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	• Minor Project Proposal • Detailed scope of work • Establishing a total building area.
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	Stakeholders the PM wishes to gain input from. These can include: • Facilities Operations (FO) • Environmental Health & Safety (EHS) • Utilities & Energy Services (UES) • Business Services • Facilities Planning & Construction (FPC) • Office of Instructional Resources (OIR) • UCF IT • Parking Services • Landscape & Natural Resources (LNR) • UCF Police Department (PD) • Resource Management (RM) • Department of Security (DS) • Sustainability Initiatives (SI)

Key Steps

Start: AE uploads drawing for the current design phase into e-Builder Step1: PM reviews drawing and uses e-Builder functionality to request comment from relevant entities Step2: Project stakeholders submit comments Step3: PM delivers comments to AE Step4: AE responds to comments and/or updates drawings and notifies PM Step5: The cycle continues until all comments for each relevant design phase are addressed. Finish: AE uploads/confirms final Construction drawings in e-Builder and marks process as Accepted

How to guide – The Drawning 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:

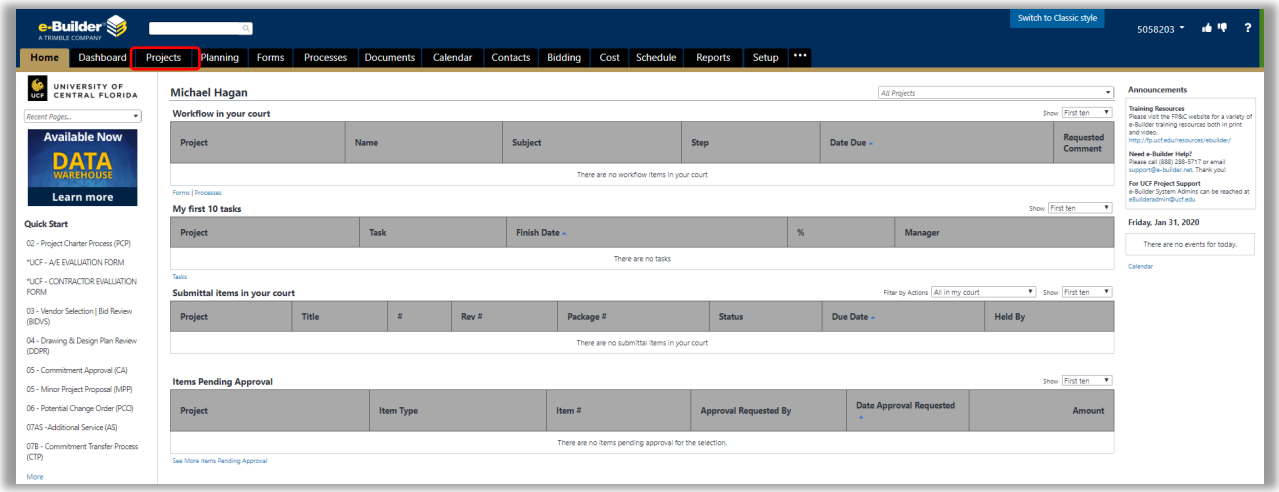
Start Process	Header information and Review Type
Programing Documents	Section where these type of documents are uploaded
Schematic Design	Section where these type of documents are uploaded
Design Development	Section where applicable Design Development documents are uploaded: • DD 50% • DD 50% Specifications (SPECS) • DD 95% • DD 95% Specifications (SPECS) • DD DOCS (final)
Construction Documents	Section where applicable Construction Documents are uploaded: • CD 50% • CD 50% Specifications (SPECS) • CD 100% • CD 100% Specifications (SPECS) • CD 100% SPECS – VOL II • CD DOCS (final)
Critical Needs	Section where the Critical Needs Checklist is uploaded
Plan Review Comments	Section where comments are added. Each comment has three parts: • Reviewer Name, Comment, and Page #/Spec# indicator • PM Notes • Architect Response

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

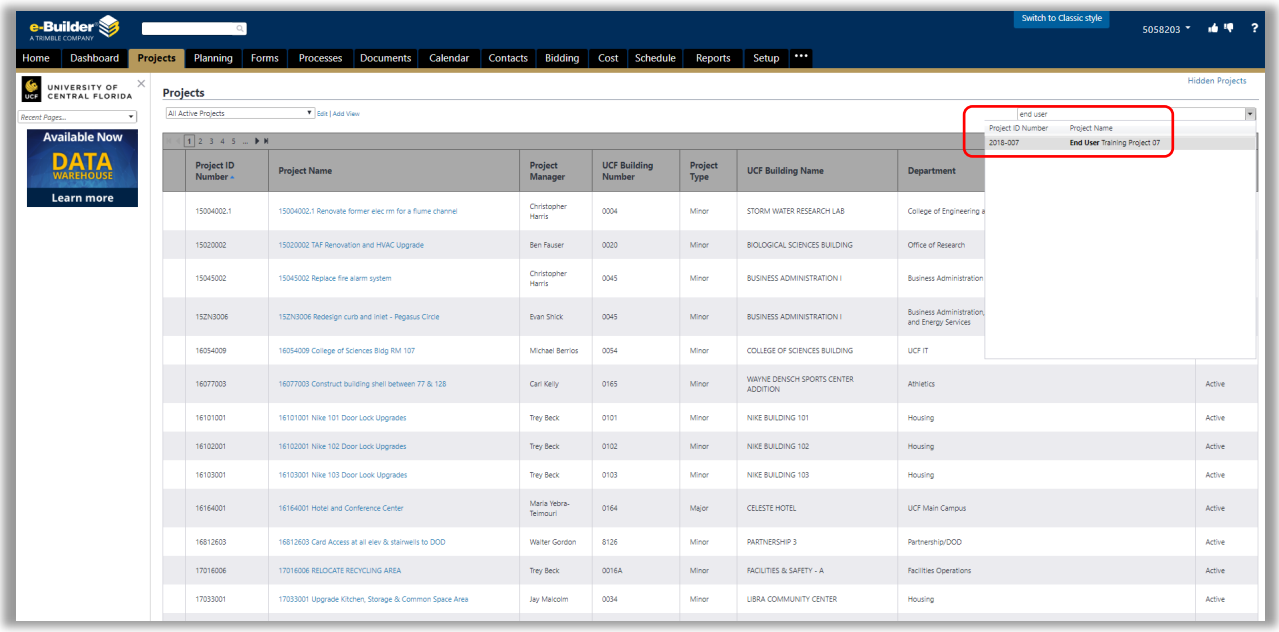
Navigate to Drawing & Design Plan Review Process

This section describes activities performed by the Design Professional.

