



OAKS CI – QUICK HELP

DESIGN REVIEW AND DISCUSSION
GROUPS



Design Reviews

DESIGN REVIEWS



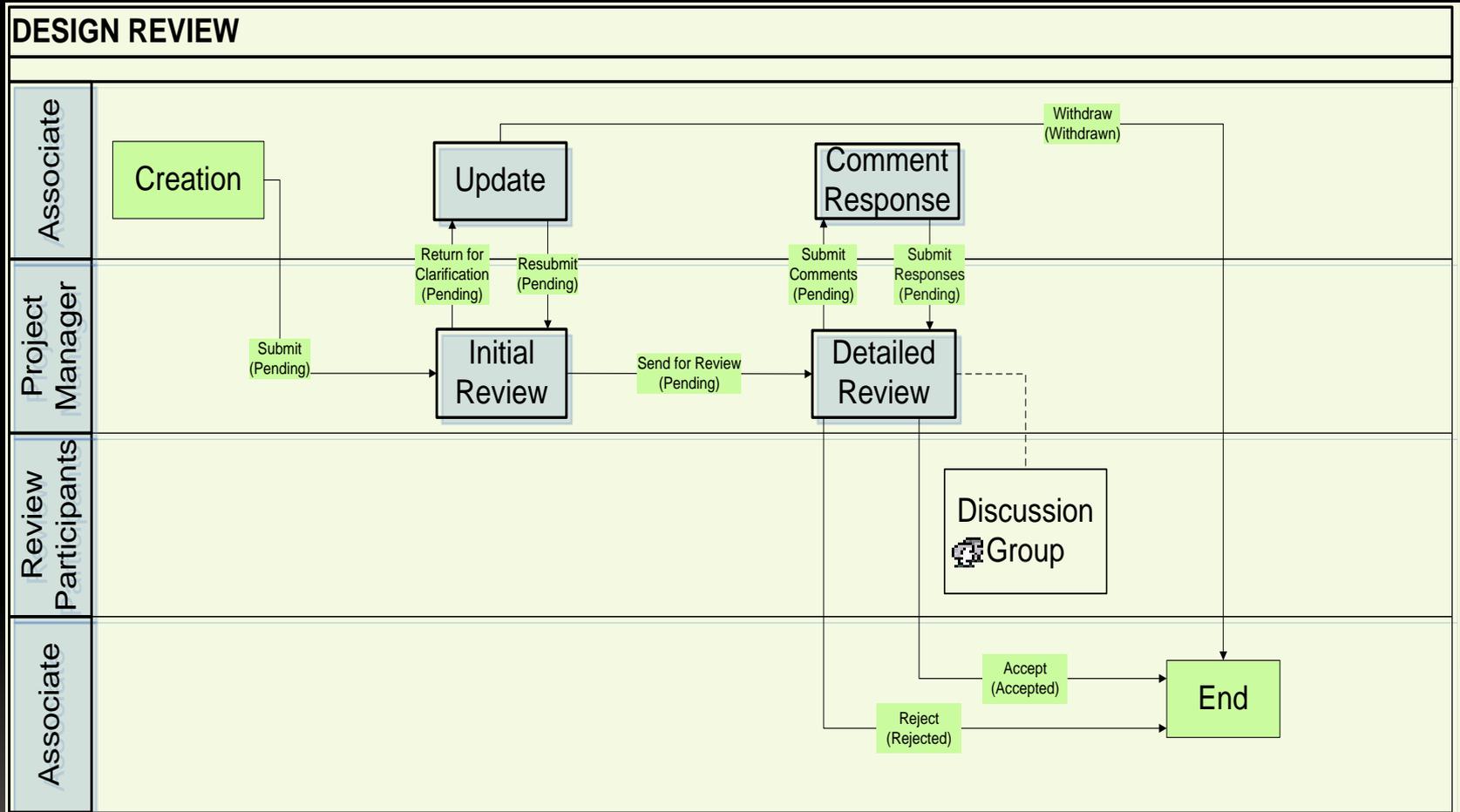
Design Review Purpose

- The Design Review business process provides for the electronic submission, review and approval of the program verification, schematic design, design development and construction documents
- This business process must be submitted at specific stages of the design process as defined in the Associate's contract
- Using this process, the Associate (A/E) submits drawings and specifications electronically. The Project Manager coordinates review of the submittal. Automated work flow guides the process and documents the results in the project record.

Design Review Roles

- Associate
 - Creates the designs, loads them into Unifier, creates the Design Review record, submits the design review to the PM for review and responds to comments from the review participants
 - **(NOTE: IN ORDER TO ATTACH MULTIPLE FILES, THE DESIGN REVIEW MUST BE CREATED IN DOCUMENT MANAGER)**
- 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)

Design Review Workflow



Steps to Create a Design Review

- *Upload design documents in the project's Document Manager*
- Choose and highlight the folders/documents to be reviewed
- Click the arrow down button next to New and choose the Design Review
- The folders/documents will be automatically populated to the record

Upload Design Documents

- To associate a document to a business process (BP) record it must first be uploaded to the Document Manager
- All documents and directory structure can be uploaded in one action using the Intermediate File Transfer Utility
- The help file provides specific step by step instructions

Upload Design Documents

- Upload design documents to the following locations:

Program Verification	Project Documents\0200 Design\0210 Program Verification
Schematic Design	Project Documents\0200 Design\0220 Schematic Design
Design Development	Project Documents\0200 Design\0230 Design Development
Construction Documents	Project Documents\0200 Design\0240 Construction Documents

Upload Design Documents

- Submission of pdf, plot, or similar file type is preferred
- Ask your Project Manager if you are unsure of the type to use
- Microstation & AutoCAD files can be viewed using the Cimmetry viewer if needed

Steps to Create a Design Review

- Load design documents in the project's Document Manager
- *Create a Design Review record*
- Attach the documents to the Design Review record
- Submit the Design Review

Steps to Create a Design Review

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Create Design Review

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™ 02/12/2010 - Oaks Student 2 Community Bookmarks Preferences

