

## Drawing and Design Plan Review Narrative



### Purpose

Drawing and Design Plan Review is used when a Project requires Design Professionals to create drawings, which will be used in the development and execution of the project. Design Professionals are involved in projects that require signed/sealed drawings for bid, permit and/or construction. Architects and professional engineers are responsible for designing building components/systems to all applicable codes, laws and standards. Projects with life safety components, projects over \$50,000 in value, and projects with HVAC systems over 15 tons require architects and/or professional engineers.

The Drawing and Design Plan Review allows the PM and other Partner Departments to review and provide input on a common set of digitized drawings.

### Initiator

The Drawing and Design Plan Review is initiated by the Design Professional after they have prepared a set of drawings in accordance with the UCF Design, Construction and Renovation Standards, appropriate for the scope of the Project.

### Key Terms

Programming Documents	<ul style="list-style-type: none"><li>• Minor Project Proposal</li><li>• Detailed scope of work</li><li>• Establishing a total building area.</li></ul>
Schematic Design Documents	Schematic Design produces rough drawings of a site plan, floor plans, elevations and often illustrative sketches or computer renderings.
Design Development Documents	Design development depicts a more detailed site plan as well as floor plans, elevations and section drawings with full dimensions.
Construction Documents	Construction documents include a complete set of architectural drawings (site plan, floor plans, sections, details, etc.) that are combined with structural drawings (and possibly mechanical and electrical drawings) that have enough detail for the contractor to build your project.
Critical Needs Checklist	Checklist based on critical components as described in the UCF Design, Construction and Renovation Standards
Plan Review	The combined reviews and comments of all applicable project stakeholders, responded to and addressed by the Design Professional

Stakeholders / Reviewers	<p>Stakeholders the PM wishes to gain input from. These can include:</p> <ul style="list-style-type: none"> <li>• Facilities Operations (FO)</li> <li>• Environmental Health &amp; Safety (EHS)</li> <li>• Utilities &amp; Energy Services (UES)</li> <li>• Business Services</li> <li>• Facilities Planning &amp; Construction (FPC)</li> <li>• Office of Instructional Resources (OIR)</li> <li>• UCF IT</li> <li>• Parking Services</li> <li>• Landscape &amp; Natural Resources (LNR)</li> <li>• UCF Police Department (PD)</li> <li>• Resource Management (RM)</li> <li>• Department of Security (DS)</li> <li>• Sustainability Initiatives (SI)</li> </ul>
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### Key Steps

<p>Start: AE uploads drawing for the current design phase into e-Builder</p> <p>Step1: PM reviews drawing and uses e-Builder functionality to request comment from relevant entities</p> <p>Step2: Project stakeholders submit comments</p> <p>Step3: PM delivers comments to AE</p> <p>Step4: AE responds to comments and/or updates drawings and notifies PM</p> <p>Step5: The cycle continues until all comments for each relevant design phase are addressed.</p> <p>Finish: AE uploads/confirms final Construction drawings in e-Builder and marks process as Accepted</p>
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## How to guide – The Drawing and Design Plan Review (DDPR) Process

The e-Builder Drawing and Design Plan Review process is comprised of the following elements in the Details tab:

Start Process	Header information and Review Type
Programing Documents	Section where these type of documents are uploaded
Schematic Design	Section where these type of documents are uploaded
Design Development	Section where applicable Design Development documents are uploaded: <ul style="list-style-type: none"><li>• DD 50%</li><li>• DD 50% Specifications (SPECS)</li><li>• DD 95%</li><li>• DD 95% Specifications (SPECS)</li><li>• DD DOCS (final)</li></ul>
Construction Documents	Section where applicable Construction Documents are uploaded: <ul style="list-style-type: none"><li>• CD 50%</li><li>• CD 50% Specifications (SPECS)</li><li>• CD 100%</li><li>• CD 100% Specifications (SPECS)</li><li>• CD 100% SPECS – VOL II</li><li>• CD DOCS (final)</li></ul>
Critical Needs	Section where the Critical Needs Checklist is uploaded
Plan Review Comments	Section where comments are added. Each comment has three parts: <ul style="list-style-type: none"><li>• Reviewer Name, Comment, and Page #/Spec# indicator</li><li>• PM Notes</li><li>• Architect Response</li></ul>

In the Attached Documents tab, the Architect can also attach any document which includes supplemental or supporting information.

## Navigate to Drawing & Design Plan Review Process

*This section describes activities performed by the Design Professional.*

From the e-Builder Home screen

The screenshot shows the e-Builder Home screen with the 'Projects' tab selected in the navigation menu. The main content area displays a summary of project-related information for Michael Hagan, including workflow items, tasks, submittal items, and items pending approval. The left sidebar contains a 'Quick Start' section with links to various project processes. The right sidebar features an 'Announcements' section with training resources and a calendar for Friday, Jan 31, 2020.

From the Projects Screen

The screenshot shows the e-Builder Projects screen with a list of active projects. A red box highlights the 'End User' column, which contains the text 'End User Training Project 07'. The table lists various projects with columns for Project ID Number, Project Name, Project Manager, UCF Building Number, Project Type, UCF Building Name, and Department.

Project ID Number	Project Name	Project Manager	UCF Building Number	Project Type	UCF Building Name	Department
15004002.1	15004002.1 Renovate former elec rm for a fume channel	Christopher Harris	0004	Minor	STORM WATER RESEARCH LAB	College of Engineering & Technology
15020002	15020002 TAF Renovation and HVAC Upgrade	Ben Fauser	0020	Minor	BIOLOGICAL SCIENCES BUILDING	Office of Research
15045002	15045002 Replace fire alarm system	Christopher Harris	0045	Minor	BUSINESS ADMINISTRATION I	Business Administration
152N3006	152N3006 Redesign curb and inlet - Pegasus Circle	Brian Shick	0045	Minor	BUSINESS ADMINISTRATION I	Business Administration and Energy Services
16054009	16054009 College of Sciences Bldg RM 107	Michael Berrios	0054	Minor	COLLEGE OF SCIENCES BUILDING	UCF IT
16077003	16077003 Construct building shell between 77 & 128	Carl Kelly	0165	Minor	WAYNE DENSON SPORTS CENTER ADDITION	Athletics
16101001	16101001 Nike 101 Door Lock Upgrades	Trey Beck	0101	Minor	NIKE BUILDING 101	Housing
16102001	16102001 Nike 102 Door Lock Upgrades	Trey Beck	0102	Minor	NIKE BUILDING 102	Housing
16103001	16103001 Nike 103 Door Lock Upgrades	Trey Beck	0103	Minor	NIKE BUILDING 103	Housing
16164001	16164001 Hotel and Conference Center	Maria Yebra-Termouri	0164	Major	CELESTE HOTEL	UCF Main Campus
16812603	16812603 Card Access at all elev & stairwells to DOD	Walter Gordon	8126	Minor	PARTNERSHIP 3	Partnership/DOD
17016006	17016006 RELOCATE RECYCLING AREA	Trey Beck	0016A	Minor	FACILITIES & SAFETY - A	Facilities Operations
17033001	17033001 Upgrade Kitchen, Storage & Common Space Area	Jay Marcom	0034	Minor	LIBRA COMMUNITY CENTER	Housing