From the e-Builder Home screen

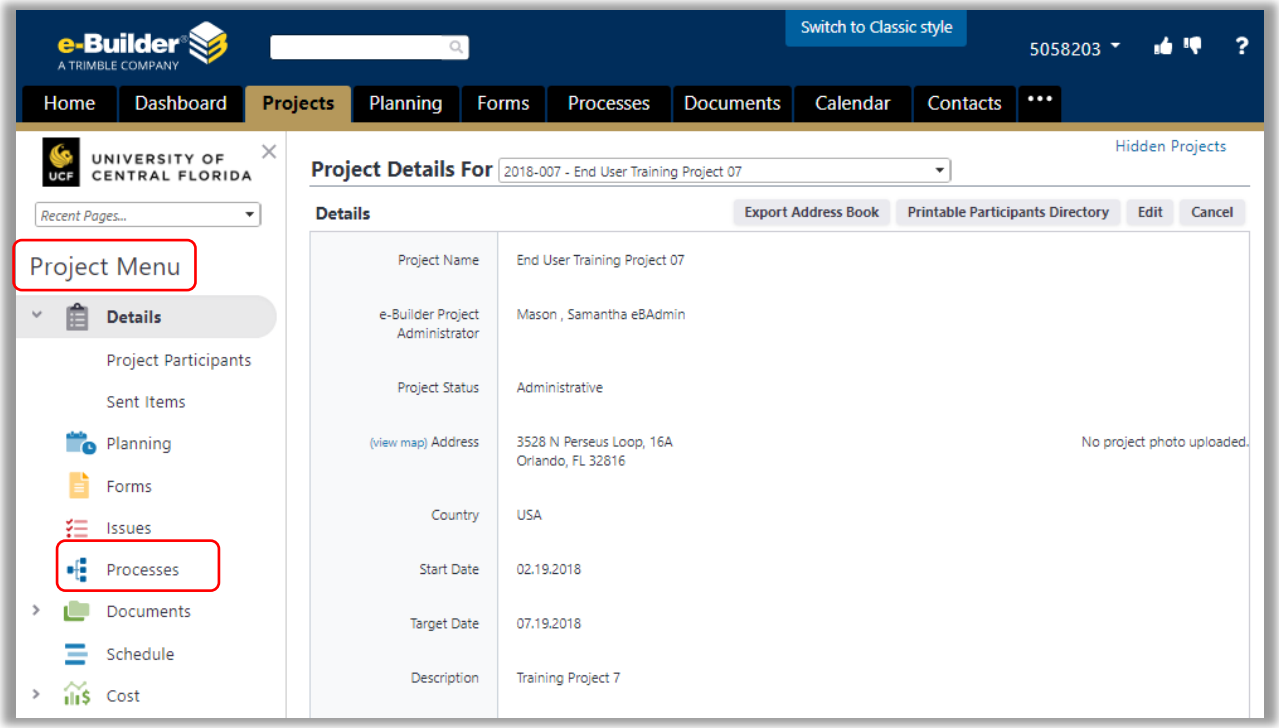


From the Projects Screen



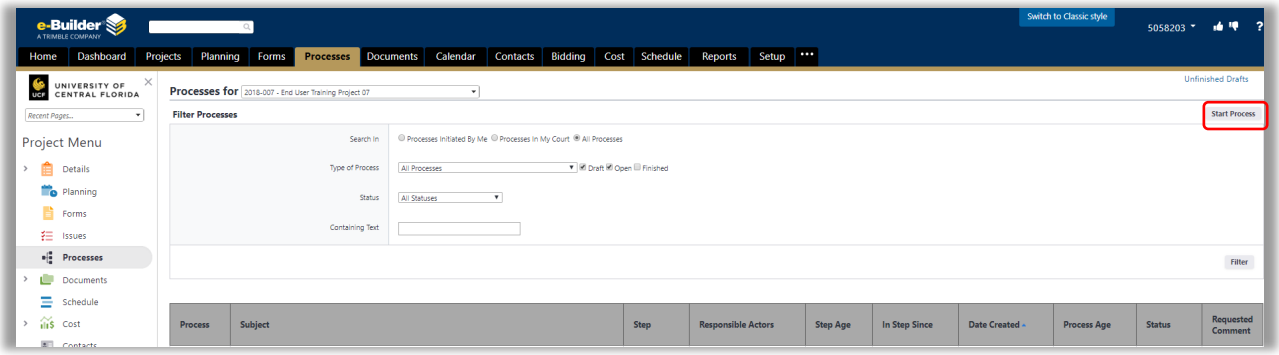
- Search for and select the project for which you wish to initiate the Drawing and Design Plan Review

From the Projects screen – Project Menu



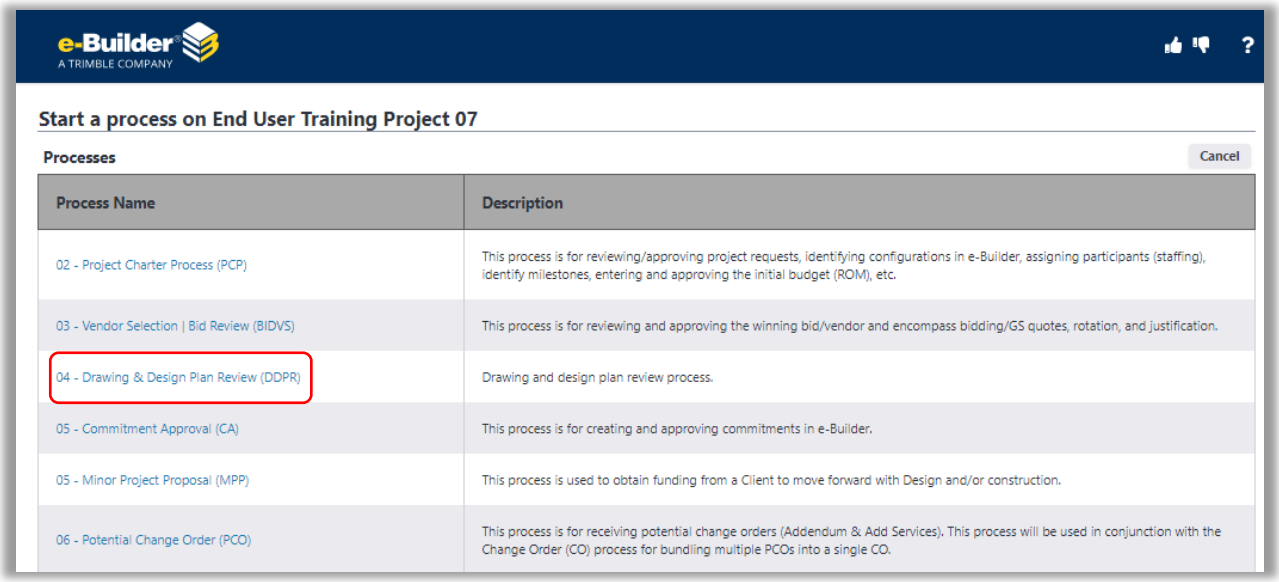
- Select the **Processes** link

From the Processes screen – Filter Processes



- Select the **Start Process** button

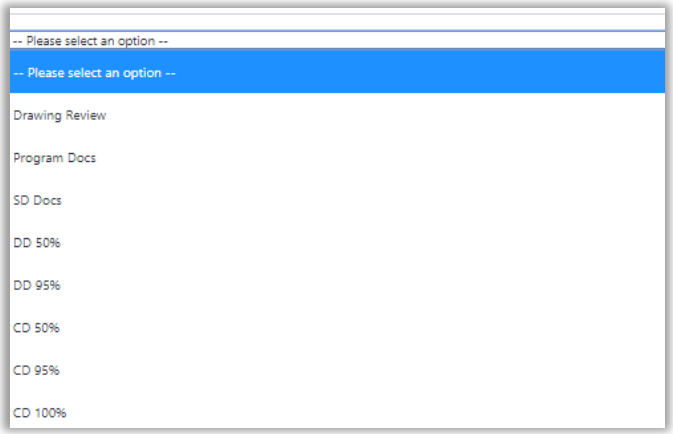
From the Start a Process pop-up window



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

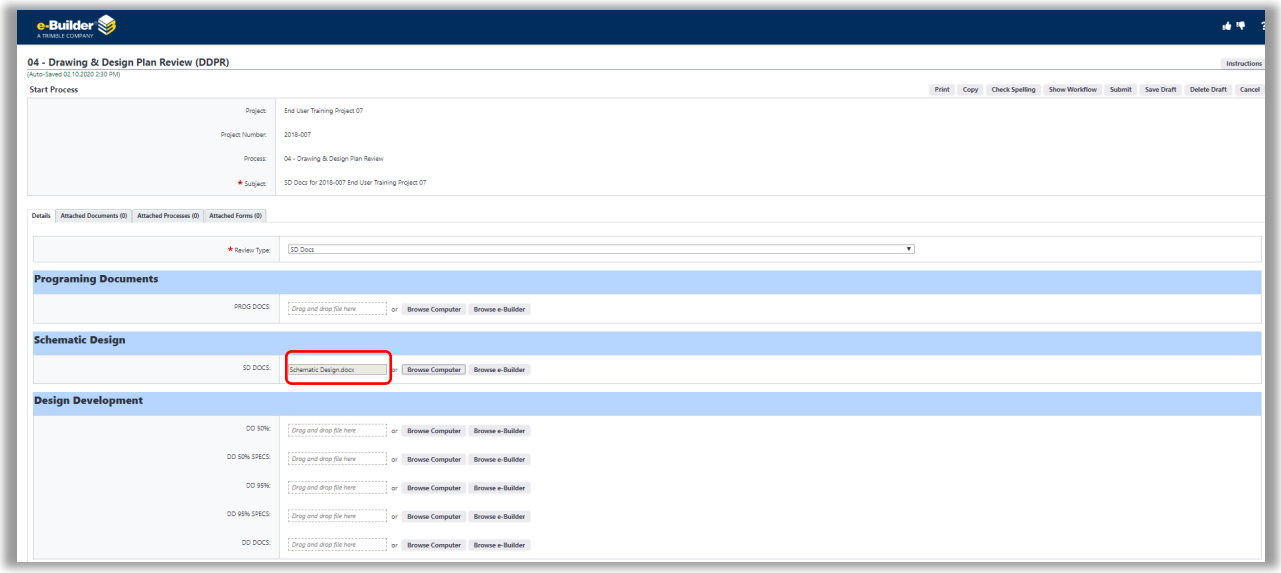
From the 04 – Drawing & Design Plan Review (DDPR) screen