Home Company Workspace Projects

User Mode ▾

File Edit View Help

New ▾ Open Find ▾ Upload Download Delete Check Out ▾ Comments Permissions

Current Phase ▾

Documents 6 Item(s) Page 1 of 1 Display 100

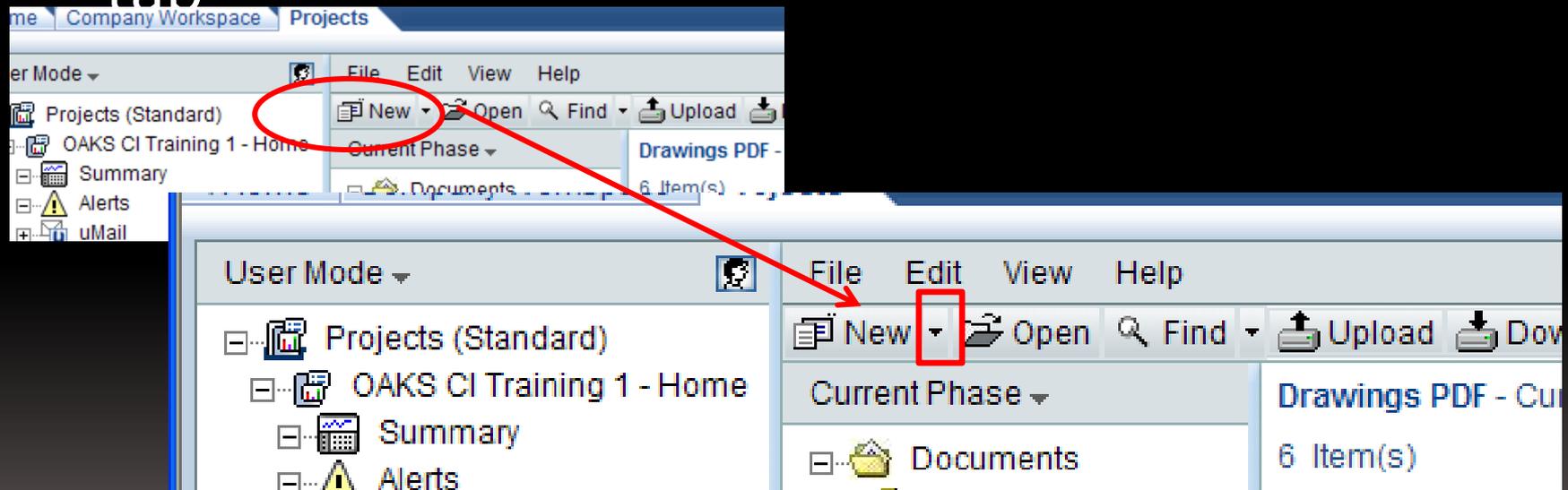
	Ref	BP	Name	Size	Upload Date	Own
Folder			Arch			Oaks
Folder			Civil			Oaks
Folder			dfhsdhh			Oaks
Folder			mep			Oaks
Folder			Stru			Oaks
File			INFCACHE.1	5 KB	11/10/2009	Shau

Steps to Create a Design Review

- Upload design documents in the project's Document Manager
- Choose and highlight the folders/documents to be reviewed
- *Click the arrow down button next to New and choose the Design Review*
- The folders/documents will be automatically populated to the record

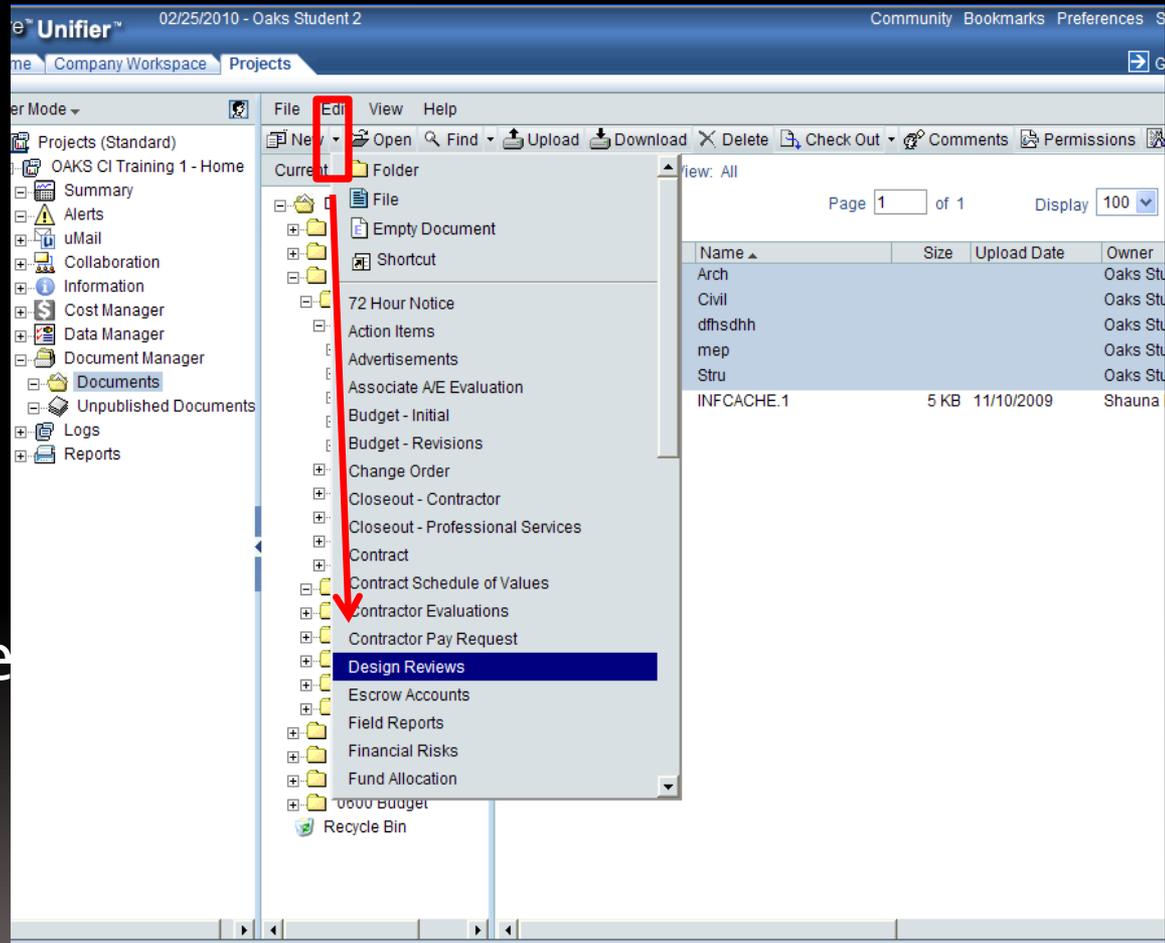
Create Design Review

- Once you have selected the files and/or folders to be attached, go to **New** in the upper left and click the **down arrow** directly next to the New tab



Create Design Review

- Once you have clicked the **down arrow next to New**, a drop down menu will appear.
- Select **Design Review** to create the form



Steps to Create a Design Review

- Upload design documents in the project's Document Manager
- Choose and highlight the folders/documents to be reviewed
- Click the arrow down button next to New and choose the Design Review
- *The folders/documents will be automatically populated to the record*

Creating a Design Review

https://oaksci.training.ohio.gov/?fromDm=1&module_name=udr&phase=current&project_id=1006 - Crea - Windows Internet...