- Search for and select the project for which you wish to initiate the Drawing and Design Plan Review

From the Projects screen – Project Menu

Project Menu

- Details
- Project Participants
- Sent Items
- Planning
- Forms
- Issues
- Processes**
- Documents
- Schedule
- Cost

Project Details For 2018-007 - End User Training Project 07

Details

Export Address Book Printable Participants Directory Edit Cancel

Project Name	End User Training Project 07
e-Builder Project Administrator	Mason, Samantha eAdmin
Project Status	Administrative
(view map) Address	3528 N Perseus Loop, 16A Orlando, FL 32816
Country	USA
Start Date	02.19.2018
Target Date	07.19.2018
Description	Training Project 7

- Select the **Processes** link

From the Processes screen – Filter Processes

Processes for 2018-007 - End User Training Project 07

Filter Processes

Search In: Processes Initiated By Me Processes In My Court All Processes

Type of Process: All Processes

Status: All Statuses

Containing Text:

Start Process

Filter

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status	Requested Comment
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- Select the **Start Process** button

From the Start a Process pop-up window

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Start a process on End User Training Project 07

Processes Cancel

Process Name	Description
02 - Project Charter Process (PCP)	This process is for reviewing/approving project requests, identifying configurations in e-Builder, assigning participants (staffing), identify milestones, entering and approving the initial budget (ROM), etc.
03 - Vendor Selection   Bid Review (BIDVS)	This process is for reviewing and approving the winning bid/vendor and encompass bidding/GS quotes, rotation, and justification.
<b>04 - Drawing &amp; Design Plan Review (DDPR)</b>	Drawing and design plan review process.
05 - Commitment Approval (CA)	This process is for creating and approving commitments in e-Builder.
05 - Minor Project Proposal (MPP)	This process is used to obtain funding from a Client to move forward with Design and/or construction.
06 - Potential Change Order (PCO)	This process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO.

- Select the **04 – Drawing & Design Plan Review (DDPR)** link

From the 04 – Drawing & Design Plan Review (DDPR) screen

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04 - Drawing & Design Plan Review (DDPR)  
(Auto-Saved: 02/12/2025 1:10 PM)

Start Process Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel

Project: End User Training Project 07  
Project Number: 2018-007  
Process: 04 - Drawing & Design Plan Review  
Subject: for 2018-007 End User Training Project 07

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

Review Type: ...Please select an option...

- Select the **Review Type** dropdown menu

-- Please select an option --

-- Please select an option --

Drawing Review

Program Docs

**SD Docs**

DD 50%

DD 95%

CD 50%

CD 95%

CD 100%

- Select the type of review you wish to initiate. This alerts the reviewers as to which Design Phase drawing they should review and comment on.
  - In this example, *SD Docs* is selected

From the 04 – Drawing & Design Plan Review screen – Schematic Design section

04 - Drawing & Design Plan Review (DDPR)  
(Auto-Saved 03/10/2025 2:30 PM)

Start Process

Project: End User Training Project 07  
Project Number: 2018-007  
Process: 04 - Drawing & Design Plan Review  
Subject: SD Docs for 2018-007 End User Training Project 07

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

Review Type: SD Docs

**Programming Documents**

PROG DOCS:  or [Browse Computer](#) [Browse e-Builder](#)

**Schematic Design**

SD DOCS: **Schematic Design.docx** [Browse Computer](#) [Browse e-Builder](#)

**Design Development**

DD 50%:  or [Browse Computer](#) [Browse e-Builder](#)

DD 50% SPECS:  or [Browse Computer](#) [Browse e-Builder](#)

DD 55%:  or [Browse Computer](#) [Browse e-Builder](#)

DD 60% SPECS:  or [Browse Computer](#) [Browse e-Builder](#)

DD DOCS:  or [Browse Computer](#) [Browse e-Builder](#)

- Select the **Browse Computer** button and upload the appropriate design document
  - *In this example, Schematic Design.docx was uploaded*

From the 04 – Drawing & Design Plan Review screen

04 - Drawing & Design Plan Review (DDPR)

(Auto-Saved 02.10.2020 2:55 PM)

Instructions

Start Process

PrintCopyCheck SpellingShow WorkflowSubmitSave DraftDelete DraftCancel

Project:End User Training Project 07

Project Number:2018-007

Process:04 - Drawing & Design Plan Review

\* Subject:SD Docs for 2018-007 End User Training Project 07

Details

Attached Documents (0)

Attached Processes (0)

Attached Forms (0)

\* Review Type:

SD Docs

Programing Documents

PROG DOCS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

Schematic Design

SD DOCS:

Schematic Design.docx (version 1)

Properties | Download (11.8KB) | Redline | Remove

Design Development

DD 50%:

Drag and drop file here

or

Browse Computer

Browse e-Builder

DD 50% SPECS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

DD 95%:

Drag and drop file here

or

Browse Computer

Browse e-Builder

DD 95% SPECS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

DD DOCS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

Construction Documents

CD 50%:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 50% SPECS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 95%:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 95% SPECS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 100%:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 100% SPECS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD 100% SPECS - VOL II:

Drag and drop file here

or

Browse Computer

Browse e-Builder

CD DOCS:

Drag and drop file here

or

Browse Computer

Browse e-Builder

Critical Needs

\* Critical Needs Check List Attachment:

—

Critical Needs Checklist Mockup.docx (version 1)

Properties | Download (11.8KB) | Redline | Remove

- Upload the Critical Needs Checklist
- Select the **Save Draft** button
- Select the **Submit** Button



## PM Review & Start Timer

*This section describes activities performed by the Project Manager.*

Once the Design Professional selects the Submit button, e-Builder moves the process into the PM's court. The PM has three primary responsibilities at this process step:

1. Download and attach a comment template which must be used by all reviewers
2. Ensure all applicable project stakeholders have an opportunity to review the design professional's document(s)
3. Start the process timer and ensure all reviewers understand when the review period ends

From the e-Builder Home screen

The screenshot shows the e-Builder Home screen for Michael Hagan. The 'Workflow in your court' table has the following data:

Project	Name	Subject	Step	Date Due	Requested Comment
End User Training Project 07	DDPR - 1	SD Docs for 2018-007 End User Training Project 07	PM Review & Start Timer		

The 'My first 10 tasks' table is empty with the message 'There are no tasks'.

