OAKS
Capital Improvements

Design Reviews

K-12

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Topics

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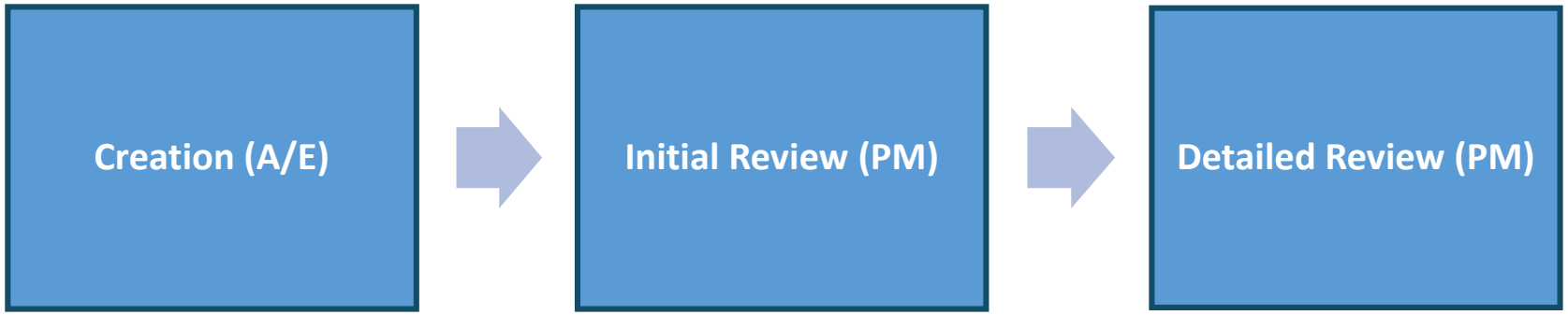
Purpose & Procedure

- 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

Workflow Steps:



Click the boxes to navigate directly to each section

Uploading to Document Manager

* ***If you are a School District Project user, skip ahead to Create Design Review Record***

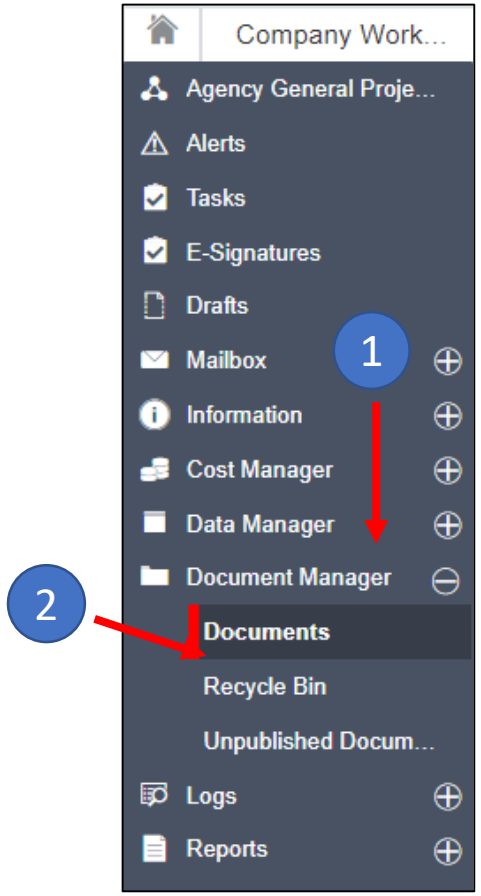
If you are using Document Manager to add attachments to the Design Review, this should be done before creating the Design Review Record. The following section will walk you through uploading files to the Document Manager.

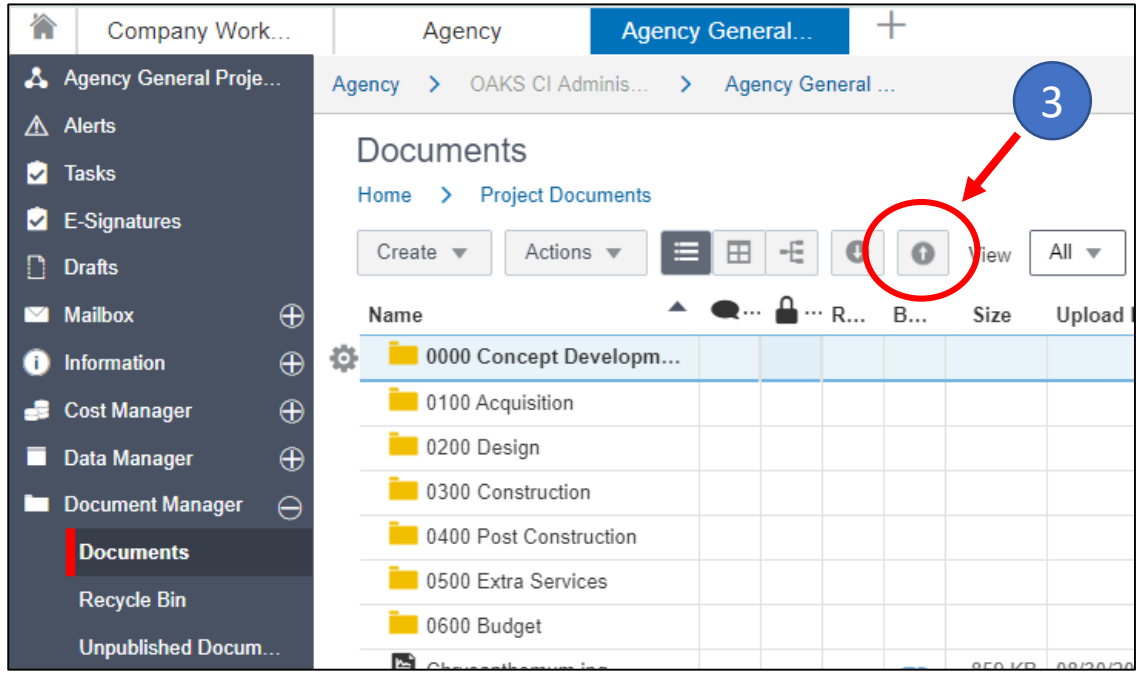
About Document Manager

- Document Manager houses all your supporting documentation
- All documents must be uploaded into Document Manager **first** before they can be attached to a record
- Provides a platform for maintaining a wide variety of files and documents
- Ensures that project participants are always working on the most current versions
- Provides ready access to all documents from anywhere at any time

Document Upload

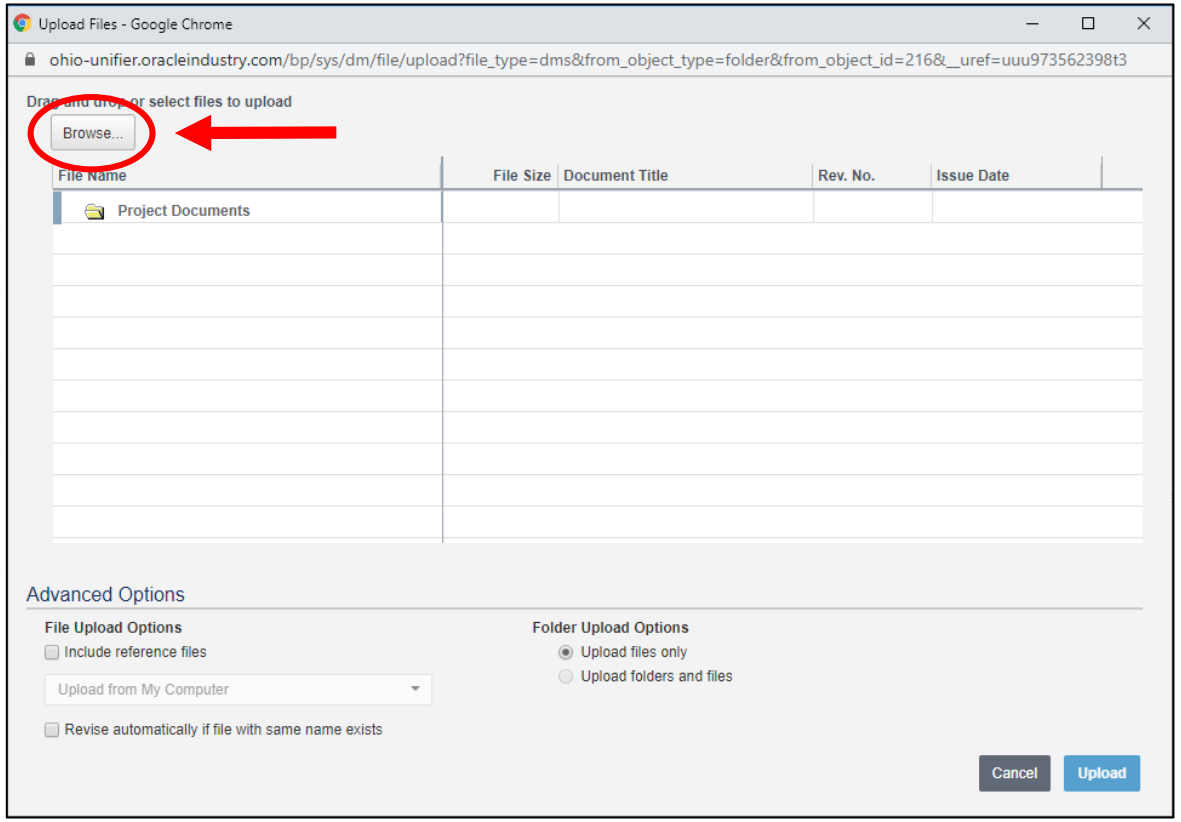
1. Navigate to Document Manager
2. Click on Documents
3. Click the **Upload Arrow button**





File Upload Window

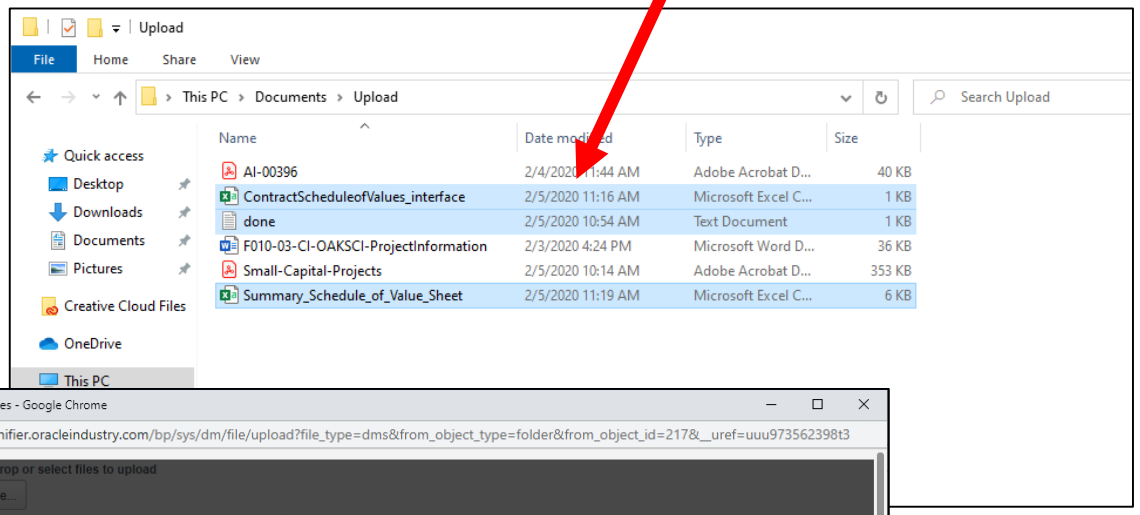
- A new window will appear for you to add files
- Click **Browse** to choose files for upload



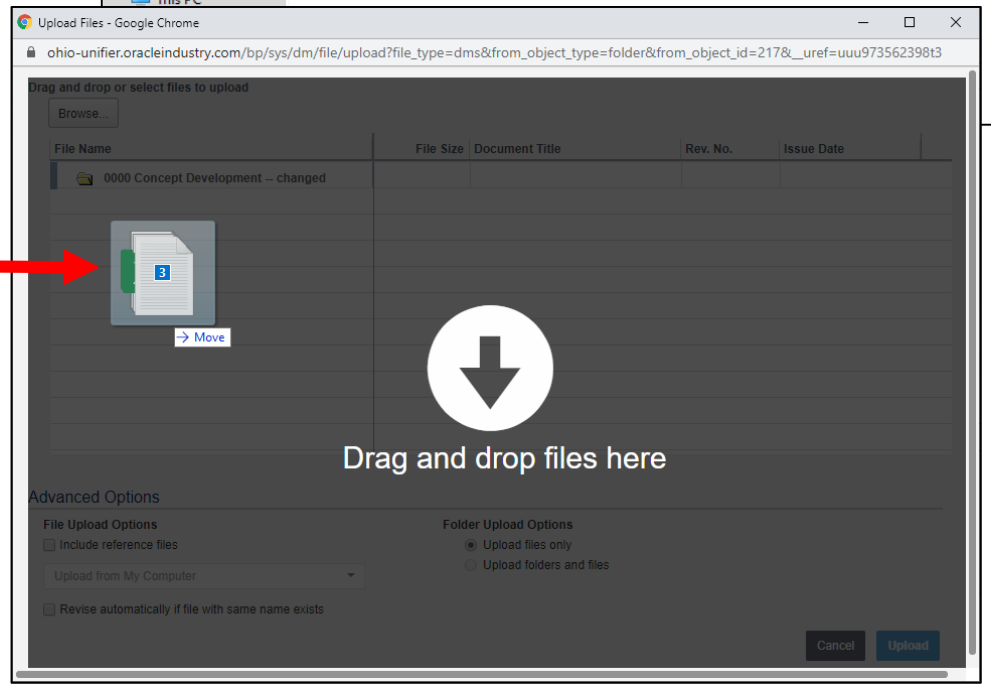
Drag and Drop files

- Find the document(s) on your computer you want to upload
- Drag and Drop the documents into the Upload Files window

