



Design Reviews

Agency/Higher-Ed

Purpose and Process

- ▶ The Design Review business process provides for the electronic submission, review and approval of the program verification, schematic design, design development and construction documents.
- ▶ The business process must be submitted at specific stages of the design process as defined in the Associate's (A/E) contract.
- ▶ Using this process, the Associate submits drawings and specifications electronically. The Project Manager (PM) coordinates review of the submittal. Automated workflow guides the process and records the results to the project record.
- ▶ **Workflow:**
Created by: A/E → Sent to: PM initial review → Sent to: A/E Update (if necessary) → Sent to: PM detailed review → Sent to: A/E comment response

Design Review Roles

- ▶ Associate (A/E)
 - ▶ Creates the designs, loads them into Document Manager, creates the Design Review record and attaches supporting documents, submits the design review to the PM for review and responds to comments from the review participants
- ▶ Project Manager (PM)
 - ▶ Provides an initial review to ensure completeness of items being submitted and facilitates the detailed review by all appropriate reviewers
- ▶ Review Participants
 - ▶ Participate in the detailed review of design items and submit a comment log to the PM
 - ▶ Participants typically include the Owner, various Consultants, and the Construction Manager (CM)

Create a Design Review Record

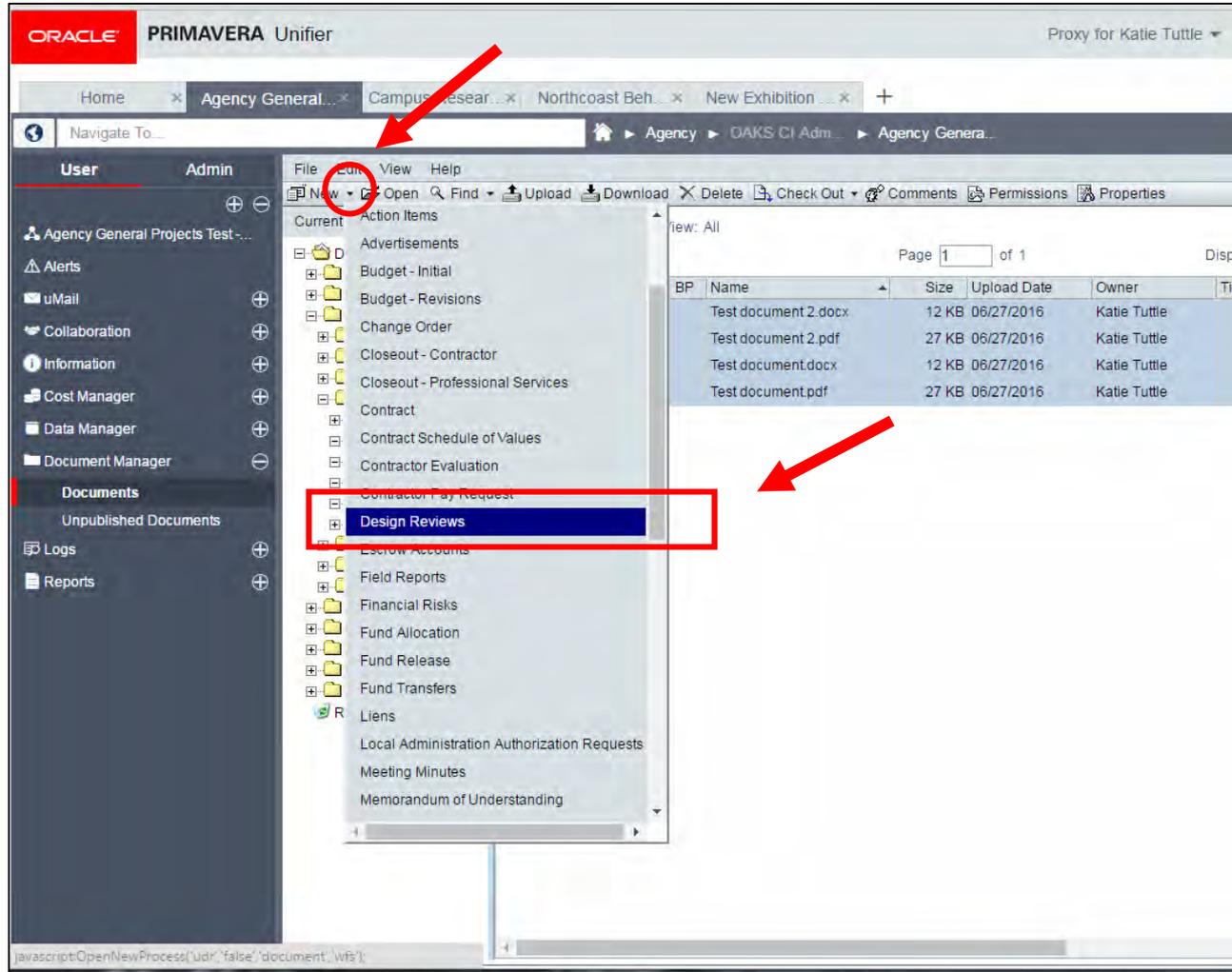
- ▶ In Document Manager, under Documents, select the appropriate folder where your documents are housed.
- ▶ Select all of the document you wish to attach to the Design Review Record.