The 'Submittal items in your court' table is empty with the message 'There are no submittal items in your court'.

The 'Items Pending Approval' table is empty with the message 'There are no items pending approval for the selection'.

- Select the [Project Name](#) link to navigate to the Processes tab with the 04 – Drawing & Design Plan Review (DDPR) process pre-selected

From the e-Builder Processes tab

The screenshot shows the e-Builder Processes tab. The 'Filter Processes' section has the following filters:

- Search in: Processes Initiated By Me, Processes in My Court, All Processes
- Type of Process: 04 - Drawing & Design Plan Review (DDPR)
- Status: All Statuses
- Step Name: (empty)
- Containing Text: (empty)

The 'Processes' table has the following data:

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status	Requested Comment
DDPR - 1	SD Docs for 2018-007 End User Training Project 07	PM Review & Start Timer	Michael Hagan	0	02/10/2020	02/10/2020	0	Submitted	

- Select either the [Process](#) link or the [Subject](#) link to open the DDPR process for the project
  - DDPR – 1
  - SD Docs for 2018-007 End User Training Project 07

04 - Drawing & Design Plan Review (DDPR) - 1

Instructions

Start Rvw. Time

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Project:	End User Training Project 07	Project Number:	2018-007
Process Document:	DDPR - 1 <a>Show History</a>   <a>Current Actors</a>	Overall Due Date:	
Current Workflow Step:	PM Review & Start Timer <a>Show Workflow Diagram</a>	Step Due Date:	
Subject:	SD Docs for 2018-007 End User Training Project 07		
Status:	Submitted		

Details

Comments (0)

Attached Documents (2)

Attached Processes (0)

Attached Forms (0)

Attached To (0)

Review Type:


SD Docs

Programming Documents

PROG DOCS:

Schematic Design

SD DOCS:

 Schematic Design.docx (version 1)

Properties | Download (11.8KB) | Redline

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 100% SPECS - VOL II:

CD DOCS:

Critical Needs

Critical Needs Check List Attachment:

 Critical Needs Checklist Mockup.docx (version 1)

Properties | Download (11.8KB) | Redline

Show Filter | Select All

Download Template

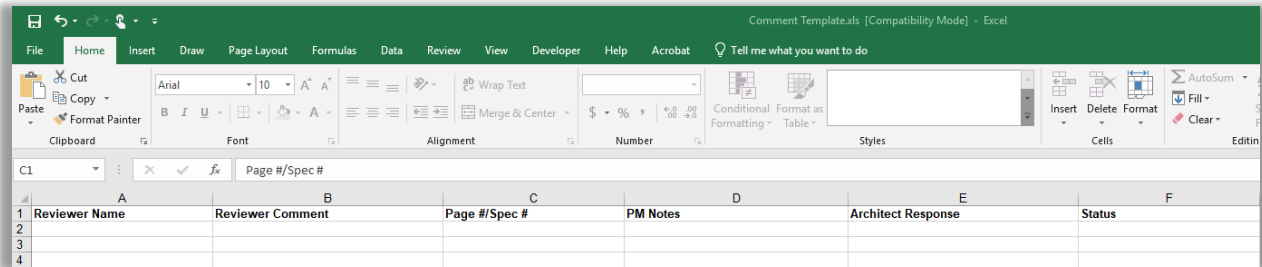
Import

Delete

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

- Select the [Download Template](#) link

An MS Excel file will open.



- Save this file to your computer so you can attach it to the DDPR process.

From the 04 – Drawing & Design Plan Review (DDPR) – 1 screen

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### 04 - Drawing & Design Plan Review (DDPR) - 1

Start Rvw. Time: [Dropdown] | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

Project:	End User Training Project 07	Project Number:	2018-007
Process Document:	DDPR - 1 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	PM Review & Start Timer <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	SD Docs for 2018-007 End User Training Project 07		
Status:	Submitted		

Details | Comments (0) | **Attached Documents (2)** | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Review Type: SD Docs

**Programing Documents**

PROG DOCS: [Text Box]

- Select the Attached Documents tab

From the Attached Documents tab

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04 - Drawing & Design Plan Review (DDPR) - 1

Start Rvw. Time Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	End User Training Project 07	Project Number:	2018-007
Process Document:	DDPR - 1 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	PM Review & Start Timer <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	SD Docs for 2018-007 End User Training Project 07		
Status:	Submitted		

Details Comments (0) Attached Documents (2) Attached Processes (0) Attached Forms (0) Attached To (0)

Show Thumbnails Download Attach Documents Remove Documents

	File Name	Attached By	Date Attached	Seq # - Step Name	Attached To
<input type="checkbox"/>	Schematic Design.docx (version 1) <a href="#">Properties</a>   <a href="#">Download (11.8KB)</a>   <a href="#">Redline</a>   <a href="#">Edit</a>	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	SD DOCS
<input type="checkbox"/>	Critical Needs Checklist Mockup.docx (version 1) <a href="#">Properties</a>   <a href="#">Download (11.8KB)</a>   <a href="#">Redline</a>   <a href="#">Edit</a>	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	Critical Needs Check List Attachment

