



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

Design Review Roles

- ▶ 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 documents you wish to attach to the Design Review Record.

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and user information 'Katie Tuttle' with a 'Sign Out' link. Below the navigation bar, there are browser tabs for 'Home', 'Talawanda- Kra...', and 'Brown - New K...'. The main interface is divided into several sections:

- Left Sidebar (Navigation):** Contains a 'User' section with 'Talawanda- Kramer Elementar...' and an 'Admin' section with various tools like Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Documents, Unpublished Documents, Logs, and Reports. A red arrow points to the 'Documents' folder under the 'Documents' section.
- File Explorer:** Shows a tree view under 'Current Phase' with folders for 'Documents', 'SMSD', 'Contracts', 'Locally Funded Initiati...', 'Design Reviews', and 'Recycle Bin'. A red arrow points to the 'Design Reviews' folder.
- Design Reviews Table:** A table titled 'Design Reviews - Current View: All' showing 4 items. A red box highlights the table content, and a red arrow points to the table.

Ref	PP	Name	Size	Upload Date	Owner	Title	Rev No
		Test document 2.docx	12 KB	06/23/2016	Katie Tuttle		
		Test document 2.pdf	27 KB	06/23/2016	Katie Tuttle		
		Test document.docx	12 KB	06/23/2016	Katie Tuttle		
		Test document.pdf	27 KB	06/23/2016	Katie Tuttle		

Create a Design Review Record

- ▶ Click the down arrow next to “New” and choose Design Review K12.

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' with a 'Sign Out' link. Below the navigation bar, there are browser tabs for 'Home', 'Talawanda- Kra...', and 'Brown - New K...'. The main interface features a left-hand navigation pane with categories like 'User', 'Admin', and 'Documents'. The central area shows a 'File' menu with a 'New' option circled in red. A dropdown menu is open from 'New', listing various document types such as 'Budget Amendment K12', 'Budgets K12', 'Certified Payrolls K12', and 'Design Reviews K12'. The 'Design Reviews K12' option is highlighted with a red box, and a red arrow points to it from the right. The right-hand side of the interface shows a table with columns for 'Name', 'Size', 'Upload Date', 'Owner', and 'Title', containing several document entries.

Ref.	BP	Name	Size	Upload Date	Owner	Title	Rev.No.	Iss
		Test document 2.docx	12 KB	06/23/2016	Katie Tuttle			
		Test document 2.pdf	27 KB	06/23/2016	Katie Tuttle			
		Test document.docx	12 KB	06/23/2016	Katie Tuttle			
		Test document.pdf	27 KB	06/23/2016	Katie Tuttle			

Create a Design Review Record

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

The screenshot displays the 'Create New Design Reviews K12' web application interface. The browser address bar shows the URL: https://ohio-stage-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3952&module_name=udrk&csvimport=fa. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with icons for Send, Save, Spelling, Discussion, and Close Window. The main content area is divided into sections: General, Action Details, and Design Reviews.

General Section: Fields for Project Number (OCI-140363.01), Project Name (Talawanda- Kramer Elementary), Organization Name (Talawanda CSD), Facility Name (Kramer Elementary (Talawanda)), Record Number, Creator (Katie Tuttle), Creation Date, and Status.

Action Details Section: Fields for To..., Cc..., and Send For:.

Design Reviews Section: Attachment Index: (2), Current View: All, Display Attachments with Comments by: All, Page 1 of 1, Display 100 Items Per Page.

Attachments Table:

File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

A red box highlights the attachments table, and a red arrow points to the 'Attachments' link on the left.

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. OCI-140363.01 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3952&module_name=udrk&csvimport=fa

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Discussion Close Window

General Design Reviews K12

General

Project Number: OCI-140363.01 Record Number:

Project Name: Talawanda- Kramer Elementary Creator: Katie Tuttle

Organization Name: Talawanda CSD Creation Date:

Facility Name: Kramer Elementary (Talawanda) Status:

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

Stage: Schematic Design * Completion Status: 85 - 95% (CD Only) *

FilePath: Design Reviews

Publish Path: Design Reviews/Schematic Design

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

The screenshot shows the 'Create New Design Reviews' form in Google Chrome. The browser address bar shows the URL: https://ohio-stage-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3952&module_name=udrk&csvimport=f. The form is titled 'Design Reviews K12' and is for Project No. OCI-140363.01. The 'Workflow Actions' dropdown menu is set to 'Submit'. The 'Send' button is circled in red, with a red arrow pointing to it. The 'Submit' action is highlighted with a red box, and its 'To' field is populated with 'Ashwin Dasanahalli, Barbara Taylor, Katie Tuttle'. The 'Send For' field is set to 'Initial Review'. The 'Status' field is also highlighted with a red arrow. The form includes fields for Project Number, Project Name, Organization Name, Facility Name, Record Number, Creator, Creation Date, and Status. The 'Attachments' section shows two PDF files: 'X Talawanda SD LFI.pdf' and 'Talawanda SD LFI.pdf'. The bottom of the form has links for 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'.

File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

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 Click Open

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and a user profile for 'Katie Tuttle' with a star icon, a help icon, and a 'Sign Out' button. Below the navigation bar, there are browser tabs for 'Home', 'Talawanda- Kra...', and 'Brown - New K...'. The main content area is titled 'Tasks - Current View: All' and shows a list of 10 items. The 'Collaboration' menu item in the left sidebar is highlighted with a red box. The 'Design Reviews K12' task in the list is also highlighted with a red box.

Type	Number	Title	Re	From	Sent for	Task Due	Received	Workflow Name
Design Reviews K12	DR-002			Katie Tuttle,so	Initial Review		06/23/2016	Design Reviews
Request for Interpretation K12	RPI-0001	RPI Res		Katie Tuttle,so	Response Acceptance		06/22/2016	Requests for Inter
Submittals K12	SUB-0001	Test Su		Katie Tuttle,so	AE Review	07/06/2016	06/22/2016	Submittals v1.1
Miscellaneous Commit K12	MC-0003	Misc. C		Katie Tuttle,so	Funding Certification		05/06/2016	Miscellaneous Co
Miscellaneous Invoice K12	MI-0001	Test Inv		Katie Tuttle,soc	Payment Processing		05/06/2016	Miscellaneous Invc
Miscellaneous Commit K12	MC-0002	Misc. C		Katie Tuttle,soc	Funding Certification		05/04/2016	Miscellaneous Cor
Design Reviews K12	DR-001			Katie Tuttle,soc	Detailed Review		04/15/2016	Design Reviews
Subcontractor/Supplier Declarations	SMSSD-003	OAKS C		Katie Tuttle,soc	Subcontract Attachment		04/12/2016	Subcontractor & Su
Contract K12	CON-001	Katie's		Katie Tuttle,soc	School District Contract E		04/07/2016	Best Value Selectio
Contract Modification K12	CM-0003	Test dis		Katie Tuttle,soc	Contractor Review		04/01/2016	V2.0 - GMP Subcor

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 a web application interface for 'Design Reviews K12'. The main window shows the 'General' tab with fields for Project Number (OCI-140363.01), Record Number (DR-001), Project Name (Talawanda - Kramer), Organization Name (Talawanda CSD), Facility Name (Kramer Elementary), and Est. Construction Cost (\$). Below this is the 'Task Details' section, which includes 'From: Katie Tuttle', 'To: Project Manager: Ashwin Dasanahalli', 'Cc:', and 'Sent For: Initial Review'. The 'Design Reviews' section shows an 'Attachment Index' with 2 items. A table of attachments is visible, with the first row highlighted in red:

File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

A red arrow points from the first row of the attachment index to a 'Line Item' window. The 'Line Item' window shows the 'Name' field with the value 'X Talawanda SD LFI.pdf' and a red arrow pointing to the 'Type' field. The 'Line Item' window also has fields for 'Line Item Status' and 'Short Description'.

Initial Review

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

Design Reviews K12 - Project No. OCI-140363.01 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=152675&parent_id=0&viewOnly=0&project

File Edit View Actions Help

Accept Task Decline Task Close Window

Design Reviews K12

General

Project Number: OCI-140363.01 Record Number: DR-001
Project Name: Talawanda- Kramer Elementary Creator: Katie Tuttle
Organization Name: Talawanda CSD Creation Date: 04/15/2016 09:54 AM (UTC-8)
Facility Name: Kramer Elementary (Talawanda) Status: Pending
Est. Construction Cost (\$): 50,000.00

Task Details

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)
To: [Project Manager: Ashwin Dasanahalli](#) Task Status: [Not Started](#)
Cc: [More](#)
Sent For: **Initial Review**

Design Reviews

Attachment Index : (2) Current View: All Display Attachments with Comments by: All
New Rename Move Delete 2 Item(s) Page 1 of 1 Display 100 Items Per Page

File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

Comments Download Find References

[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. OCI-140363.01 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=152675&model=udk&project_id=11078

File Edit View Actions Help

Send Save Spelling... Discussion Close Window

Workflow Actions

- Send For Detailed Review
- Send For Detailed Review
- Return For Clarification

Design Reviews K12

General

Project Number: OCI-140363.01 Record Number: DR-001

Project Name: Talawanda-Kramer Elementary Creator: Katie Tuttle

Organization Name: Talawanda CSD Creation Date: 04/15/2016 09:54 AM (UTC-8)

Facility Name: Kramer Elementary (Talawanda) Status: Pending

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

Action Details

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

To: Ashwin Dasanahalli, Barbara Taylor, Katie Tuttle

Cc:

Send For: Detailed Review

Task Notes:

Design Reviews

Attachment Index : (2) Current View: All Display Attachments with Comments by: All

New Rename Move Delete 2 Item(s) Page 1 of 1 Display 100 Items Per Page

File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

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

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:

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