- Select the **Review Type** dropdown menu



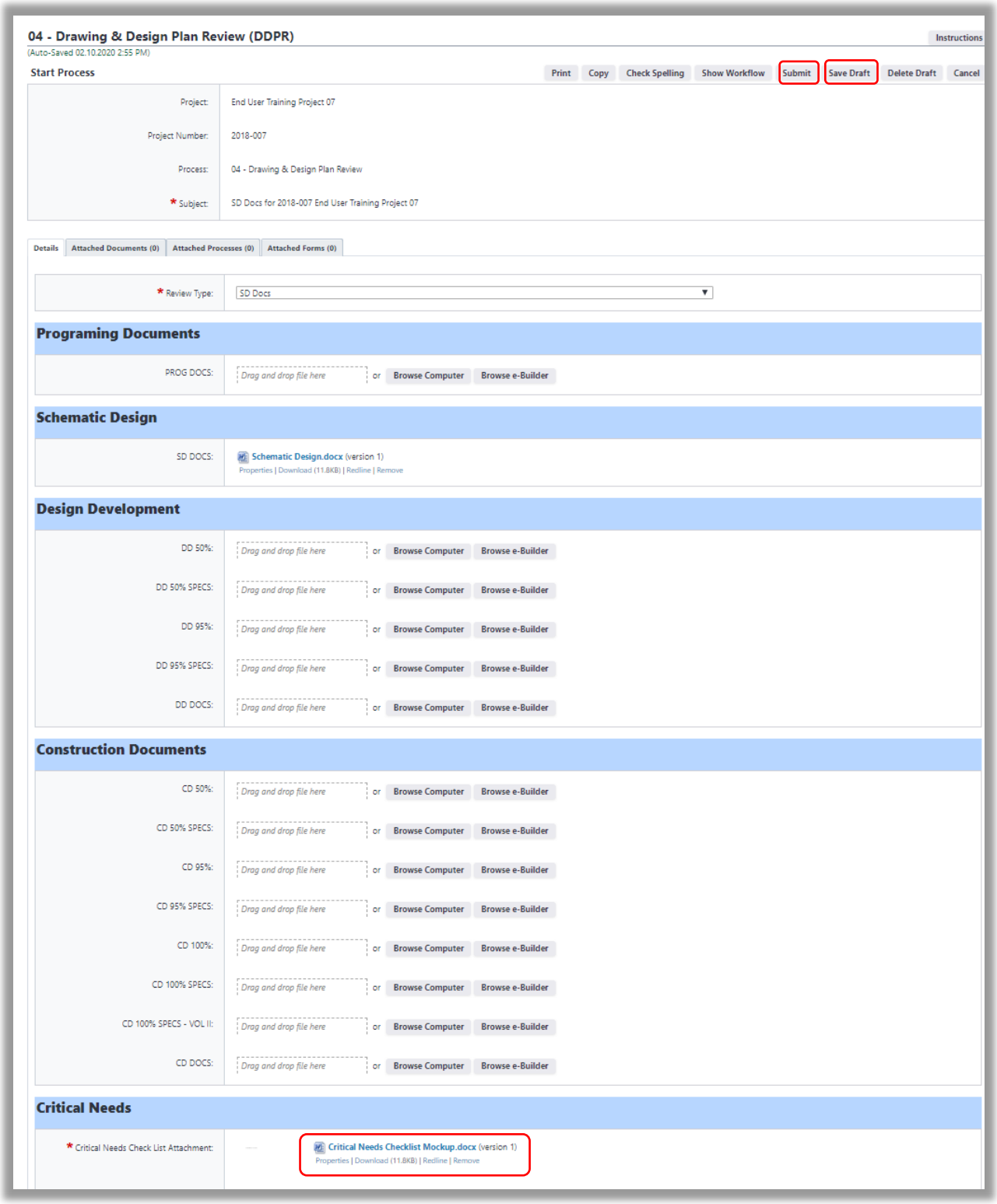
- Select the type of review you wish to initiate. This alerts the reviewers as to which Design Phase drawing they should review and comment on.
    - *In this example, SD Docs is selected*

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



- 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



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

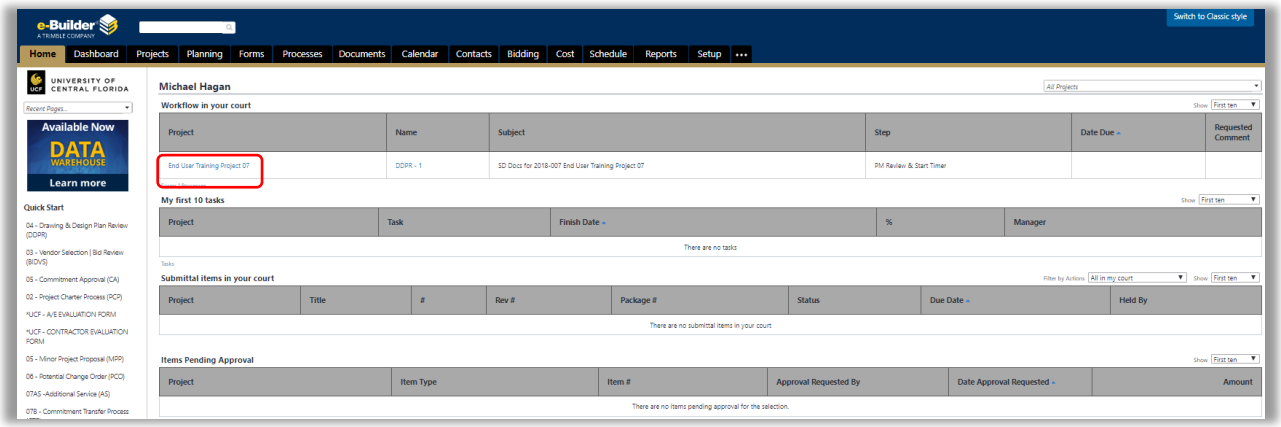
PM Review & Start Timer

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:

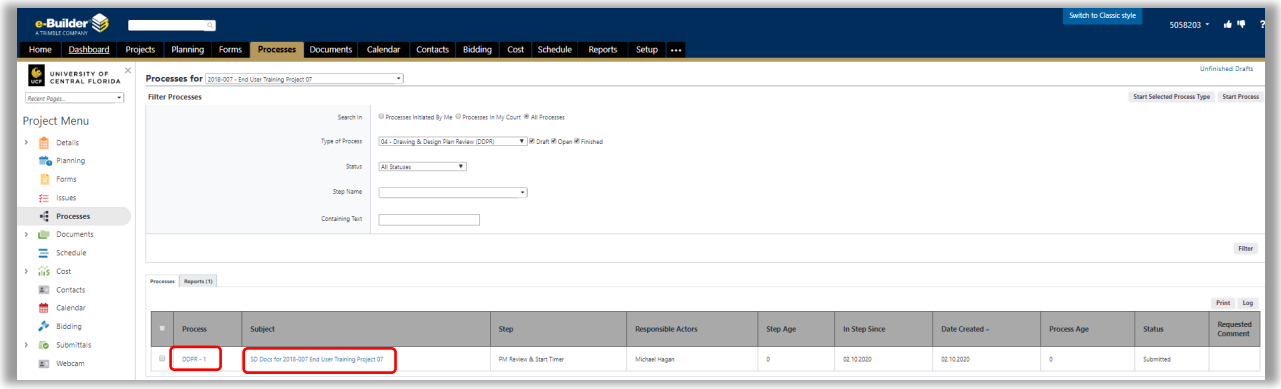
1. Download and attach a comment template which must be used by all reviewers
2. Ensure all applicable project stakeholders have an *opportunity* to review the design professional's document(s)
3. Start the process timer and ensure all reviewers understand when the review period ends