Download Attach Documents Remove Documents

Start Rvw. Time Take Action Check Spelling Print Copy Delegate Save Cancel

- Select the **Attach Documents** button

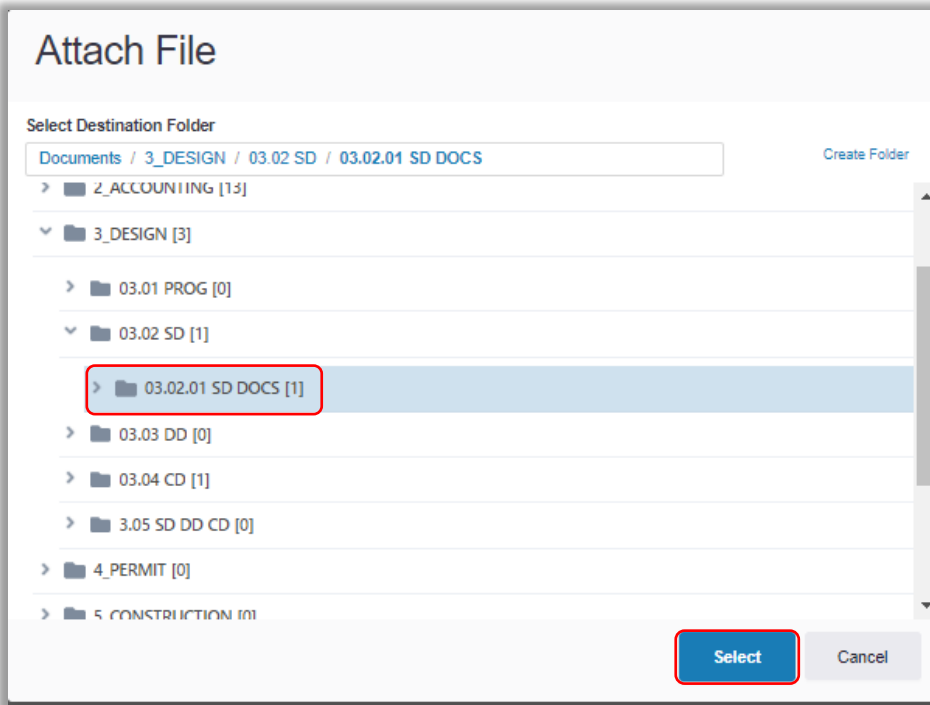
Attach File

Upload from your Computer

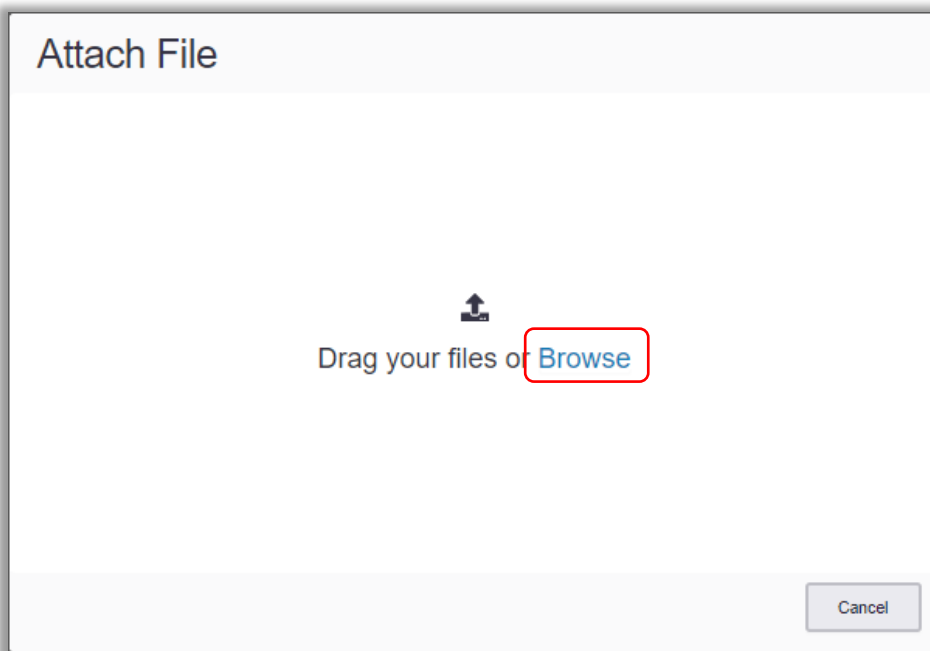
Select from Documents Module

Cancel

- Select Upload from your Computer



- Select the **Destination** folder, where your upload will be deposited into
  - *In this example, 03.02.01 SD DOCS was selected*
- Select the **Select** button



- Select the Browse link and navigate to the folder where you saved the Template document and upload it

## Attach File

03.02.01 SD DOCS

1 FILES UPLOADED

26 KB

Comment Template.xls

26 KB

All Uploads

Description

This description will be applied to all files being uploaded.

Drag your files or [Browse](#)

Done

- Add a Description if you desire and select the Done button

The Template has now been added to the process in the Attached Documents tab

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04 - Drawing & Design Plan Review (DDPR) - 1

Instructions

Start Row Time

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Project: End User Training Project 07

Process Document: DDPR - 1

Current Workflow Step: PM Review & Start Timer

Subject: SD Docs for 2018-007 End User Training Project 07

Status: Submitted

Project Number: 2018-007

Overall Due Date:

Step Due Date:

Details

Comments (1)

Attached Documents (3)

Attached Processes (0)

Attached Forms (0)

Attached To (0)

Show Thumbnails

Download

Attach Documents

Remove Documents

	File Name	Attached By	Date Attached	Seq # - Step Name	Attached To
	Schematic Design.docx (version 1) Properties   Download (11.8KB)   Redline   Edit	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	SD DOCS
	Critical Needs Checklist Mockup.docx (version 1) Properties   Download (11.8KB)   Redline   Edit	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	Critical Needs Check List Attachment
	Comment Template.xls (version 1) Properties   Download (26.1KB)   Redline   Remove   Edit	Hagan, Michael (UCF)	02.10.2020 4:06 PM	2 - PM Review & Start Timer	Public Comment

Download

Attach Documents

Remove Documents

Start Row Time

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Also, the template is added in the Comments tab

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04 - Drawing & Design Plan Review (DDPR) - 1

Start Rvw. Time Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	End User Training Project 07	Project Number:	2018-007
Process Document:	DDPR - 1 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	PM Review & Start Timer <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	SD Docs for 2018-007 End User Training Project 07		
Status:	Submitted		

Details Comments (1) Attached Documents (3) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Comment

A document was attached Michael Hagan, UCF, 02.10.2020 4:06 PM

**Files Attached (1):**  
 Comment Template.xls (Version 1)  
[Properties](#) | [Download](#) | [Redline](#) | [Remove](#)

Request Comment Comment

Start Rvw. Time Take Action Check Spelling Print Copy Delegate Save Cancel

Note: Anytime a comment is added, the PM will receive an email notification

**End User Training Project 07**

A comment was added by Michael Hagan on step PM Review & Start Timer on the following process. To view details or take action, [click here](#).

**Process Details**

Project	End User Training Project 07
Process	DDPR - 1
Subject	SD Docs for 2018-007 End User Training Project 07
Step	PM Review & Start Timer
In Step Since	02.10.2020
Last Action	Submit
Last Action Taken By	Michael Hagan
Status	Submitted

**Comment(s)**

Michael Hagan, UCF, 02/10/2020 4:06 PM

A document was attached

A comment was added by Michael Hagan on step PM Review & Start Timer on the following process. To view details or take action, [click here](#).

**e-Builder Technical Support**  
phone: 1-888-288-5717 fax: 1-888-576-9322  
[support@e-builder.net](mailto:support@e-builder.net)

## Select Stakeholders to Review and Comment

The PM now must select the various stakeholders who should review and comment on the design professional's document.

