



# 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 shows a web application interface for document management. The browser address bar indicates the URL is <https://oaksci.training.ohio.gov/>. The page title is "02/12/2010 - Oaks Student 2". The navigation menu includes "Home", "Company Workspace", and "Projects". The "Projects" tab is active, showing a "User Mode" dropdown and a "File Edit View Help" menu. The left sidebar contains a tree view of folders, with "Document Manager" and "Documents" highlighted. The main content area displays a list of folders under "Drawings PDF - Current View: All". The list has 6 items and shows "Page 1 of 1" with "Display 100 items per page". The list columns are "Name", "Size", "Upload Date", "Owner", and "Title". The folders listed are "Arch", "Civil", "dfhsdhh", "mep", and "Stru", all owned by "Oaks Student 1". A folder named "INFCACHE.1" is also listed with a size of "5 KB" and an upload date of "11/10/2009" by "Shauna Hooks". A red box highlights the folders "Arch", "Civil", "dfhsdhh", "mep", and "Stru". A red arrow points to the "dfhsdhh" folder.

Name	Size	Upload Date	Owner	Title
Arch			Oaks Student 1	
Civil			Oaks Student 1	
dfhsdhh			Oaks Student 5	
mep			Oaks Student 1	
Stru			Oaks Student 1	
INFCACHE.1	5 KB	11/10/2009	Shauna Hooks	

# Create a Design Review Record

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

The screenshot shows a web browser window displaying a project management application. The browser address bar shows the URL <https://oaksci.training.ohio.gov/>. The application interface includes a navigation menu on the left with items like 'Projects (Standard)', 'OAKS CI Training 1 - Home', 'Summary', 'Alerts', 'uMail', 'Collaboration', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Documents', 'Unpublished Documents', 'Logs', and 'Reports'. The main content area has a 'File' menu with options like 'New', 'Open', 'Find', 'Upload', 'Download', 'Delete', 'Check Out', 'Comments', 'Permissions', and 'Properties'. The 'New' menu is open, showing a list of options including 'Folder', 'File', 'Empty Document', 'Shortcut', '72 Hour Notice', 'Action Items', 'Advertisements', 'Associate A/E Evaluation', 'Budget - Initial', 'Budget - Revisions', 'Change Order', 'Closeout - Contractor', 'Closeout - Professional Services', 'Contract', 'Contract Schedule of Values', 'Contractor Evaluations', 'Contractor Pay Request', 'Design Reviews', 'Escrow Accounts', 'Field Reports', 'Financial Risks', 'Fund Allocation', 'Budget', and 'Recycle Bin'. The 'Design Reviews' option is highlighted in blue, and a red arrow points to it. A table on the right side of the interface displays a list of records with columns for Name, Size, Upload Date, Owner, and Title.

Name	Size	Upload Date	Owner	Title
Arch			Oaks Student 1	
Civil			Oaks Student 1	
dfhsdhh			Oaks Student 5	
mep			Oaks Student 1	
Stru			Oaks Student 1	
INFCACHE.1	5 KB	11/10/2009	Shauna Hooks	

# Create a Design Review Record

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

The screenshot displays a web application window titled "Create New Design Reviews - Project No. SFC-140358.01 - Internet Explorer". The URL is [https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate\\_id=1206&module\\_name=udr&csvimport=false&project\\_id=1047&attach=\\${attach}&fromDm=&ph](https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=1206&module_name=udr&csvimport=false&project_id=1047&attach=${attach}&fromDm=&ph). 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" (Design Reviews K12), "Action Details", and "Design Reviews".

**General Section:**

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:	

**Action Details Section:**

Create New Design Reviews K12

To...

Cc...

