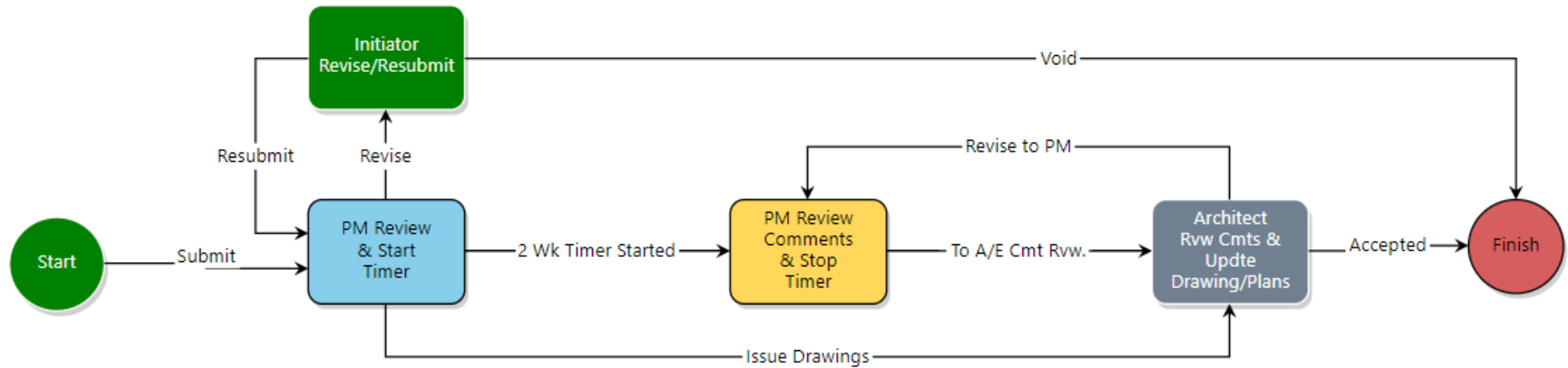




A Guide On Drawing & Design Plan Review (DDPR) Process

*Prepared by e-Builder
06 February 2018*



Process Description:

The purpose of the Drawing & Design Plan Review process is to track and manage Design Submittals. This process is initiated by the Architect/Engineering team to periodically submit design documents for review and comment. The A/E issues a package to UCF which routes to a Project Manager (PM) for review. Once the PM completes review, the process routes to the professional team to review and provide comment. Once the team has provided their review, the AE provides an overall disposition on the proposed design prior to its execution within the project.

Process Participants:

1. Architect/Engineer (A/E)
2. Project Manager (PM)







Process Details:

1. The Architect/Engineer (A/E) will complete the required fields and submit design documents for review.
2. The Project Manager (PM) receives and reviews the information and can send back to the Architect/Engineer (A/E) for revisions or move the process forward as Issue Drawings. Another option is to request external comments and move the process to another step in the Project Manager's court (PM Review Comments & Stop Timer Step) by actioning the process as Start Design Review Time. This action tracks which departments have been notified and has a two week action due date.
3. The Project Manager (PM) reviews the comments from the professional teams, and will move the process forward to the Architect/Engineer for review of the comments by actioning the process as To A/E Comment Review.
4. The Architect/Engineer (A/E) receives the process in their court and reviews the information. The A/E can either accept the comments/issues and move the process forward as Accepted or they can send it back to the PM Review Comments & Stop Timer Step.

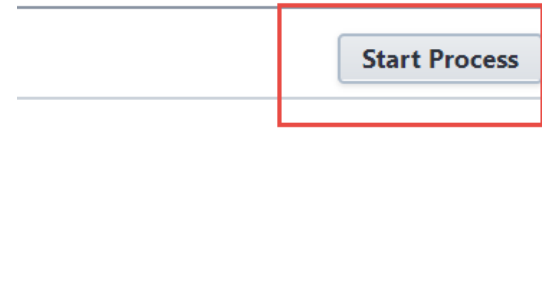
Initiation of Process:

1. Select specific project to start the Drawing & Design Plan Review Process.
2. Select **Processes** from the Project Menu.