From the 04 – Drawing & Design Plan Review screen

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**04 - Drawing & Design Plan Review (DDPR) - 1**

Start Rvw. Time ▼ Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	End User Training Project 07	Project Number:	2018-007
Process Document:	DDPR - 1 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	PM Review & Start Timer <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	SD Docs for 2018-007 End User Training Project 07		
Status:	Submitted		

Details Comments (1) Attached Documents (3) Attached Processes (0) Attached Forms (0) Attached To (0)

**Request Comment** Comment

Comment ▼

A document was attached Michael Hagan, UCF, 02.10.2020 4:06 PM

**Files Attached (1):**  
 Comment Template.xls (Version 1)  
[Properties](#) | [Download](#) | [Redline](#) | [Remove](#)

**Request Comment** **Comment**

Start Rvw. Time ▼ Take Action Check Spelling Print Copy Delegate Save Cancel

- Select the **Request Comment** button
  - Ensure pop-up blocker is disabled



From the Request Comment pop-up window

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**Request Comment**

Request Comment Cancel

\* To

Select from Users on Project

All Users

Adebumni, Muhedeen (UCF)

Anadio, Ray (UCF)

Anderson, Cathryn (UCF)

Arft, Nicole (UCF)

Ashworth, Shannon (UCF)

Baez, Julimer (UCF)

Bauer, Kenneth (SAFEbuilt)

Enter External Users Email or Lookup

Type to search...

Allow external users to attach files

\* Subject

ACTION REQ'D - End User Training Project 07 - SD Docs for 2018-007 End User Training Project 07

Respond By:

Message:

Font Name Real... B I U A

Note - Participants accessing the process externally will see all comments and attachments.

Request Comment Cancel

For users already added to the project, the filter is set to All Users  
To filter by specific project roles, select the dropdown menu (optional)

Select from Users on Project

All Users

All Users

Roles

\*Doc Control - Super User

\*Doc Control Reliability

\*Document Controls

\*External Member

\*Internal Member

Accounting Supervisor

Architect/Engineer

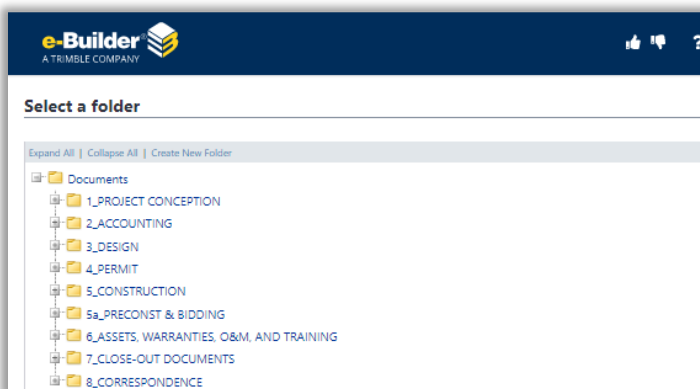
Architect/Engineer Secondary

- Select the desired role
- Use the > and < buttons to add or remove project participants from the Request Comment list

To email a link, which allows External Users to review and comment on the design professional's document(s)

The screenshot shows the 'Request Comment' form in the e-Builder interface. The form has a header with the e-Builder logo and navigation icons. Below the header, there are 'Request Comment' and 'Cancel' buttons. The main form area is divided into sections: 'To' (with a 'Select from Users on Project' dropdown and a list of users), 'Enter External Users Email or Lookup' (a text input field with a red border), 'Allow external users to attach files' (a checkbox with a red border), 'Subject' (a text input field), 'Respond By' (a date picker), and 'Message' (a rich text editor). At the bottom, there is a note: 'Note - Participants accessing the process externally will see all comments and attachments.' and another set of 'Request Comment' and 'Cancel' buttons.

- Enter the email addresses for all recipients you wish to receive an email notification containing a link, which allows them to access the document and add comments. External users must have e-Builder accounts.
- Select the **Allow external users to attach files** checkbox
  - A [\[Select Folder\]](#) link will appear



- Set the **Destination** folder where attachments from recipients will be uploaded
  - In this example, 03.02.01 SD DOCS was selected

From the Request Comment pop-up window

**e-Builder**  
A TRIMBLE COMPANY

**Request Comment**

Request Comment Cancel

**\* To**

Select from Users on Project

All Users

Adewumni, Muhadeen (UCF)

Anadio, Ray (UCF)

Anderson, Cathryn (UCF)

Arft, Nicole (UCF)

Ashworth, Shannon (UCF)

Baez, Julimer (UCF)

Bauer, Kenneth (SAFEbuilt)

Enter External Users Email or Lookup

Mike Hagan <Michael.Hagan@ucf.edu> x

Allow external users to attach files

☒ Documents \ 3\_DESIGN \ 03.02 SD \ 03.02.01 SD DOCS [Change folder] [Remove Folder]

**\* Subject**

ACTION REQ'D - End User Training Project 07 - SD Docs for 2018-007 End User Training Project 07

Respond By:

Message:

Font Name Real... B I U abc

Note - Participants accessing the process externally will see all comments and attachments.

Request Comment Cancel

- Update the subject line if desired
- Add a Respond By date so the recipients know the deadline by which their review and comments need to be delivered
- Add a message instructing the recipients to review the document(s) and provide feedback
- Select the **Request Comment** button

**Indicate which stakeholder groups are required to review and comment**  
From the 04 – Drawing & Design Plan Review screen