Choose your folder of Documents or Select Multiple Documents

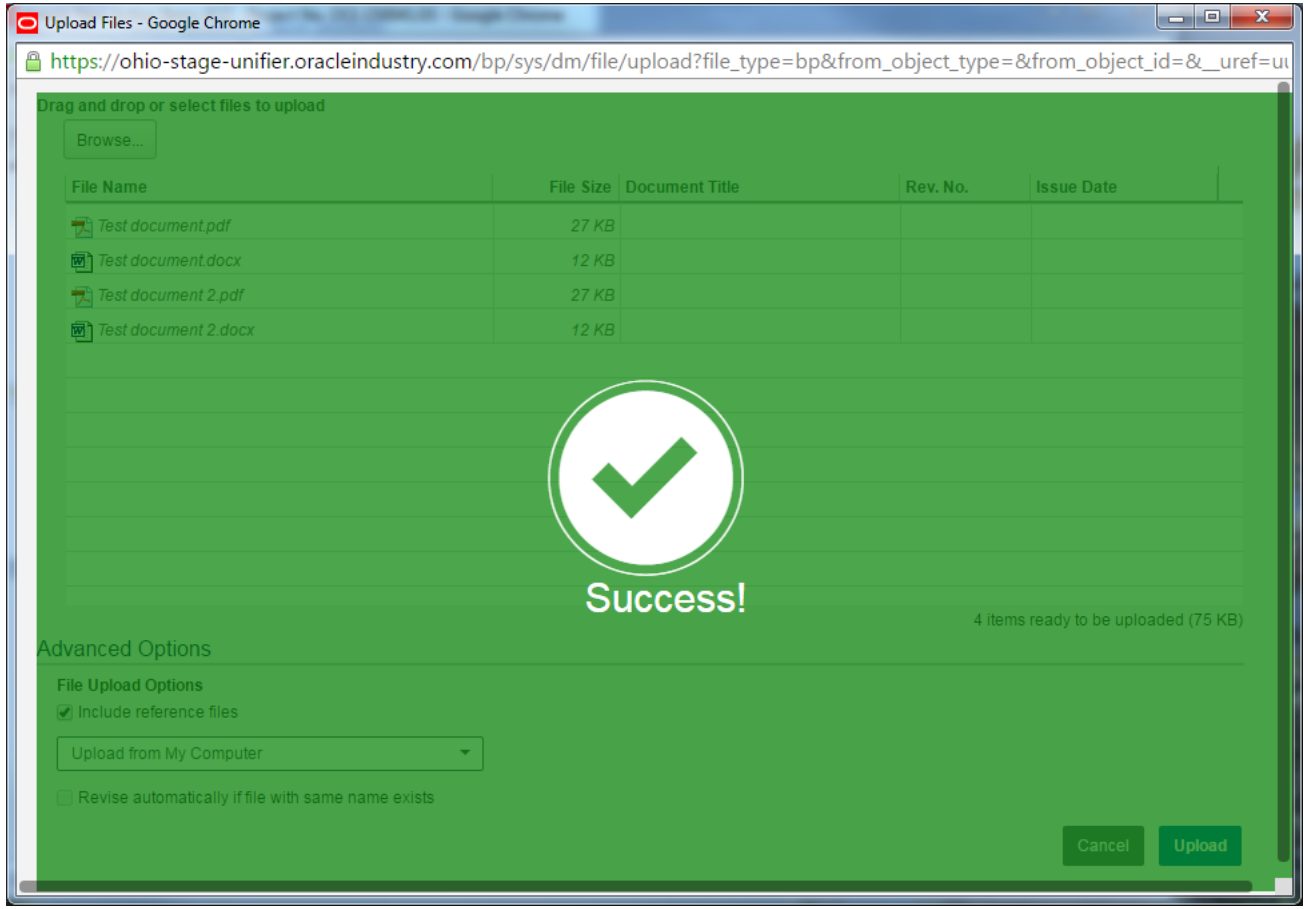


Drag and Drop the documents into the Upload Files window



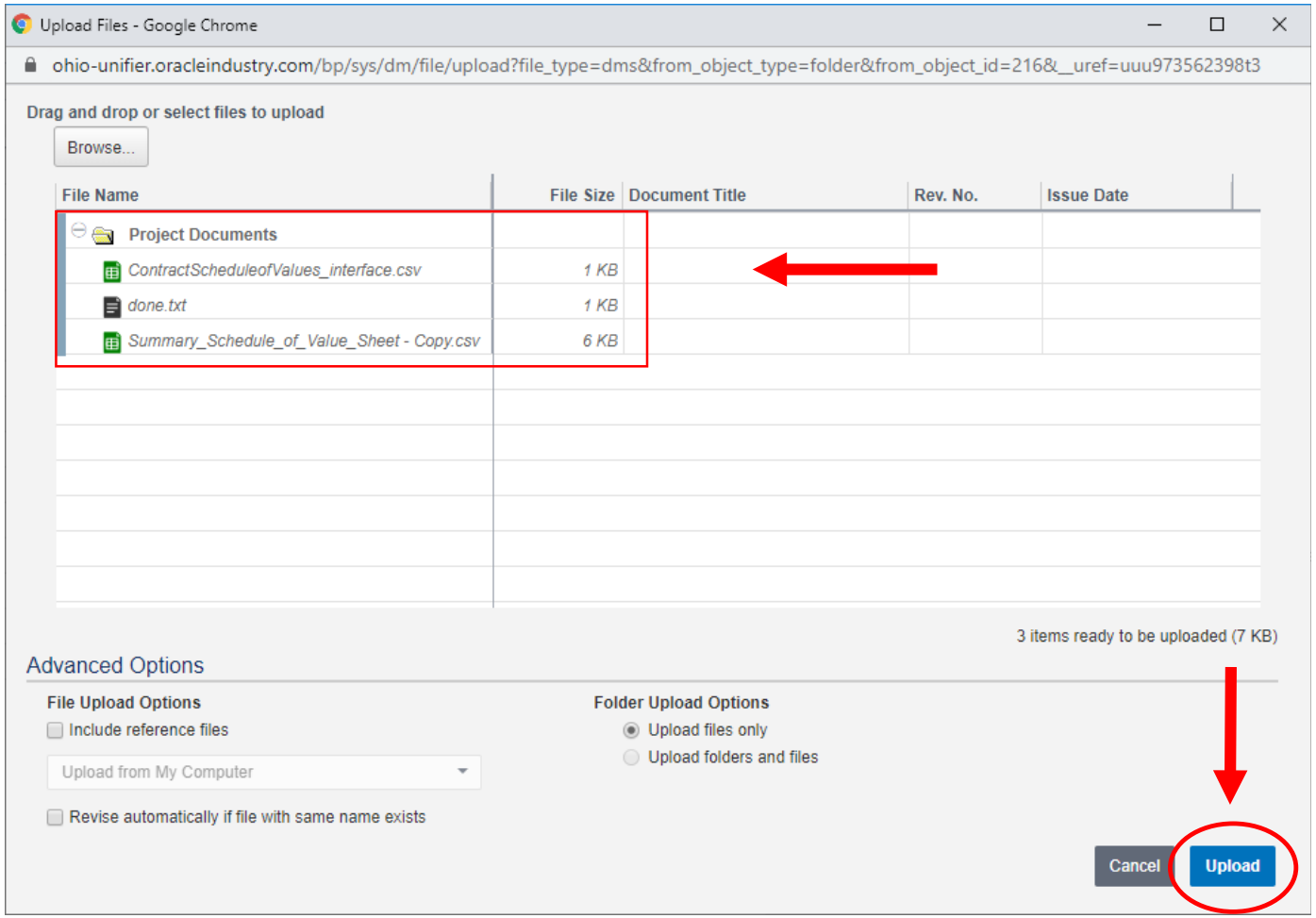
Adding Documents

- If all folders and files have been added, you will see a green “Success!” screen



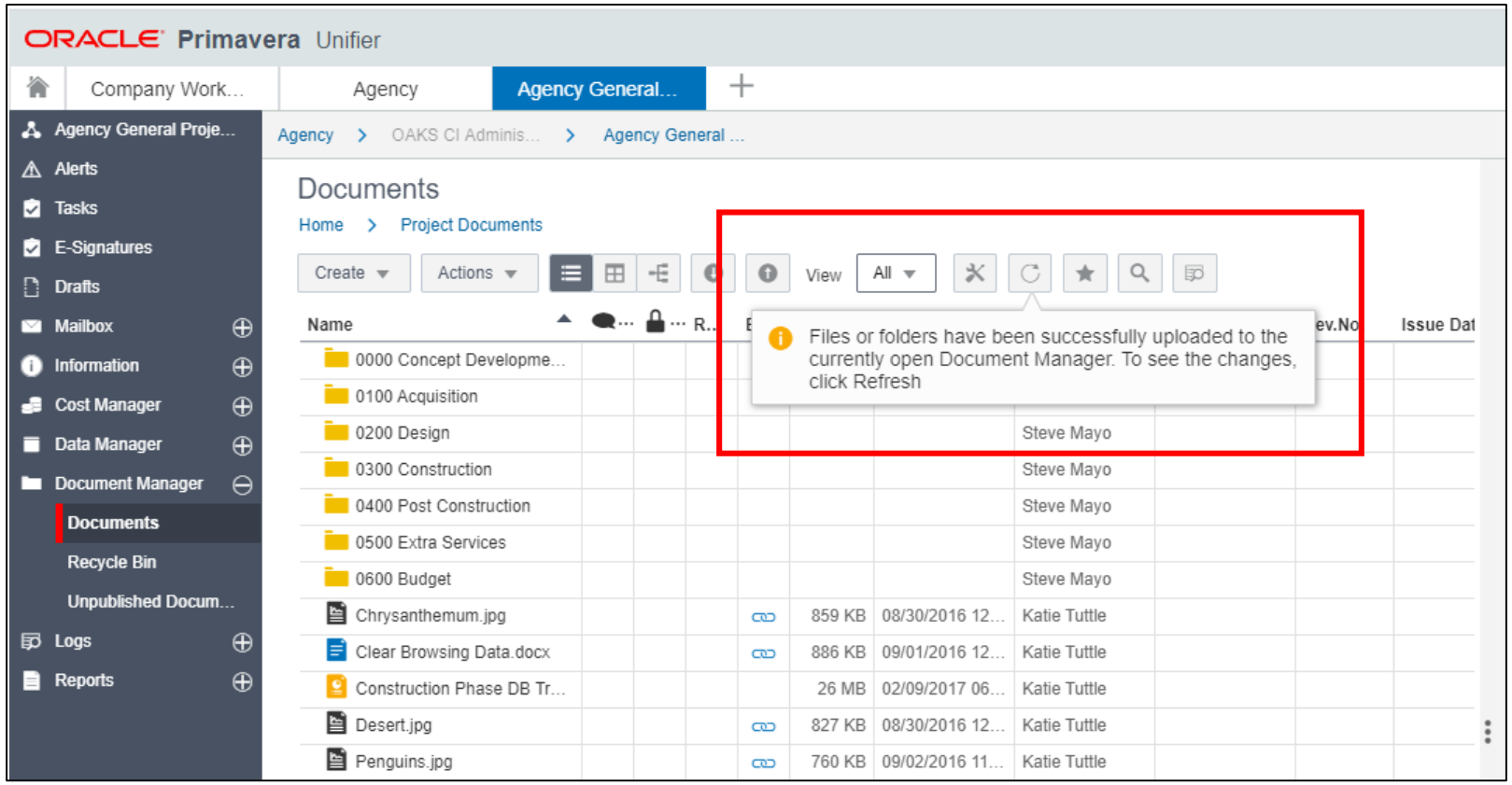
Upload Documents

- You should see all your documents in the Upload Files window
- Click **Upload** button



View Documents

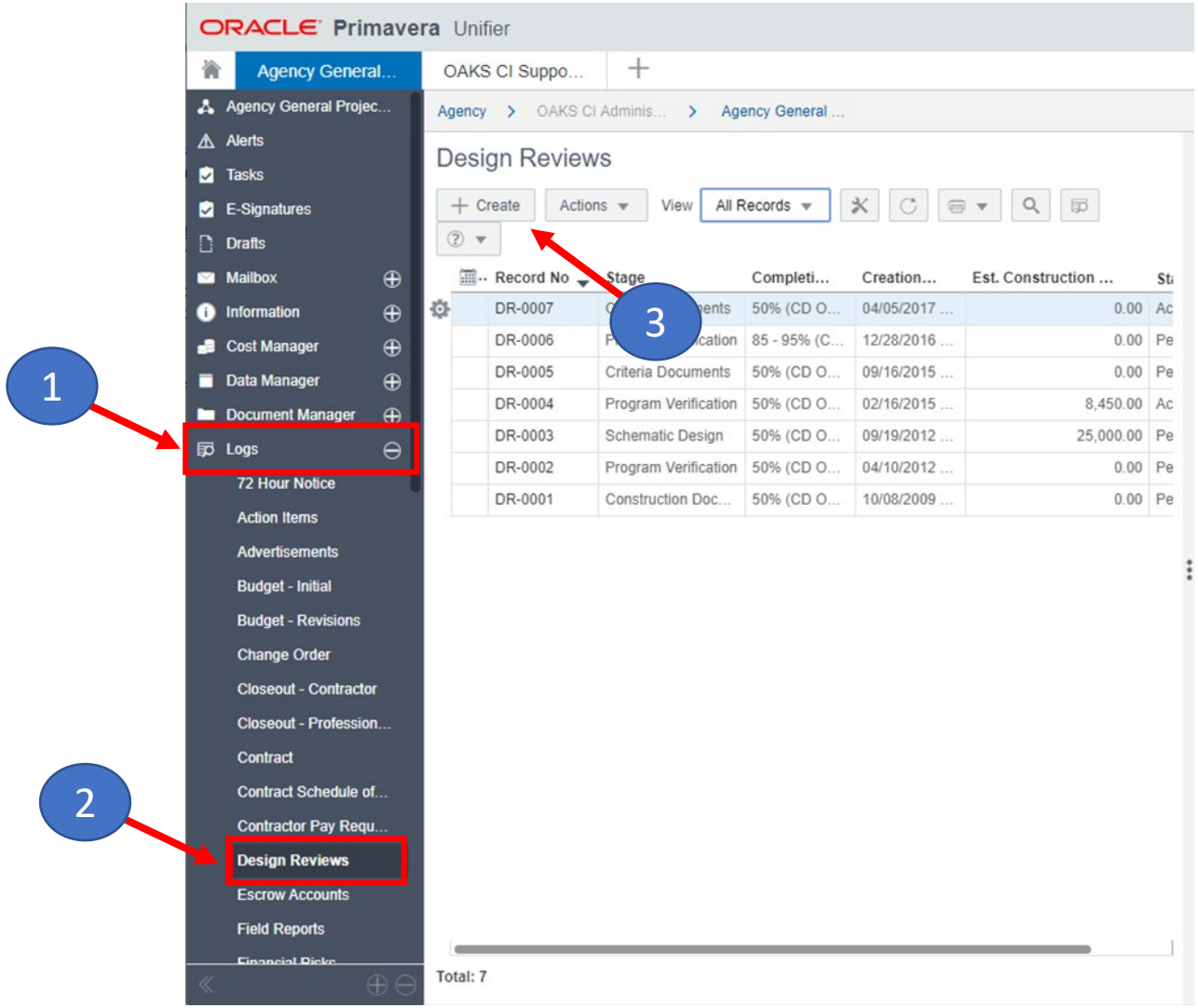
- The window will close, and you will receive a message that your files have been uploaded
- Click the **Refresh** button to see the new files



Create Design Review (A/E)

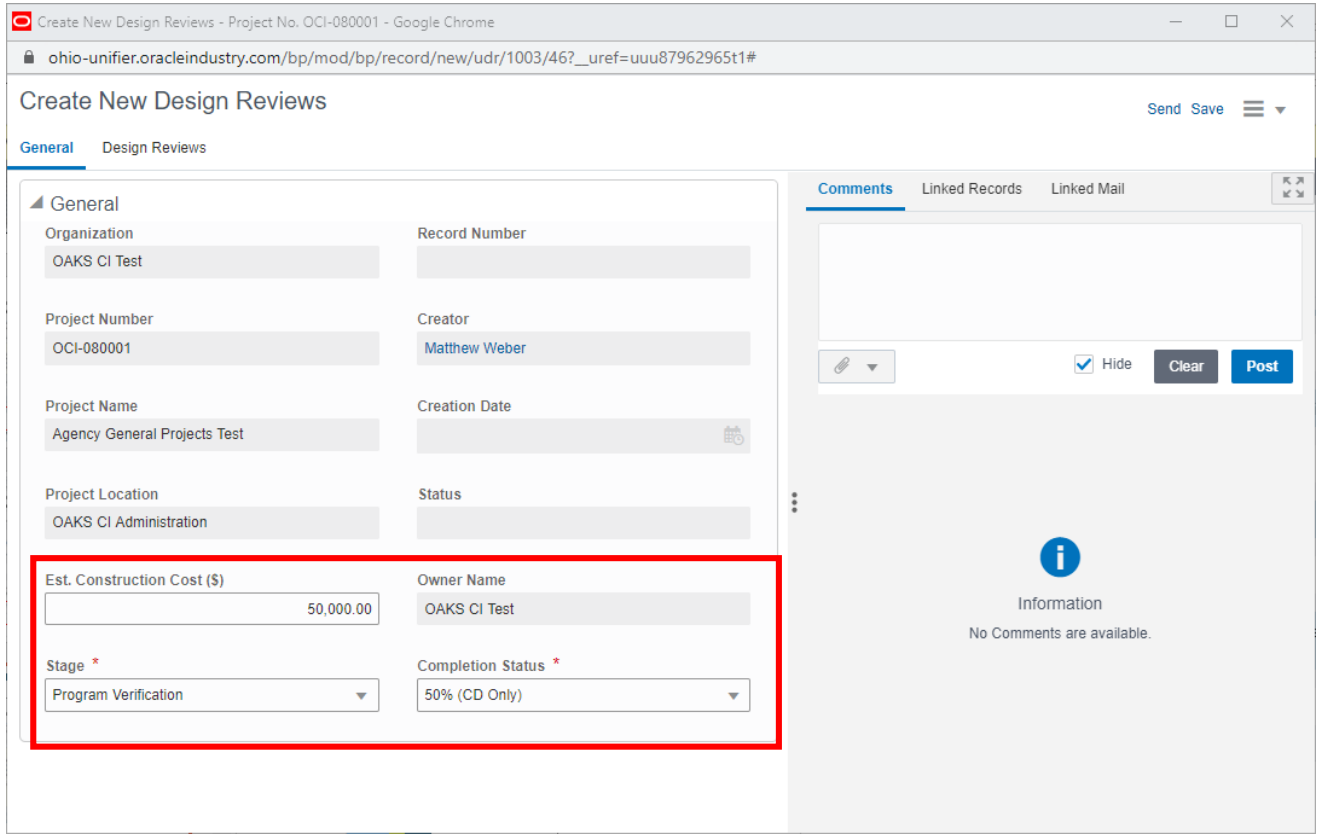
Create a Design Review Record (A/E)