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: Oaks Student 2

Project Name: OAKS CI Training 1 Creation Date:

Project Location: Surface Road Status:

Est. Construction Cost (\$): 0.00 Owner Name: Department of Administrative Services

Action Details

Create New Design Reviews

To...

Cc...

Send For:

Task Notes:

Design Reviews

Attachment Index: (45) Display Attachments with Comments by: All

New Rename Move Delete 0 Item(s) Page 1 of 1 Display 100 items per page

File Name	Type	Status
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Add Copy Import Remove Comments Download Find References

Linked Records (0) General Comments Linked uMails (0)

- The folders are created directly into new form
- Continue creating record

Create a Design Review Record

Create New Design Reviews - Project No. TRNG-2007-00001 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add LI Remove LI Comments Download Discussion

General Design Reviews

General

Organization: Record Number:

Project Number: TRNG-2007-00001 Creator: Ohio Instructor

Project Name: Ohio Training Project Creation Date:

Project Location: Status:

Est. Construction Cost (\$): Owner Name:

Stage: -Select- * Completion Status: -Select- *

Action Details

Linked Records (0) General Comments Linked uMails (0)

- Complete Upper Form Information
- Estimated Construction Cost
- Stage
 - Program Verification
 - Schematic Design
 - Design Development
 - Construction Document
- Completion Status

Routing The Design Reviews

Workflow Actions Submit

Send Save Spelling... Undo Accept Task Add LI Remove LI Comments Download Discussion

Design Reviews

General

General

Organization: Record Number:

Project Number: TRNG-2007-00001 Creator: Ohio Instructor

Project Name: Ohio Training Project Creation Date:

Project Location: Status:

Est. Construction Cost (\$): n nn Owner Name:

Action Details

Submit

To... Ohio Instructor

Cc...

Send For: Initial Review

Task Notes:

Attachment Index: (1)

Display Attachments with Comments by: All

New Rename Move Delete 1 Item(s) Page 1 of 1 Display 100 items per page

File Name	Type	Status
Design Review	Sample	Accepted

Linked Records (0) General Comments Linked uMails (0)

- Select Submit from the Workflow Action
- To field is pre-populated with the PM
- Add Cc as desired
- Click Send

Note: Once you hit Send you can no longer change the record



Initial Review

- The project manager reviews the design submission to ensure it is complete and ready for the review participants to consider
- They can 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

Initial Review

Design Reviews - Project No. UAT-080002 - Windows Internet Explorer

https://oaksci.test.ohio.gov/bp/process/task/open?task_id=851&model=udr

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add LI Remove LI Comments Download Discussion

Design Reviews

General

General

Organization: Administrative Services Record Number: DR-0005

Project Number: UAT-080002 Creator: John King

Project Name: UAT Beta Creation Date: 01/14/2008 03:33 PM Local (GMT-5)

Project Location: OAKS CI Third UAT Pass Status: Pending

Est. Construction Cost (\$): 500 000 00 Owner Name: Administrative Services

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:

Attachment Index : (5)

Display Attachments with Comments by: All

New Rename Move Delete

Attachments
New Folder

5 Item(s) Page 1 of 1 Display 100 items per page

File Name	Type	Status
shop drawings-5.pdf		
shop drawings-4.pdf		
shop drawings-3.pdf		
shop drawings-2.pdf		
shop drawings-1.pdf		

Linked Records (0) General Comments Linked uMails (0)

Internet 100%

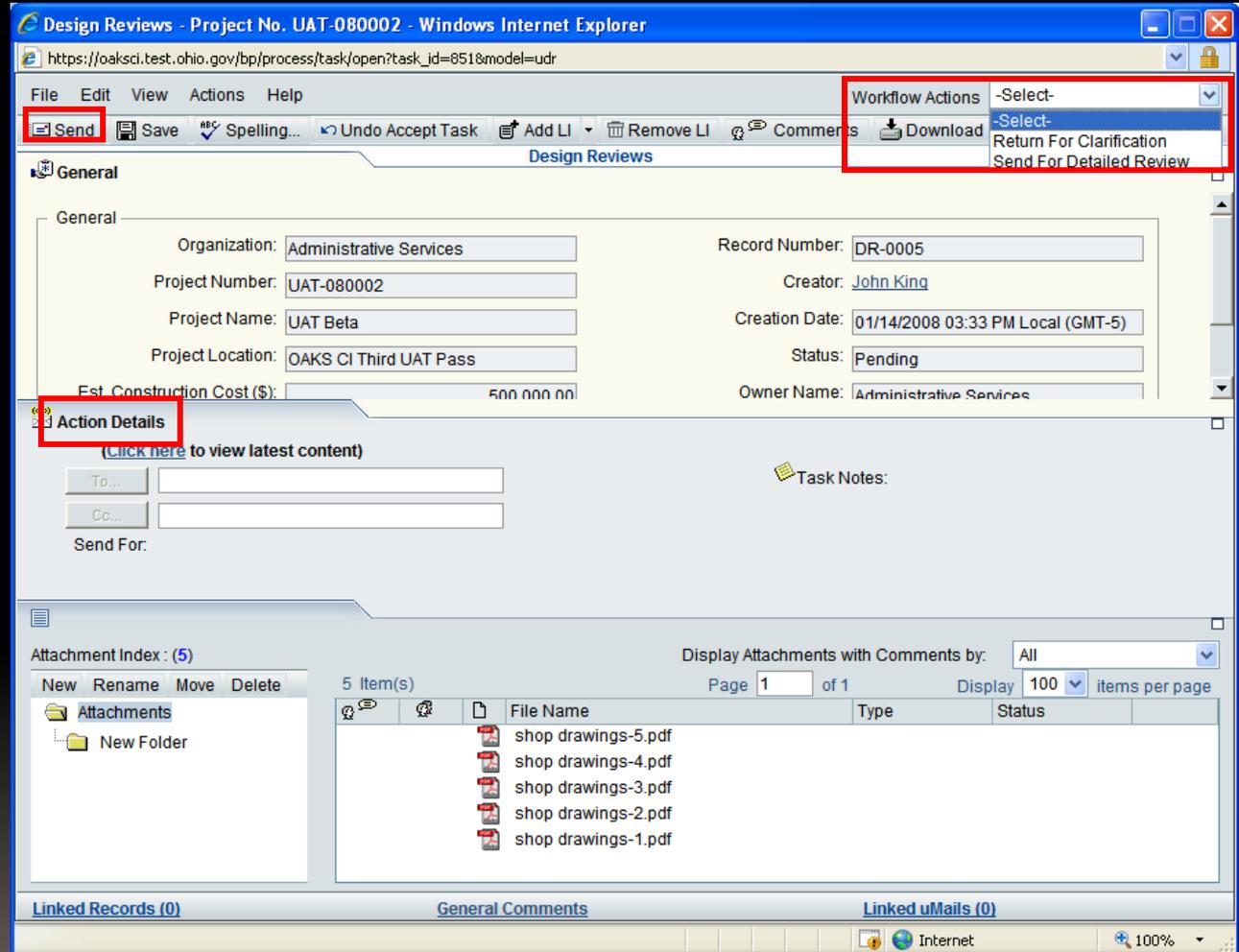
- Collaboration > Tasks
- Select Design Review task to open it

Task has been accepted by PM to review

Attachment Index

Initial Review Workflow Actions

- Return for Clarification
 - To the Associate
- Send for Detailed Review
 - Returns task 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, typically an Excel workbook or Word template provided by the Project Manager



Working with Discussion Groups

The background features a dark gradient with several overlapping geometric shapes and lines. A prominent light gray triangle points towards the center from the left. Multiple thin lines in shades of gray and red intersect at a central point, creating a star-like pattern. On the left side, there are vertical bars: a barcode at the top, a small gray bar, a small olive green bar, and a long red bar at the bottom.