The screenshot displays the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and a user profile for 'Katie Tuttle'. The breadcrumb trail shows the path: Agency > OAKS CI Adm... > Agency Genera... The left sidebar contains a 'Document Manager' section with a 'Documents' sub-section highlighted by a red box. A red arrow points from this 'Documents' box to the 'Drawings PDF' folder in the main document tree. The 'Drawings PDF' folder is expanded, showing a table of four documents. A red box highlights the entire table, and a red arrow points from the bottom of the table towards the right side of the screen.

Ref.	BP	Name	Size	Upload Date	Owner	Title	RevNo.
		Test document 2.docx	12 KB	06/27/2016	Katie Tuttle		
		Test document 2.pdf	27 KB	06/27/2016	Katie Tuttle		
		Test document.docx	12 KB	06/27/2016	Katie Tuttle		
		Test document.pdf	27 KB	06/27/2016	Katie Tuttle		

Create a Design Review Record

- ▶ Click the down arrow next to “New” and choose Design Review.



Create a Design Review Record

- ▶ The record will be created and the attachments will populate into the record.

The screenshot displays a web application interface for creating a Design Review Record. The interface is organized into several sections:

- General:** Contains form fields for Organization (Department of Administrative Services), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Est. Construction Cost (\$: 0.00), Record Number, Creator (Katie Tuttle), Creation Date, Status, Owner Name (Department of Administrative Services), and Completion Status.
- Action Details:** Includes a 'Create New Design Reviews' section with 'To...' and 'Cc...' buttons, and a 'Task Notes' field.
- Design Reviews:** Features an 'Attachment Index' with 3 items. A red arrow points to the table below.

File Name	Type	Status
update--CMR SOV and GMP Amendment Sam		
Temporarily Run another version of IE.docx		
SAH_Install.ini		

Create a Design Review Record

- ▶ Fill out all of the information in the upper form of the record (General Tab)
- ▶ The sections marked with a red * are required

Create New Design Reviews - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?fromDm=1&module_name=udr&phase=current&project_id=1003

File Edit View Actions Help Workflow Actions -Select

Send Save Spelling.. Discussion Close Window

General Design Reviews

General

Organization:	Department of Administrative Services	Record Number:	
Project Number:	OCI-080001	Creator:	Katie Tuttle
Project Name:	Agency General Projects Test	Creation Date:	
Project Location:	OAKS CI Administration	Status:	
Est. Construction Cost (\$):	0.00	Owner Name:	Department of Administrative Services
Stage:	Criteria Documents *	Completion Status:	50% (CD Only) *

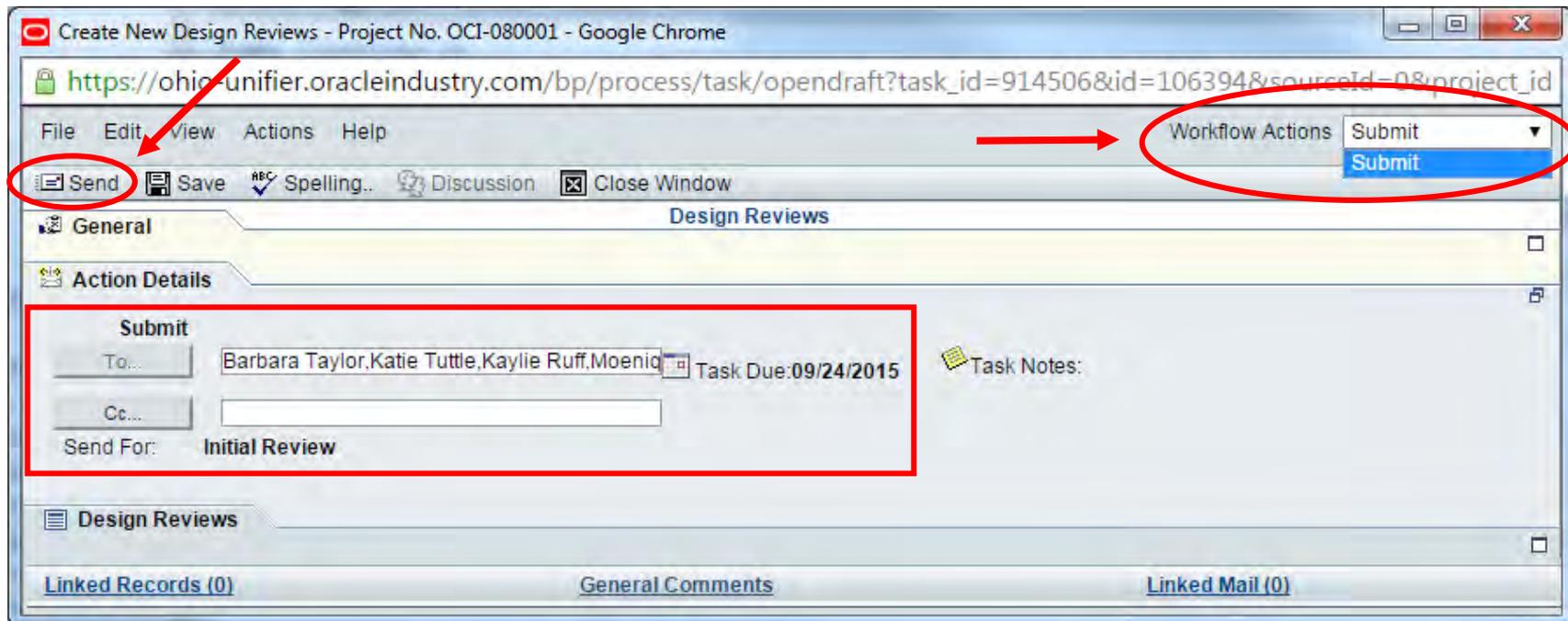
Action Details

Design Reviews

[Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Create a Design Review Record

- ▶ Select Workflow Action: Submit
- ▶ The “To” field will auto populate with the recipient
- ▶ Click Send



Initial Review

- ▶ The Project Manager (PM) reviews the design submission to ensure it is complete and ready for the review participants to consider
- ▶ Navigate to: Collaboration -> Tasks
- ▶ Select Design Review and Double-Click to Open

The screenshot shows the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Proxy for Katie Tuttle'. The breadcrumb trail is 'Agency > OAKS CI Adm... > Agency Genera...'. The left sidebar contains a navigation menu with 'Collaboration' and 'Tasks' highlighted in red. The main content area displays a table of tasks with the following data:

Type	Number	Title	Record Due	From	Sent for	Task Due
Design Reviews	DR-0005			Katie Tuttle,soo	Initial Review	06/30/2016
Change Order	CO-0013	Test Proposal Rec		Katie Tuttle,SOO	PM Review	
Contractor Pay Request	CPR-0011	PR-004 Test		Katie Tuttle,soo	Payment Processing	
Professional Services Agreements	Agree-0014	Agreement #3		Katie Tuttle,soo	Acknowledgement	
Professional Services Agreements	Agree-0013	Test Agreement #2		Katie Tuttle,soo	Update	
Contract	CON-0002	C Test		Rita Nichols, soo	Notice of Intent To Award	
Request for Interpretations	RFI-00010	Request #1		Katie Tuttle,soo	Response Acceptance	03/24/2016
Subcontractor/Supplier Declaration	SSD-0009	Consultant SMSD		Katie Tuttle,soo	Declaration Review	
Request for Interpretations	RFI-00009	RFI Test 8		Katie Tuttle,soo	Response Acceptance	02/02/2016
Submittals	SUB-0016	Test Submittal		Katie Tuttle,soo	Associate Review	02/04/2016
Professional Services Amendments	Amend-0005	Amendment #1		Katie Tuttle,soo	Amendment Proposal Review	
Request for Interpretations	RFI-00008	RFI Test 5		Katie Tuttle,soo	Response Acceptance	01/13/2016
Professional Services Pay Request	PSPR-0008	Tuesday Test		Katie Tuttle,soo	Payment Process	