From the e-Builder Home screen

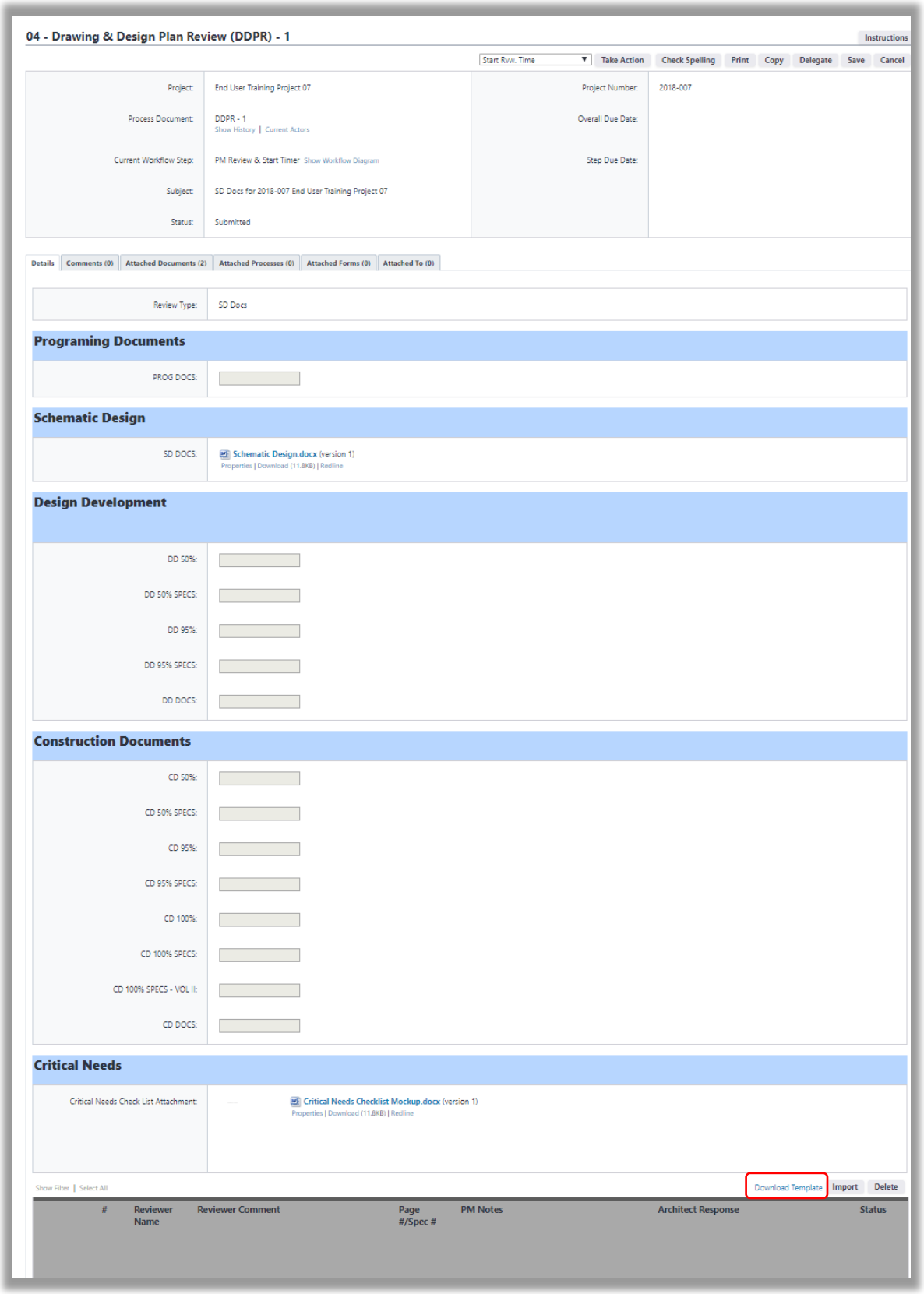


- Select the *Project Name* link to navigate to the Processes tab with the 04 – Drawing & Design Plan Review (DDPR) process pre-selected

From the e-Builder Processes tab

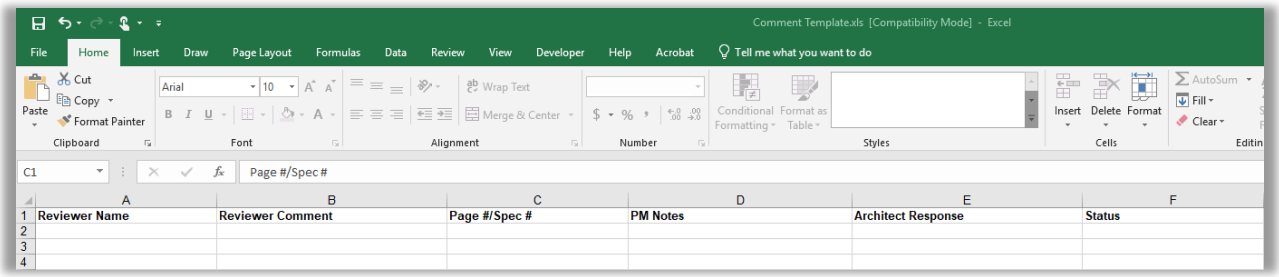


- Select either the Process link or the Subject link to open the DDPR process for the project
  - DDPR – 1
  - SD Docs for 2018-007 End User Training Project 07



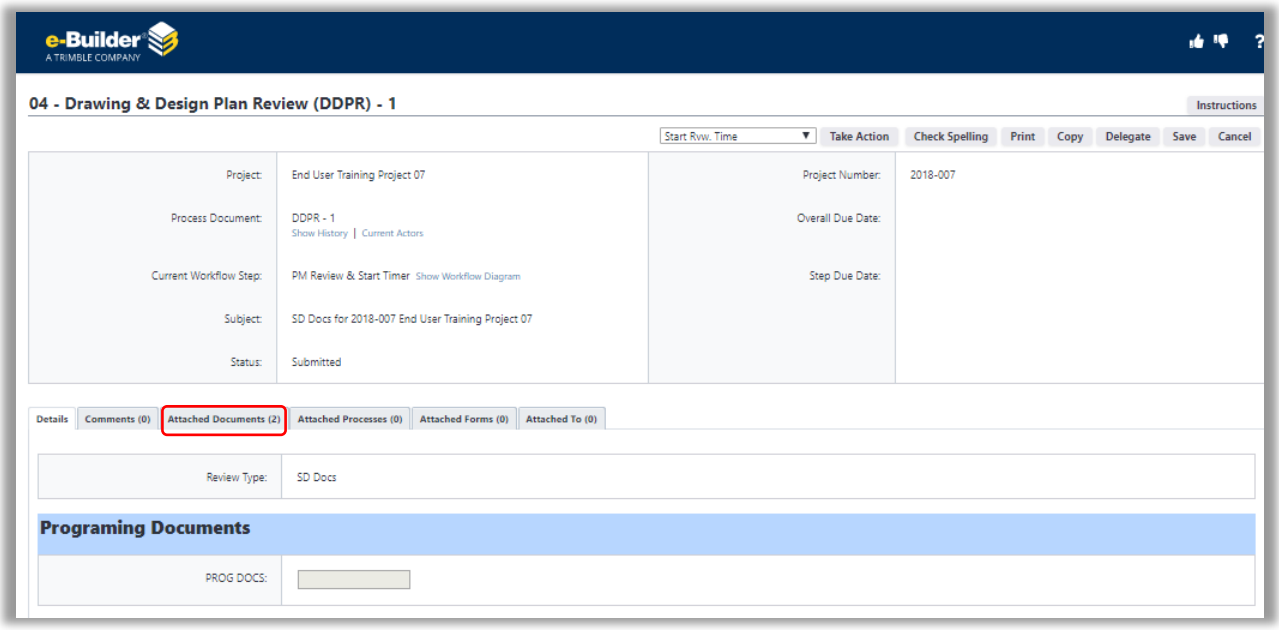
- Select the Download Template link

An MS Excel file will open.