Discussion Groups - Collaborating with Team Members

- In selected business processes the task owner can initiate a Discussion Group to solicit input from other project team members
- Eligible participants are pulled from the business process *Add Assignee* list
- Invited members of the discussion group can contribute their own text comments and attach documents
- All participants can view each others comments and attachments

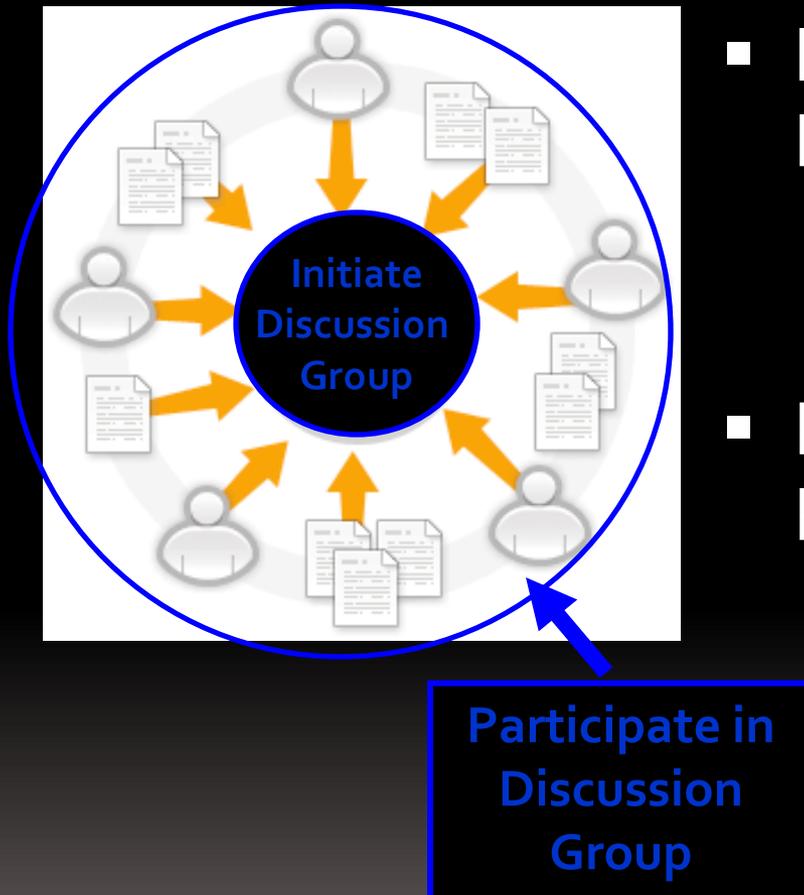




Discussion Groups

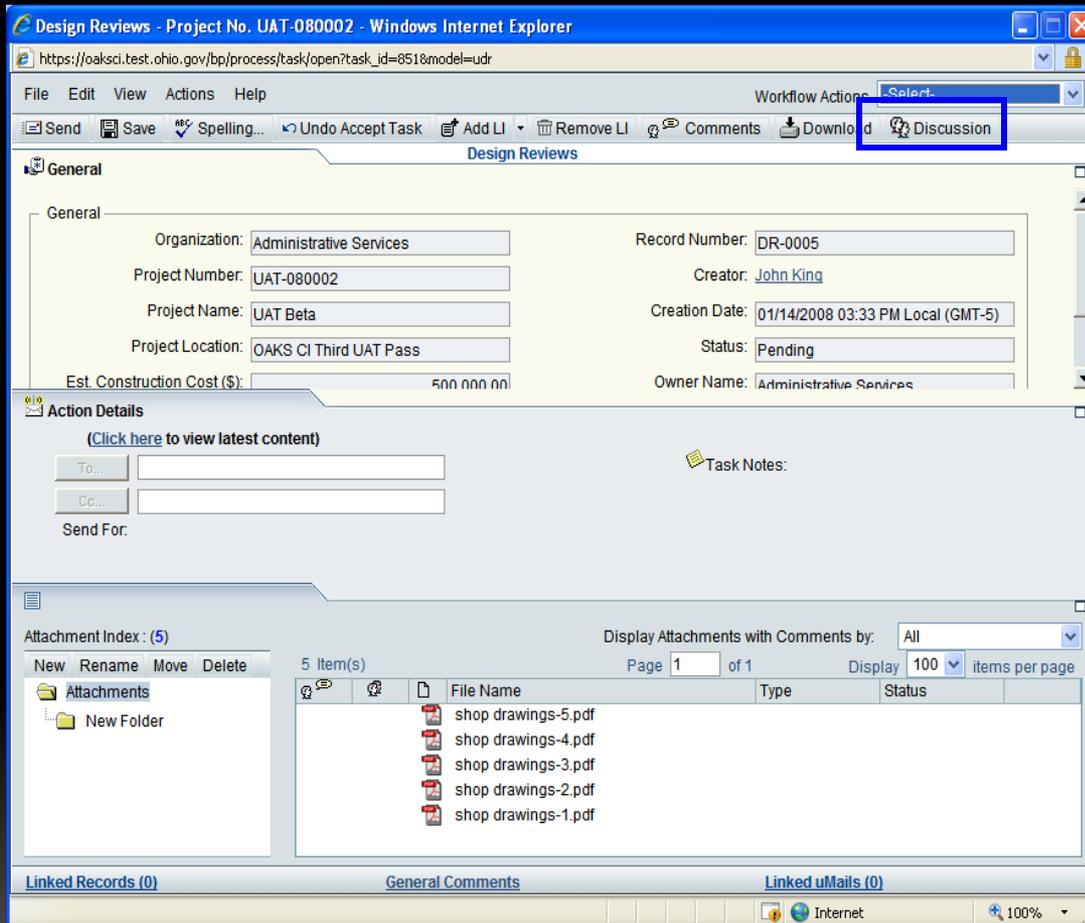
- Task owner can:
 - Select which, if any, of the comments and/or markups to use in creating final comments or markups for the task
 - Hide or delete these comments
 - Consolidate comments for use in creating the final comment or markup

