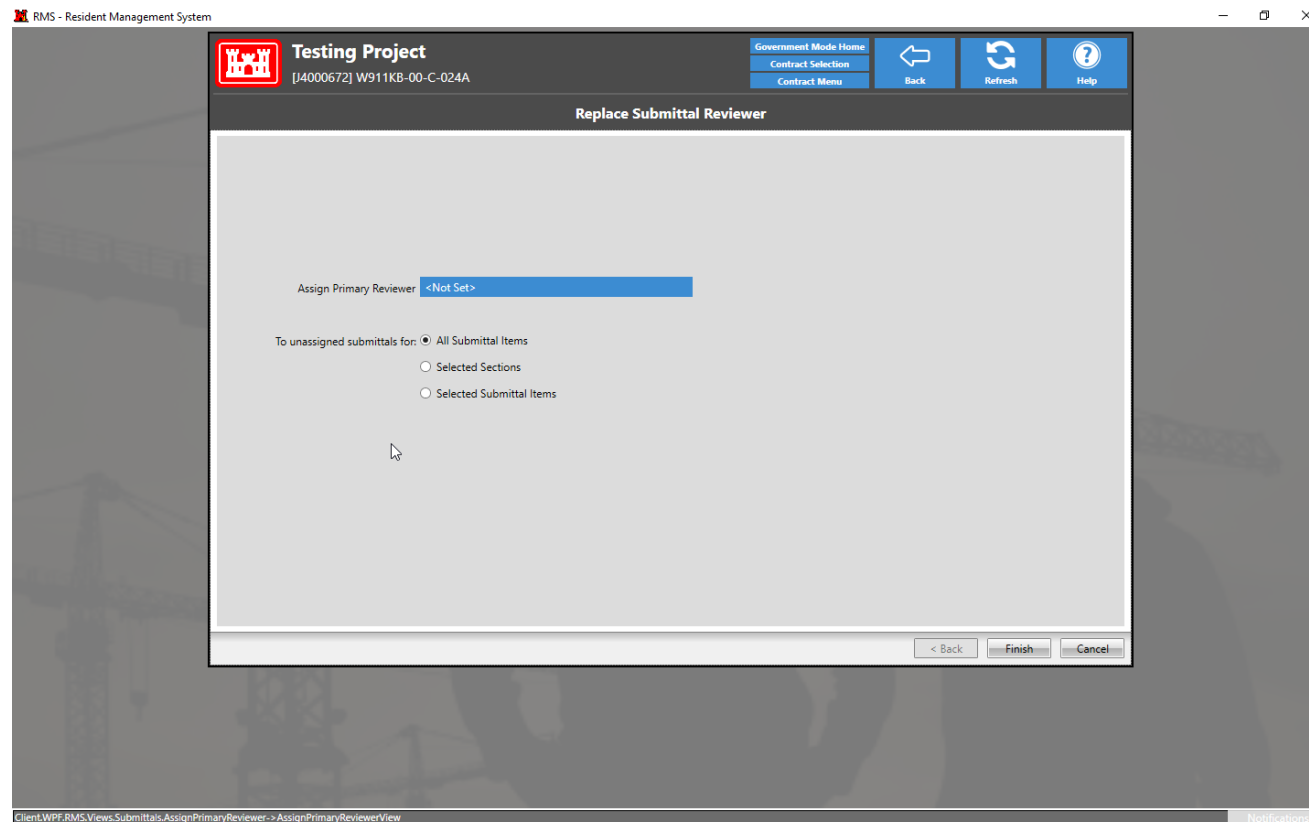
Notifications



The following options is just for “Assign Primary Reviewer for Unassigned Reviewers”. The other options in the drop down menu will be covered by other step-by-step instructions.



After selecting “Assign Primary Reviewer to Unassigned Submittals” the “Replace Submittal Reviewer” menu will appear. Options 2-4 will cover the three options listed below.

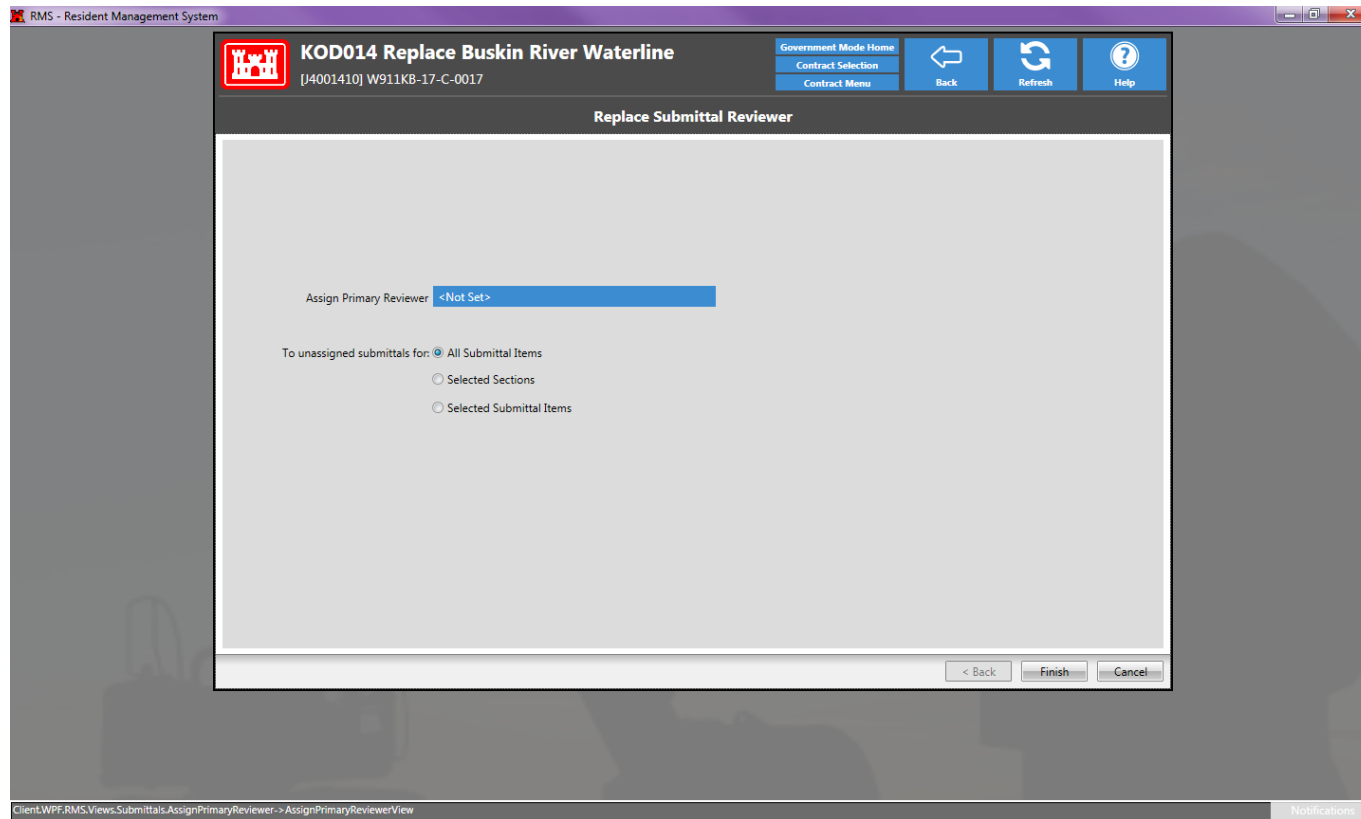


Option Number 2: All Submitted Items

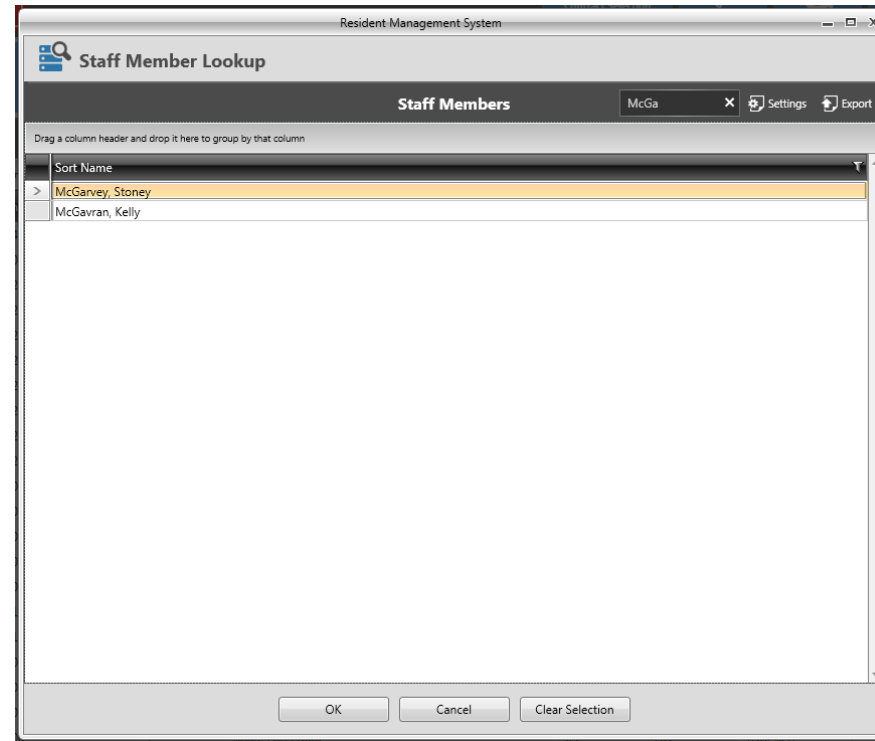
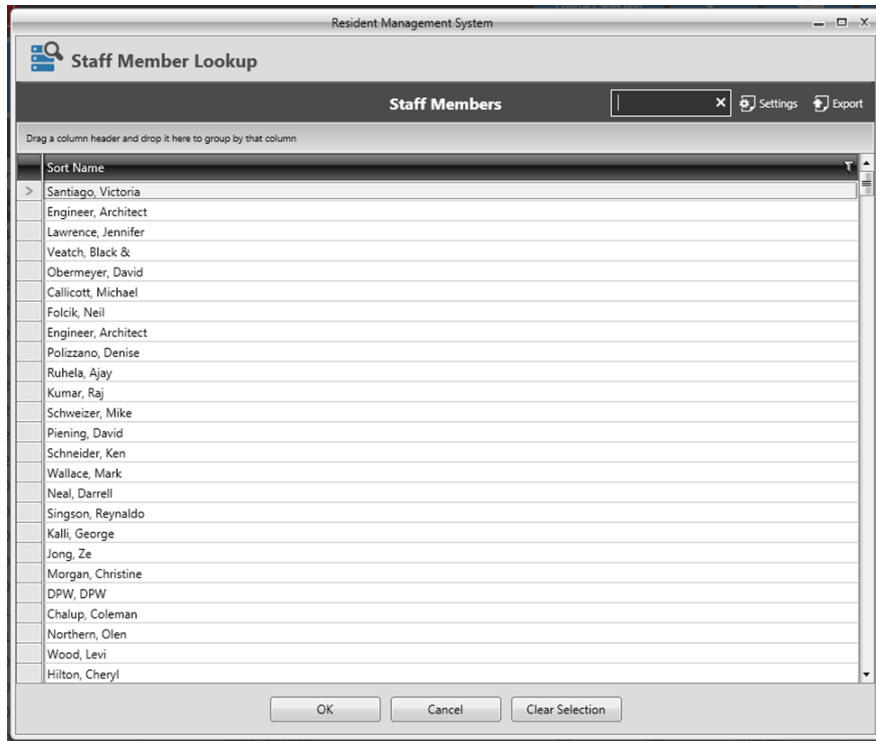
- ▶ This option fills in all submittal items that are currently <Not Set> with the selected reviewer. This will not overwrite previously assigned reviewers.



Select “All Submittal Items” and click on the blue box next to “Assign Primary Reviewer”.



The “Staff Member Lookup” will appear. Start typing in the name of the reviewer in the “Search” box. This will narrow down the list. Highlight the name of the reviewer and select “OK”.



Primary Reviewer will be populated for all items that did not have a reviewer.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection
Contract Menu

Back Refresh Help

Register 01- Main Register
Click to select another Register

This view allows for batch type operations on submittal register items. Click on the UPDATE button to access these operations such as replacing invalid reviewers or replacing one reviewer with another. You can also change the Reviewers and Review Days for submittal items directly in the data grid below.

UPDATE Submittal Items Search Settings Export

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

Section	Item No	Description	SD No	Info Only	Primary Reviewer	Review Days
> 01 19 40.00 29	1	Equipment Schedule	01	FIO	McGavran, Kelly	30
01 32 01.00 10	1	Project Scheduler Qualifications	01	GA	McGavran, Kelly	30
01 35 26	1	Accident Prevention Plan	01	GA	McGavran, Kelly	30
01 35 26	2	Activity Hazard Analysis	01	GA	McGavran, Kelly	30
01 35 26	3	Crane Critical Lift Plan	01	GA	McGavran, Kelly	30
01 35 26	4	Crane Operators	01	GA	McGavran, Kelly	30
01 35 26	5	Confined Space Entry Permit	07	FIO	McGavran, Kelly	30
01 35 26	6	Hot Work Permit	07	FIO	McGavran, Kelly	30
01 35 26	7	License Certificates	07	FIO	McGavran, Kelly	30
01 35 26	8	Certificate of Compliance	07	FIO	McGavran, Kelly	30
01 50 00	1	Construction Site Plan	01	GA	McGavran, Kelly	30
01 50 00	2	Traffic Control Plan	01	GA	McGavran, Kelly	30
01 50 00	3	Backflow Preventer Tests	06	FIO	McGavran, Kelly	30
01 50 00	4	Backflow Tester	07	FIO	McGavran, Kelly	30
01 50 00	5	Backflow Preventers	06	FIO	McGavran, Kelly	30
01 74 19.01 29	1	Waste Management Plan	01	GA	McGavran, Kelly	30
01 74 19.01 29	2	Records	11	FIO	McGavran, Kelly	30
01 78 00	1	Warranty Management Plan	03	FIO	McGavran, Kelly	30
01 78 00	2	Warranty Tags	03	FIO	McGavran, Kelly	30
01 78 00	3	Final Cleaning	03	FIO	McGavran, Kelly	30
01 78 00	4	Spare Parts Data	03	FIO	McGavran, Kelly	30
01 78 00	5	Preventative Maintenance	08	FIO	McGavran, Kelly	30

Client:WPF.RMS.Views.Submittals.SubmittalReviewerSelection -> SubmittalReviewerSelectionView

Notifications



Option 3: Assign Selected Sections.

- ▶ This will allow a primary reviewer to be added to specific specification sections.



Click “Selected Sections”.

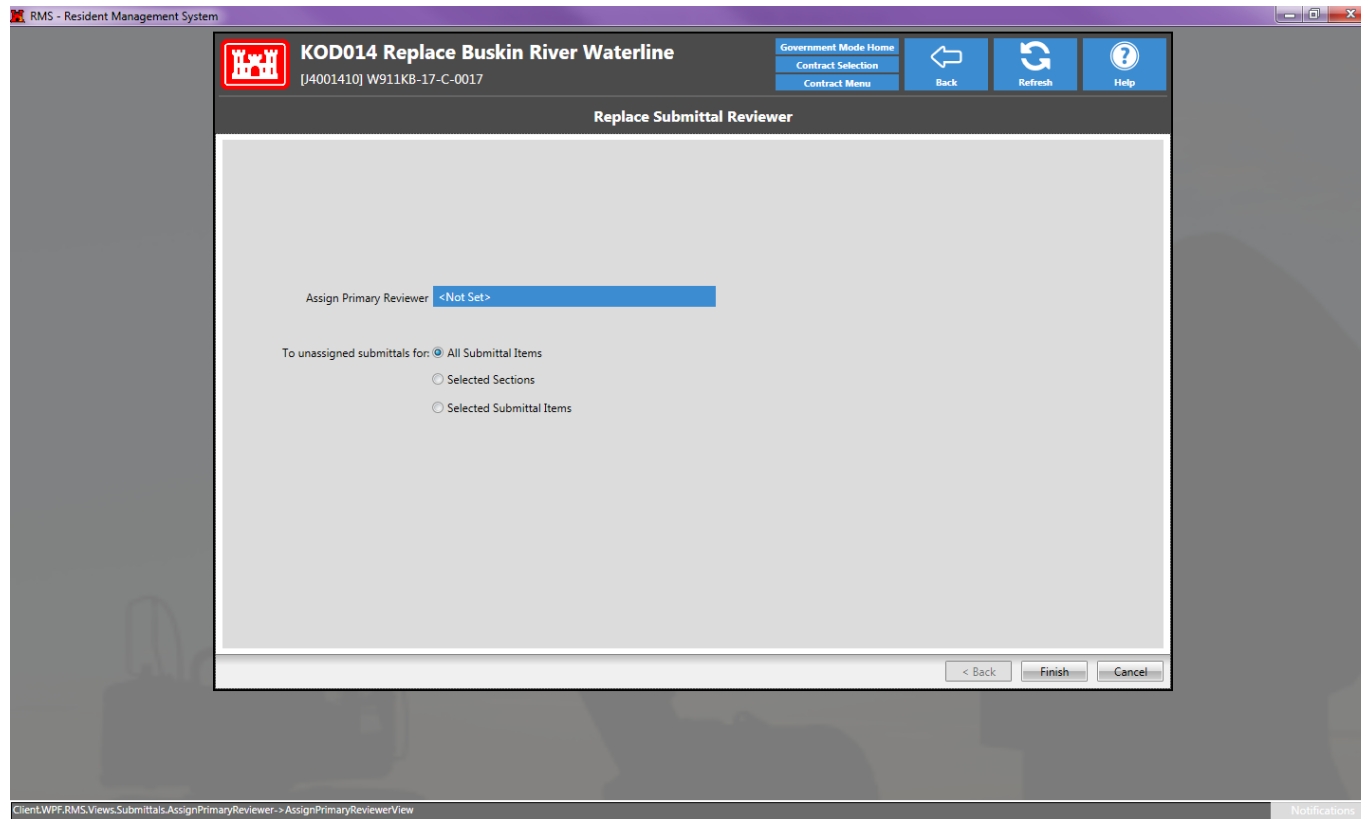
The screenshot displays the 'RMS - Resident Management System' window. The main header area includes a logo on the left, the title 'KOD014 Replace Buskin River Waterline' with the identifier '[J4001410] W911KB-17-C-0017', and navigation buttons for 'Government Mode Home', 'Contract Selection', and 'Contract Menu'. Below this are 'Back', 'Refresh', and 'Help' buttons. The main content area is titled 'Replace Submittal Reviewer' and contains the following elements:

- 'Assign Primary Reviewer' dropdown menu showing '<Not Set>'.
- 'To unassigned submittals for:' section with three radio button options:
 - All Submittal Items
 - Selected Sections
 - Selected Submittal Items

At the bottom of the main content area are '< Back', 'Next >', and 'Cancel' buttons. The status bar at the very bottom shows the path 'Client\WPF\RMS.Views.Submittals.AssignPrimaryReviewer->AssignPrimaryReviewerView' and a 'Notifications' icon.



Click on the blue box next to “Assign Primary Reviewer”.



Once the primary reviewer has been selected, click “Next”

The screenshot displays the 'RMS - Resident Management System' window. The main header shows 'KOD014 Replace Buskin River Waterline' with the ID '[J4001410] W911KB-17-C-0017'. Navigation options include 'Government Mode Home', 'Contract Selection', and 'Contract Menu'. Action buttons for 'Back', 'Refresh', and 'Help' are present. The central area is titled 'Replace Submittal Reviewer' and contains the following elements:

- 'Assign Primary Reviewer' with a dropdown menu showing 'McGavran, Kelly'.
- 'To unassigned submittals for:' with three radio button options:
 - All Submittal Items
 - Selected Sections
 - Selected Submittal Items

At the bottom of the form, there are three buttons: '< Back', 'Next >', and 'Cancel'. The status bar at the bottom of the window shows the path 'Client\WPF\RMS.Views.Submittals.AssignPrimaryReviewer->AssignPrimaryReviewerView' and a 'Notifications' icon.