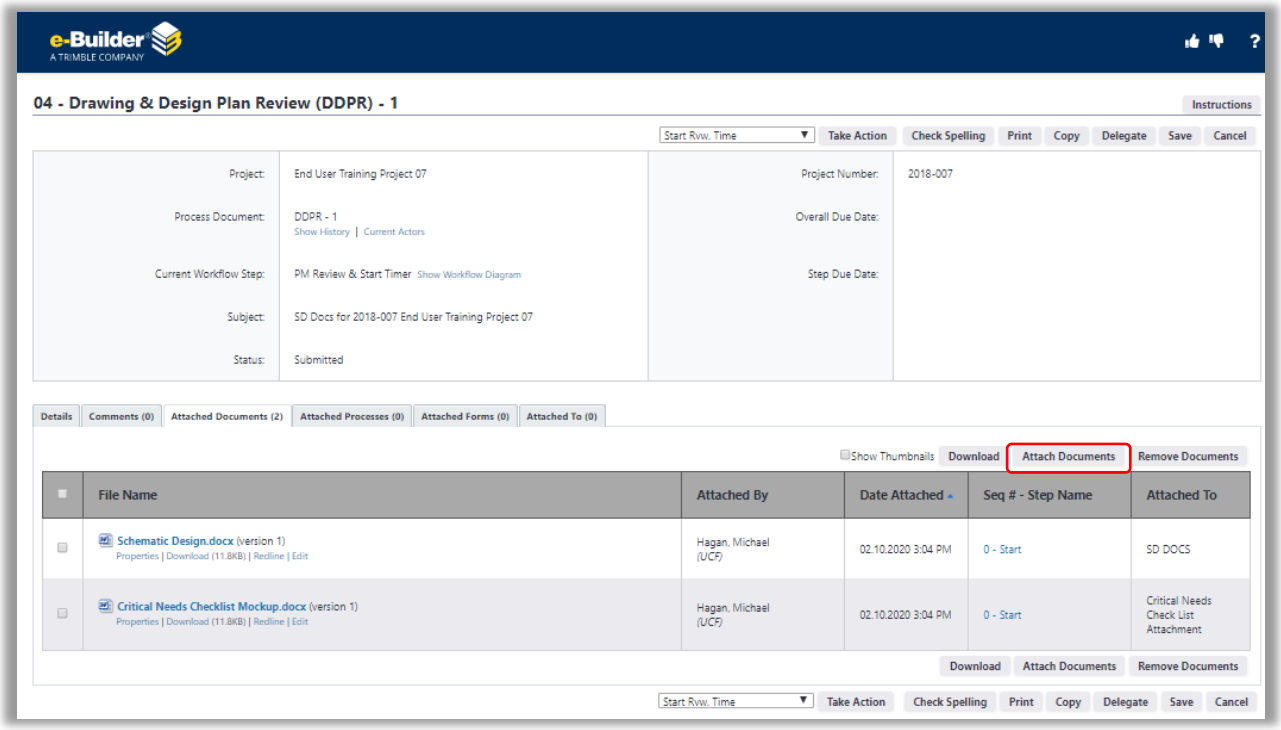
- Save this file to your computer so you can attach it to the DDPR process.

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

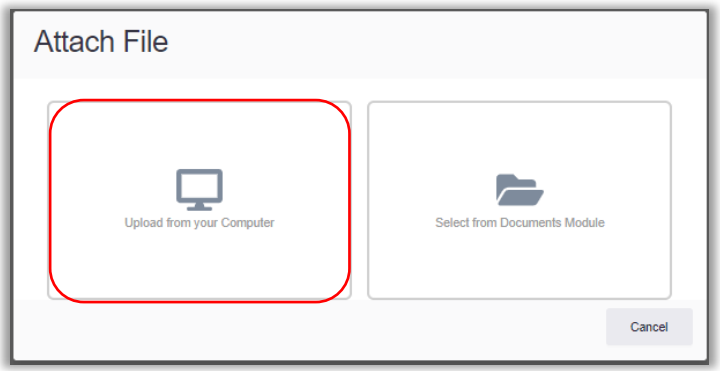


- Select the Attached Documents tab

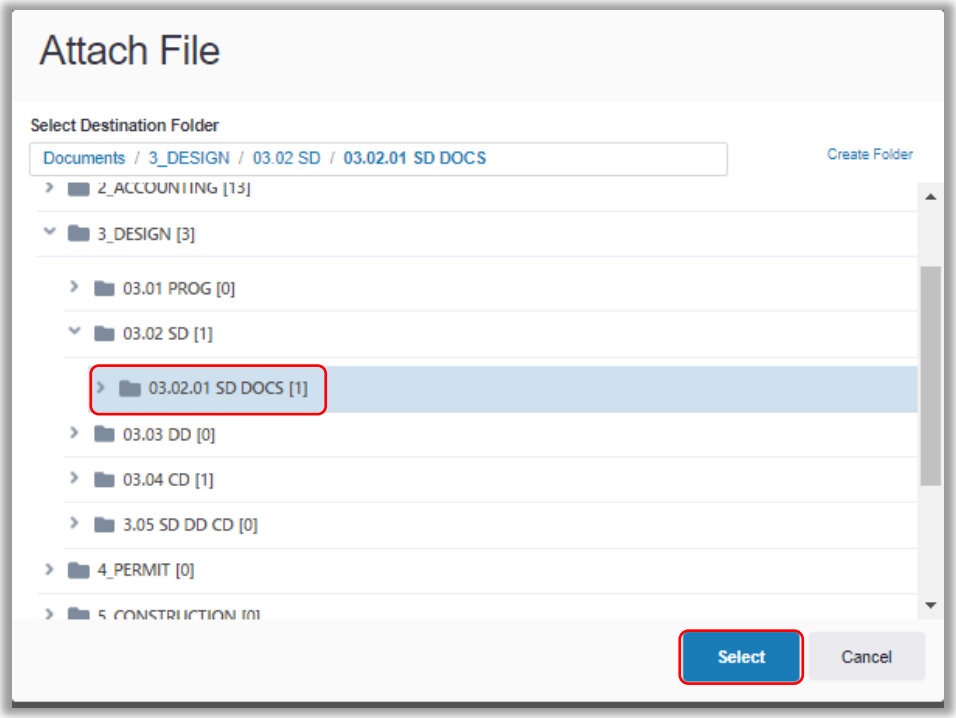
From the Attached Documents tab



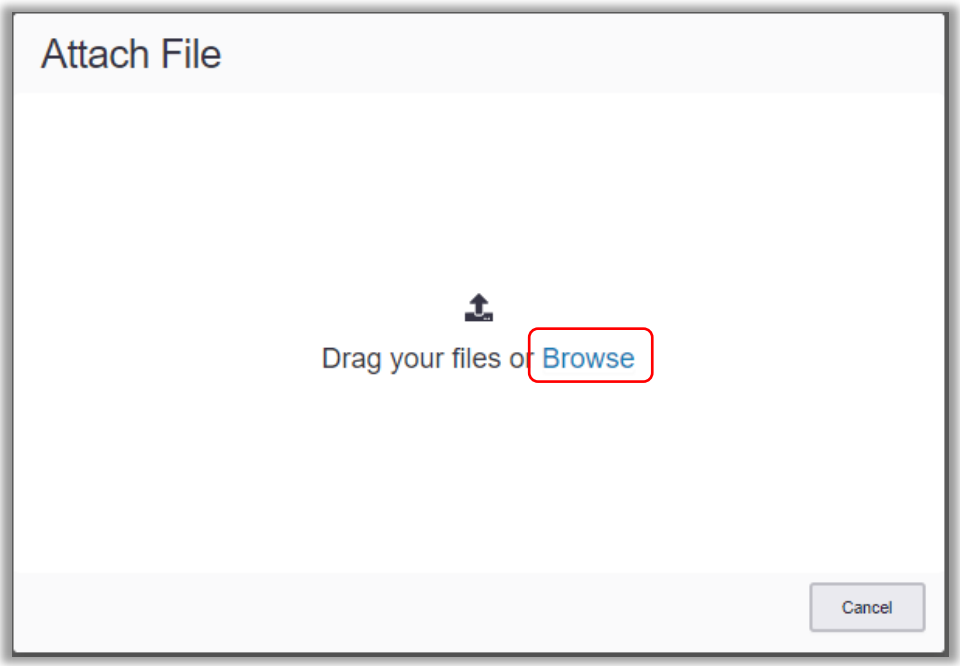
- Select the **Attach Documents** button



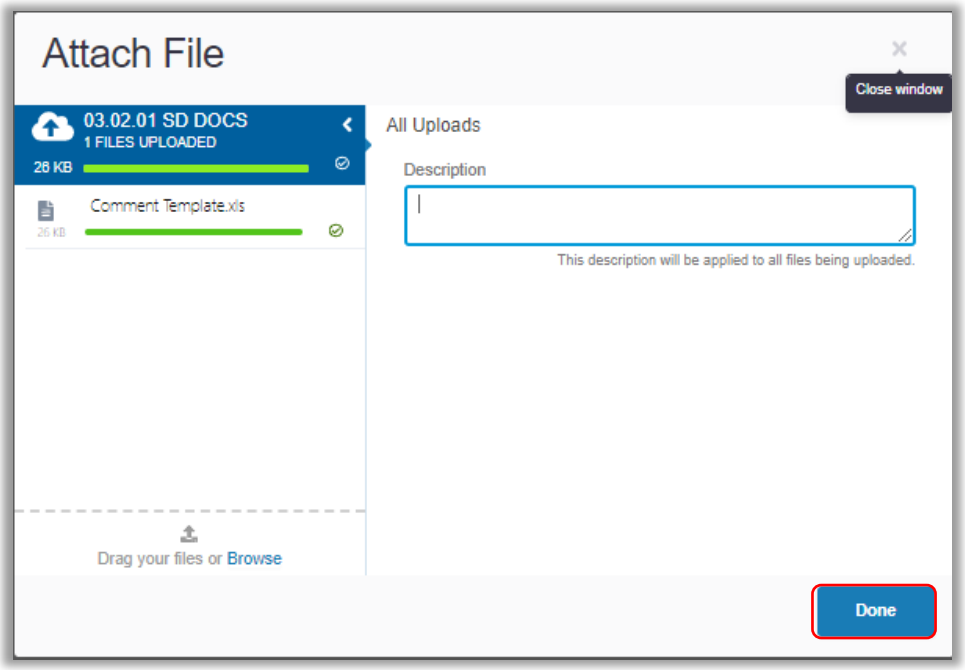
- Select Upload from your Computer



- 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

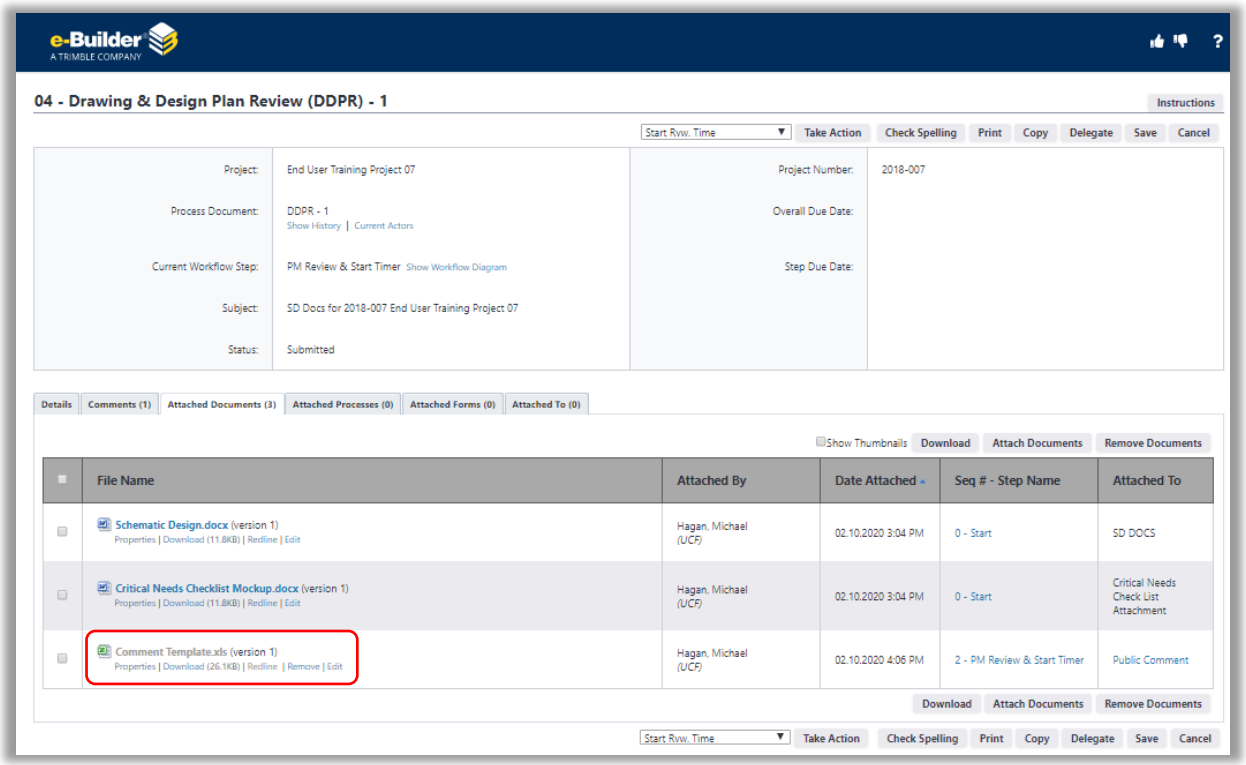


- Select the Browse link and navigate to the folder where you saved the Template document and upload it