Discussion Groups



- **Initiate a Business Process Discussion Group**
 - You may **initiate** a Discussion Group to help you draft your comments or markups
- **Participate in a Business Process Discussion Group**
 - You have been requested to **join** (participate) a discussion group by another user who wants input before completing a task

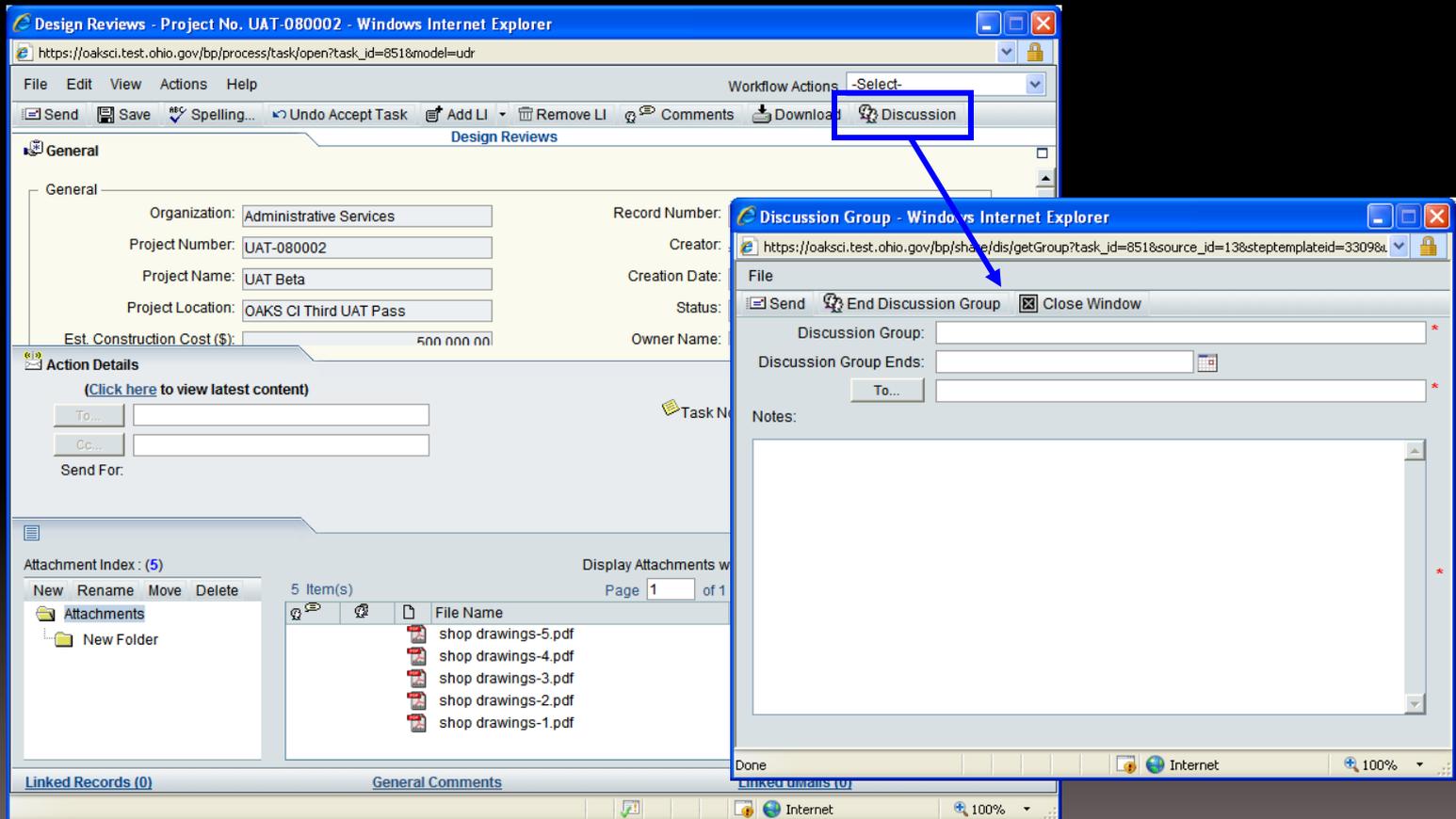
Initiate A Discussion Group



- Open a business process record and click the Discussion Group button

Initiate a Discussion Group

- Design Review discussion groups can be initiated from the Detailed Review step



Initiate A Discussion Group

Discussion Group Invitation Window

Discussion Group: Discussion Group *

Discussion Group Ends: [Calendar Icon]

To... Ohio Instructor; *

Notes: This is for Ohio Training *

Required fields

- The Discussion Group Invitation window opens
- Name the discussion group
- Click To and Choose the user(s) to include in the discussion group
- Notes is a required field



Discussion Group

- Note: When a discussion group is initiated, ownership of the task remains with the initiator (in this case the PM)
- Discussion group members may enter General Comments but they cannot initiate workflow actions or close the discussion group



Participating in a Discussion Group

- If you are invited to join a discussion group, a new Task will appear in your Task logs, and you will receive an e-mail message
- The *Sent for* column of the Task log will indicate “Discussion” distinguishing it from business process workflow related tasks
- Discussion group participants can add and save comments within the discussion group

Task Sent for Discussion

08/07/2007 - Ohio Instructor

File Edit View Help

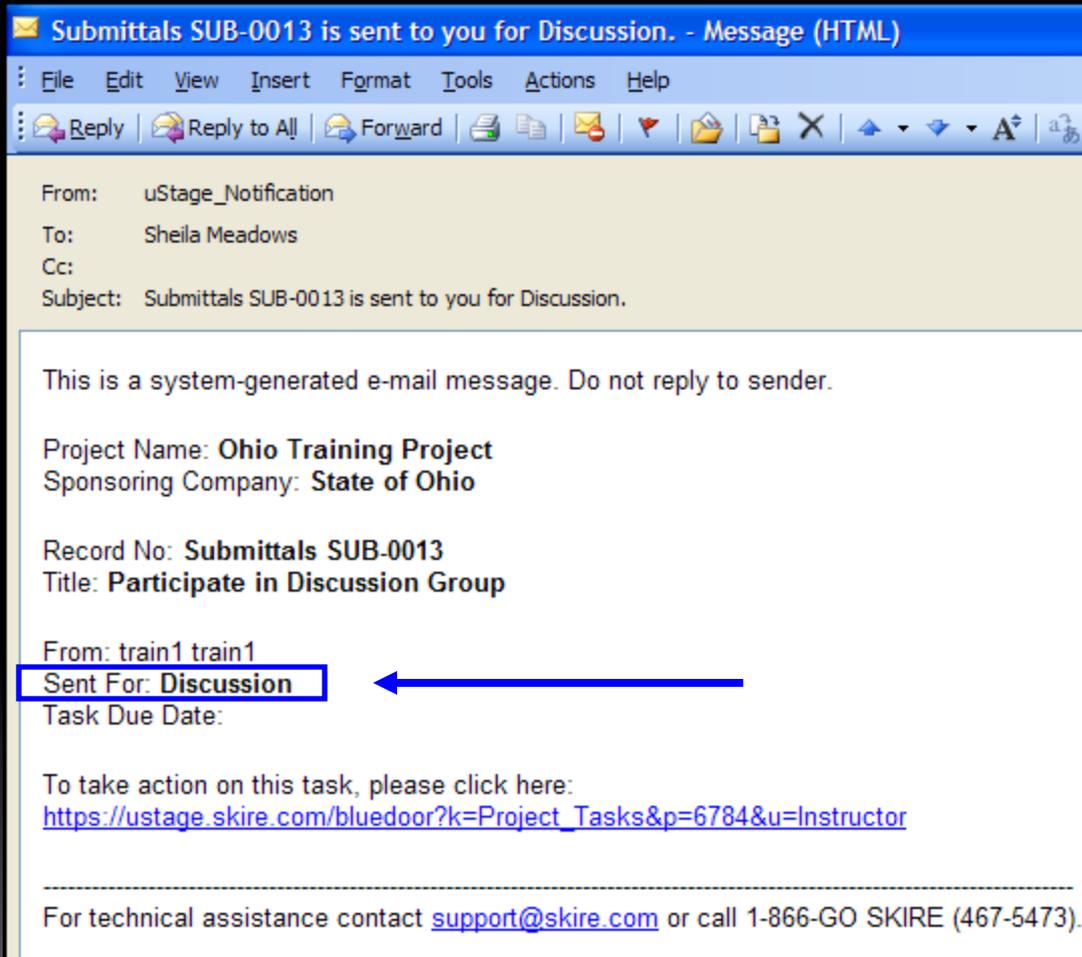
New Open Find

Tasks - Current View: All

9 Item(s) Page 1 of 1 Display 100 items per page

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Submittals	SUB-0014	Discussion Group	09/04/2007	train1 train1, soo	Discussion	08/08/2007	08/07/2007
Submittals	SUB-0009	Discussion Group2	08/22/2007	Ohio Instructor,sc	CM Review		07/25/2007
Submittals	SUB-0008	Discussion Group	08/22/2007	Ohio Instructor,sc	CM Review		07/25/2007
Submittals	SUB-0007	Submittal multiple folders	08/21/2007	Ohio Instructor,sc	Associate Revi	08/13/2007	07/24/2007
Submittals	SUB-0006	Submittals Training	08/21/2007	Ohio Instructor,sc	Associate Revi	08/13/2007	07/24/2007
Submittals	SUB-0005	Submittals 5	08/21/2007	Ohio Instructor,s	Associate Rev	08/13/2007	07/24/2007
Action Items	AI-0003	Training AI 2	07/31/2007*	Ohio Instructor,sc	Review		07/24/2007
Submittals	SUB-0004	Training Submittals 4	08/21/2007	Ohio Instructor,s	CM Review		07/24/2007
Submittals	SUB-0003	Training Submittals3	08/21/2007	Ohio Instructor,sc	CM Review		07/24/2007

Email Notification



- When users respond to a discussion group, the discussion group owner is notified by email

Participate in a Discussion Group

The screenshot shows the Skire Unifier web interface. The top navigation bar includes the Skire Unifier logo, the user name '08/07/2007 - Ohio Instructor', and links for 'Preferences', 'Support', and 'Logout'. The left sidebar contains a tree view of navigation options: Home, Tasks, Messages, Drafts, uMail, Company, Programs, Projects, Ohio Training Project - Hon, Summary, Alerts, uMail, Collaboration, and Tasks. The 'Collaboration' and 'Tasks' items are highlighted with a blue box. The main content area features a menu bar with 'File', 'Edit', 'View', and 'Help'. Below it is a toolbar with 'New', 'Open', and 'Find' buttons, where 'Open' is highlighted with a blue box. The main area displays 'Tasks - Current View: All' with '1 Item(s)' and pagination controls showing 'Page 1 of 1' and 'Display 100 items per page'. A table with one row is shown below, with the first row highlighted by a blue border.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Submittals	SUB-0015	Discussion in Ge	09/04/2007	train1 train1, soo	Discussion		08/07/2007

- From the Tasks log, select the discussion group business process
- Click Open

Participate in a Discussion Group

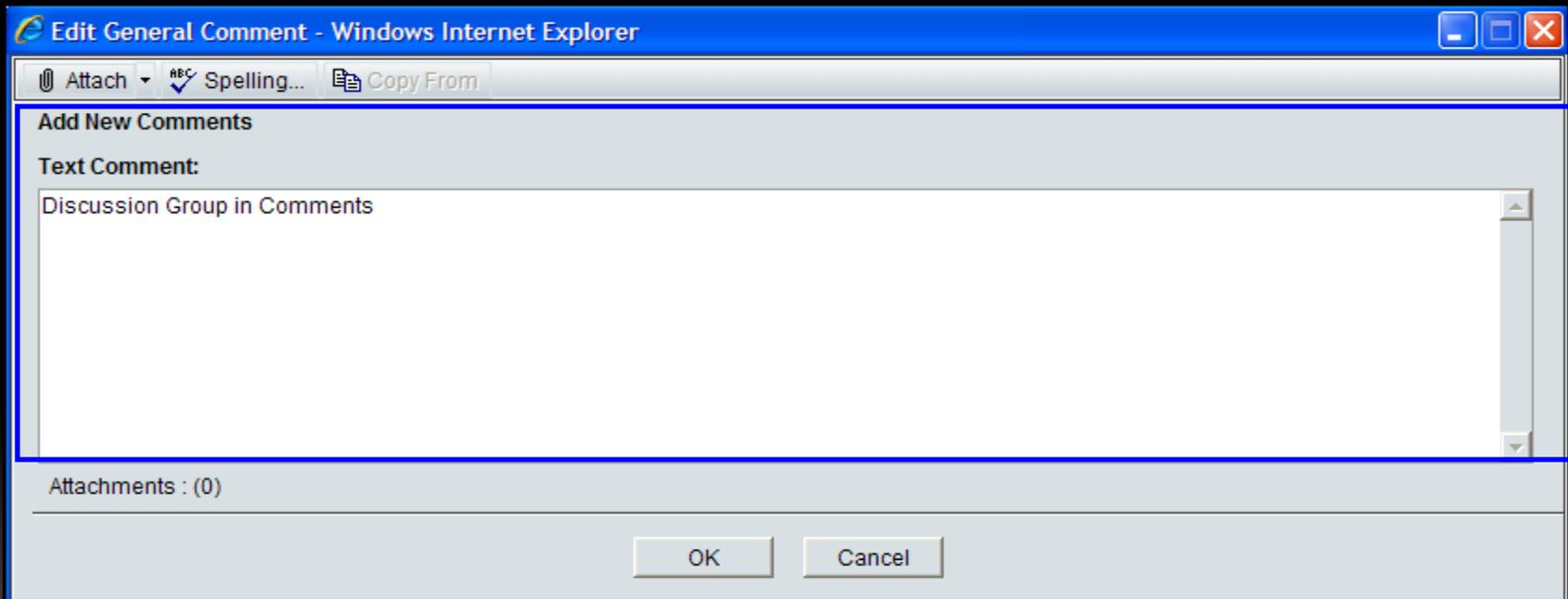
The screenshot shows a web browser window titled "Design Reviews - Project No. UAT-070001". The address bar shows the URL: https://oaksci.test.ohio.gov/bp/process/task/open?task_id=241&parent_id=3&viewOnly=2. The browser menu includes File, Edit, View, Actions, and Help. The application toolbar has buttons for Send, Save, Spelling, Undo, Accept, Task, Add LI, Remove LI, Comments, Download, and Discussion. The main content area is divided into sections: "General" with fields for Organization, Project Number (UAT-070001), Project Name (UAT Alpha), Project Location, Est. Construction Cost (\$), Record Number (DR-0006), Creator (UAT Associate 1), Creation Date (12/05/2007 10:14 AM Local (GMT-5)), Status (Pending), and Owner Name. Below this is the "Task Details" section, which contains a "Discussion Notes" area with the instruction: "Please enter comments for each mark up item so I do not miss any of your input." At the bottom, there is an "Attachment Index: (114)" section with a table of attachments. The table has columns for File Name, Type, and Status. A "General Comments" button is highlighted with a blue box at the bottom of the interface.