1. Click **Logs** to expand
2. Select the **Design Reviews** BP
3. Click **Create**



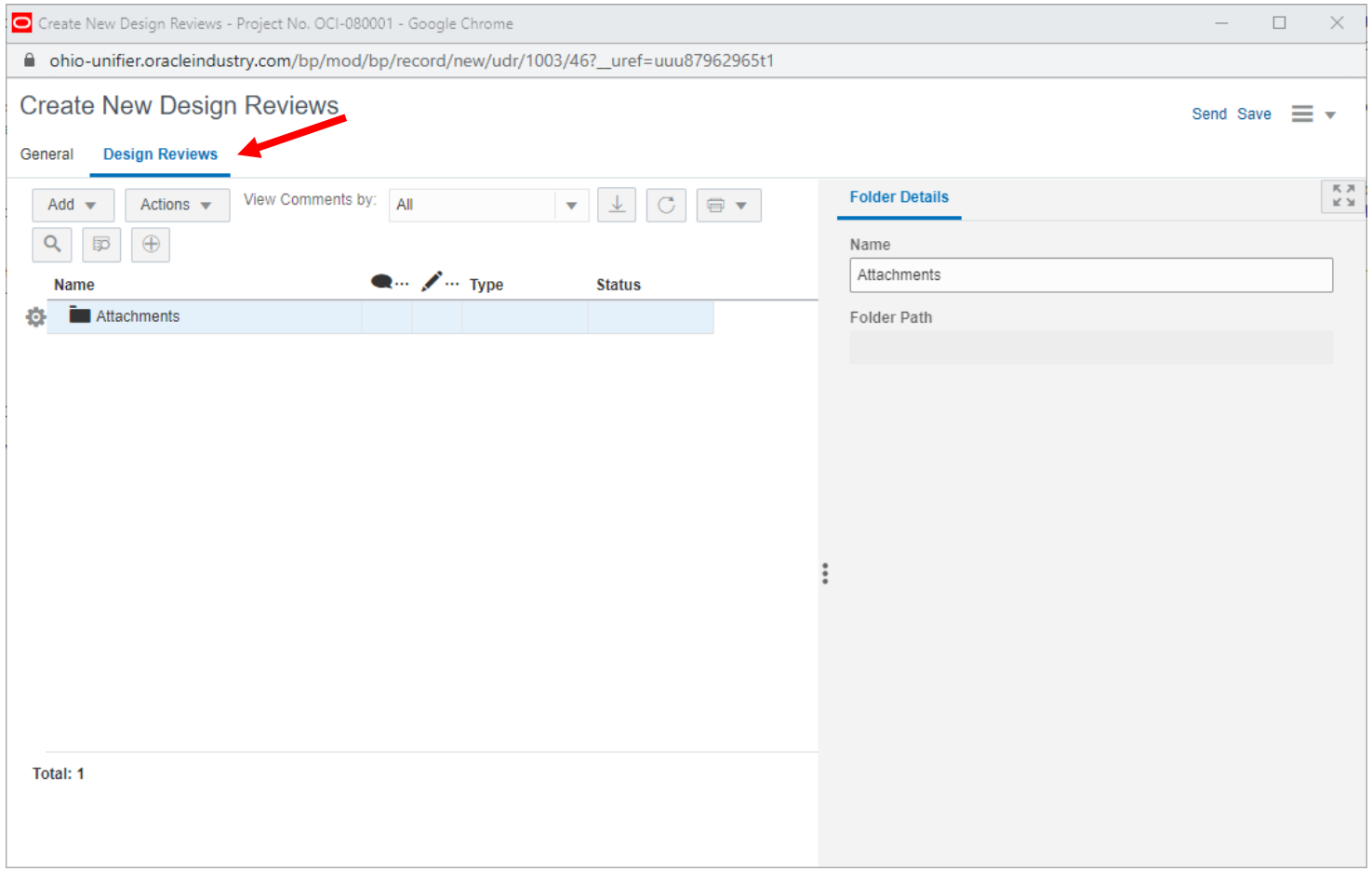
Complete General Tab – Create (A/E)

- Fill out all of the information in the General Tab
- The sections marked with a red * are required



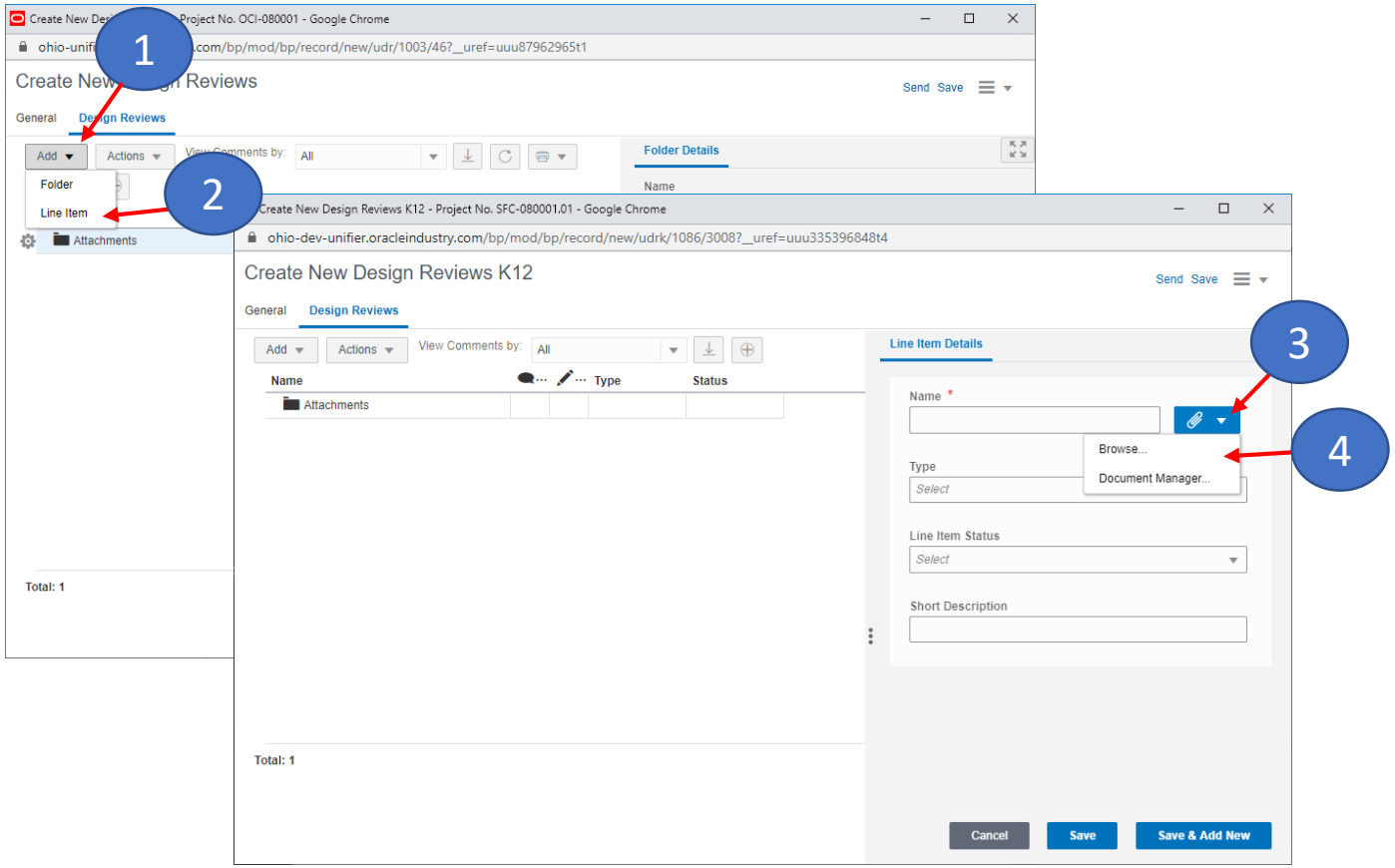
Add Attachments to Design Review – Create (A/E)

- Click the **Design Reviews** tab
  - Here you will add attachments to the record



Add Attachments – Create (A/E)

1. Click **Add**
2. Select **Line Item**
3. Click the attachment button
4. Select **Browse** to attach documents from your computer, or select **Document Manager**

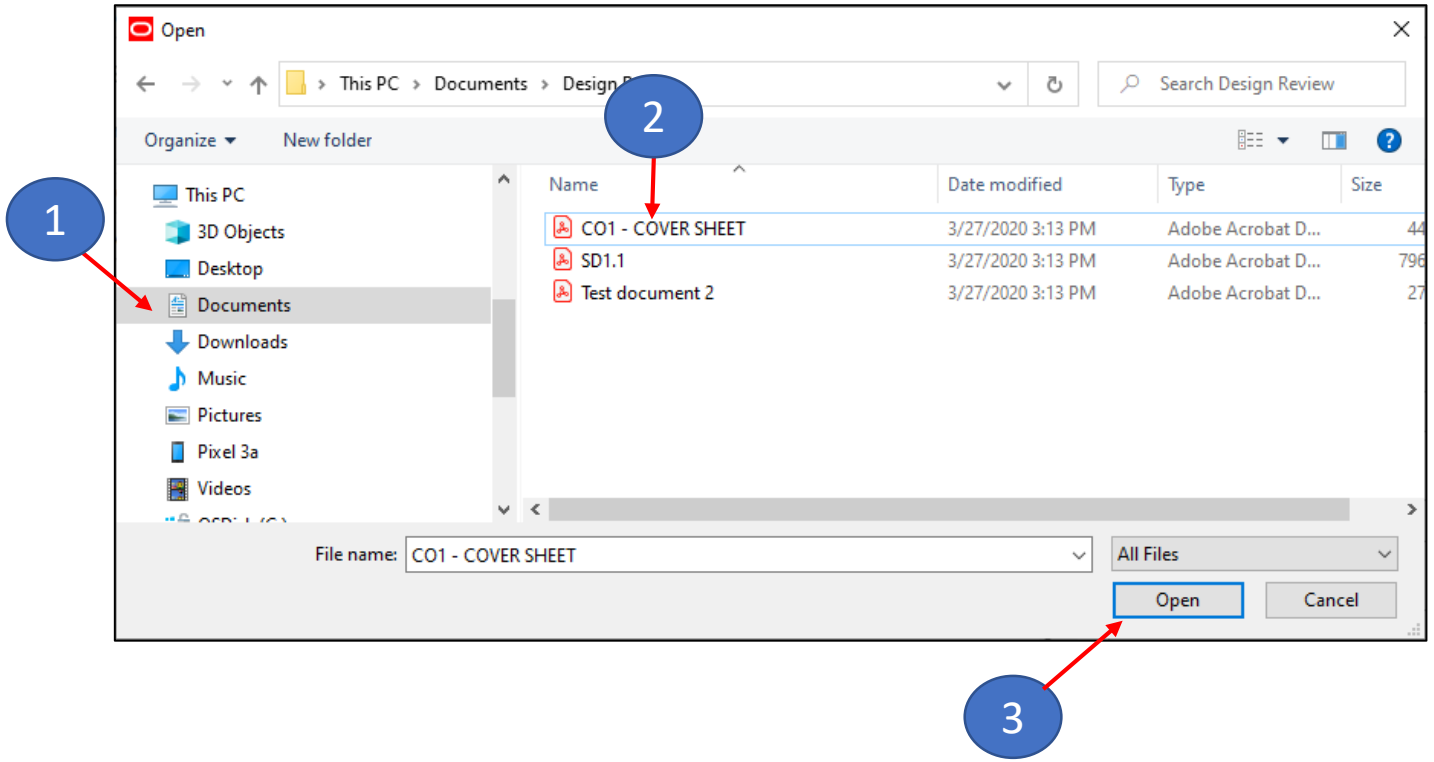


Add Attachments From Browse – Create (A/E)

* *If you uploaded the attachments with **Document Manager**, skip this slide*

- If you selected **Browse**, you will upload documents directly from your computer

1. Navigate to the folder where your documents are stored
2. Select the attachment you want to upload
3. Click **Open**

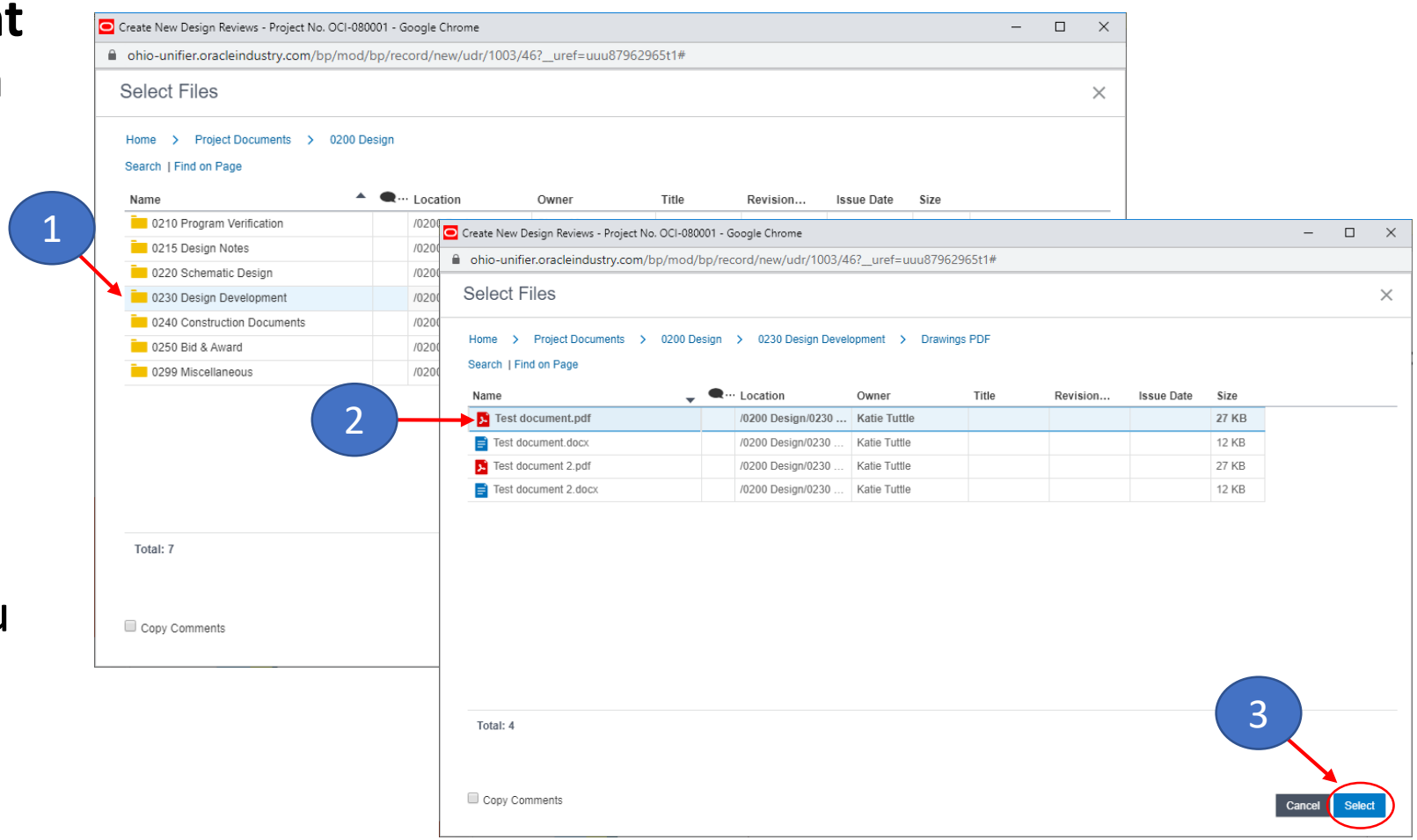


Add Attachments from Document Manager – Create (A/E)

* *If you uploaded the attachments from your computer with **Browse**, skip this slide*

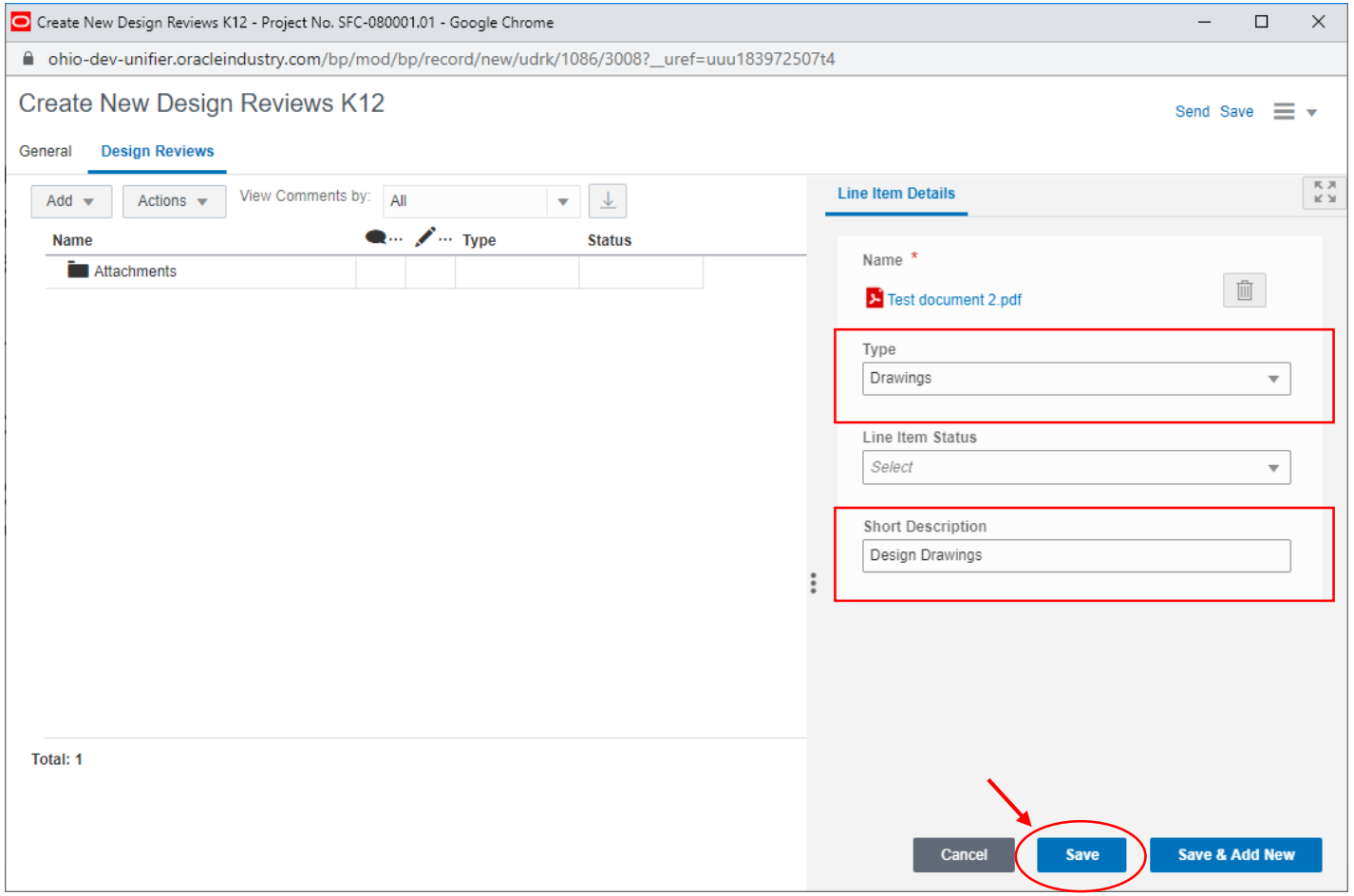
- If you selected **Document Manager**, you will attach documents that are already uploaded

1. Navigate to the attachment by double clicking folders where the document is stored
2. Click the document you wish to attach
3. Click **Select**



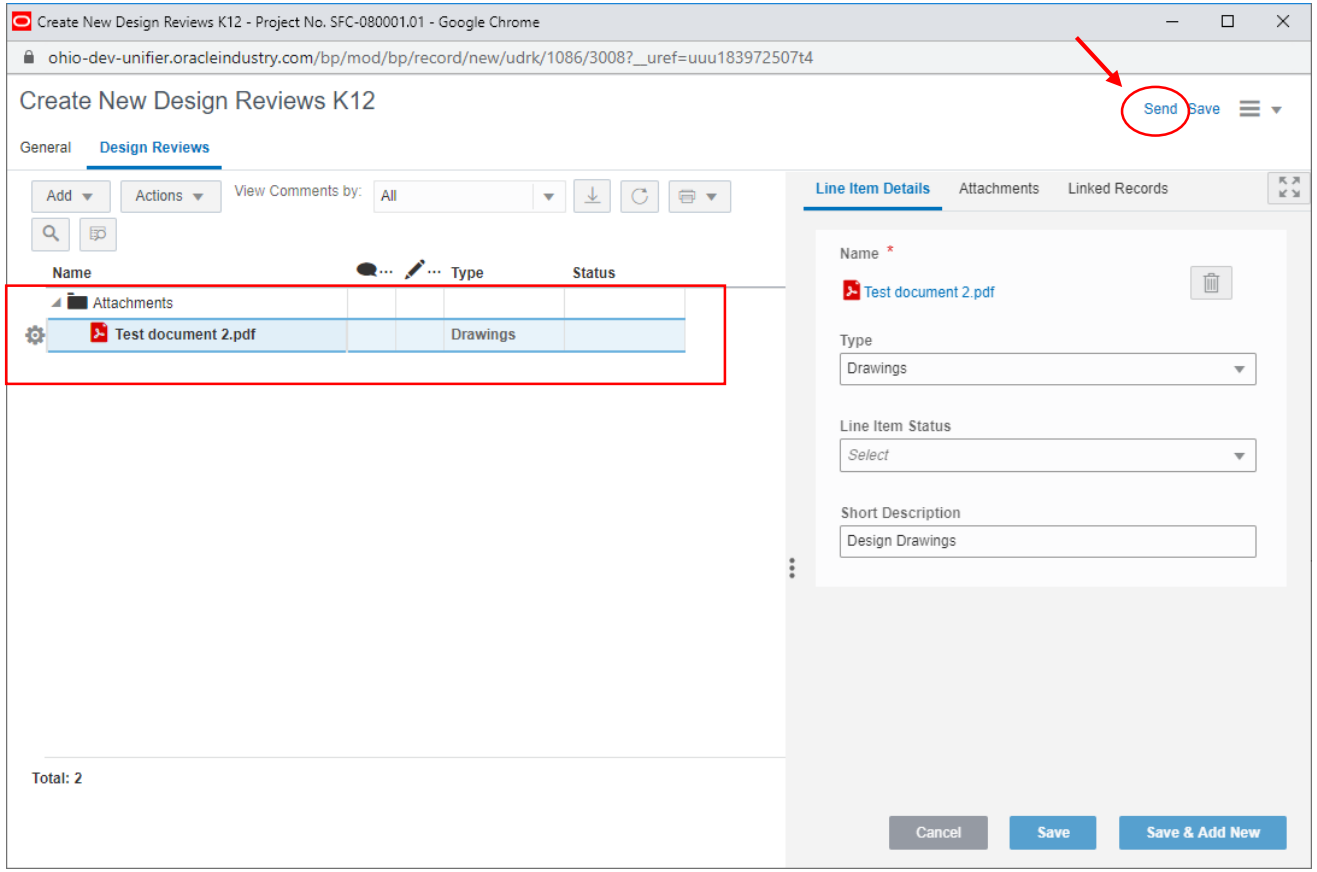
Add Attachments – Create (A/E)

- The selected document will appear under the **Name** field
- Complete **Type**, and **Short Description** fields
- Click **Save** or **Save & Add New**



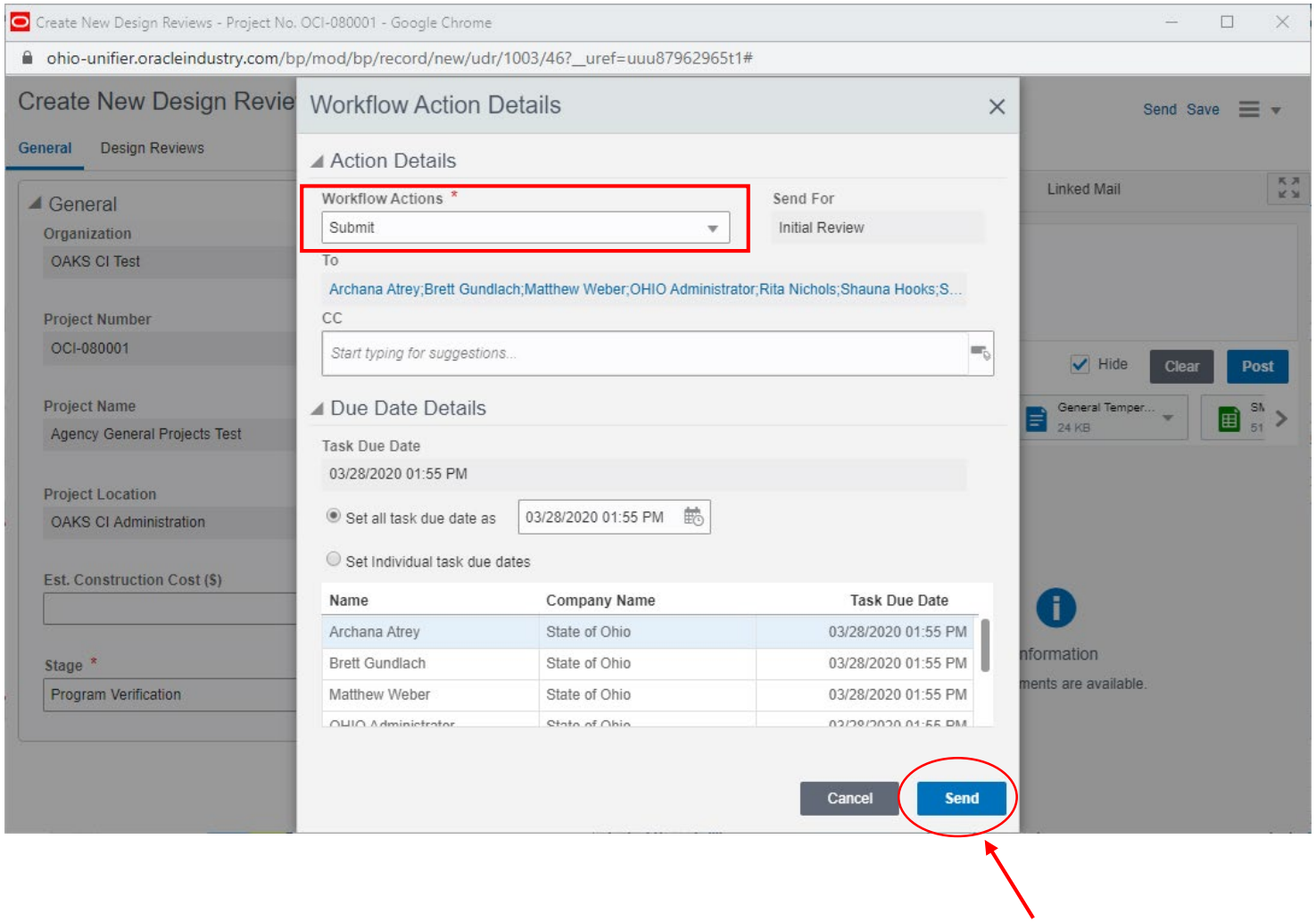
Add Attachments – Create (A/E)

- Your document will show on the left-hand side
- Continue adding any necessary attachments until you are ready to move the record forward
- When the record is ready to move forward, Click **Send**



Submit for Initial Review – Create (A/E)

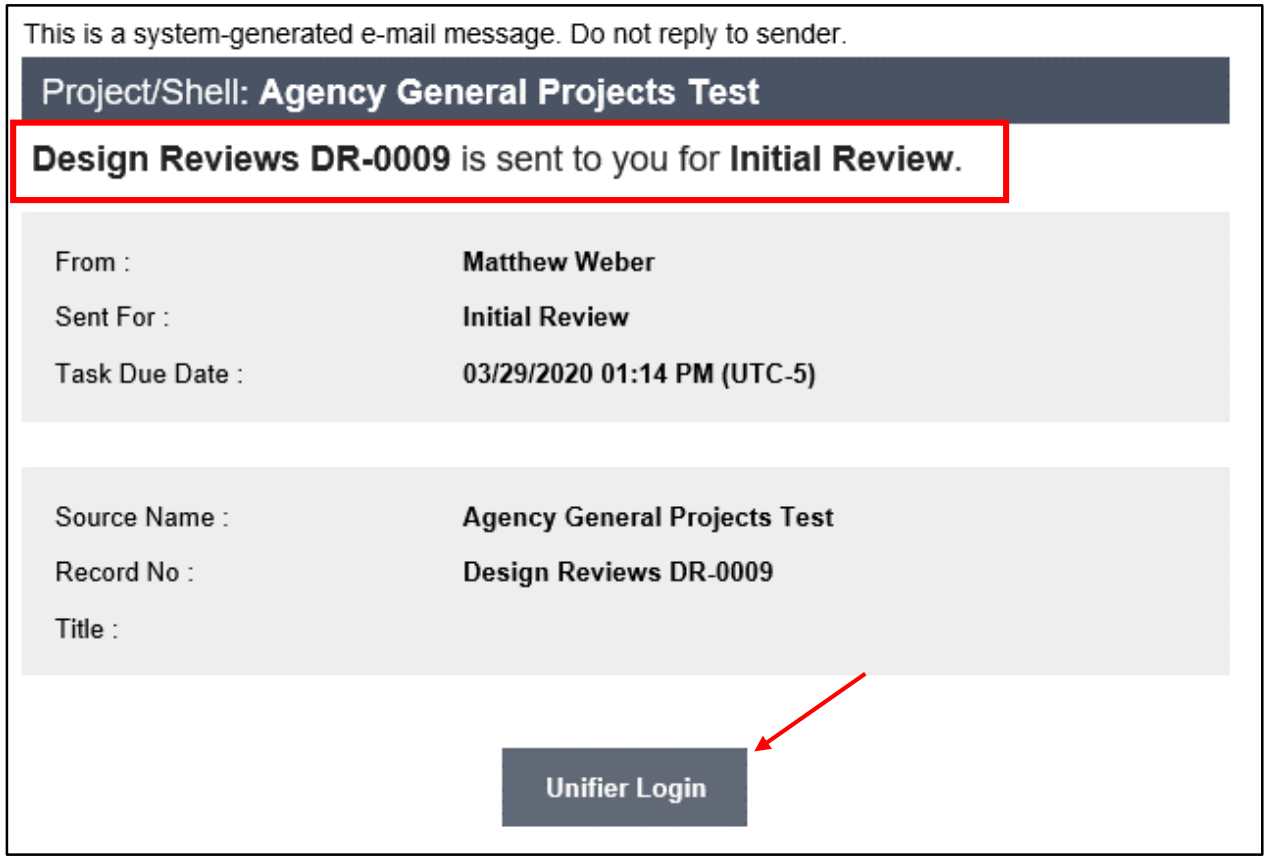
- Verify Workflow Action (**Submit**)
  - The recipients of the task will automatically populate
- Click **Send**
  - The record will be sent to the PM for Initial Review



Initial Review (PM)

Receive Task – Initial Review (PM)

- PM receives an Email
- Click on the “Unifier Login” button to access the task


This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **Agency General Projects Test**

Design Reviews DR-0009 is sent to you for **Initial Review**.

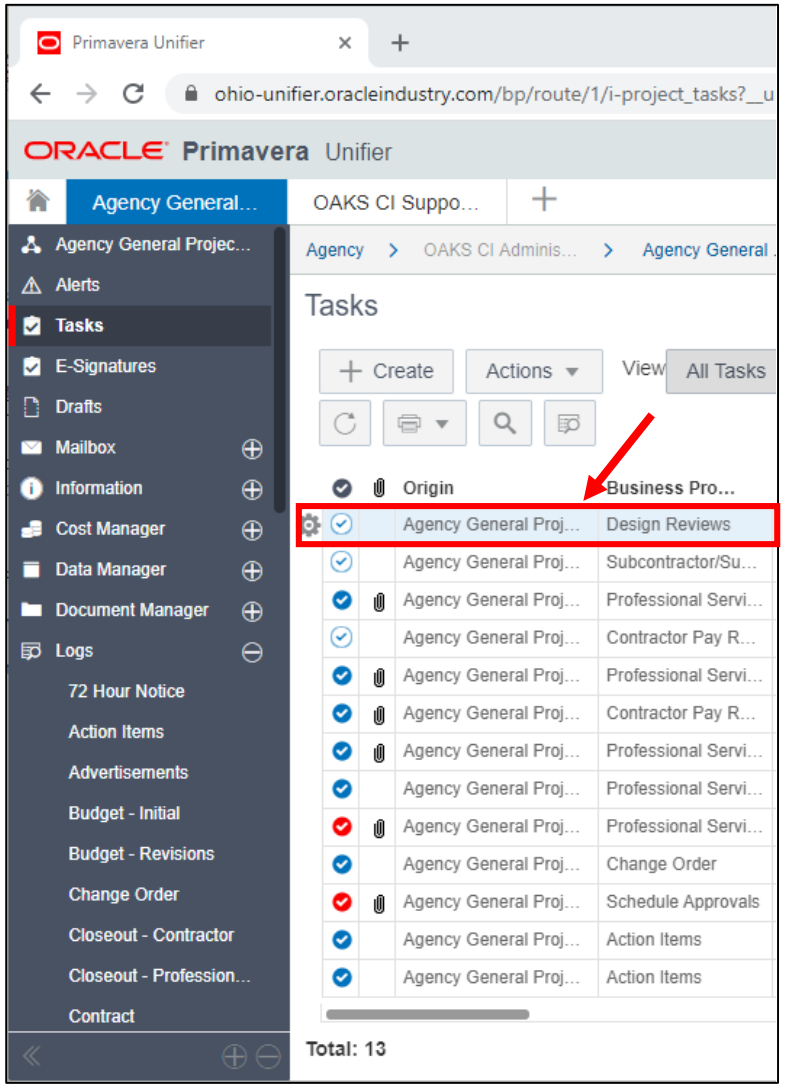
From :	**Matthew Weber**
Sent For :	**Initial Review**
Task Due Date :	**03/29/2020 01:14 PM (UTC-5)**

Source Name :	**Agency General Projects Test**
Record No :	**Design Reviews DR-0009**
Title :	

Unifier Login

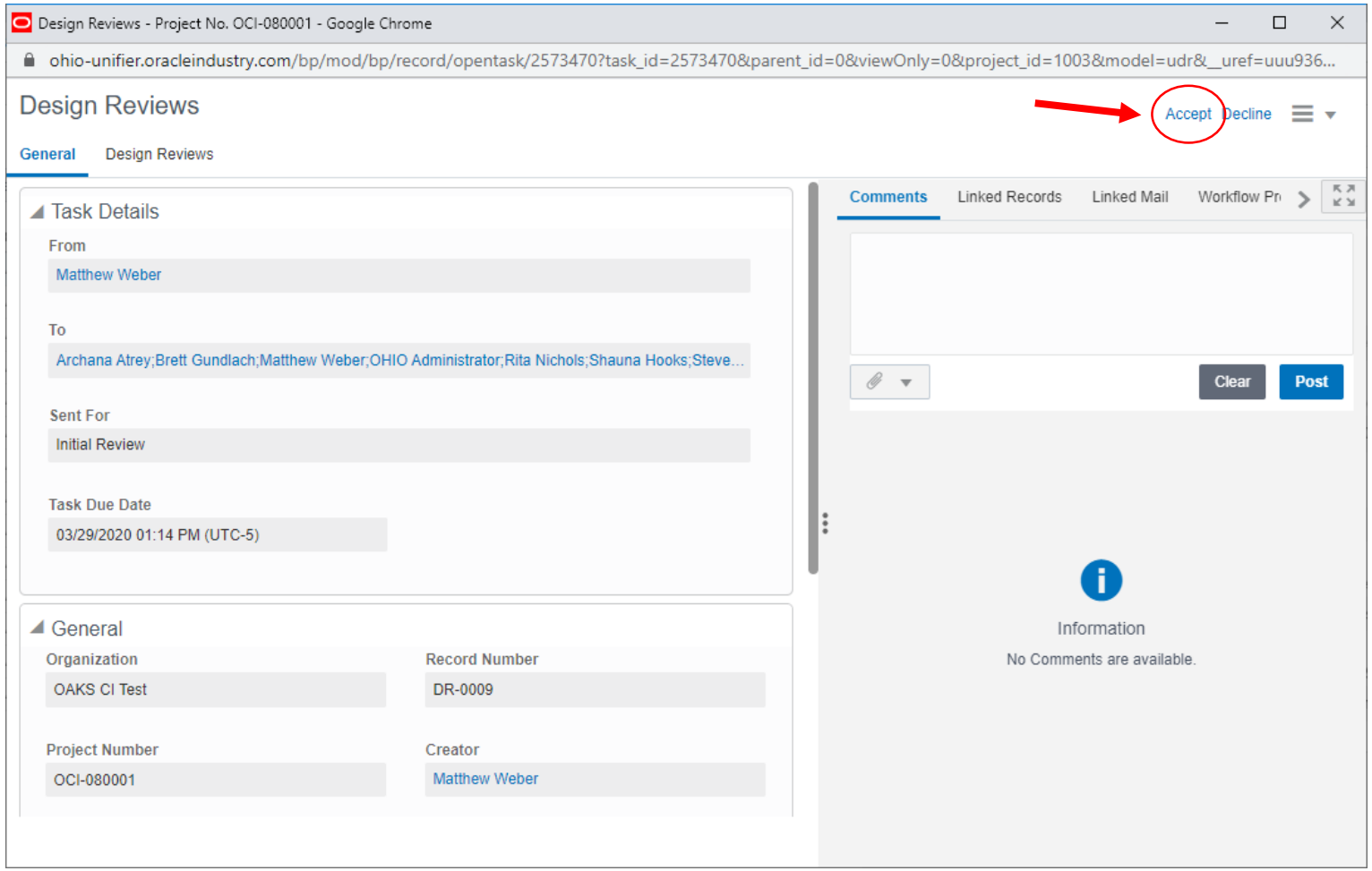
Open Task – Initial Review (PM)

- After logging into the system, the PM will find the **Task** corresponding to the email
- Double click the **Task** to open



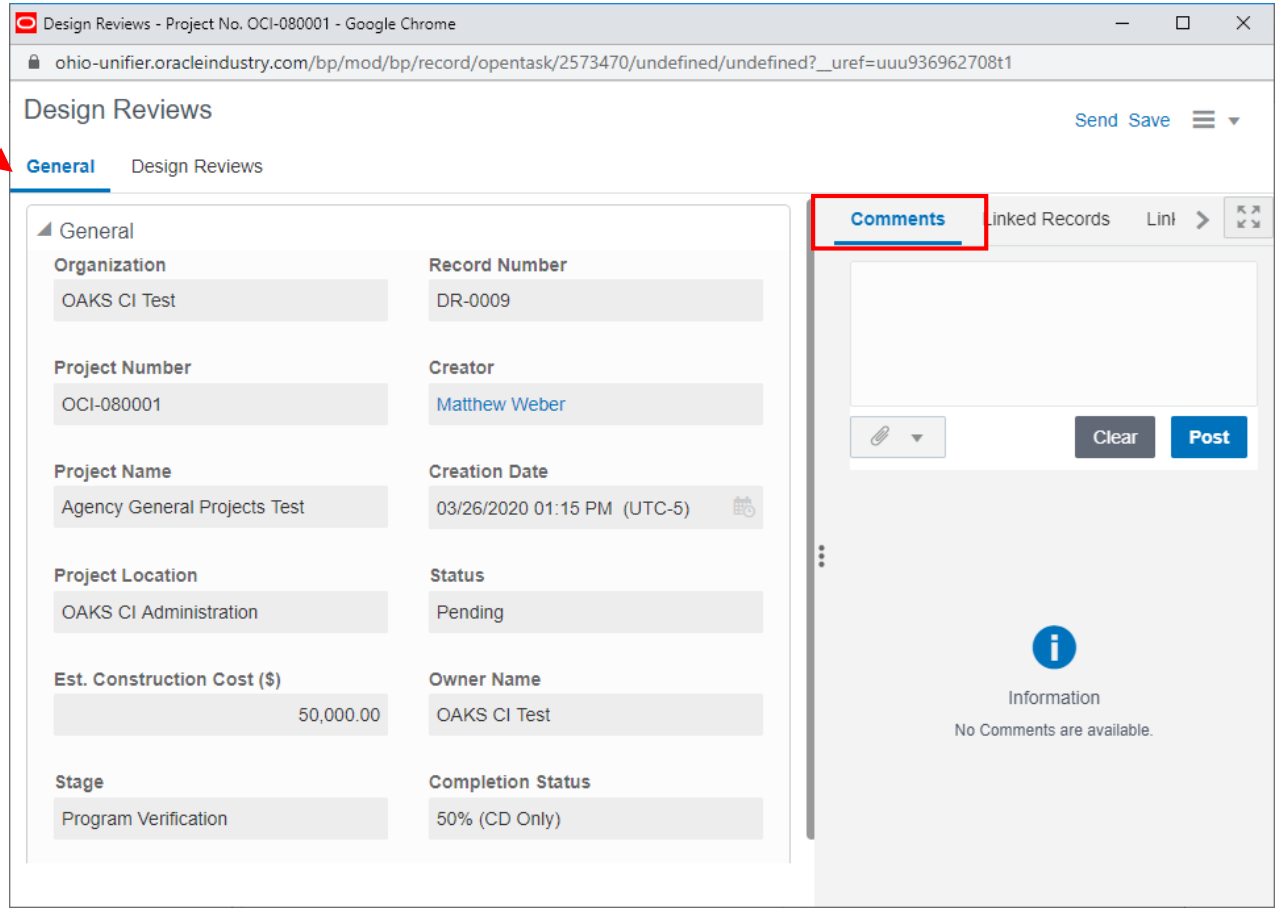
Accept Task – Initial Review (PM)

- Click **Accept** to begin work on the record



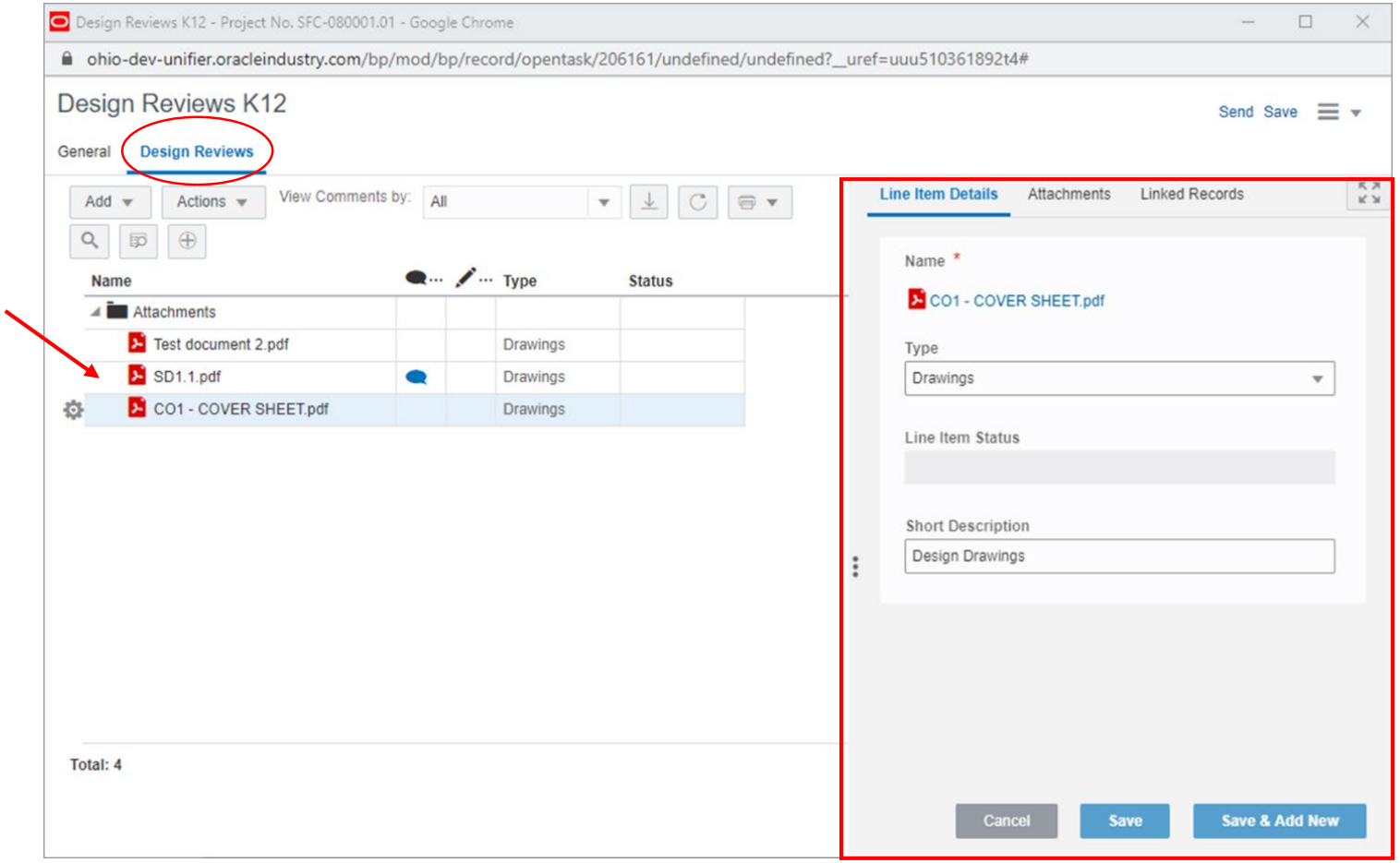
Review General Tab – Initial Review (PM)

- Review the information in the General Tab
- Check the right pane to see if there are any General Comments attached



Design Reviews – Initial Review (PM)

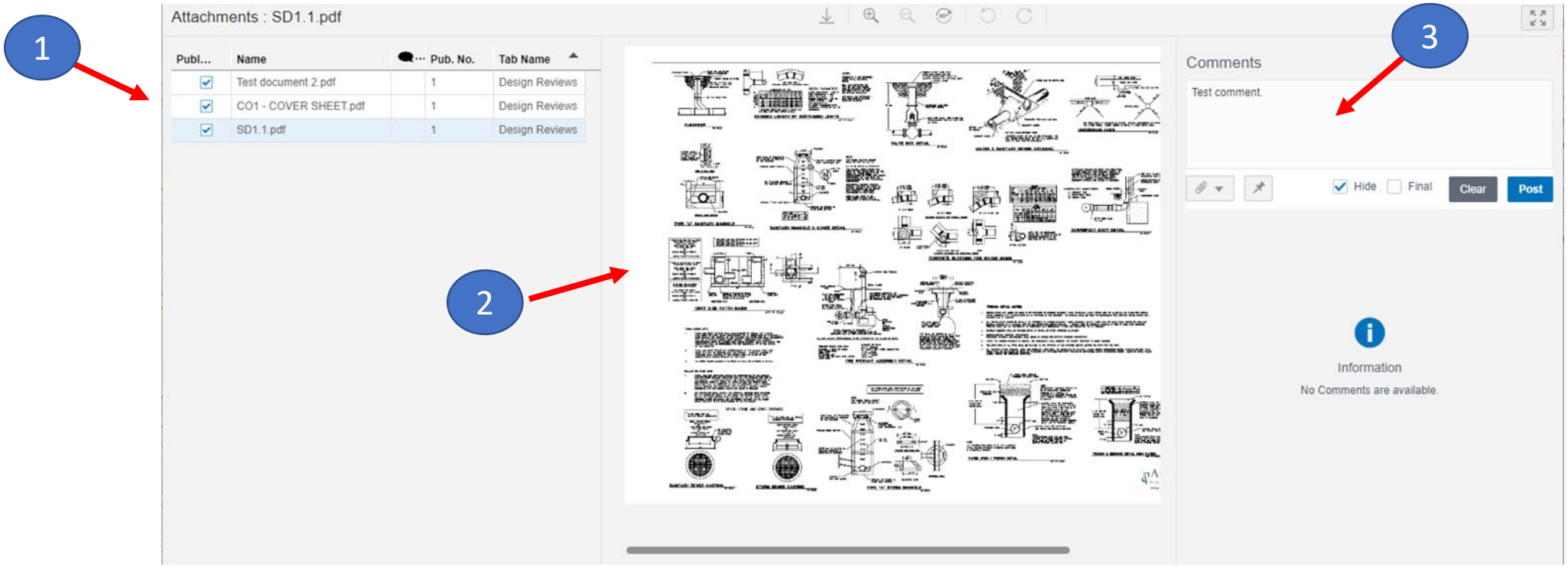
- Click the **Design Reviews** tab to view attachments
- Single click an attachment to view **Line Item Details** in the right pane
- Double click attachment to view



View Attachments – Initial Review (PM)

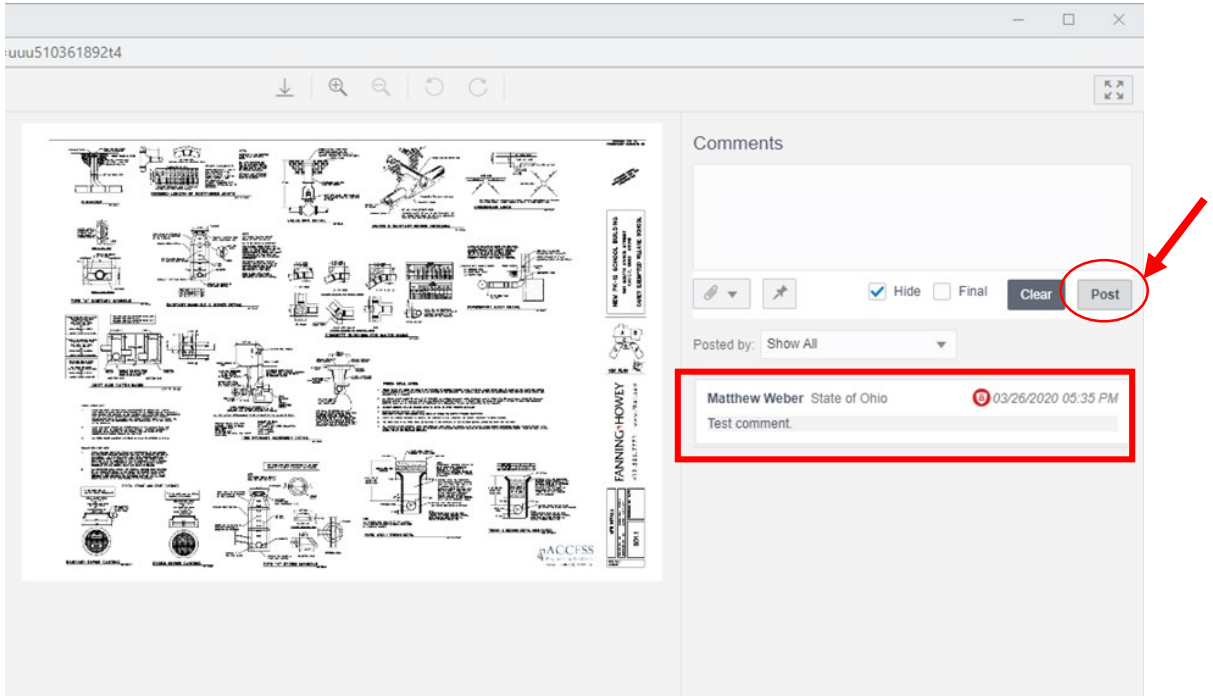
A new window will open to display the documents in three sections

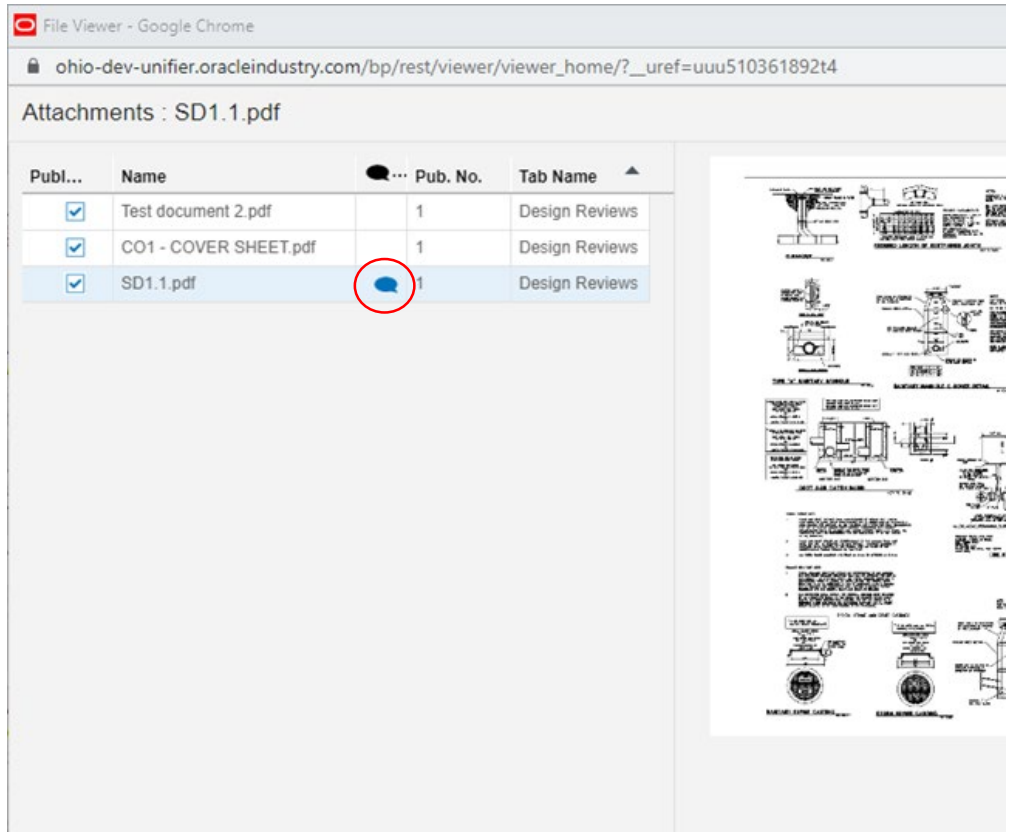
1. The left section will display the attachments under the folder you've selected. Click each attachment to view details.
2. The middle section will display the document, this can be an image or text depending on the file
3. The right section will allow you to see and add comments to the selected document



Add Comments – Initial Review (PM)

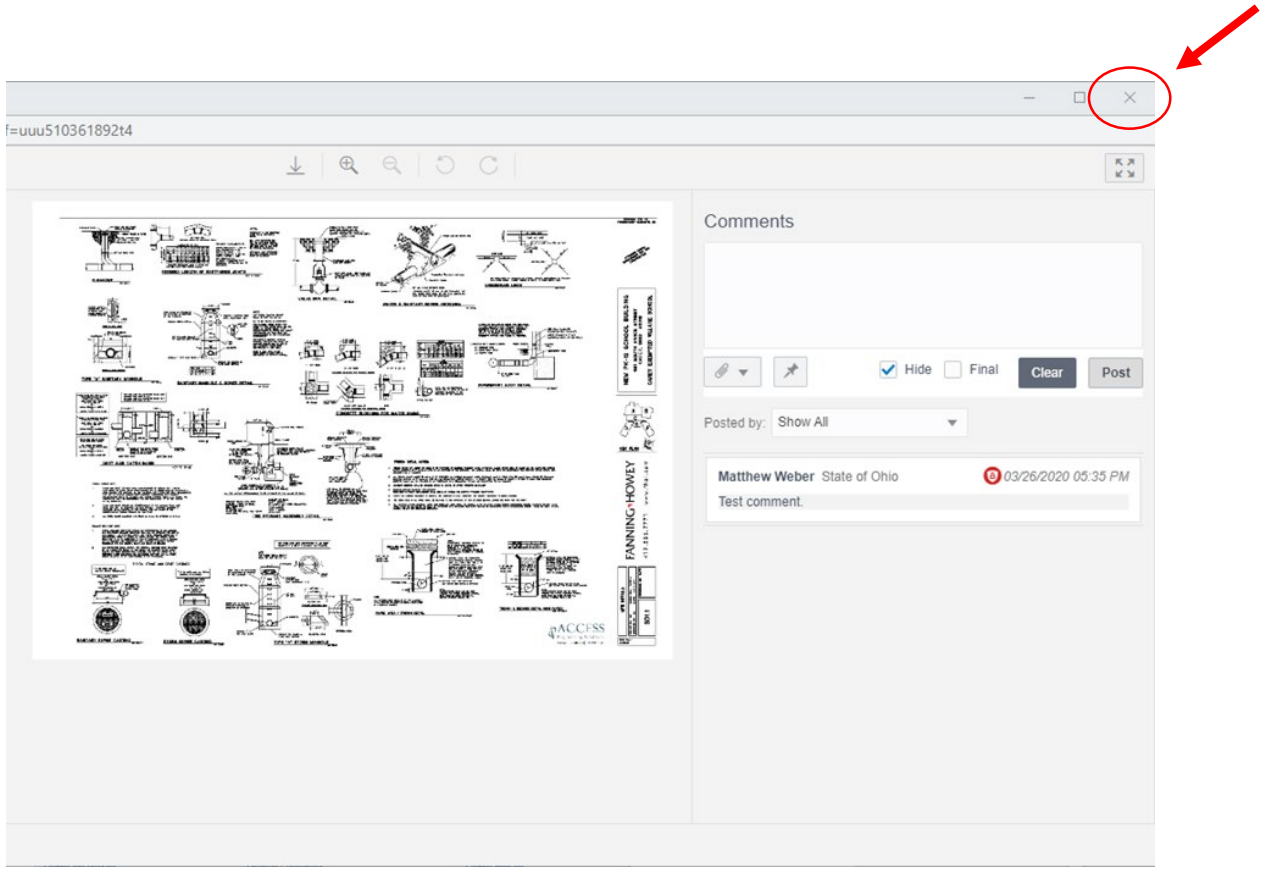
- After typing your comment, click the **Post** button
- The comment will display below and be linked to the attachment permanently
- Once any comment is added, a blue comment bubble will be visible next to the attachment





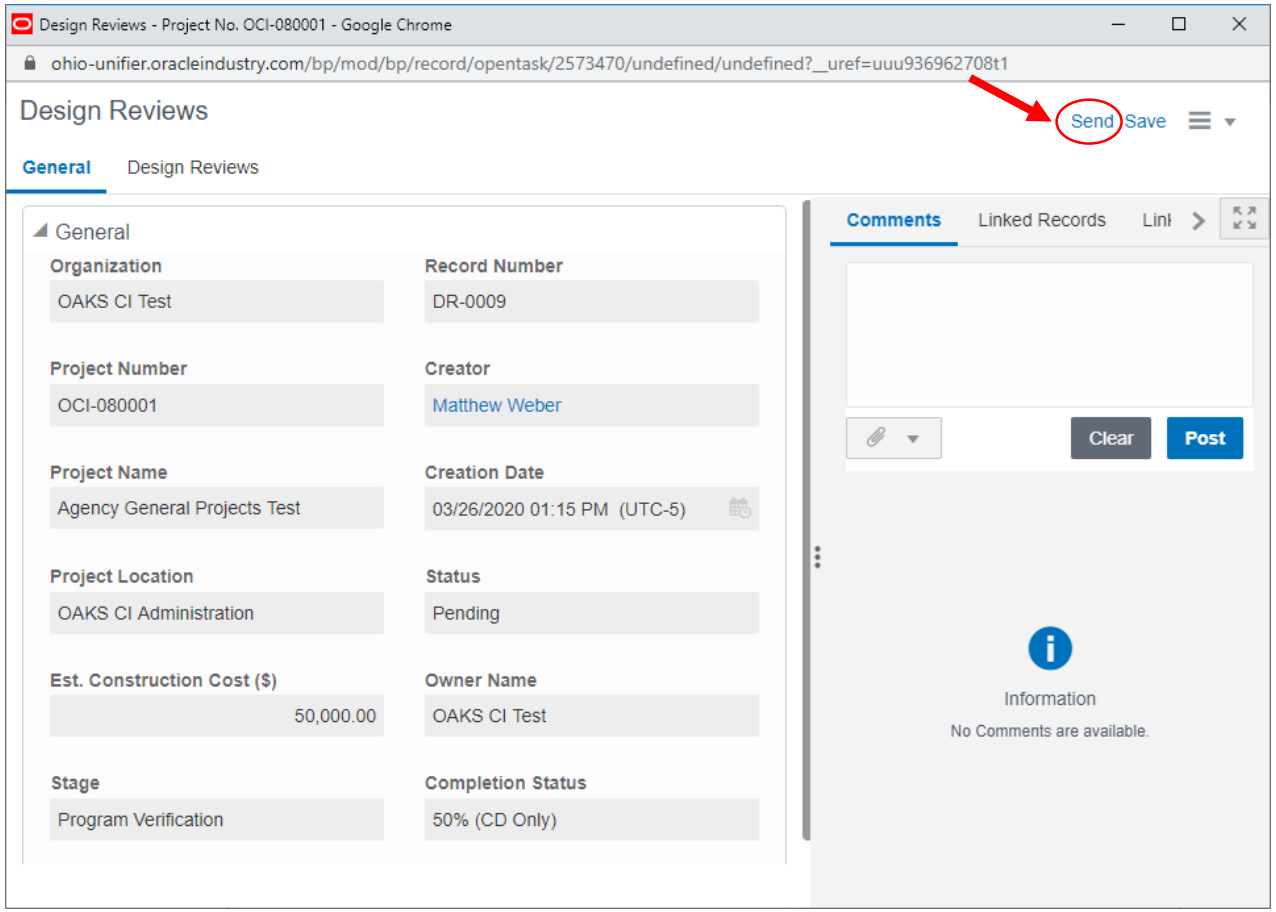
View Attachments – Initial Review (PM)

- When you are finished reviewing the attachments, close the window by clicking the **X** in the top right corner



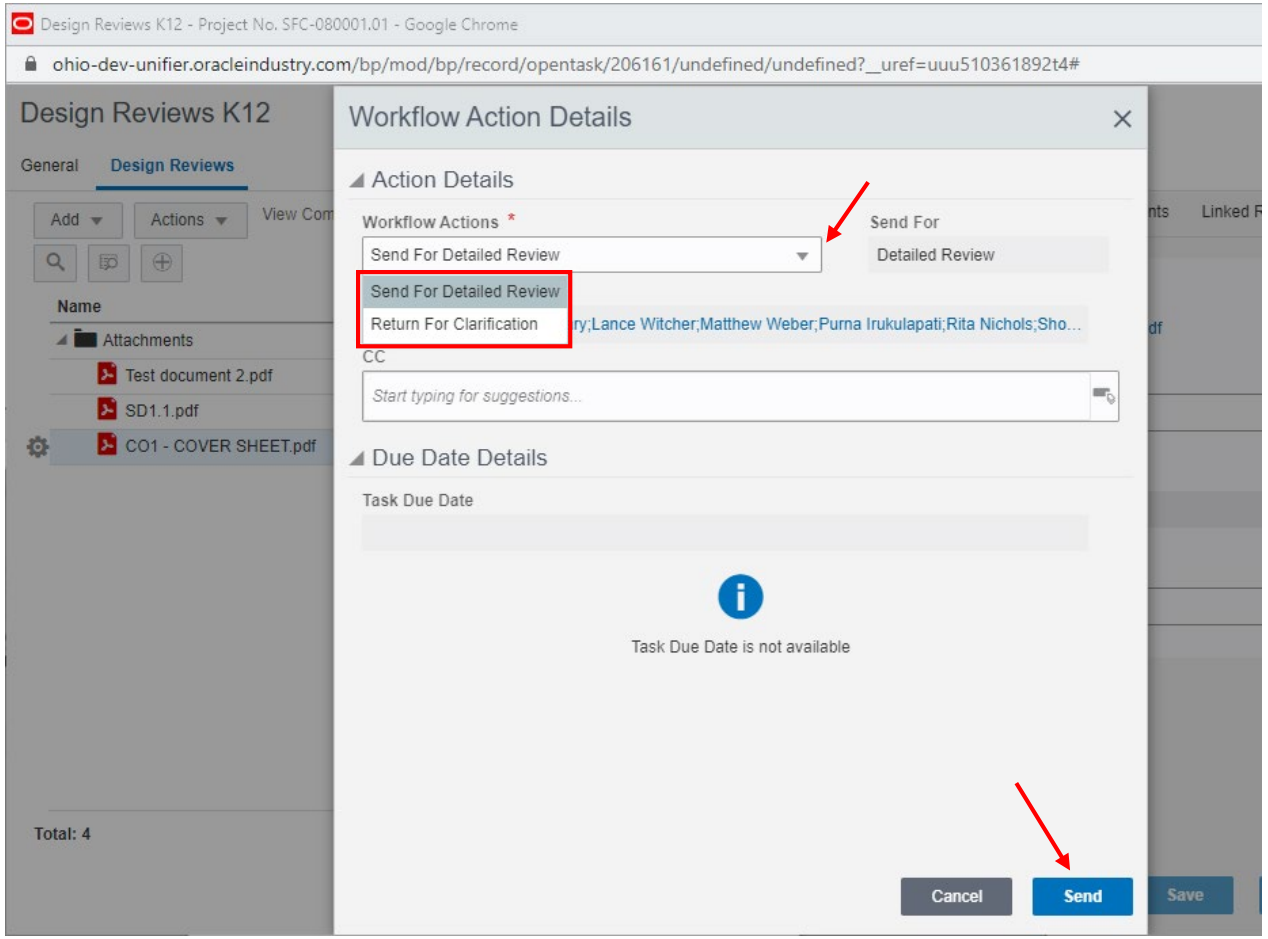
Send Record – Initial Review (PM)

- When the Initial Review is complete, click the **Send** button at the top right corner of the record



Send Record – Initial Review (PM)

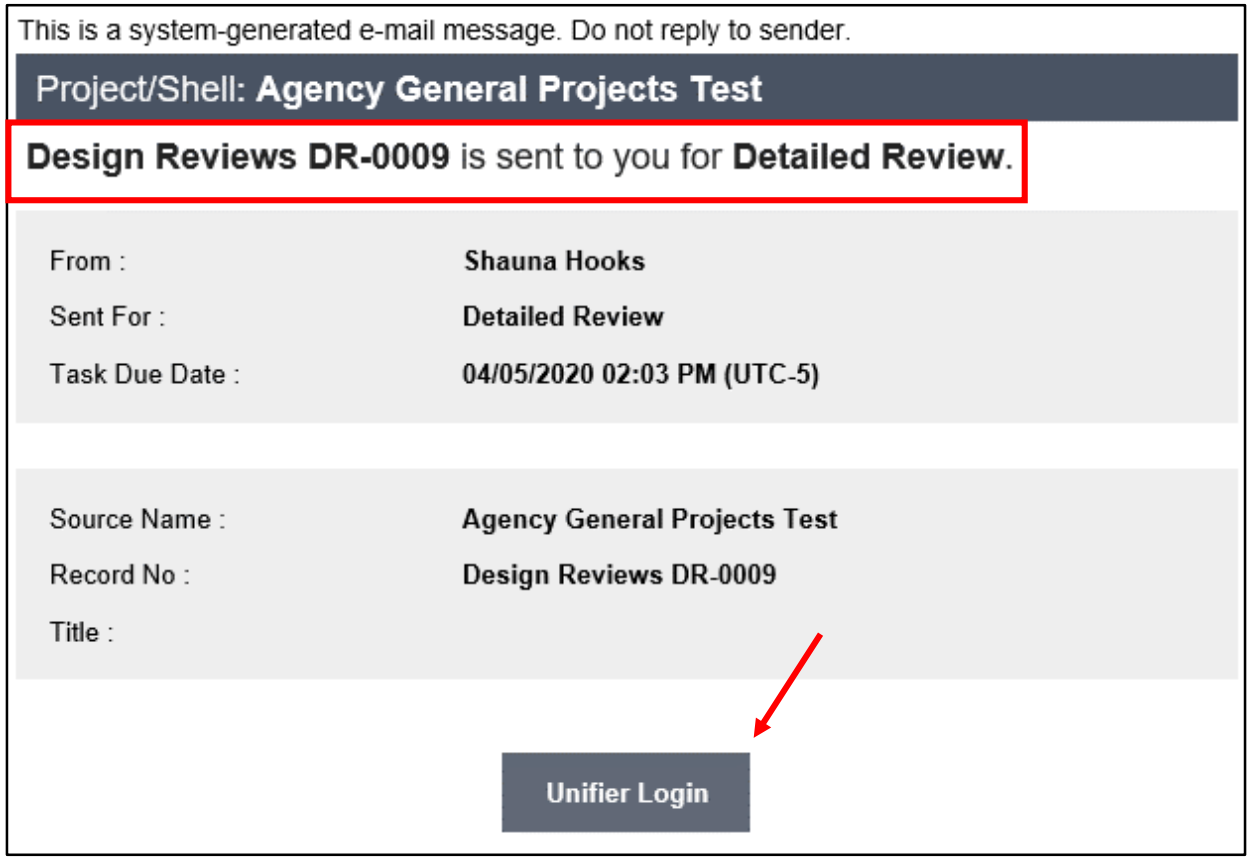
- Select the **Workflow Action**
  - **Send for Detailed Review**: Sends the review to the PM for detailed review
  - **Return for Clarification**: Sends the review back to the A/E for update
- Click **Send**



Detailed Review (PM)

Receive Task – Detailed Review (PM)

- PM receives an Email
- Click on the **Unifier Login** button to access the task


This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **Agency General Projects Test**

Design Reviews DR-0009 is sent to you for **Detailed Review**.

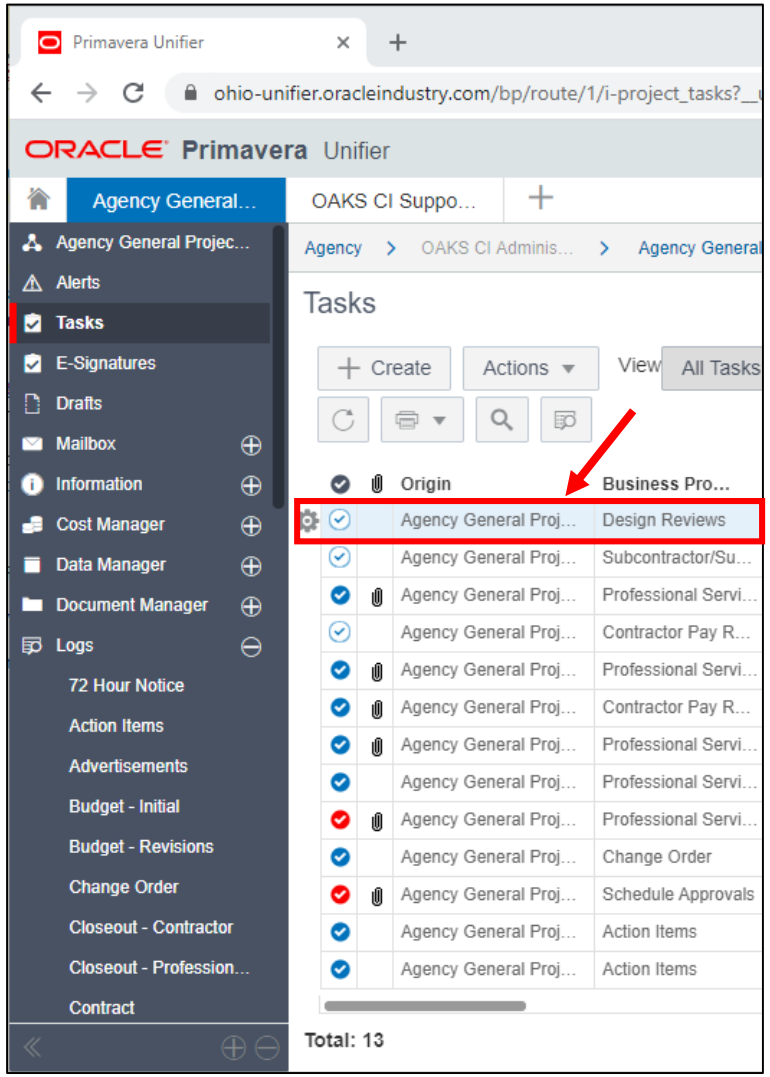
From :	**Shauna Hooks**
Sent For :	**Detailed Review**
Task Due Date :	**04/05/2020 02:03 PM (UTC-5)**

Source Name :	**Agency General Projects Test**
Record No :	**Design Reviews DR-0009**
Title :	

Unifier Login

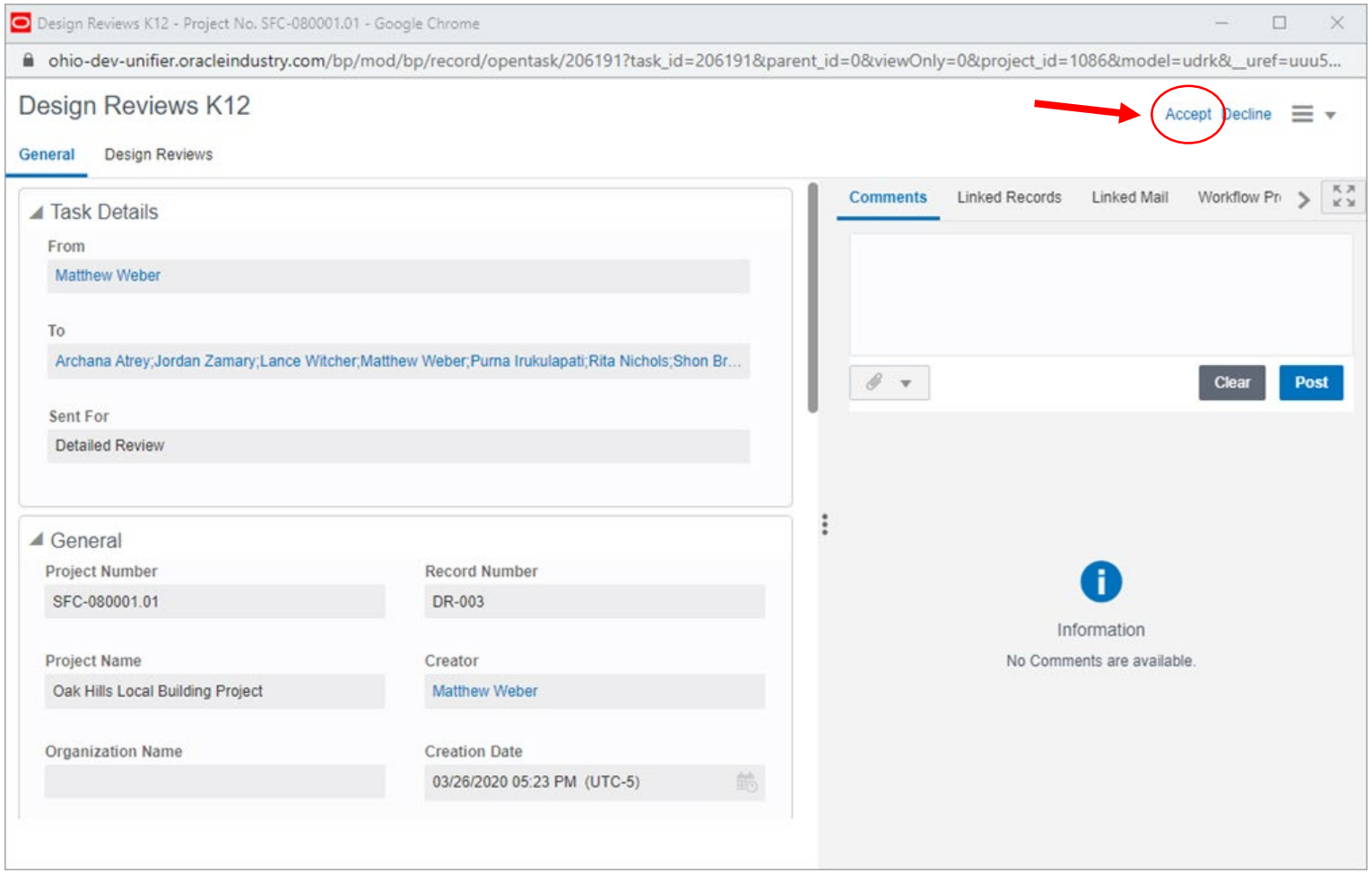
Open Task – Detailed Review (PM)

- After logging into the system, the PM will find the **Task** corresponding to the email
- Double click the **Task** to open



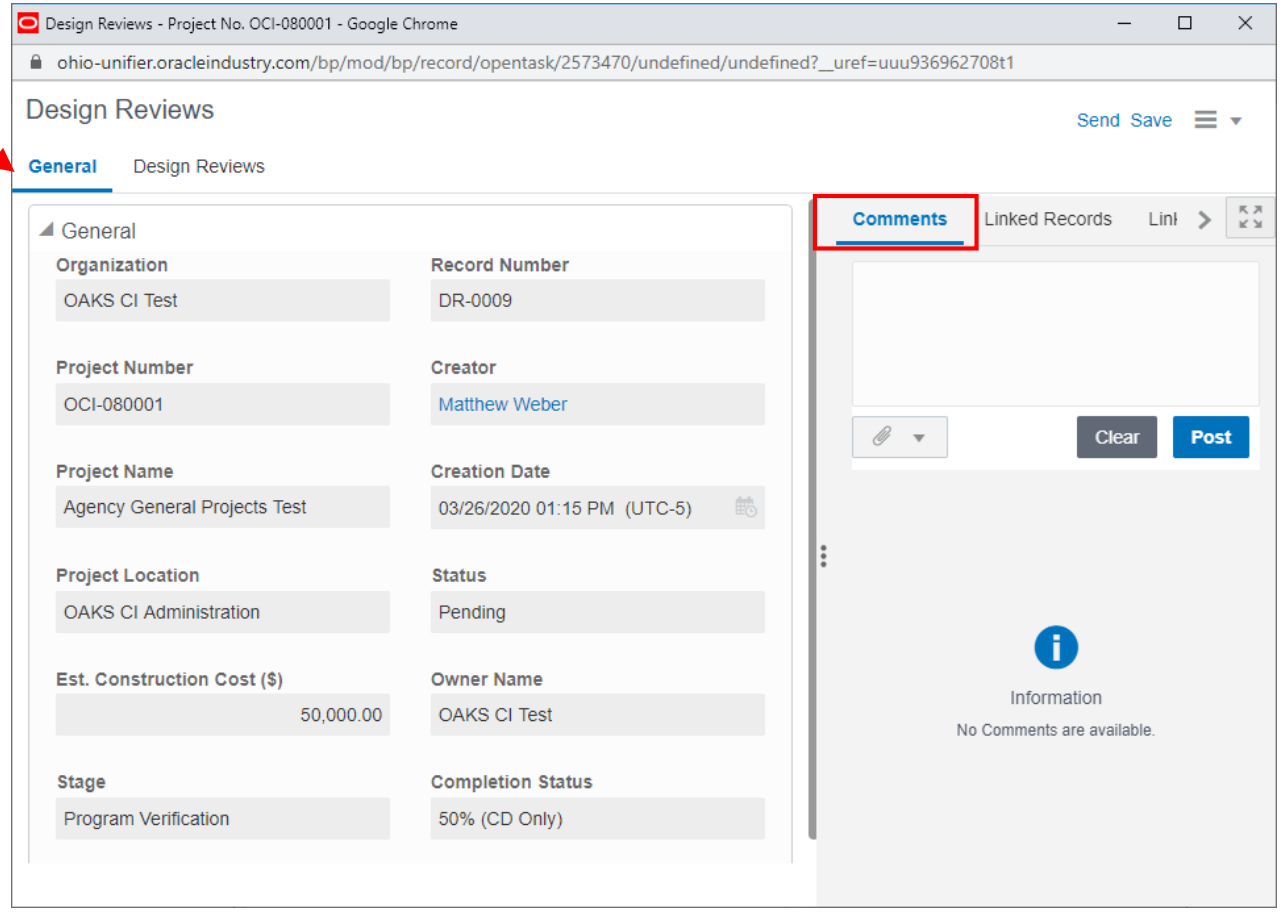
Accept Task – Initial Review (PM)

- Click **Accept** to begin work on the record



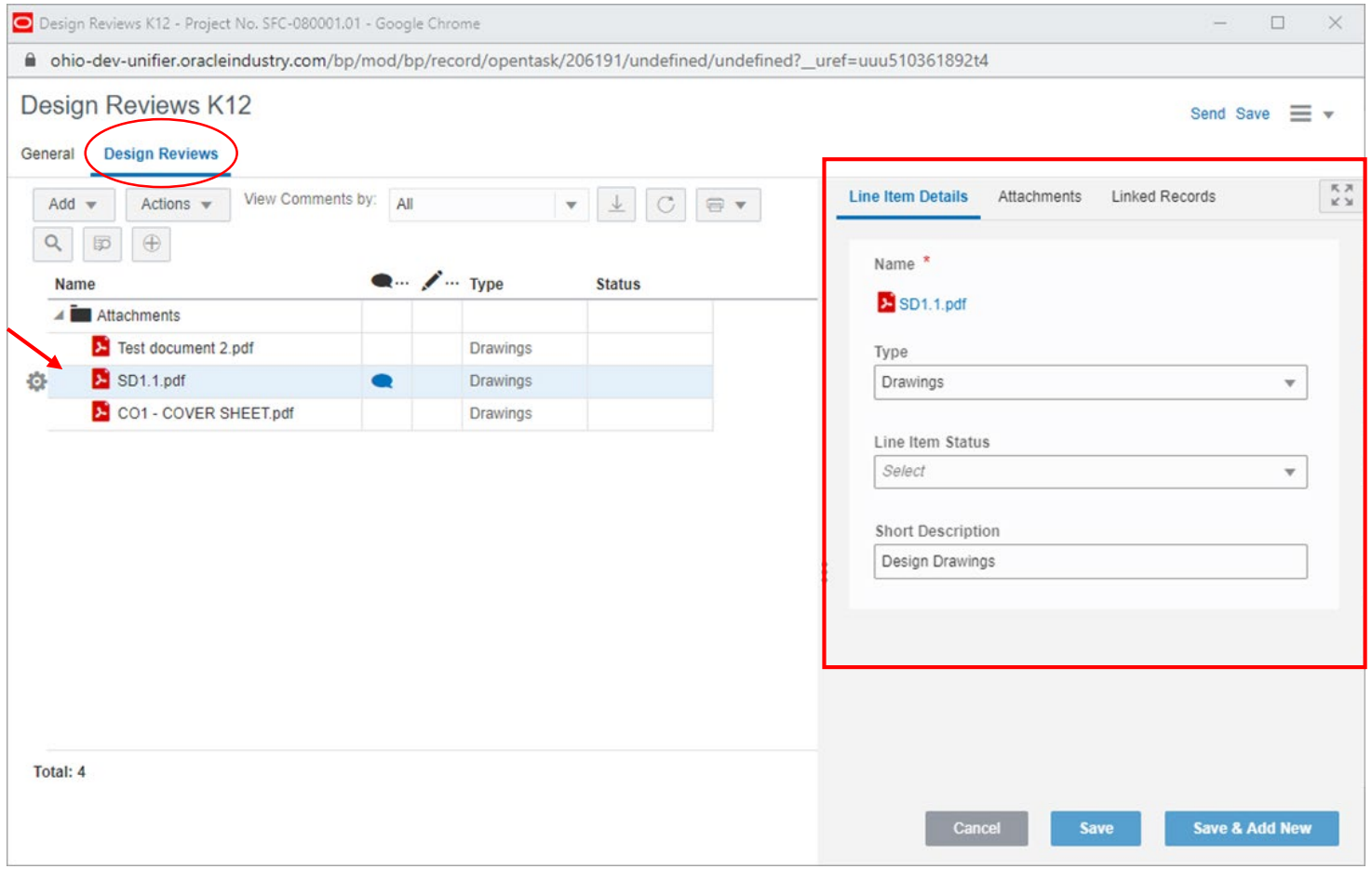
Review General Tab – Detailed Review (PM)

- Review the information in the General Tab
- Check the right pane to see if there are any General Comments attached



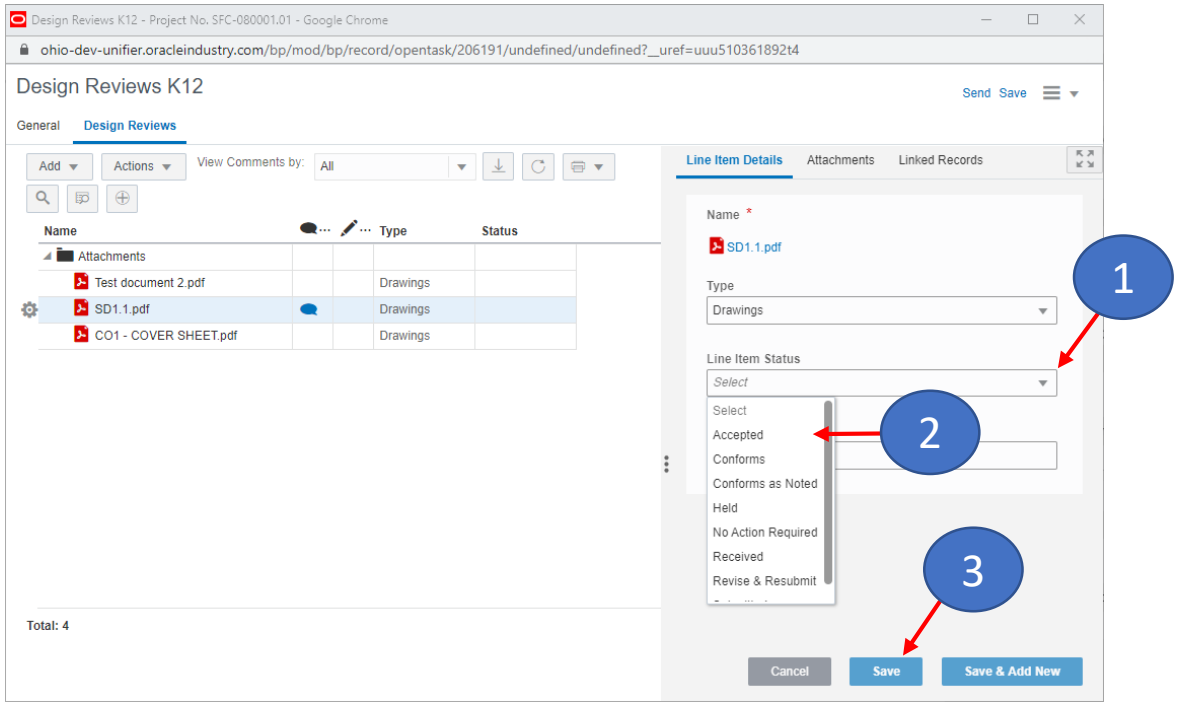
Design Reviews – Detailed Review (PM)

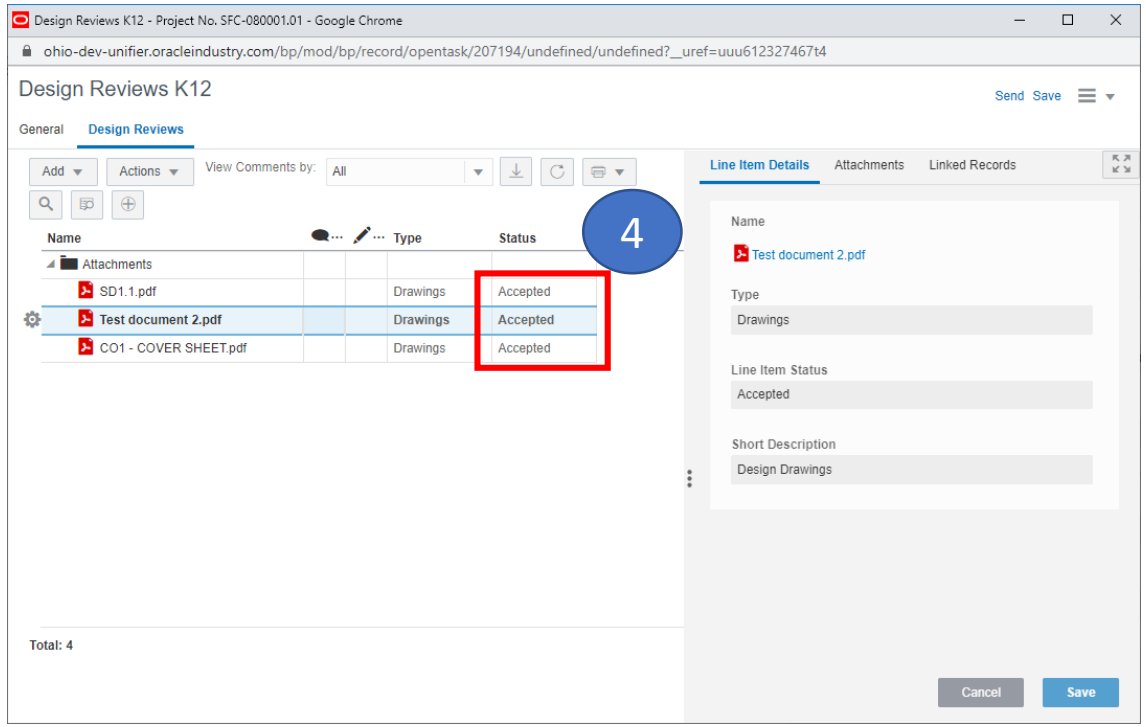
- Click the **Design Reviews** tab to view attachments
- Single click an attachment to view **Line Item Details** in the right pane.



Change Line Item Status – Detailed Review (PM)

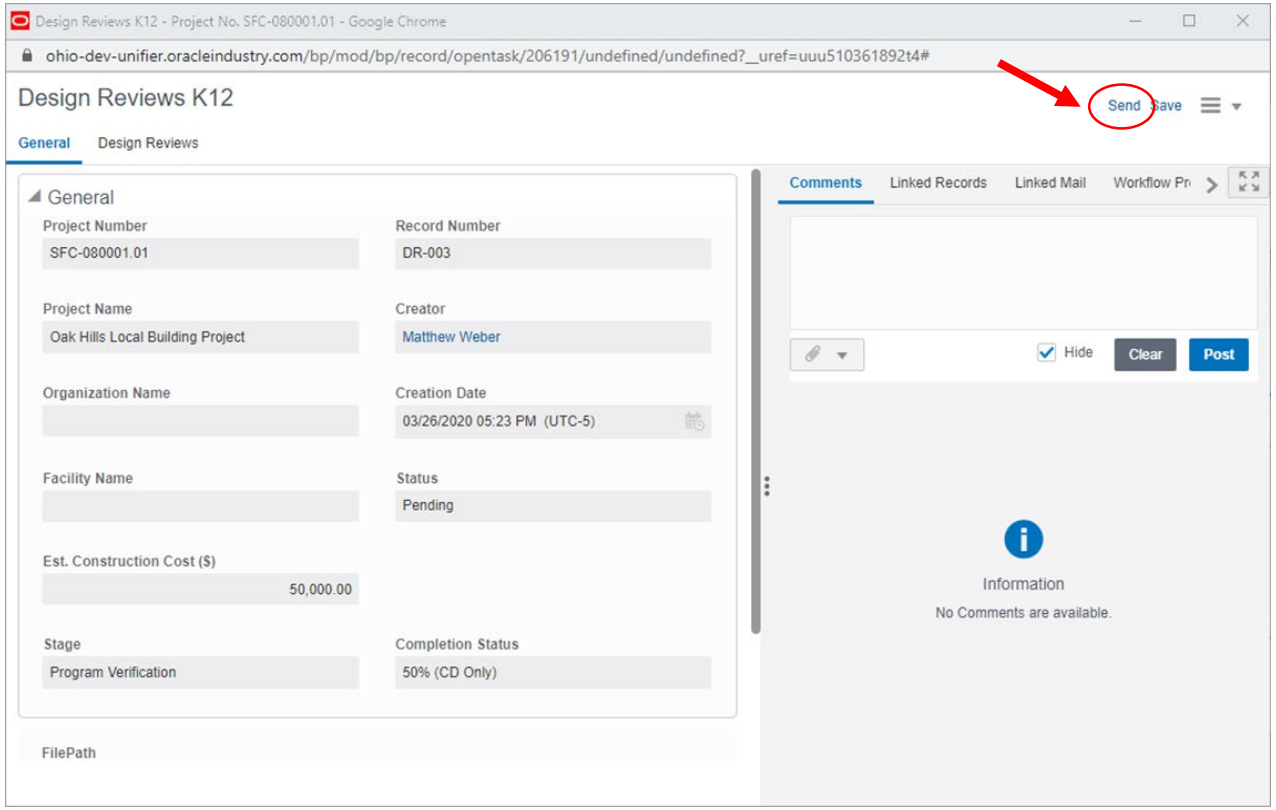
1. Click the arrow next to **Line Item Status**
2. Select a new status
3. Click **Save**
4. New status will display next to the attachment





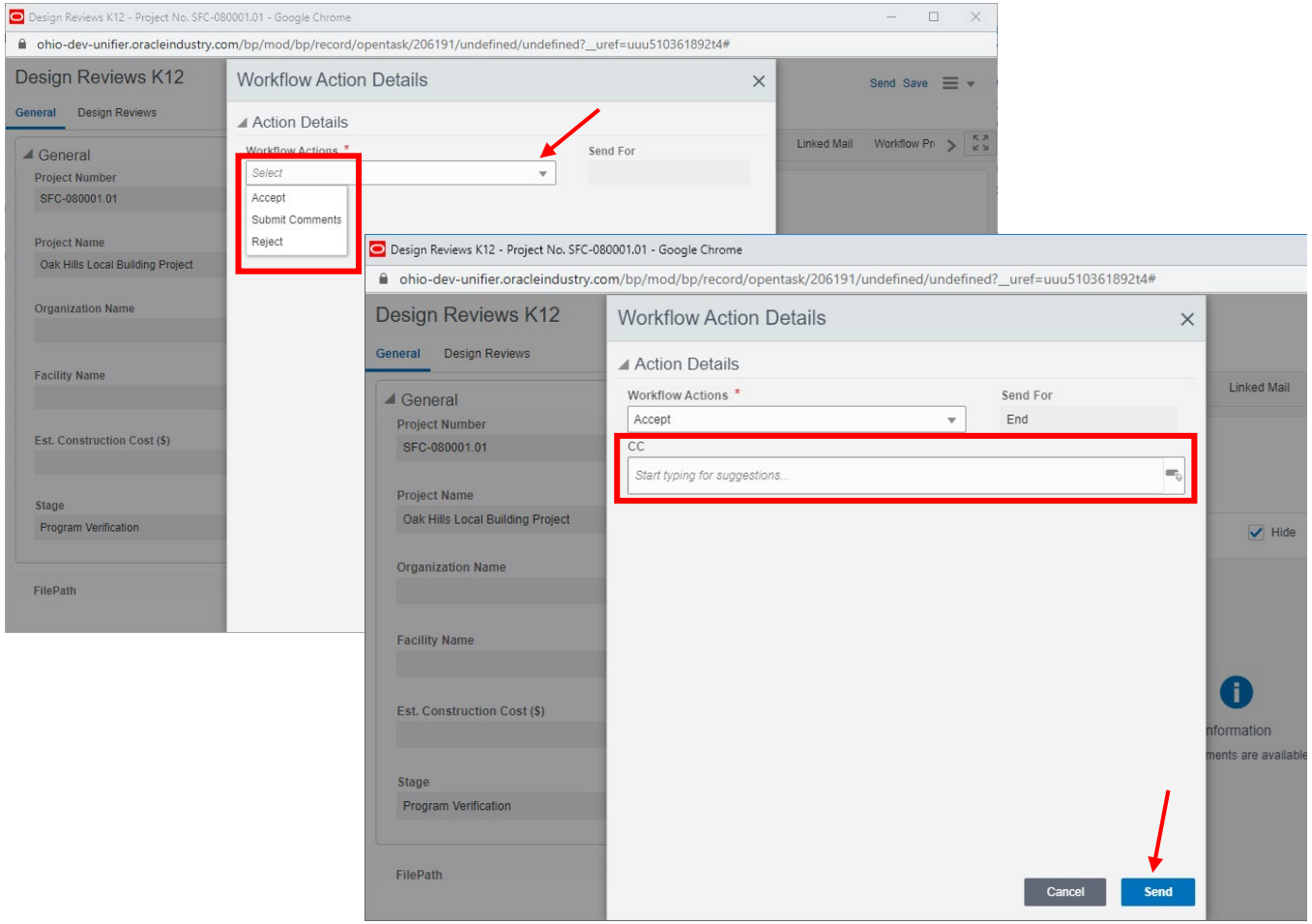
Send Record – Detailed Review (PM)

- When the Detailed Review is complete, click the **Send** button at the top right corner of the record



Send Record – Initial Review (PM)

- Select the **Workflow Action**
  - **Accept:** Select to complete the Design Review Business Process. The **CC** field can be used to notify project members
  - **Submit Comments**: Sends the review back to the A/E for Comment Response. **To** field will automatically populate.
  - **Reject**: will end Record
- Click **Send**



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211