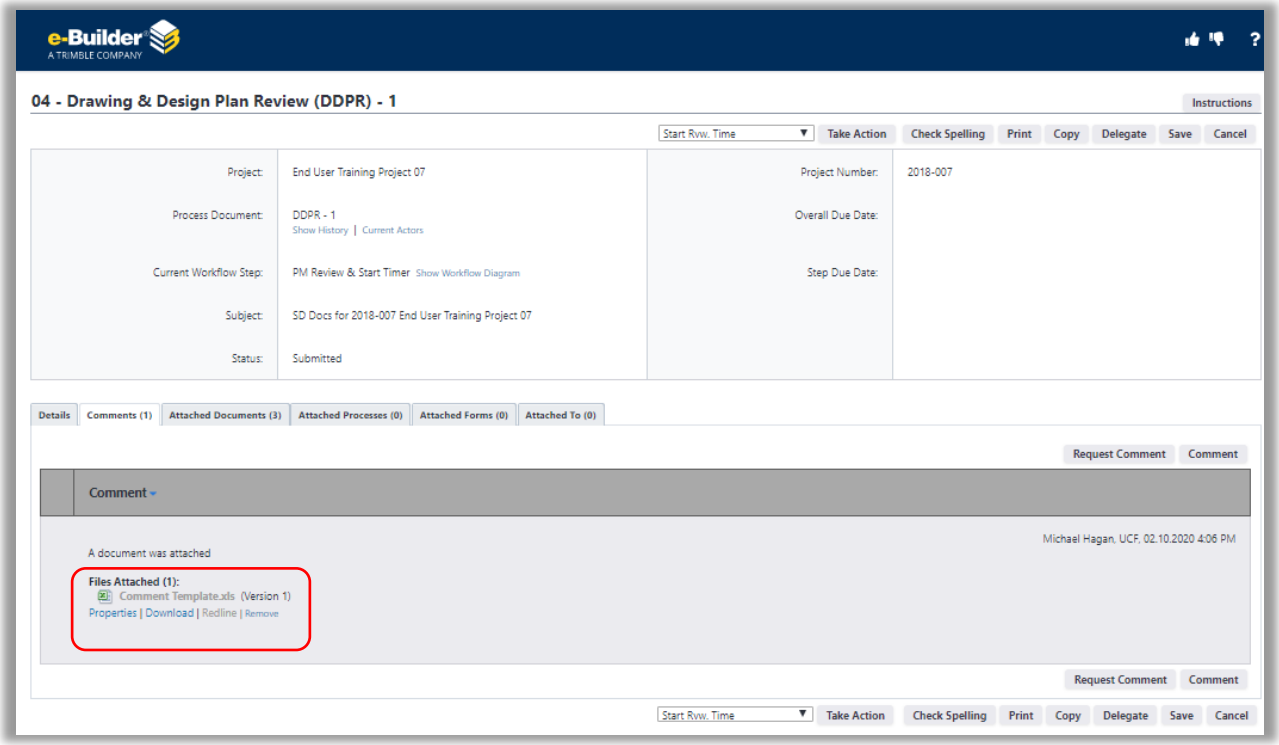


- Add a Description if you desire and select the Done button

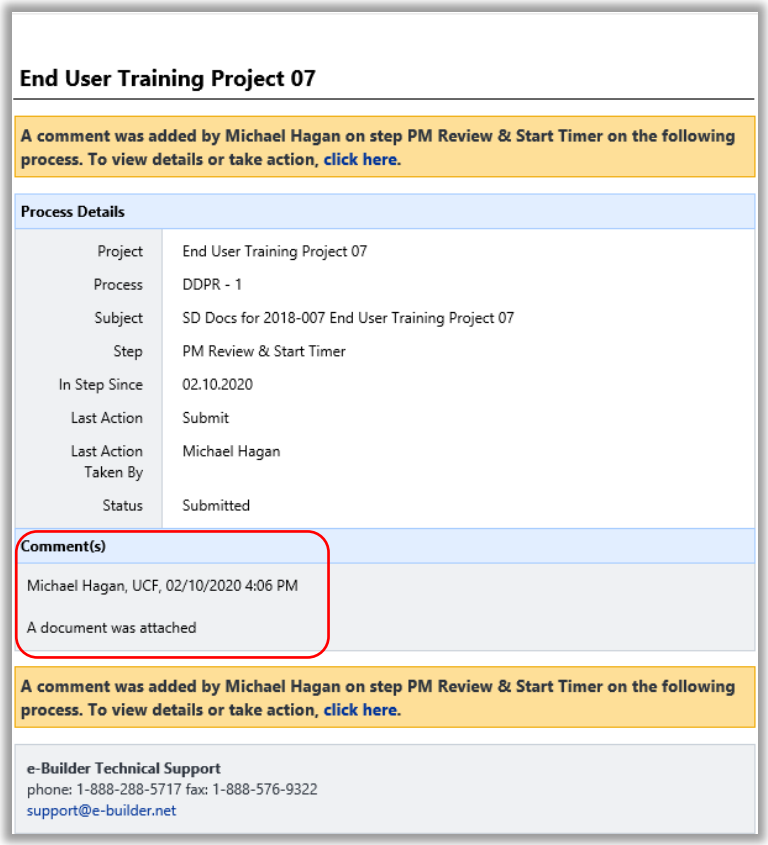
The Template has now been added to the process in the Attached Documents tab



Also, the template is added in the Comments tab



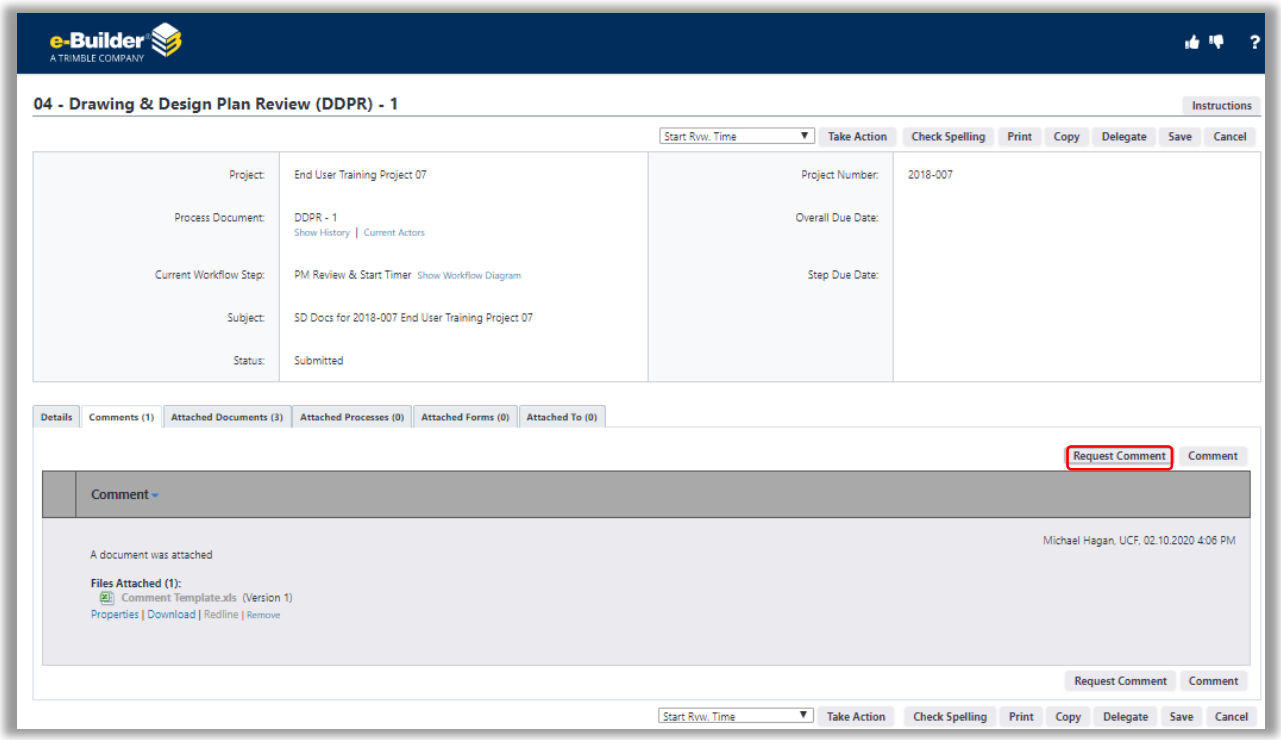
Note: Anytime a comment is added, the PM will receive an email notification