The business process form will be view-only, except for the General Comments area

- Participants can view all attached files by clicking on them
- Do not place comments on individual files, these are difficult to retrieve and track
- To submit comments Click General Comments and attach a comments log

Add Comments to a Discussion Group

- Add text comments and/or attachments



Edit General Comment - Windows Internet Explorer

Attach Spelling... Copy From

Add New Comments

Text Comment:

Discussion Group in Comments

Attachments : (0)

OK Cancel



Add Comments to a Discussion Group

- Your comments log must be uploaded to the DM before you can attach it in General Comments

Closing a Discussion Group

When a discussion group is closed, all invited participants will receive an e-mail notification

- To close a discussion group:
 - The Initiator can close the discussion group at any time by clicking “End Discussion Group”
 - This removes the task from each participant’s task log, regardless of whether or not they have completed the task
- Discussion groups are closed automatically when the Task in which the discussion group had been initiated is completed, regardless of the status of the discussion group comments



Warning

- Using the Undo Accept Task function after a Discussion Group has been initiated will disconnect the Discussion Group
- All comment and attachments provided by the participants will be deleted and will be unrecoverable



Managing Comments

- Once the discussion group has completed review of the design submission, the project manager will close the Discussion Group and review the comments made by the group members

Managing Comments

- At this point the PM can review comments and attachments, add additional comments, and remove comments and attachments. A few hints regarding what Unifier allows:
 - If you entered the comment you can modify or remove it
 - If others entered the comment you cannot modify it but you can remove it
 - If you open an attachment you can edit it but you must do a save as and import the new file back into the Document Manager and attach it as a new comment, even if you created the original file and comment

Managing Comments

- Comments received in a discussion group can be consolidated into a single, cohesive comment

The screenshot shows two overlapping windows from Microsoft Internet Explorer. The top window is titled 'Edit General Comment' and contains a form for adding new comments. The 'Copy From...' button is circled in red. The bottom window is titled 'Copy General Comments' and displays a table of existing comments. The 'Copy From...' button is also circled in red. Red arrows point from the 'Copy From...' button in the top window to the table in the bottom window. Blue dashed arrows point from the table in the bottom window to the 'Text Comment' field in the top window.

Date	Name	Company	Final Comment
08/31/2005 01:42 PM Local (GMT-8)	Brian Nash	argos	Yes
08/31/2005 01:41 PM Local (GMT-8)	Brian Nash	argos	No
08/31/2005 01:43 PM Local (GMT-8)	Brian Nash	argos	Yes

Consolidating Comments

- Useful for consolidating comments and markups received during a discussion group
- All attachments to comments will display as attachments to the consolidated comment
- Consolidated comment logs can be made into documents that are attached directly to the business process form
 - Documents attached in the lower portion of a document-type business process, or documents attached directly to the business process form

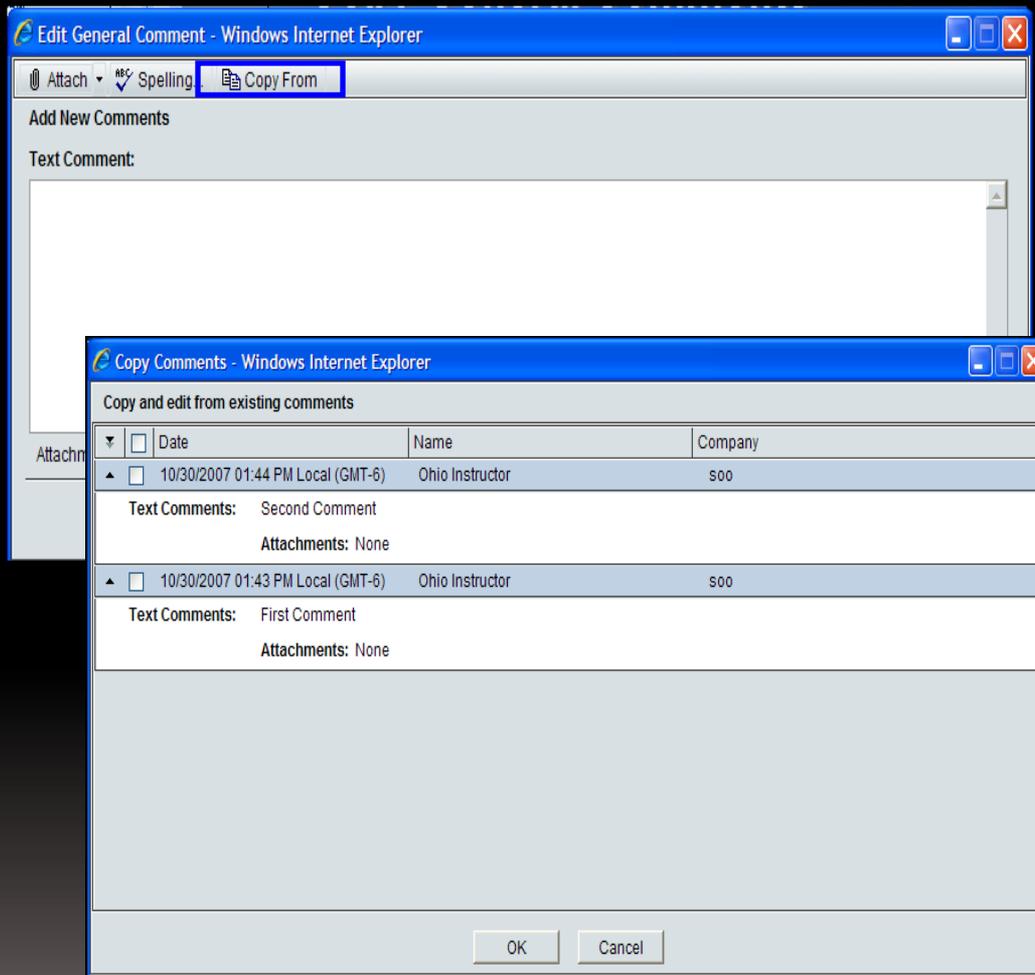
Copying and Consolidating Comments and Markups