Initial Review

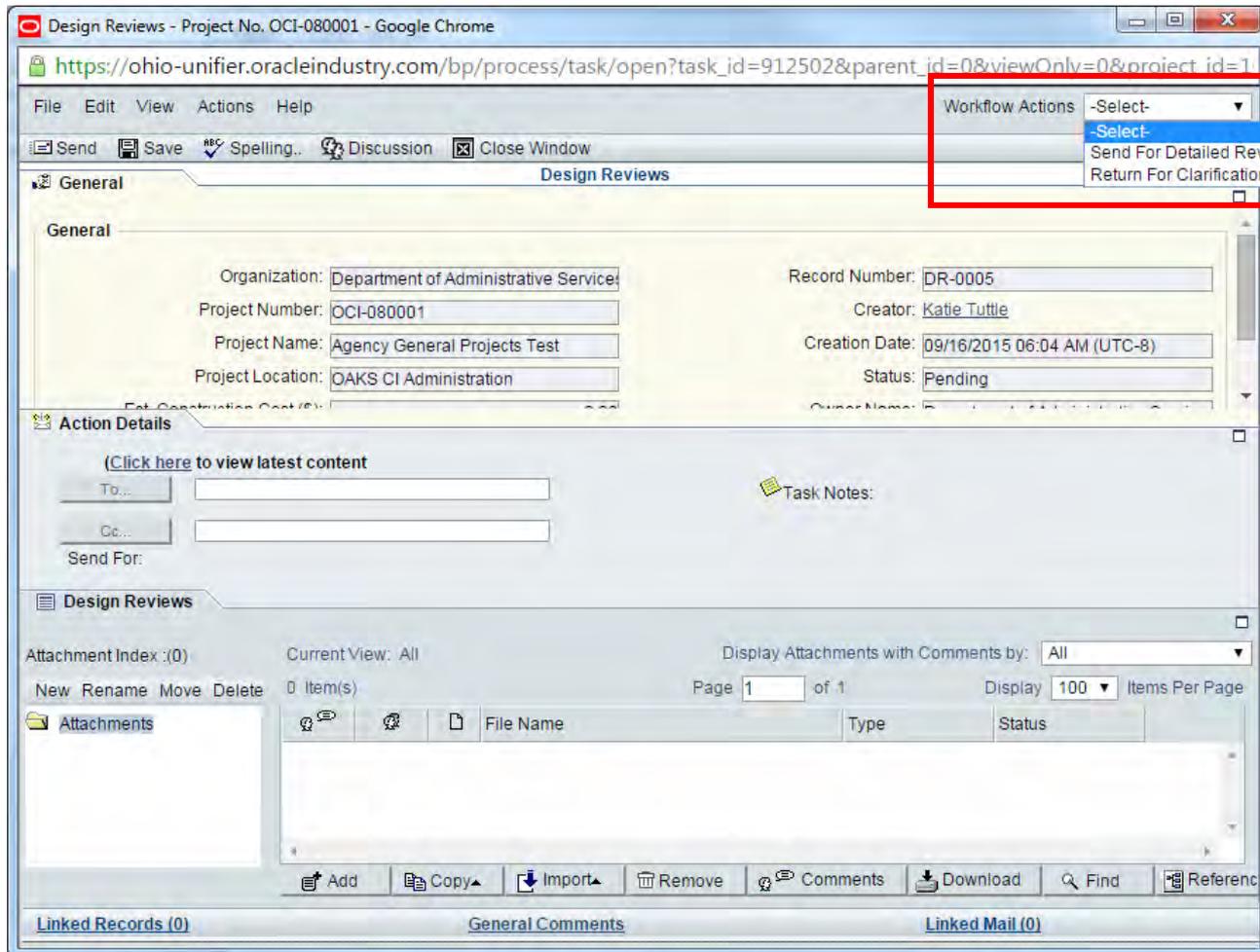
- ▶ You may view any attached document by double clicking the file name in the lower form (attachment index) and then double clicking the file name in the window that appears

The screenshot displays the Oracle BPM Studio interface for creating a new design review. The main window is titled "Create New Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=914506&id=106394&sourceId=0&project_id. The "Design Reviews" form is visible, with fields for Organization (Department of Administrative Service), Project Number, Project Name, and Project Location. The "Attachment Index" section shows 3 items. The first item, "update-CMR SOV and GMP Amendment Sam", is highlighted with a red box. A red arrow points from this item to the "Design Reviews Line Item" form, which also has a red box around the "Name" field containing the same file name. Another red arrow points from the "Name" field back to the "Attachment Index" table.

File Name	Type	Status
update-CMR SOV and GMP Amendment Sam		
Temporarily Run another version of IE.docx		
SAH_Install.ini		

Initial Review Workflow Actions

- ▶ Return for Clarification: Sends the review back to the Associate (A/E)
- ▶ Send for Detailed Review: Sends the review back to the PM



Detailed Review

- ▶ The PM will facilitate a detailed review of the design submission
- ▶ Participants will review the design submission and document questions, comments, suggestions and issues in an individual comments log. This is typically an Excel workbook or Word template provided by the PM

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211