#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status				
Grand Totals (0 items)										
Add New Item for Plan Review Comments										
	Reviewer Name	<input type="text"/>								
	Reviewer Comment	<input type="text"/>								
	Page #/Spec #	<input type="text"/>								
	PM Notes	<input type="text"/>								
	Architect Response	<input type="text"/>								
	Status	Please select...								
<div>Clear</div> <div>Add</div>										
<p><b>Instructions:</b></p> <p>PM: Download the template or Dynamic Grid (visible line items), and attach the file to the [Attached Files] tab then do the following:</p> <p>Department Notification Instructions via Request External Comments</p> <ol style="list-style-type: none"> <li>1. Click on the [Comments] tab</li> <li>2. Click on the "Request Comment" button (right); make sure popups are allowed on your browser.</li> <li>3. Enter the email addresses of all recipients for the drawing and plans review.</li> <li>4. Check the box "Allow external users to attach files" and set the folder location where attachments from recipients will be uploaded.</li> <li>5. Update the *Subject line</li> <li>6. Set a Respond By date</li> <li>7. Enter a Message instructing the drawing and plans reviewers to review</li> <li>8. Click the [Request Comment] button to send the message</li> </ol> <p>Respondents will attach their comments in their response. Consolidate the comments into a single file and import into the the Plan Review Comments.</p>										
<p>Please check-off departments that have been notified.</p> <p>Then [Take Action] to start the clock (2 weeks)</p>										
<table border="1"> <tr> <td> <p>* Departments Notified to Review the Plans:</p> <p><input type="checkbox"/> BUSINESS SERVICES</p> <p><input type="checkbox"/> PAC. PLANNING &amp; CONST. (P&amp;C)</p> <p><input type="checkbox"/> OFF. OF INSTRUCTIONAL RS.(OIR)</p> <p><input type="checkbox"/> UTILITY &amp; ENERGY SERV. (UES)</p> </td> <td> <p>Check all departments that have been notified</p> <p><input type="checkbox"/> COMP. SERV. &amp; TELCOM (CS&amp;T)</p> <p><input type="checkbox"/> FACILITIES OPERATION (FO)</p> <p><input type="checkbox"/> PARKING SERVICES</p> </td> <td> <p><input type="checkbox"/> ENV. HEALTH &amp; SAFETY (EH&amp;S)</p> <p><input type="checkbox"/> LAND &amp; NAT. RESOURCES (LNR)</p> <p><input type="checkbox"/> POLICE DEPARTMENT (PD)</p> </td> <td> <p><input type="checkbox"/> P&amp;S RESOURCE MNGMT(RM)</p> <p><input type="checkbox"/> OFF. OF EMERGENCY MNGT (OSEM)</p> <p><input type="checkbox"/> SUSTAINABILITY INITIATIVES (SI)</p> </td> </tr> </table>							<p>* Departments Notified to Review the Plans:</p> <p><input type="checkbox"/> BUSINESS SERVICES</p> <p><input type="checkbox"/> PAC. PLANNING &amp; CONST. (P&amp;C)</p> <p><input type="checkbox"/> OFF. OF INSTRUCTIONAL RS.(OIR)</p> <p><input type="checkbox"/> UTILITY &amp; ENERGY SERV. (UES)</p>	<p>Check all departments that have been notified</p> <p><input type="checkbox"/> COMP. SERV. &amp; TELCOM (CS&amp;T)</p> <p><input type="checkbox"/> FACILITIES OPERATION (FO)</p> <p><input type="checkbox"/> PARKING SERVICES</p>	<p><input type="checkbox"/> ENV. HEALTH &amp; SAFETY (EH&amp;S)</p> <p><input type="checkbox"/> LAND &amp; NAT. RESOURCES (LNR)</p> <p><input type="checkbox"/> POLICE DEPARTMENT (PD)</p>	<p><input type="checkbox"/> P&amp;S RESOURCE MNGMT(RM)</p> <p><input type="checkbox"/> OFF. OF EMERGENCY MNGT (OSEM)</p> <p><input type="checkbox"/> SUSTAINABILITY INITIATIVES (SI)</p>
<p>* Departments Notified to Review the Plans:</p> <p><input type="checkbox"/> BUSINESS SERVICES</p> <p><input type="checkbox"/> PAC. PLANNING &amp; CONST. (P&amp;C)</p> <p><input type="checkbox"/> OFF. OF INSTRUCTIONAL RS.(OIR)</p> <p><input type="checkbox"/> UTILITY &amp; ENERGY SERV. (UES)</p>	<p>Check all departments that have been notified</p> <p><input type="checkbox"/> COMP. SERV. &amp; TELCOM (CS&amp;T)</p> <p><input type="checkbox"/> FACILITIES OPERATION (FO)</p> <p><input type="checkbox"/> PARKING SERVICES</p>	<p><input type="checkbox"/> ENV. HEALTH &amp; SAFETY (EH&amp;S)</p> <p><input type="checkbox"/> LAND &amp; NAT. RESOURCES (LNR)</p> <p><input type="checkbox"/> POLICE DEPARTMENT (PD)</p>	<p><input type="checkbox"/> P&amp;S RESOURCE MNGMT(RM)</p> <p><input type="checkbox"/> OFF. OF EMERGENCY MNGT (OSEM)</p> <p><input type="checkbox"/> SUSTAINABILITY INITIATIVES (SI)</p>							
<div>... Please select an action ...</div> <div>Take Action</div> <div>Check Spelling</div> <div>Print</div> <div>Copy</div> <div>Delegate</div> <div>Save</div> <div>Cancel</div>										

- Select all applicable checkboxes in the Departments Notified to Review the Plans field

## Setting the Timer

When the PM has sent out all requests for comment, they start the timer on the process. To start the time, navigate to the 04 – Drawing & Design Plan Review (DDPR) screen.

From the 04 – Drawing & Design Plan Review (DDPR) screen

04 - Drawing & Design Plan Review (DDPR) - 1

Start Rvw. Time Take Action Check Spelling Print Copy Delegate Save Cancel

Project: End User Training Project 07 Project Number: 2018-007

Process Document: DDPR - 1 Overall Due Date:

Current Workflow Step: PM Review & Start Timer Show Workflow Diagram Step Due Date:

Subject: SD Docs for 2018-007 End User Training Project 07

Status: Submitted

Details Comments (3) Attached Documents (4) Attached Processes (0) Attached Forms (0) Attached To (0)

Review Type: SD Docs

- Select the dropdown menu to the left of the Take Action button

-- Please select an action --

-- Please select an action --

Issue Drawing

Revise to Init.

Start Rvw. Time

- Select Start Rvw. Time
- Select the **Take Action** button

This moves the process to the next step – PM Review Comments & Stop Timer

Processes for 2018-007 - End User Training Project 07

Filter Processes

Search in: Processes Initiated By: My All Processes In My Court All Processes

Type of Process: [04 - Drawing & Design Plan Review (DDPR)] Draft W/ Open W/ Finished

Status: [All Statuses]

Step Name: [ ]

Containing Text: [ ]

Filter

Processes Reports (1)

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status	Requested Comment
DDPR - 1	SD Docs for 2018-007 End User Training Project 07	PM Review Comments & Stop Timer	Michael Hagen	0	02.10.2020	02.10.2020	0	Submitted	

- The PM waits until the comment period has passed, then updates the process with all comments received


## Reviewer Actions

*This section describes activities performed by reviewers.*


### Email notification to reviewers

Mon 2/10/2020 4:58 PM

**UCF - e-Builder Network Notification** <bounces@e-builder.net>  
**ACTION REQ'D - End User Training Project 07 - SD Docs for 2018-007 End User Training Project 07**

To  Michael Hagan

Retention Policy UCF Delete after 10 Years (10 years) Expires 2/7/2030

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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### End User Training Project 07

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**Michael Hagan has requested your comment on the following process by 02/17/2020. To view details and comment, [click here](#).**

Process Details	
Project	End User Training Project 07
Process	DDPR - 1
Subject	SD Docs for 2018-007 End User Training Project 07
Step	PM Review & Start Timer
In Step Since	02.10.2020
Last Action	Submit
Last Action Taken By	Michael Hagan
Status	Submitted

**Comment(s)**

Michael Hagan, UCF, 02/10/2020 4:57 PM

Requested comment on step PM Review & Start Timer from Mike Hagan [Michael.Hagan@ucf.edu](mailto:Michael.Hagan@ucf.edu) with a respond by date of 02.17.2020.

Please review the SD Document and return your comments by February 17th at 5pm.

Michael Hagan, UCF, 02/10/2020 4:06 PM

A document was attached

**Michael Hagan has requested your comment on the following process by 02/17/2020. To view details and comment, [click here](#).**

**e-Builder Technical Support**  
 phone: 1-888-288-5717 fax: 1-888-576-9322  
[support@e-builder.net](mailto:support@e-builder.net)

- When a reviewer selects the [click here](#) link, they will be taken to the DDPR process

From the reviewer DDRP screen

e-Builder  
A TRIMBLE COMPANY

DDPR - 1

InstructionsAdd Comment

Project:  
Process Document:  
Current Workflow Step:  
Subject:  
Status:

End User Training Project 07  
DDPR - 1  
PM Review & Start Timer  
SD Docs for 2018-007 End User Training Project 07  
Submitted

Project Number:  
Overall Due Date:  
Step Due Date:

2018-007

DetailsComments (2)Attached Documents (3)Attached Processes (0)Attached Forms (0)Attached To (0)

Review Type: SD Docs

Programing Documents

PROG DOCS:

Schematic Design

SD DOCS:

Schematic Design.docx (version 1)  
Download (11.8KB)

Design Development

DO 50%:  
DO 50% SPECS:  
DO 95%:  
DO 95% SPECS:  
DO DOCS:

Construction Documents

CD 50%:  
CD 50% SPECS:  
CD 95%:  
CD 95% SPECS:  
CD 100%:  
CD 100% SPECS:  
CD 100% SPECS - VOL II:  
CD DOCS:

Critical Needs

Critical Needs Check List Attachment:

Critical Needs Checklist Mockup.docx (version 1)  
Download (11.8KB)

Show Filter

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

- They can access the
  - Critical Needs Checklist
  - Schematic Design document

From the Attached Documents tab

DDPR - 1

Project: End User Training Project 07  
 Process Document: DDPR - 1  
 Current Workflow Step: PM Review & Start Timer  
 Subject: SD Docs for 2018-007 End User Training Project 07  
 Status: Submitted

Project Number: 2018-007  
 Overall Due Date:  
 Step Due Date:

Details | Comments (2) | Attached Documents (3) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Show Thumbnails Download

File Name	Attached By	Date Attached	Seq # - Step Name	Attached To
Schematic Design.docx (version 1) Download (1.1 KB)	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	SD DOCS
Critical Needs Checklist Mockup.docx (version 1) Download (1.1 KB)	Hagan, Michael (UCF)	02.10.2020 3:04 PM	0 - Start	Critical Needs Check List Attachment
Comment Template.xls (version 1) Download (26.1 KB)	Hagan, Michael (UCF)	02.10.2020 4:05 PM	2 - PM Review & Start Timer	Public Comment

Download

Add Comment

- A reviewer can download the
  - Schematic Design document
  - Critical Needs Checklist
  - Comment Template
- Once the reviewer has completed their review and updated the Comment Template, they select the **Add Comment** button

From the Add Comment screen

Add Comment

Process Document: DDPR - 1

Your Name: Mike Hagan

Your Company: zThis Old House

Your E-mail Address: Michael.Hagan@ucf.edu

Comment: Comments for sections G, A, and M

File 1: L:\User\mhagan\TFC\PM Manual\06 - Appendix - Narratives\02-Design\04-Drawing and Design Plan Review Narrative\Narrative Material\Comment Template - zThis Old House Comments.xls Browse...

File 2: Browse...

File 3: Browse...

Save Cancel

- The **Your Name** field will be auto-populated
- The **Your Company** field will be auto-populated
- The **Your Email Address** field will be auto-populated
- Reviewer will add any additional comment into the **Comment** text field
- Reviewer will select the **Browse** button to navigate to and attach their updated Comment Template
- Reviewer selects the **Save** button, which
  - Adds their comment and attachment to the DDPR comments tab



- Adds the attachment to the Attached Documents tab
- Adds the attachment to the *03.02.01 SD DOCS* folder
- Initiates an email notification to the PM

Mon 2/10/2020 5:22 PM

UCF - e-Builder Network Notification <bounces@e-builder.net>  
FYI - End User Training Project 07 - SD Docs for 2018-007 End User Training Project 07

To: Michael Hagan  
Retention Policy: UCF Delete after 10 Years (10 years) Expires: 2/7/2030  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

### End User Training Project 07

**Mike Hagan, zThis Old House (Michael.Hagan@ucf.edu) has responded to your request for comment. To view details or take action, click here.**

Process Details	
Project	End User Training Project 07
Process	DDPR - 1
Subject	SD Docs for 2018-007 End User Training Project 07
Step	PM Review & Start Timer
In Step Since	02.10.2020
Last Action	Submit
Last Action Taken By	Michael Hagan
Status	Submitted

Review Type	SD Docs
PROG DOCS	
SD DOCS	Schematic Design.docx
DD 50%	
DD 50% SPECS	
DD 95%	
DD 95% SPECS	
DD DOCS	
CD 50%	
CD 50% SPECS	
CD 95%	
CD 95% SPECS	
CD 100%	
CD 100% SPECS	
CD 100% SPECS - VOL II	
CD DOCS	
Critical Needs Check List Attachment	Critical Needs Checklist Mockup.docx
Departments Notified to Review the Plans	Check all departments that have been notified

**Comment(s)**

Michael Hagan, UCF, 02/10/2020 5:21 PM

Response to Michael Hagan's external comment request from Mike Hagan, zThis Old House ([Michael.Hagan@ucf.edu](mailto:Michael.Hagan@ucf.edu)):

Comments for sections G, A, and M.

Michael Hagan, UCF, 02/10/2020 4:57 PM

Requested comment on step PM Review & Start Timer from Mike Hagan [Michael.Hagan@ucf.edu](mailto:Michael.Hagan@ucf.edu) with a response by date of 02-17-2020.

## Importing Comments from Reviewers

*This section describes activities preformed by the Project Manager.*


When reviewers have attached their comment templates, the PM should download and save these files into a folder on their computer.

*Example Template 1- Reviewer Comments*

	A	B	C	D	E	
	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
2	Mike Hagan	Please specify Low VOC paint per UCF Des G-001				
3	Mike Hagan	Please insert administrative language from s M-101				
4	Mike Hagan	New conduit not indicated in design. Please	A-010			
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
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21						
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35						
36						
37						
38						
39						
40						
41						
42						

In the following part of the process, the PM will be able to import these templates into e-Builder, which could save them time instead of manually entering the information.

From the Drawing & Design Plan Review screen



04 - Drawing & Design Plan Review (DDPR) - 1

Start Rev. Time

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Project: End User Training Project 07

Process Document: DDPR - 1  
[Show History](#) | [Current Action](#)

Current Workflow Step: PM Review & Start Time [Show Workflow Diagram](#)

Subject: SD Docs for 2018-007 End User Training Project 07

Status: Submitted

Project Number: 2018-007

Overall Due Date:

Step Due Date:

Details

Comments (1)

Attached Documents (4)

Attached Processes (0)

Attached Forms (0)

Attached To (0)

Review Type: SD Docs

Programming Documents

PROG DOCS:

Schematic Design

SD DOCS:

☒ Schematic Design.docx (version 1)

[Properties](#) | [Download \(11.8KB\)](#) | [Redline](#)

Design Development

DD 50%:

DD 50% SPEC:

DD 95%:

DD 95% SPEC:

DD DOCS:

Construction Documents

CD 50%:

CD 50% SPEC:

CD 95%:

CD 95% SPEC:

CD 100%:

CD 100% SPEC:

CD 100% SPECs - VOL II:

CD DOCS:

Critical Needs

Critical Needs Check List Attachment:

☒ Critical Needs Checklist Mockup.docx (version 1)

[Properties](#) | [Download \(11.8KB\)](#) | [Redline](#)

Show Filter | Select All

Download Template

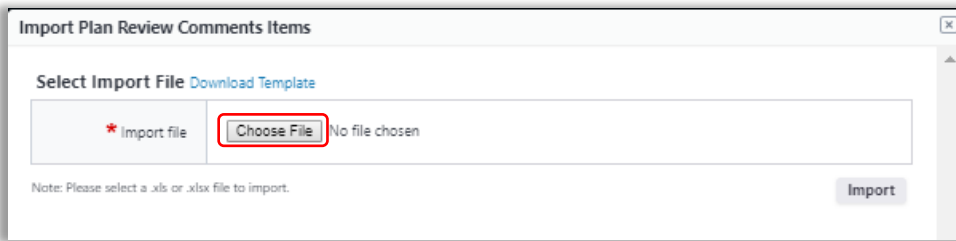
Import

Delete

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

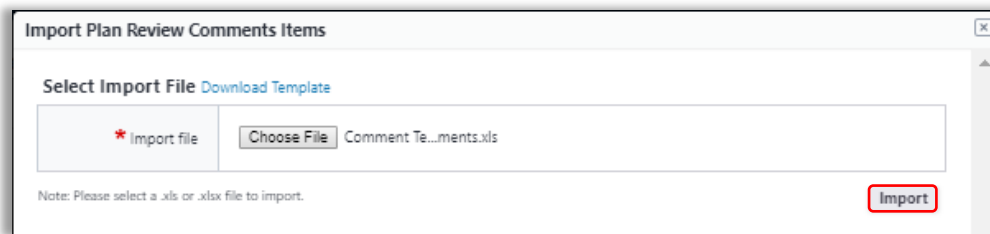
- Select the **Import** button

From the Import Plan Review Comments Items pop-up window



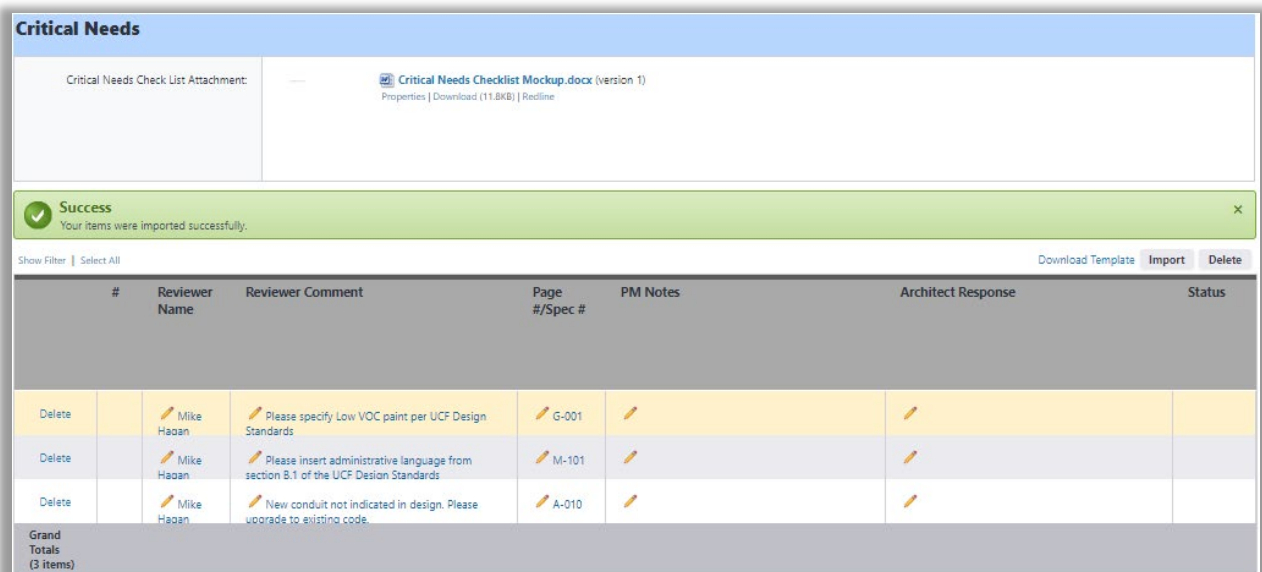
- Select the **Choose File** button
- Navigate to the folder where the updated Comment Template is saved and upload the file

From the Import Plan Review Comments Items pop-up window



- Select the **Import** button

From the Drawing & Design Plan Review screen



#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
Delete	Mike Haagan	Please specify Low VOC paint per UCF Design Standards	G-001			
Delete	Mike Haagan	Please insert administrative language from section B.1 of the UCF Design Standards	M-101			
Delete	Mike Haagan	New conduit not indicated in design. Please upgrade to existing code.	A-010			
Grand Totals (3 items)						

Note: The PM can choose to add their comments to the template before uploading, which would then populate the PM Notes field as well.