



Design Reviews

K-12 Cloud

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 A/E 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

Create a Design Review Record

- ▶ In Document Manager, under Documents, select the appropriate folder where your documents are housed.
- ▶ Select all of the documents you wish to attach to the Design Review Record by click the first document, holding down your shift key and then selecting the last document.

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Document Manager' expanded to show 'Documents'. A red arrow points to this menu item. The main area displays a table of documents under the 'Design Reviews' folder. A red box highlights a selection of documents from 'Additional Documents'. A red arrow points to the 'Rev.No.' column header in the table.

Name	Ref	BP	Size	Upload Date	Owner	Title	Rev.No.	Issue Date	Pub.No.	% Complete	Location
Design Reviews					Kaylie Ruff					0	/
Additional Documents					Rita Nichols					0	/Design Reviews
Carey LEED Scorec...			100 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
Cooling Load.pdf			84 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
ES_3pm.jpg			281 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
ES_9am.jpg			279 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
Heating Load.pdf			89 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
HS_3pm.jpg			344 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
HS_9am.jpg			344 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
LEED Funding Usa...			141 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
overall_3pm.jpg			247 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
overall_9am.jpg			247 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
Parametric Modelin...			513 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
Thumbs.db			42 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi
Drawings					Rita Nichols					0	/Design Reviews

Total Files: 257

Create a Design Review Record

- ▶ Click “Create” and then choose “Business Process”

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user 'Katie Tuttle'. The breadcrumb trail shows the current location: 'School Facilities > OAKS CI District... > Oak Hills Local...'. The main content area is titled 'Documents' and shows a list of files. A red arrow points to the 'Create' button in the top toolbar, which has opened a dropdown menu. The 'Business Process' option is highlighted in the menu. The table below shows a list of documents with columns for Ref, BP, Size, Upload Date, Owner, Title, Rev.No., Issue Date, Pub.No., % Complete, and Location.

Ref	BP	Size	Upload Date	Owner	Title	Rev.No.	Issue Date	Pub.No.	% Complete	Location
				Kaylie Ruff					0	/
				Rita Nichols					0	/Design Reviews
		100 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		84 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		281 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		279 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		89 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		344 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		344 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		141 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		247 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		247 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		513 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
		42 KB	05/19/2017 0...	Rita Nichols				1	0	/Design Reviews/Additi..
				Rita Nichols					0	/Design Reviews

Total Files: 257

https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?_uref=uuu211:navigator-3#

Create a Design Review Record

- ▶ Select “Design Reviews K12” from the Business Process dropdown list
- ▶ Select Workflow if necessary

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows the user 'Katie Tuttle' and a 'Sign Out' option. The main content area is titled 'Documents' and shows a list of documents under the 'Design Reviews' folder. A 'New Record' dialog box is open in the foreground, prompting the user to select a business process origin, business process, and workflow. The 'Design Reviews K12' business process and 'Design Review' workflow are selected. The background shows a list of documents with columns for '% Complete' and 'Location'.

% Complete	Location
0	/
0	/Design Reviews
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews/Additi...
0	/Design Reviews

URL: https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?__uref=uuu211:navigator-3#

Create a Design Review Record

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

The screenshot displays a web browser window titled "Create New Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromDm=1&wftemplate_id=3008&module_name=udrk&phase=current&project_id=. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with options like Submit, Send, Save, Spelling, Discussion, and Close Window.

The main content area is divided into sections:

- General:** Contains form fields for Project Number (SFC-080001.01), Project Name (Oak Hills Local Building Project), Organization Name, Facility Name, Est. Construction Cost (\$: 0.00), Record Number, Creator (Katie Tuttle), Creation Date, Status, and Completion Status.
- Action Details:** Includes a Submit button, a To... field (Archana Atrey, Barbara Taylor, Bill Schwertfager), a Cc... field, and a Send For field (Initial Review).
- Standard:** Shows an Attachment Index of 12, a Current View of All, and a Display Attachments with Comments by All. Below this is a table of attachments.

The Attachments table has the following data:

File Name	Type	Status
Carey LEED Scorecard 10.18.2013.pdf		
Cooling Load.pdf		
ES_3pm.jpg		
ES_9am.jpg		
HS_3pm.jpg		
HS_9am.jpg		

A red box highlights the first two rows of the attachments table, and a red arrow points to the 'Type' column of the second row.

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 K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromDm=1&wftemplate_id=3008&module_name=udrk&phase=current&project_id=

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Discussion Close Window

General Design Reviews K12

General

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: [Katie Tuttle](#)

Organization Name: Creation Date:

Facility Name: Status:

Est. Construction Cost (\$): 50,000.00

Stage: Program Verification * Completion Status: 85 - 95% (CD Only) *

FilePath: Design Reviews

Publish Path: Design Reviews/Program Verification

Action Details

Standard

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

Create a Design Review Record

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

The screenshot shows a web browser window titled "Create New Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromDm=1&wftemplate_id=3008&module_name=udrk&phase=current&project_id=

The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The toolbar contains "Workflow Actions", "Submit", "Send", "Save", "Spelling..", "Discussion", and "Close Window".

The main content area is titled "Design Reviews K12" and has a "General" tab selected. The "General" section contains the following fields:

- Project Number: SFC-080001.01
- Record Number: [Empty]
- Project Name: Oak Hills Local Building Project
- Creator: [Katie Tuttle](#)
- Organization Name: [Empty]
- Creation Date: [Empty]

The "Action Details" section is also visible, containing a "Submit" sub-section with the following fields:

- To...: Archana Atrey, Barbara Taylor, Bill Schwertfager
- Cc...: [Empty]
- Send For: Initial Review

The "Standard" section at the bottom shows an "Attachment Index" of 12, a "Current View" of "All", and a table of attachments:

File Name	Type	Status
Carey LEED Scorecard 10.18.2013.pdf		
Cooling Load.pdf		
ES 3pm.iib		

At the bottom of the interface, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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: Tasks
- ▶ Select Design Review then Click the Gear icon and click Open

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The main content area is titled 'Tasks' and displays a table of tasks. A red box highlights the table, and a red arrow points to the 'Open' button in the context menu for the first task.

Origin	Business Process	Record Nun
Oak Hills Local Building Project	Design Reviews K12	DR-002
Oak Hills Local Building Project	Locally Funded Initiative MOU	LFI-02
Oak Hills Local Building Project	Action Items K12	AI-0018
Oak Hills Local Building Project	Request for Interpretation K12	RFI-03
Oak Hills Local Building Project	Contract Modification K12	CM-0012
Oak Hills Local Building Project	Contract Schedule of Values K12	SOV-007
Oak Hills Local Building Project	Miscellaneous Commit K12	MC-0008
Oak Hills Local Building Project	Miscellaneous Commit K12	MC-0006
Oak Hills Local Building Project	Action Items K12	AI-0017
Oak Hills Local Building Project	Action Items K12	AI-0016
Oak Hills Local Building Project	Action Items K12	AI-0015
Oak Hills Local Building Project	Action Items K12	AI-0014

The context menu for the first task (DR-002) includes the following options: Open, Accept, Decline, Undo Accept, Print - HTML..., Print - PDF..., and Print - Custom... The 'Open' option is highlighted by a red arrow.

The right-hand side of the interface shows the 'Record Details' section, which includes a 'General' tab with the following information:

- Project Number: SFC-080001.01
- Record Number: DR-002
- Project Name: Oak Hills Local Building Project
- Creator: Katie Tuttle
- Organization Name: Oak Hills Local Building Project
- Creation Date: 06/23/2017 12:30 PM (UTC-8)
- Facility Name: Oak Hills Local Building Project
- Status: Pending
- Est. Construction Cost (\$): 50,000.00
- Stage: Program Verification
- Completion Status: 85 - 95% (CD Only)

The bottom of the interface shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/mod/wf/tasks/log?_uref=uuu211:navigator-3#

Initial Review

- ▶ Click “Accept Task” button to begin work on the record

The screenshot displays a web browser window titled "Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187081&parent_id=0&viewOnly=0&project_id=1086&__uref=uuu211:nav. The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar, a toolbar contains buttons for "Accept Task" (circled in red), "Decline Task", "Review", and "Close Window".

The main content area is titled "Design Reviews K12" and is divided into several sections:

- General:** A form with the following fields:
 - Project Number: SFC-080001.01
 - Record Number: DR-002
 - Project Name: Oak Hills Local Building Project
 - Creator: [Katie Tuttle](#)
 - Organization Name: [Empty]
 - Creation Date: 06/23/2017 12:30 PM (UTC-8)
 - Facility Name: [Empty]
 - Status: Pending
 - Est. Construction Cost (\$): 50,000.00
- Task Details:** A section with the following information:
 - From: [Katie Tuttle](#)
 - Task Due Date: [Empty]
 - To: [Project Manager: Archana Atrey](#), [More..](#)
 - Task Status: Not Started
 - Cc: [Empty]
 - Sent For: Initial Review
 - Task Notes (0)
 - Workflow Progress
- Design Reviews:** A section with the following information:
 - Attachment Index: (12)
 - Current View: All
 - Display Attachments with Comments by: All
 - Page 1 of 1
 - Display 100 Items

The "Attachments" section contains a table with the following data:

File Name	Type	Status
Carey LEED Scorecard 10.18.2013.pdf	PDF	
Cooling Load.pdf	PDF	
ES_3pm.jpg	Image	
ES_9am.jpg	Image	
HS_3pm.jpg	Image	
HS_9am.jpg	Image	

At the bottom of the interface, there are buttons for "Comments", "Download", "Find", and "References". The footer includes links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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 shows a web application interface for 'Design Reviews K12'. The main window displays project details for 'Design Reviews K12' and an attachment index with 12 items. A red box highlights the file 'Carey LEED Scorecard 10.18.2013.pdf' in the attachment index. A red arrow points from this box to a smaller window titled 'Line Item - Mozilla Firefox', which shows the details for this specific attachment, including its name and type.