Project Menu

- >  Details
- >  Planning
- >  Forms
- >  Issues
- >  Processes >
- >  Documents

3. Select **Start Process** in the process Module.



4. Click **Drawing & Design Plan Review** button.

04 - Drawing & Design Plan Review (DDPR)	Drawing and design plan review process.
--	---

Architect/Engineer Input:

1. Click process name to open Drawing & Design Plan Review.

Processes Reports (0)

Print Log

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
DDPR								

2. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Details Attached Documents (0) Attached Processes (0) Attached Forms (0)

* Review Type:

Programing Documents

PROG DOCS: or

Schematic Design

SD DOCS: or

Design Development

DD 50%: or

DD 50% SPECS: or

DD 95%: or

DD 95% SPECS: or

DD DOCS: or

Construction Documents

CD 50%: or

CD 50% SPECS: or

CD 95%: or

CD 95% SPECS: or

CD 100%: or

CD 100% SPECS: or

CD DOCS: or

Critical Needs

* Critical Needs Check List Attachment: or

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Submit** – Select this action if all information is entered and process is ready to move forward.

e-Builder

04 - Drawing & Design Plan Review (DDPR)

Start Process

PM Review & Start Timer:

1. Click process name to open Drawing & Design Plan Review.

Process	Subject	Strp	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
DDPR								

2. Scroll to review and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Review Type:

Programing Documents

PROG DOCS:

Schematic Design

SD DOCS:

Design Development

DD 50%:

DD 50% SPECS:

DD 95%:

DD 95% SPECS:

DD DOCS:

Construction Documents

CD 50%:

CD 50% SPECS:

CD 95%:

CD 95% SPECS:

CD 100%:

CD 100% SPECS:

CD DOCS:

Critical Needs

Critical Needs Check List Attachment:

Instructions:

PM: Download the template or Dynamic Grid (visible line items), and attach the file to the [Attached Files] tab then do the following:

Department Notification Instructions via Request External Comments

- Click on the [Comments] tab
- Click on the "Request Comment" button (right); make sure popups are allowed on your browser.
- Enter email address of all recipients for the drawing and plans review.
- Check the box "Allow external users to attach files" and set the folder location where attachments from recipients will be uploaded.
- Update the *Subject line
- Set a Respond By date
- Enter a Message instructing the drawing and plans reviewers
- Click the [Request Comment] button to send the message

Respondents will attach their comments in their response. Consolidate the comments into a single file and import into the the Plan Review Comments.

Please check-off departments that have been notified.
Then [Take Action] to start the clock (2 weeks)

*** Departments notified to Review the Plans**

Check all departments that have been notified

- BUSINESS SERVICES
- COMMUNITY DEVELOPMENT
- CONSTRUCTION SERVICES
- ENVIRONMENTAL SERVICES
- FINANCE
- HEALTH & SAFETY
- INFORMATION TECHNOLOGY
- LAND & NAT. RESOURCES
- LEGAL
- POLICE DEPARTMENT
- SUSTAINABILITY INITIATIVES
- TRANSPORTATION
- UTILITIES & ENERGY

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - Start Design Review Time**— Select this action if all information is correct and process is ready to move forward to the PM's court to wait for professional team comments.
 - Revise to Initiator** – Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action.
 - Issue Drawing to A/E** – Select this action to bypass professional team review holding queue. Comments will be required upon taking this action.

Initiator Revise/Resubmit:

1. Click process name to open Drawing & Design Plan Review.

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
DDPR								

2. Review comments by selecting the **Comments** tab:

Details **Comments (1)** Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Private	Comment
100% Private	These are the comments

3. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Project Document: 04 - Drawing & Design Plan Review
 Current Workflow Step:
 * Subject:
 Tracking Info:
 Status:
 * Review Type:

Programming Documents
 R00 D00:

Schematic Design
 S0 D00:

Design Development
 D0 00%:
 D0 00% SPEC:
 D0 00%:
 D0 00% SPEC:
 D0 00%:

Construction Documents
 CD 00%:
 CD 00% SPEC:
 CD 00%:
 CD 00% SPEC:
 CD 00%:
 CD 00% SPEC:
 CD 00%:
 CD 00% SPEC:
 CD 00%:

Critical Needs
 * Critical Needs Check List Attachment:

Plan Review Comments
 Comments may be imported or exported depending on your needs.

- If importing, the columns in the file must match the columns on the screen. To do so, click the Import button, locate your file from your computer and click the import button.
- If exporting, click the Download button and select either the "Template" to download the template OR "Visible Line Items" to download the existing information on the grid.

#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
Grand Totals (0 Items)						

4. Select an action and click **Take Action** button to move process along; possible actions to take are:

- Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly. Comments will be required upon taking this action.
- Void** – Process is no longer needed and routes to finish in a Void status. Comments will be required upon taking this action.

e-Builder

04 - Drawing & Design Plan Review (DDPR)

- 1

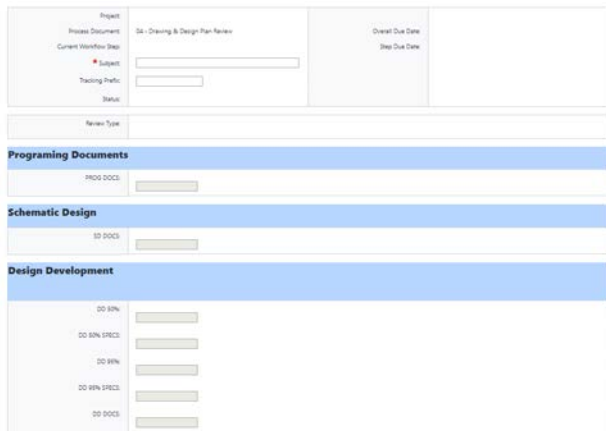
Architect Rvw Cmts & Updte Drawing/Plans:

1. Click process name to open Drawing & Design Plan Review.



Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
DDPR								

2. Review the information. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.



Project: 04 - Drawing & Design Plan Review

Process Document: 04 - Drawing & Design Plan Review

Current Workflow Step: []

Subject: []

Tracking Prefix: []

Status: []

Review Type: []

Programming Documents

PROG DOCS: []

Schematic Design

SD DOCS: []

Design Development

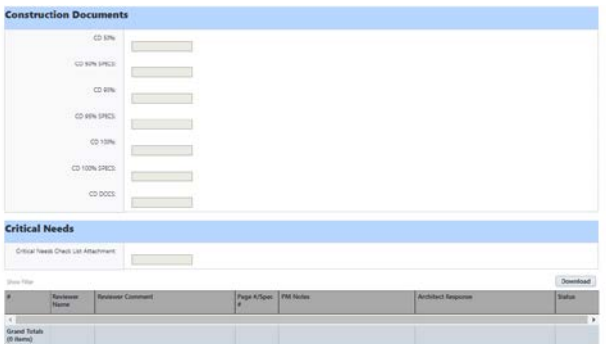
DD 50%: []

DD 50% SPEC: []

DD 60%: []

DD 60% SPEC: []

DD DOCS: []



Construction Documents

CD 50%: []

CD 50% SPEC: []

CD 60%: []

CD 60% SPEC: []

CD 100%: []

CD 100% SPEC: []

CD DOCS: []

Critical Needs

Critical Needs Check List Attachment: []

Download

#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
1						

Grand Totals (0 Items)

Instructions:

PM: Download the template or Dynamic Grid (visible line items), and attach the file to the [Attached Files] tab then do the following:

Department Notification Instructions via Request External Comments

1. Click on the [Comments] tab
2. Click on the "Request Comment" button (right); make sure popups are allowed on your browser.
3. Enter email address of all recipients for the drawing and plans review.
4. Check the box "Allow external users to attach files" and set the folder location where attachments from recipients will be uploaded.
5. Update the *Subject line
6. Set a Respond By date
7. Enter a Message instructing the drawing and plans reviewers
8. Click the [Request Comment] button to send the message

Respondents will attach their comments in their response. Consolidate the comments into a single file and import into the Plan Review Comments.

Please check-off departments that have been notified.
Then [Take Action] to start the clock (2 weeks)

Departments Notified to Review the Plans: [] Check off departments that have been notified

Comment Consultation Instructions

1. Take all file attachments and import them into the dynamic grid (Drawing and Design Plan Review Comments Grid)

After all items have been addressed, the comments grid can be downloaded and imported into the next Drawing & Design Plan Review process or simply added as an attachment as backup.

Architect Acknowledgement

Acknowledgement: I acknowledge that all comments/issues identified have been resolved and/or will be addressed in future reviews.

Acknowledged

3. Select an action and click **Take Action** button to move process along; possible actions are:

- Drawing/Plans Updated**– Select this action if all information is entered and process is ready to move forward. Comments will be required upon taking this action.
- Revise to PM**- Select this action if after reviewing the PM comments, the process needs to get sent back to the PM to make updates. Comments will be required upon taking this action.



e-Builder 

04 - Drawing & Design Plan Review (DDPR)

Delete Instance Workflow Override All Fields View

- 1 Instructions

Please select an action -- Take Action Check Spelling Print Copy Delegate Save Cancel

Accept
-- Please select an action -- ▾
Take Action
Check Spelling
Print
Delegate
Save
Cancel

Project: 1 ! Training Project ***** Process Document: 2 CO - 1 Show History Current Actors Current Workflow Step: 3 Procurement Review C Show Workflow Diagram Subject: 4 CO Initiated on 9/22/2016 6:57:35 PM Status: 5 Submitted	Project Number: 6 1111111111 Overall Due Date: 7 Step Due Date: 8
--	--

Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name
2. **Process Document:** The process instance
 - [Show History](#): Will display a historical list of actions taken within this process instance
 - [Current Actors](#): Will display a list of actors responsible for the process in its current step
3. **Current Workflow Step:** The name of the current step
 - [Show Workflow Diagram](#): Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
4. **Subject:** Displays the specific process instance subject
5. **Status:** Displays the process' current status
6. **Project Number:** Displays the project number
7. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*
8. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

Support:

Announcements ▾

To contact e-Builder Support
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

Notes and Comments: