



# Design Reviews

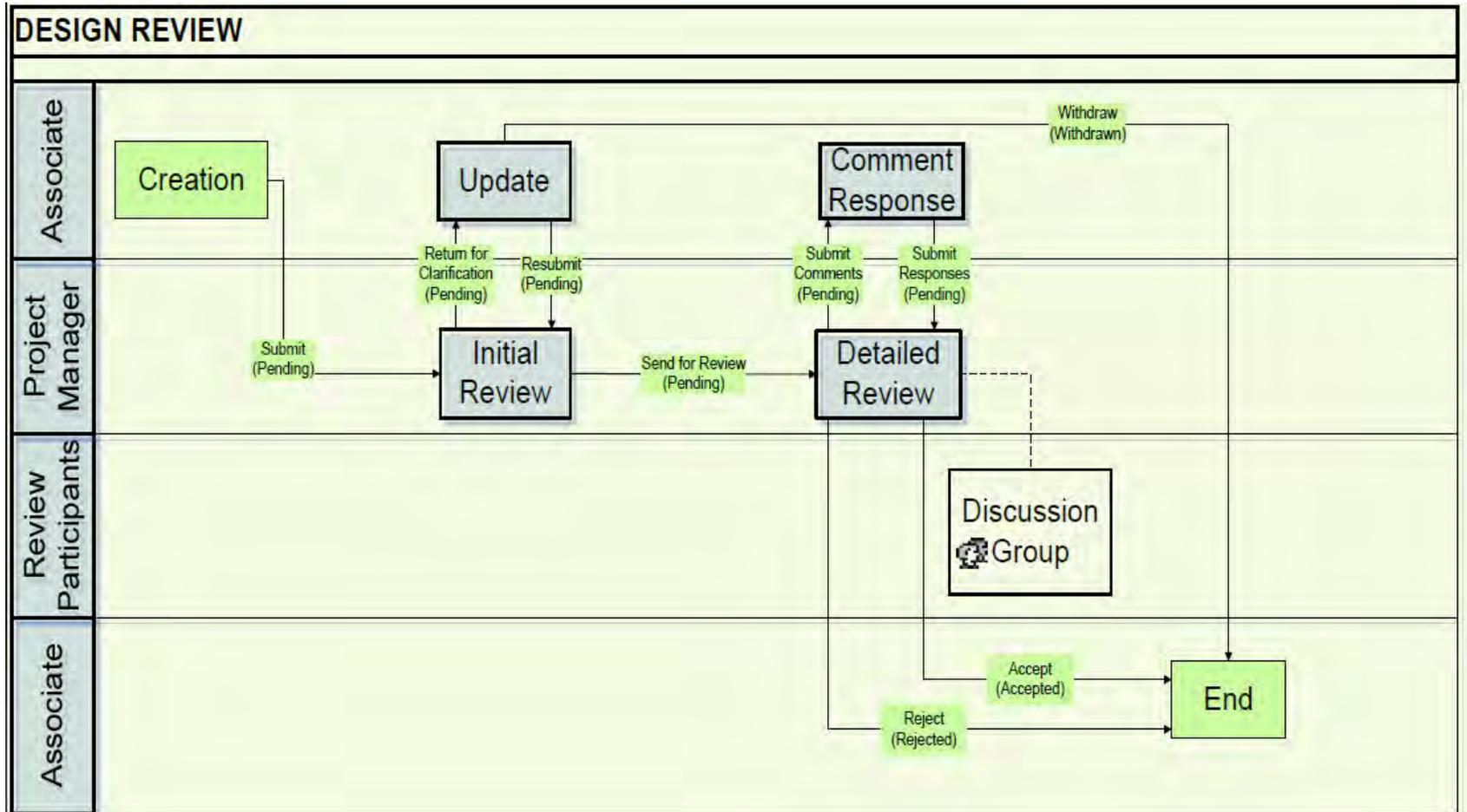
# Design Review Purpose

- ▶ The Design Review business process provides for the electronic submission, review and approval of the program verification, schematic design, design development and construction documents.
- ▶ 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.

# 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)

# Design Review Workflow



# Upload Design Documents

- ▶ Upload design documents into Document Manager and into the following locations:

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

# 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 browser address bar shows the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo and the text "Last login: 09/08/2015 10:01 AM". The navigation menu shows "Company Workspace", "Migration Testing", and "Agency General P...". The breadcrumb trail indicates the current location: "Agency > OAKS CI Adm... > Agency Gener...".

The main content area is divided into a left sidebar, a central file explorer, and a right-hand table view. The sidebar contains a "Documents" folder highlighted with a red box and a red arrow pointing to the central file explorer. The file explorer shows a tree view of folders under "Current Phase", including "Documents", "0000 Concept Develop", "0100 Acquisition", "0200 Design", "0210 Program Verifi", "Preliminary Descr", "Schedule", "Updated POR", "Design Review Co", "Probable Cost", "0215 Design Notes", "0220 Schematic Des", "0230 Design Develo", "0240 Construction D", and "0250 Bid & Award".

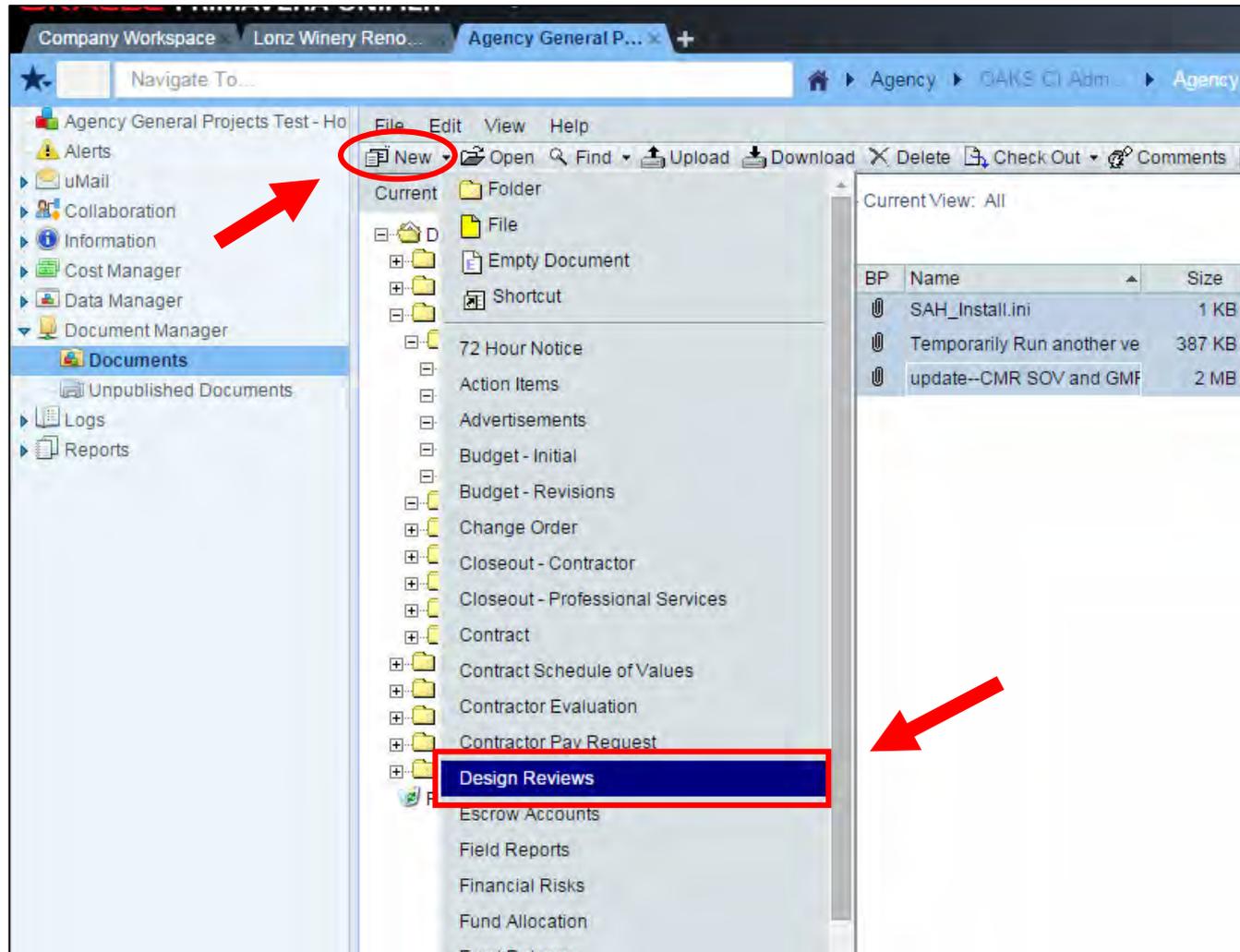
The right-hand table view, titled "Preliminary Description - Current View: All", displays a list of 3 items. The table has columns for "Ref.", "BP", "Name", "Size", "Upload Date", "Owner", and "Title". The items listed are:

Ref.	BP	Name	Size	Upload Date	Owner	Title
		SAH_Install.ini	1 KB	03/17/2014	Kaylie Ruff	
		Temporarily Run another ve	387 KB	03/17/2014	Kaylie Ruff	
		update-CMR SOV and GMF	2 MB	03/17/2014	Kaylie Ruff	

A red arrow points from the "Documents" folder in the sidebar to the table view, and another red arrow points from the table view to the "Design Review Record" folder in the file explorer.

# 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 (\$), 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 a table of 3 items. A red arrow points to this table.

The Attachment Index table is as follows:

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](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

### 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) *

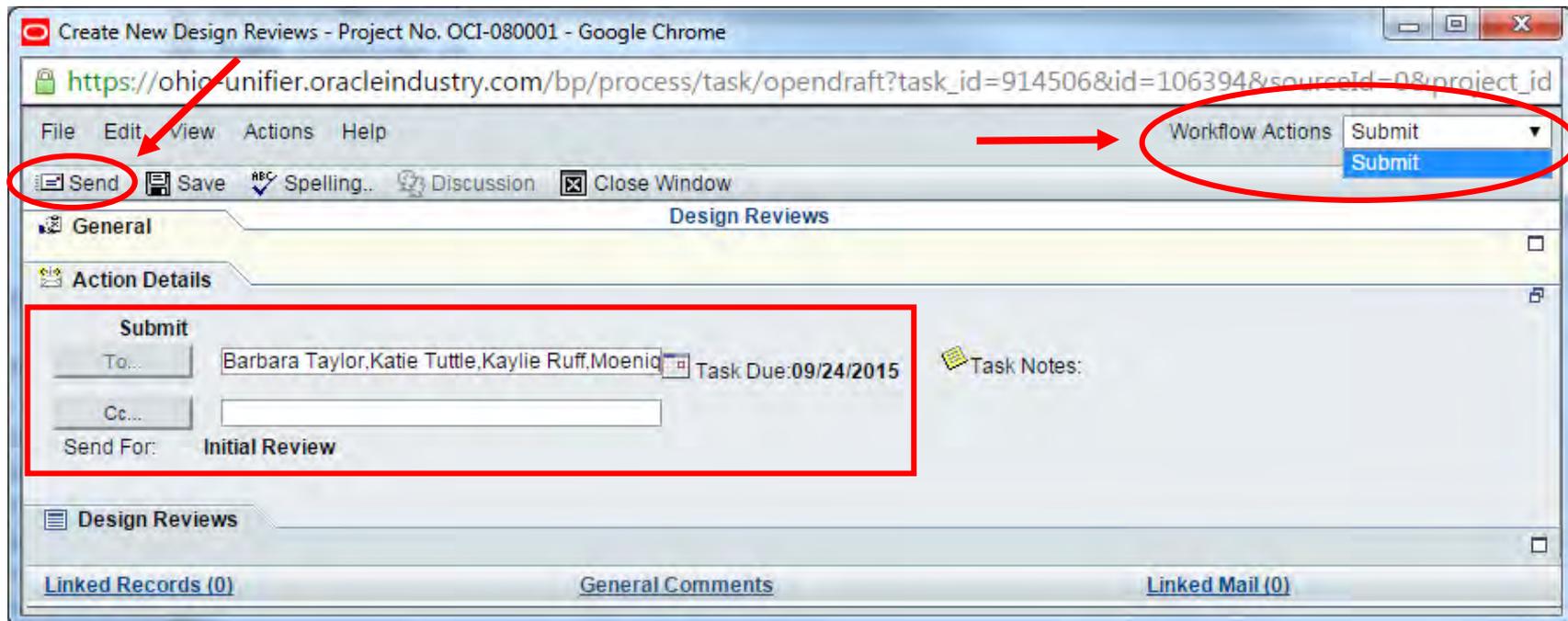
Action Details

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 Click Open

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 09/08/2015 10:01 AM Proxy for Katie Tuttle Help Sign Out

Company Workspace Lonz Winery Reno... Agency General P... +

Navigate To...

Agency General Projects Test - Ho

Alerts

uMail

Collaboration

Tasks

Messages

Drafts

Information

Cost Manager

Data Manager

Document Manager

Logs

Reports

File Edit View Help

New Open Bulk Actions Find Filtered By

Tasks - Current View: All

5 Item(s) Page 1 of 1 Display 100 Items Per Page

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Design Reviews	DR-0005			Katie Tuttle,s.oo	Initial Review	09/19/2015*	09/16/2015
Subcontractor/Supplier Declaration	SSD-0008	Bob's Concrete		Katie Tuttle,s.oo	PM Declaration Review		09/14/2015
Submittals	SUB-0015	Katie Test 3		Katie Tuttle,s.oo	Submittals in Transit Await		09/10/2015
Submittals	SUB-0014	Katie Test 2		Katie Tuttle,s.oo	Associate Review	09/24/2015	09/10/2015
Subcontractor/Supplier Declaration	SSD-0007	Bob's Concrete		Katie Tuttle,s.oo	Declaration Review		09/08/2015

# Initial Review

- ▶ 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

The screenshot displays a web application interface for 'Create New Design Reviews'. The main form is titled 'Design Reviews' and includes fields for Organization, Project Number, Project Name, and Project Location. Below the form is an 'Attachment Index' table with 3 items. The first item, 'update-CMR SOV and GMP Amendment Sam', is highlighted with a red box. A red arrow points from this box 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.

Attachment Index (3)

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

Design Reviews Line Item:

Name: update-CMR SOV and GMP Amendment Sample.docx

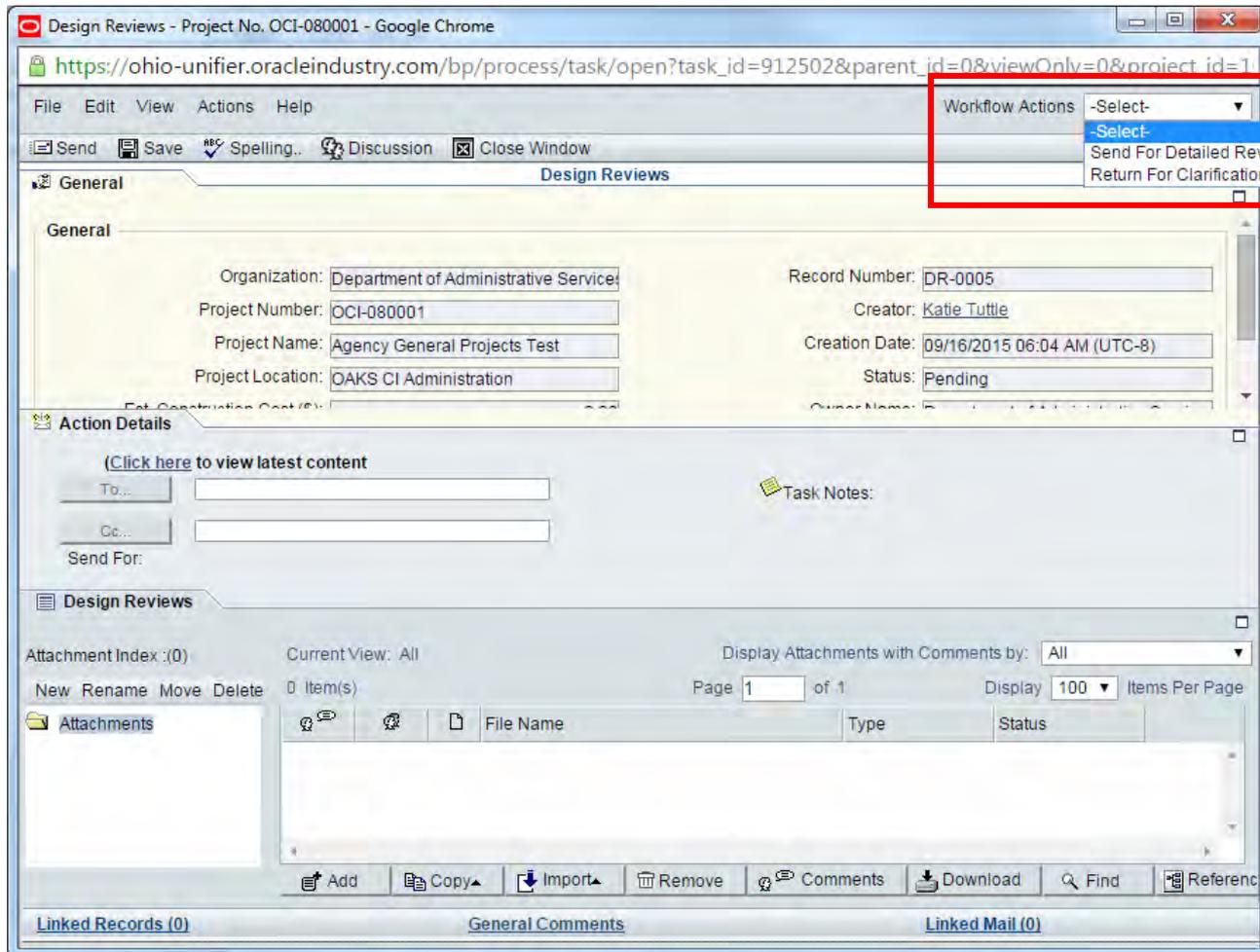
Type: -Select-

Line Item Status: -Select-

Short Description:

# 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](mailto:oaksci@ofcc.ohio.gov)

614.644.2211