Project Details:

- Project Number: SFC-080001.01
- Project Name: Oak Hills Local Building Pro
- Organization Name:
- Facility Name:
- Est. Construction Cost (\$):

Attachment Index:

File Name	Type	Status
Carey LEED Scorecard 10.18.2013.pdf		
Cooling Load.pdf		
ES_3pm.jpg		
ES_9am.jpg		

Line Item Details:

- Name: Carey LEED Scorecard 10.18.2013.pdf *
- Type: -Select-
- Line Item Status:
- Short Description:

Adding Comments

- ▶ You can add comments to individual documents by clicking the Comments button at the bottom of the screen

The screenshot displays a web browser window titled "Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187081&model=udrk&project_id=1086&initiateBP=&bulkautoaccept=&fr. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are workflow actions: "Workflow Actions" (set to "-Select-"), "Send", "Save", "Spelling...", "Discussion", "Review", and "Close Window".

The main content area is titled "Design Reviews K12" and has a "General" tab selected. The "General" section contains a "Draft Comments" area with a text input field and buttons for "Add...", "Modify...", and "Remove". Below this is a "Comments" section with "View Comments:" radio buttons for "All (0)", "Final (0)", and "Hidden (0)", and a "View Comments By:" dropdown menu set to "All".

A red arrow points from the "Comments" button in the bottom toolbar to the "Draft Comments" section. The bottom toolbar includes buttons for "Add", "Copy", "Import", "Remove", "Comments", "Download", and "Find".

At the bottom of the page, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Adding Comments

- ▶ Talking heads icon indicates that comments have been added to the document

Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187081&model=udrk&project_id=1086&initiateBP=&bulkautoaccept=&fr

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Discussion Review Close Window

General Design Reviews K12

General

Project Number: SFC-080001.01 Record Number: DR-002

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/23/2017 12:30 PM (UTC-8)

Facility Name: Status: Pending

Est. Construction Cost (\$): 50,000.00

Action Details

(Click here to view latest content)


To...
Cc...
Send For:

Task Notes:
Workflow Progress

Standard

Attachment Index : (12) Current View: All Display Attachments with Comments by: All

New Rename Move Delete 12 Item(s) Page 1 of 1 Display 100 Iter

Attachments	File Name	Type	Status
	Carey LEED Scorecard 10.18.2013.pdf		
	Cooling Load.pdf		
	ES_3pm.jpg		
	ES_9am.jpg		

Add Copy Import Remove Comments Download Find

Linked Records (0) General Comments Linked Mail (0)

Initial Review Workflow Actions

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

Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187081&model=udrk&project_id=1086&initiateBP=&bulkautoaccept=&fr

File Edit View Actions Help

Workflow Actions Send For Detailed Send Save Spelling.. Discussion Review Close Window

General Send For Detailed Review Design Reviews K12

Return For Clarification

Project Number: SFC-080001.01 Record Number: DR-002

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/23/2017 12:30 PM (UTC-8)

Facility Name: Status: Pending

Est. Construction Cost (\$): 50,000.00

Action Details

Send For Detailed Review (Click here to view latest content)

To... Archana Atrey,Barbara Taylor,Bill Schwertfager

Task Notes:

Cc... Workflow Progress

Send For: Detailed Review

Standard

Attachment Index: (12) Current View: All Display Attachments with Comments by: All

New Rename Move Delete 12 Item(s) Page 1 of 1 Display 100 Iter

Attachments	File Name	Type	Status
	Carey LEED Scorecard 10.18.2013.pdf		
	Cooling Load.pdf		
	ES_3pm.jpg		
	ES_9am.jpg		

Add Copy Import Remove Comments Download Find

Linked Records (0) General Comments Linked Mail (0)

Detailed Review

- ▶ The PM will facilitate a detailed review of the design submission
- ▶ If they wish the AE to provide a response, they will choose the Workflow Action: Submit Comments
- ▶ If the Design Review is complete, they will choose the Workflow Action: Accept and close the record

The screenshot displays a web application window titled "Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox". The browser address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187110&model=udrk&project_id=1086&initiateBP=&bulkautoaccept=&fromRefLog=&_u. The application interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there is a "Workflow Actions" section with a dropdown menu currently set to "Accept". A red box highlights this dropdown menu, and a red arrow points to it from above. The dropdown menu options are "Accept", "Submit Comments", and "Reject". The main content area shows project details for "Oak Hills Local Building Project" with fields for Project Name, Organization Name, Facility Name, Record Number (DR-002), Creator (Katie Tuttle), Creation Date (06/23/2017 12:30 PM (UTC-8)), and Status (Pending). Below this, there is an "Action Details" section with "Accept" and "Submit Comments" buttons, and a "Task Notes" section. At the bottom, there is a "Standard" section with an "Attachment Index" showing 12 items. The current view is "All" and the page is 1 of 1. The attachment list includes "Carey LEED Scorecard 10.18.2013.pdf" and "Cooling Load.pdf".

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211