Send For:

Task Notes:

**Design Reviews Section:**

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		

**Design Reviews Section (Left Sidebar):**

Attachments

**Design Reviews Section (Bottom):**

Add Copy Import Remove Comments Download Find Reference

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

# 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. SFC-140358.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate\_id=1206&module\_name=udr&csvimport=false&project\_id=1047&attach=\${attach}&fromDm=&ph

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

Workflow Actions: Submit

Send Save Spelling... Discussion Close Window

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 (\$): 60,000,000

Action Details

Submit

To... Ashwin Dasanahalli, Barbara Taylor, Katie Tuttle

Cc...

Send For: Initial Review

Task Notes:

Design Reviews

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

New Rename Move Delete Page 1 of 1 Display 100 Items Per Page

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

Add Copy Import Remove Comments Download Find Referen

Linked Records (0) General Comments 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: Collaboration -> Tasks
- ▶ Select Design Review and Click Open

The screenshot shows the Primavera Unifier web interface. The left navigation pane has 'Collaboration' and 'Tasks' highlighted with red boxes. The main content area displays a table of tasks. The first row, 'Design Reviews K12', is also highlighted with a red box. The table has the following data:

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Design Reviews K12	DR-001			Katie Tuttle,so	Initial Review		04/15/2016
Subcontractor/Supplier Declaration	SMSD-003	ORR's Company		Katie Tuttle,so	Subcontract Attachment		04/12/2016
Contract K12	CON-001	Katie's Contracting		Katie Tuttle,soc	School District Contract Exec		04/07/2016
Contract Modification K12	CM-0003	Test distribution		Katie Tuttle,so	Contractor Review		04/01/2016

# 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 - Project No. SFC-140358.01'. The main window displays project details for 'Design Reviews K12' and an attachment index with two PDF files. A secondary window titled 'Line Item' is open, showing a form for 'X Talawanda SD LFI.pdf'. A red arrow points from the file name in the attachment index to the 'Name' field in the 'Line Item' window.

**Design Reviews K12 - General**

Project Number: OCI-140363.01      Record Number: DR-001  
Project Name: Talawanda- Kramer  
Organization Name: Talawanda CSD  
Facility Name: Kramer Elementary  
Est. Construction Cost (\$):

**Task Details**

From: Katie Tuttle;  
To: Project Manager: Ashwin Dasanahalli;  
Cc: More...  
Sent For: Initial Review

**Design Reviews**

Attachment Index: (2)      Current View: 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		

**Line Item - Internet Explorer**

Design Reviews K12 Line Item:

Name: X Talawanda SD LFI.pdf  
Type:   
Line Item Status:   
Short Description:

# Initial Review

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

Design Reviews - Project No. SFC-140358.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=5&model=udr&fromcostlog=1&project\_id=1047

File Edit View Actions Help

**Accept Task** Decline Task Close Window

### Design Reviews K12

#### General

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

The screenshot displays the 'Design Reviews' application interface. The browser window title is 'Design Reviews - Project No. SFC-140358.01 - Internet Explorer'. The URL is 'https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=5&model=udr&fromcostlog=1&project\_id=1047'. The application has a menu bar with 'File', 'Edit', 'View', 'Actions', and 'Help'. Below the menu bar is a toolbar with icons for 'Send', 'Save', 'Spelling...', 'Discussion', and 'Close Window'. The main content area is divided into several sections:

- General**: Contains fields for 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)), and Est. Construction Cost (\$) (50,000.00).
- Action Details**: Shows a 'Send For Detailed Review' button with a link to view latest content. The 'To' field contains 'Ashwin Dasanahalli, Barbara Taylor, Katie Tuttle'. The 'Send For' dropdown is set to 'Detailed Review'.
- Design Reviews**: Includes an 'Attachment Index' with 2 items. A table lists attachments: 'X Talawanda SD LFI.pdf' and 'Talawanda SD LFI.pdf'. The table has columns for File Name, Type, and Status.

A red box highlights the 'Workflow Actions' menu, which is open and shows three options: 'Send For Detailed Review', 'Send For Detailed Review', and 'Return For Clarification'. A red arrow points to this menu.

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

# 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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