A list of the specification sections for the contract will appear. Click the specification sections that the reviewer will be assigned to. Click “Next”. The selected specification sections will be updated.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection
Contract Menu

Back Refresh Help

Replace Submittal Reviewer

Assign reviewer [Kelly McGavran] to unassigned submittals in selected sections

Specification Sections Search Settings Export

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

Section	Name
<input type="checkbox"/> 01 19 40.00 29	Special Items (Civil Works)
<input type="checkbox"/> 01 32 01.00 10	PROJECT SCHEDULE
<input type="checkbox"/> 01 35 26	GOVERNMENTAL SAFETY REQUIREMENTS
<input type="checkbox"/> 01 50 00	Temporary Construction Facilities And Controls
<input type="checkbox"/> 01 74 19.01 29	Construction and Demolition Waste Management
<input type="checkbox"/> 01 78 00	CLOSEOUT SUBMITTALS
<input type="checkbox"/> 02 61 13	EXCAVATION AND HANDLING OF CONTAMINATED MATERIAL
<input type="checkbox"/> 31 09 20.00 29	Field Screen Testing of Soils for Chemical Contamination

< Back Finish Cancel

Client:WPF.RMS.Views.Submittals.AssignPrimaryReviewer->AssignPrimaryReviewerView Notifications



Option 4: Selected Submittal Items

- ▶ This option will allow for the selection of multiple submittals items to be selected from all of the specification sections.



Click “Selected Submittal Items”.

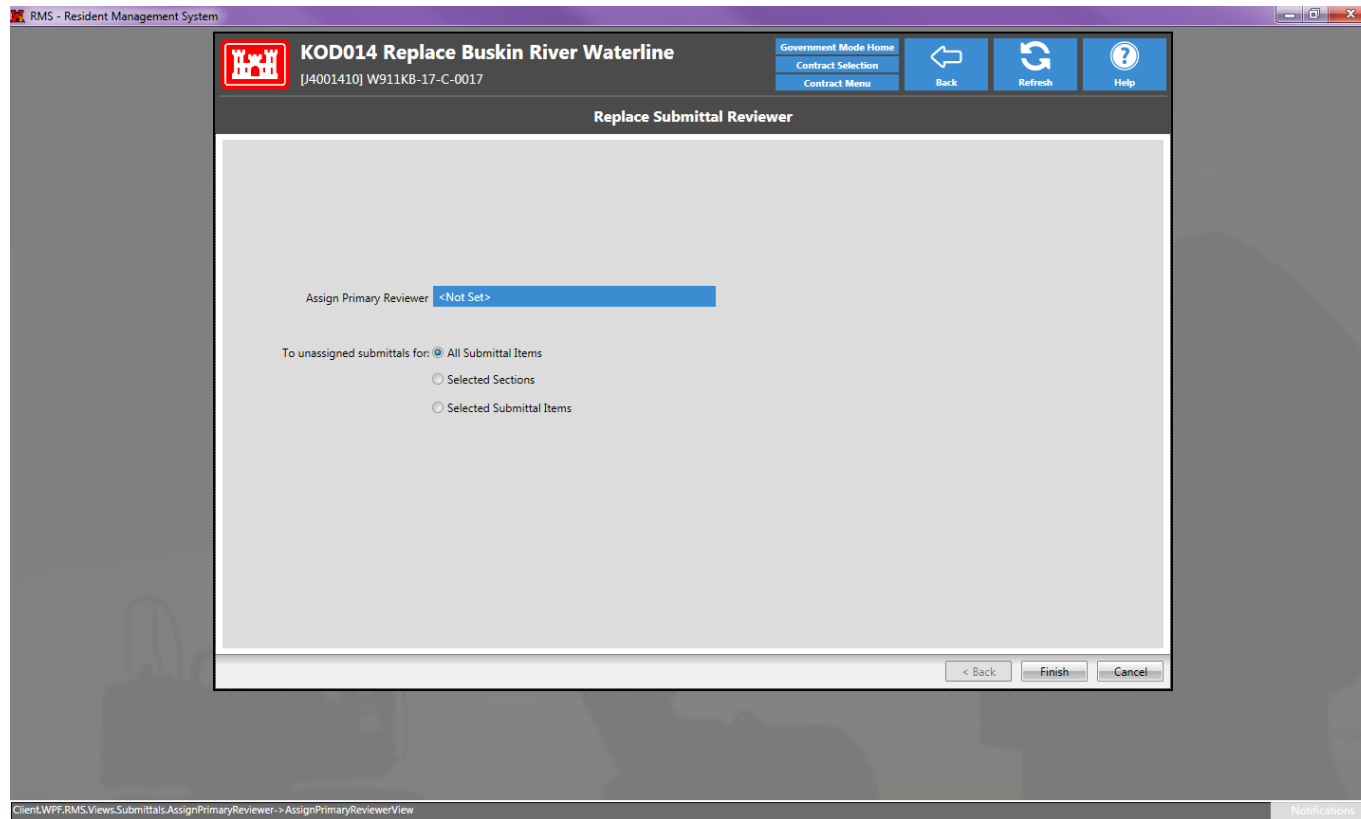
The screenshot displays the 'RMS - Resident Management System' window. The main header shows 'KOD014 Replace Buskin River Waterline' with the ID '[J4001410] W911KB-17-C-0017'. Navigation buttons include 'Government Mode Home', 'Contract Selection', 'Contract Menu', 'Back', 'Refresh', and 'Help'. The central dialog box is titled 'Replace Submittal Reviewer' and contains the following elements:

- 'Assign Primary Reviewer' field with the value 'McGavran, Kelly'.
- 'To unassigned submittals for:' section with three radio button options:
 - All Submittal Items
 - Selected Sections
 - Selected Submittal Items

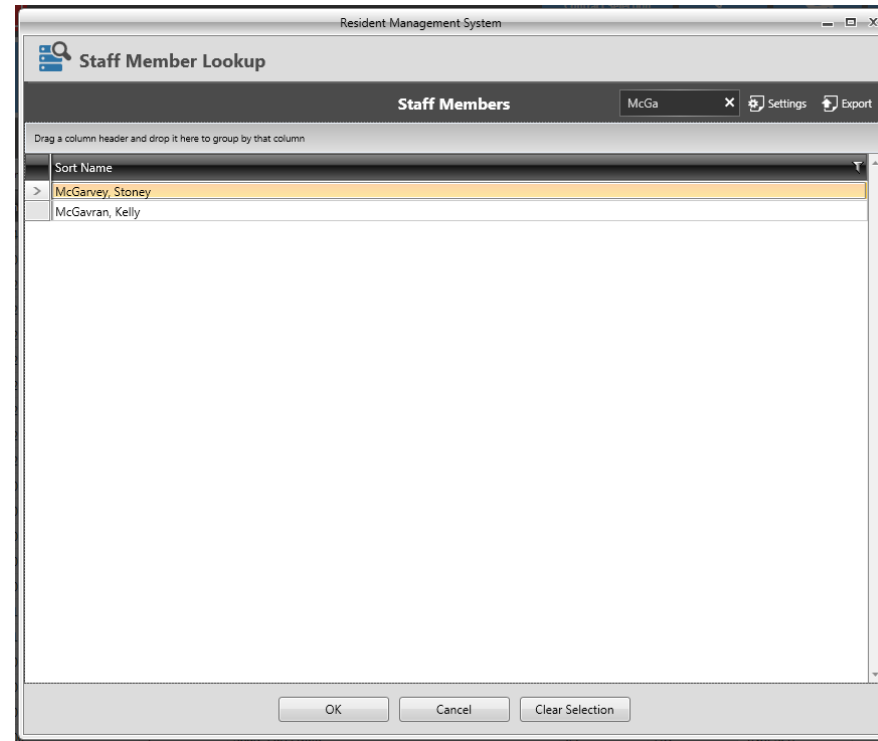
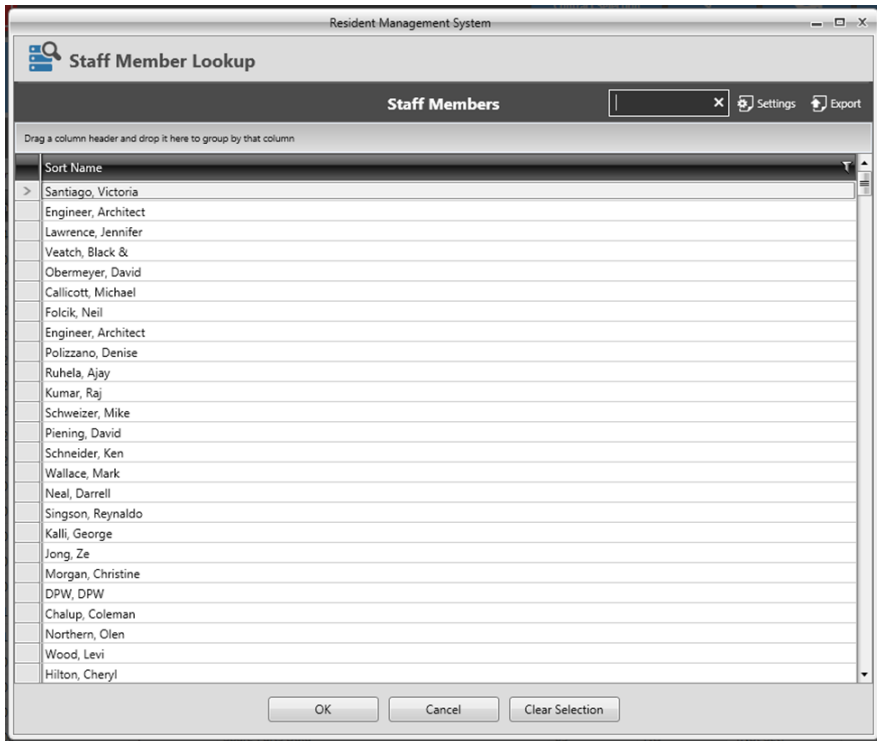
At the bottom of the dialog box are buttons for '< Back', 'Next >', and 'Cancel'. The status bar at the bottom of the window shows the path 'Client\WPF\RMS.Views.Submittals.AssignPrimaryReviewer->AssignPrimaryReviewerView' and a 'Notifications' icon.



Click on the blue box next to “Assign Primary Reviewer”.



The “Staff Member Lookup” will appear. Start typing in the name of the reviewer in the “Search” box. This will narrow down the list. Highlight the name of the reviewer and select “OK”.



Check the boxes next to the items that will be assigned to the primary reviewer.
Click “Finish” when all the items have been selected for that reviewer.

RMS - Resident Management System

KOD014 Replace Buskin River Waterline
[U4001410] W911KB-17-C-0017

Government Mode Home
Contract Selection
Contract Menu

Back Refresh Help

Replace Submittal Reviewer

Assign reviewer [Kelly McGavran] to selected unassigned submittals

Submittal Items Search Settings Export

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

Section	Item	Description	SD No	Type
> 01 19 40.00 29	0	Equipment Schedule	01	PRECONSTRUCTION SUBMITTALS
01 32 01.00 10	0	Project Scheduler Qualifications	01	PRECONSTRUCTION SUBMITTALS
01 35 26	0	Accident Prevention Plan	01	PRECONSTRUCTION SUBMITTALS
01 35 26	0	Activity Hazard Analysis	01	PRECONSTRUCTION SUBMITTALS
01 35 26	0	Crane Critical Lift Plan	01	PRECONSTRUCTION SUBMITTALS
01 35 26	0	Crane Operators	01	PRECONSTRUCTION SUBMITTALS
<input checked="" type="checkbox"/> 01 35 26	0	Confined Space Entry Permit	07	CERTIFICATES
01 35 26	0	Hot Work Permit	07	CERTIFICATES
01 35 26	0	License Certificates	07	CERTIFICATES
01 35 26	0	Certificate of Compliance	07	CERTIFICATES
01 50 00	0	Construction Site Plan	01	PRECONSTRUCTION SUBMITTALS
01 50 00	0	Traffic Control Plan	01	PRECONSTRUCTION SUBMITTALS
01 50 00	0	Backflow Preventer Tests	06	TEST REPORTS
01 50 00	0	Backflow Tester	07	CERTIFICATES
01 50 00	0	Backflow Preventers	06	TEST REPORTS
01 74 19.01 29	0	Waste Management Plan	01	PRECONSTRUCTION SUBMITTALS
01 74 19.01 29	0	Records	11	CLOSEOUT SUBMITTALS
01 78 00	0	Warranty Management Plan	03	PRODUCT DATA
01 78 00	0	Warranty Tags	03	PRODUCT DATA
01 78 00	0	Final Closings	02	PRODUCT DATA

< Back Finish Cancel

Client:WPF.RMS.Views.Submittals.AssignPrimaryReviewer->AssignPrimaryReviewerView Notifications



Note: To add, secondary reviewers this has be done under either the submittal register or when a transmittal comes in for review.