Note: Text comments can be copied and consolidated in **General Comments**. Graphic markups that are attached to a **General Comment** cannot be copied or consolidated

The following table summarizes copying and consolidating documents:

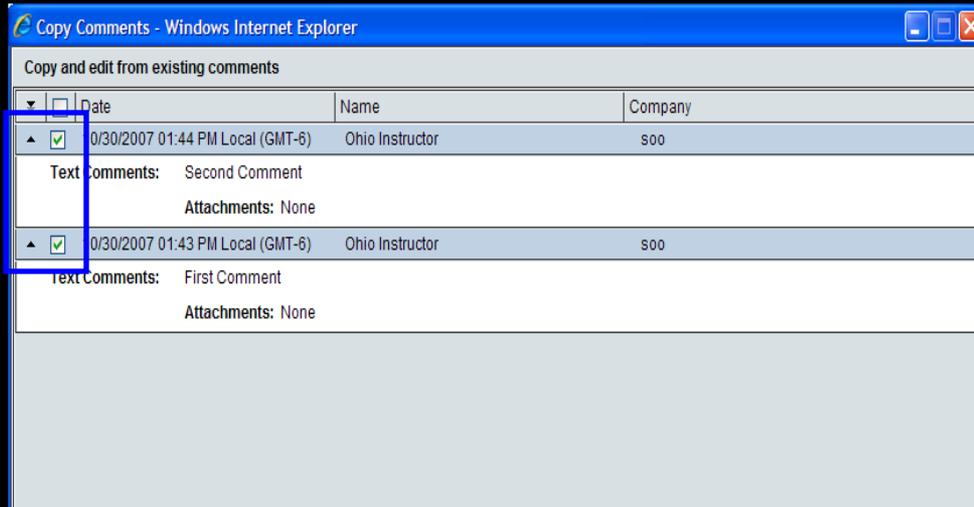
BP Feature	Consolidate Text Comments	Consolidate Graphic Markups
Documents attached to Document-Type BPs	Can copy and consolidate comments made directly to attached documents	Can copy and consolidate graphic markups on attached documents
File Attachments all BP types	Can copy and consolidate comments made to files attached directly to BPs (listed in Attachments link)	Can copy and consolidate markups made to files attached directly to BPs (listed in Attachments link)
General Comments	Can copy and consolidate General Comments	Cannot copy or consolidate markups on files attached to a General Comment

Copy General Comments



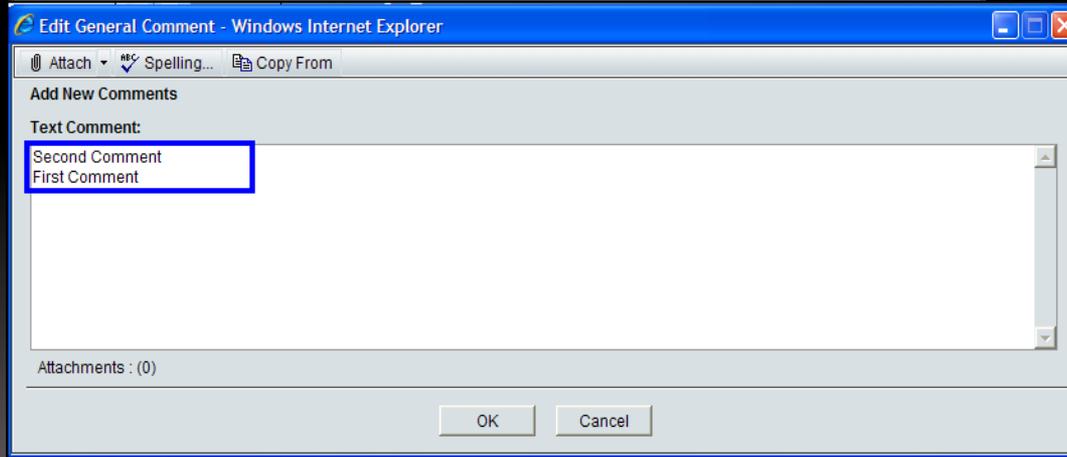
- Click General Comments link
- Click Add (or Modify)
- Click the Copy From button
 - The Copy General Comments window opens, displaying the list of existing comments

Copy General Comments



- Click the selection box next to each of the comments you want to copy into your comments and click OK
 - Any additional file attachments or markups associated with each comment are also copied to the new comment

Make edits as necessary
Click OK





Comment Response

- The Associate will receive design submittal comments gathered from the Review Participants and edited by the Project Manager in this step
- Comments are accessed using the General Comments function of the Design Review BP
- Depending on the situation, comments will be contained in one or more Comment Logs

Comment Response

- The Associate will address each comment either by making modifications or additions to the design deliverables or by responding to the comments in the comment logs
- Where significant issues need worked out, much negotiation and dialog may take place outside of the Unifier environment through face to face meetings, phone calls and email. Only the resultant agreements need to be recorded in the comments log.

Accept or Reject the Design

- The Project Manager must review the Associates responses and determine whether to:
 - **Accept** the design submission
 - **Reject** the design submission or
 - **Submit Comments** to request additional modifications to the design
- The Project Manager can also create an additional Discussion Group session if desired

Accept or Reject the Design

- Once the design review record has been accepted or rejected it is placed in a 'terminal' status and it can no longer be updated by project participants
- Users with proper access will be able to view the record, all attached design documents, the General Comments, and all attached Comment Logs from the Design Review log



Thank you!

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<http://ci.oaks.ohio.gov/>