Select Stakeholders to Review and Comment

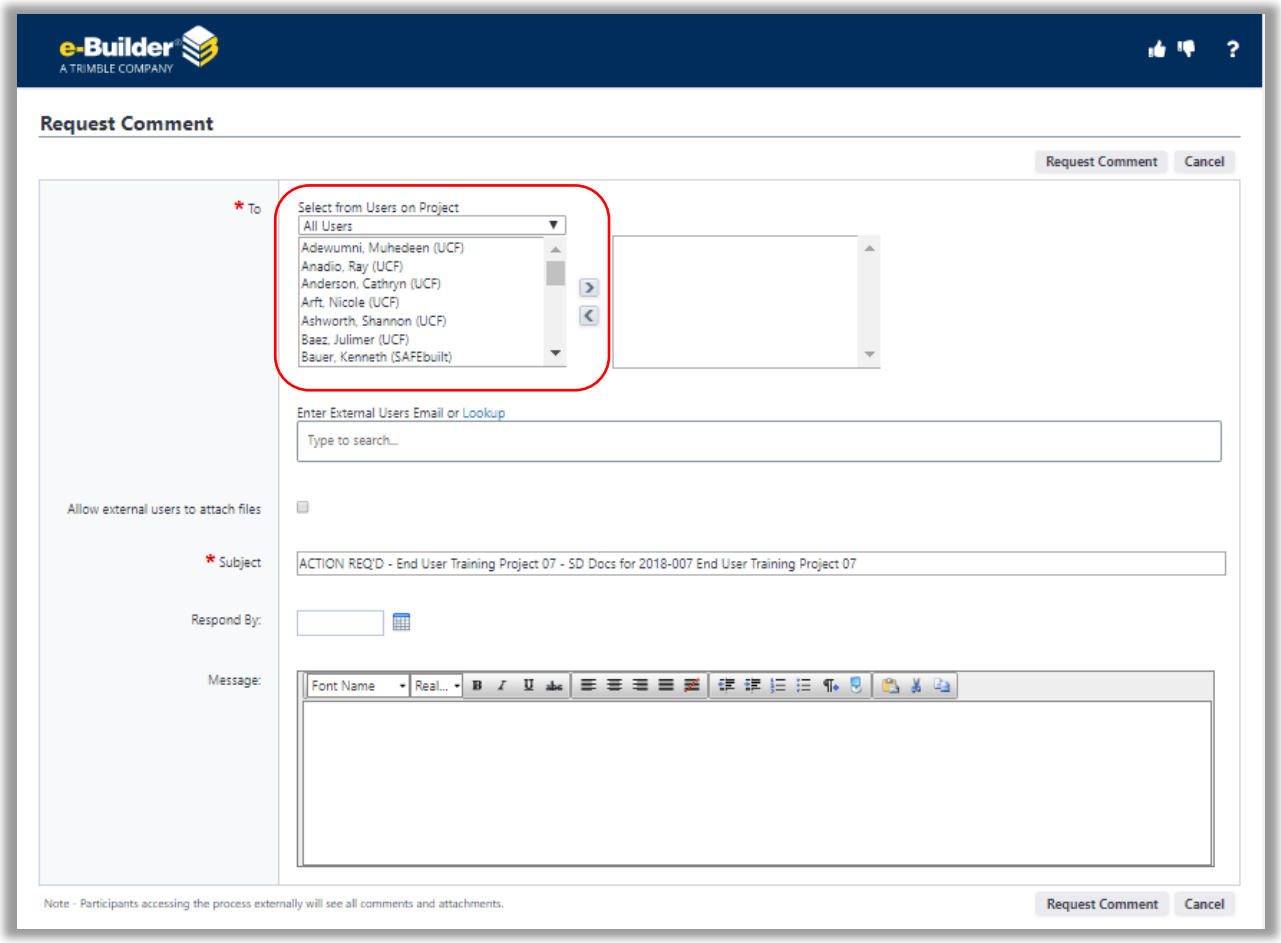
The PM now must select the various stakeholders who should review and comment on the design professional's document.

From the 04 – Drawing & Design Plan Review screen

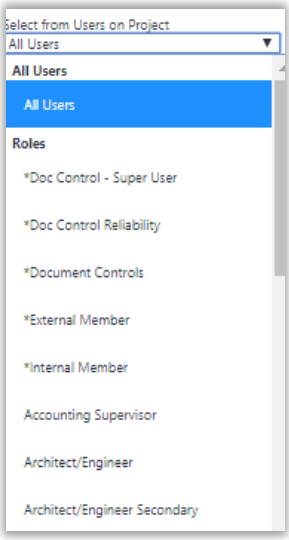


- Select the **Request Comment** button
    - Ensure pop-up blocker is disabled

From the Request Comment pop-up window

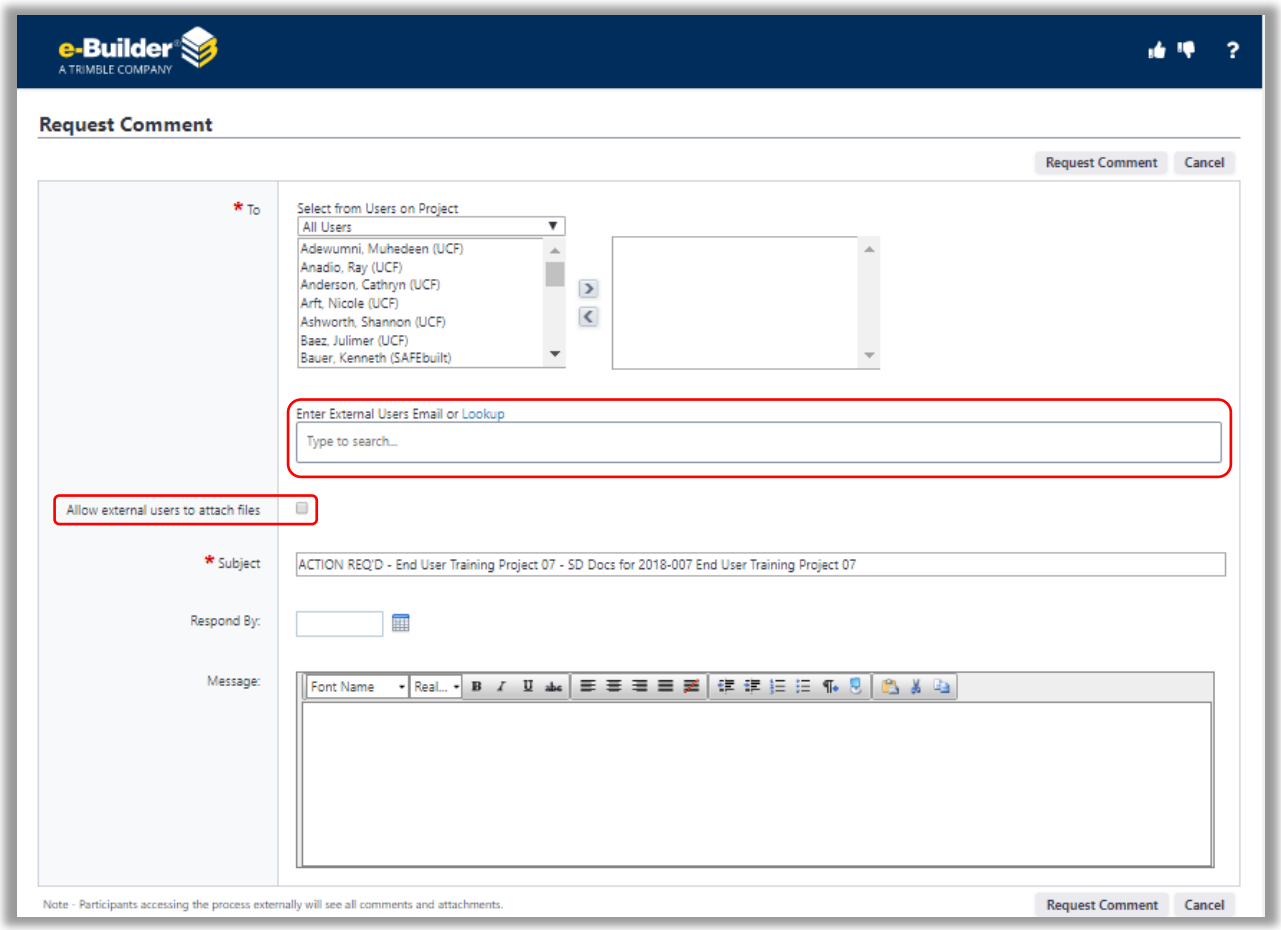


For users already added to the project, the filter is set to All Users
To filter by specific project roles, select the dropdown menu (optional)

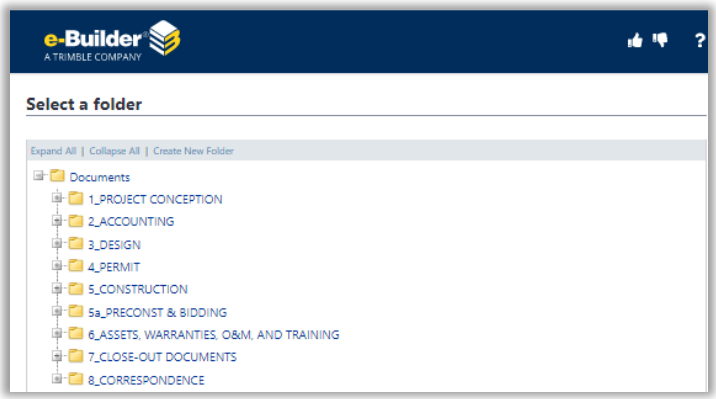


- Select the desired role
- Use the **>** and **<** buttons to add or remove project participants from the Request Comment list

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

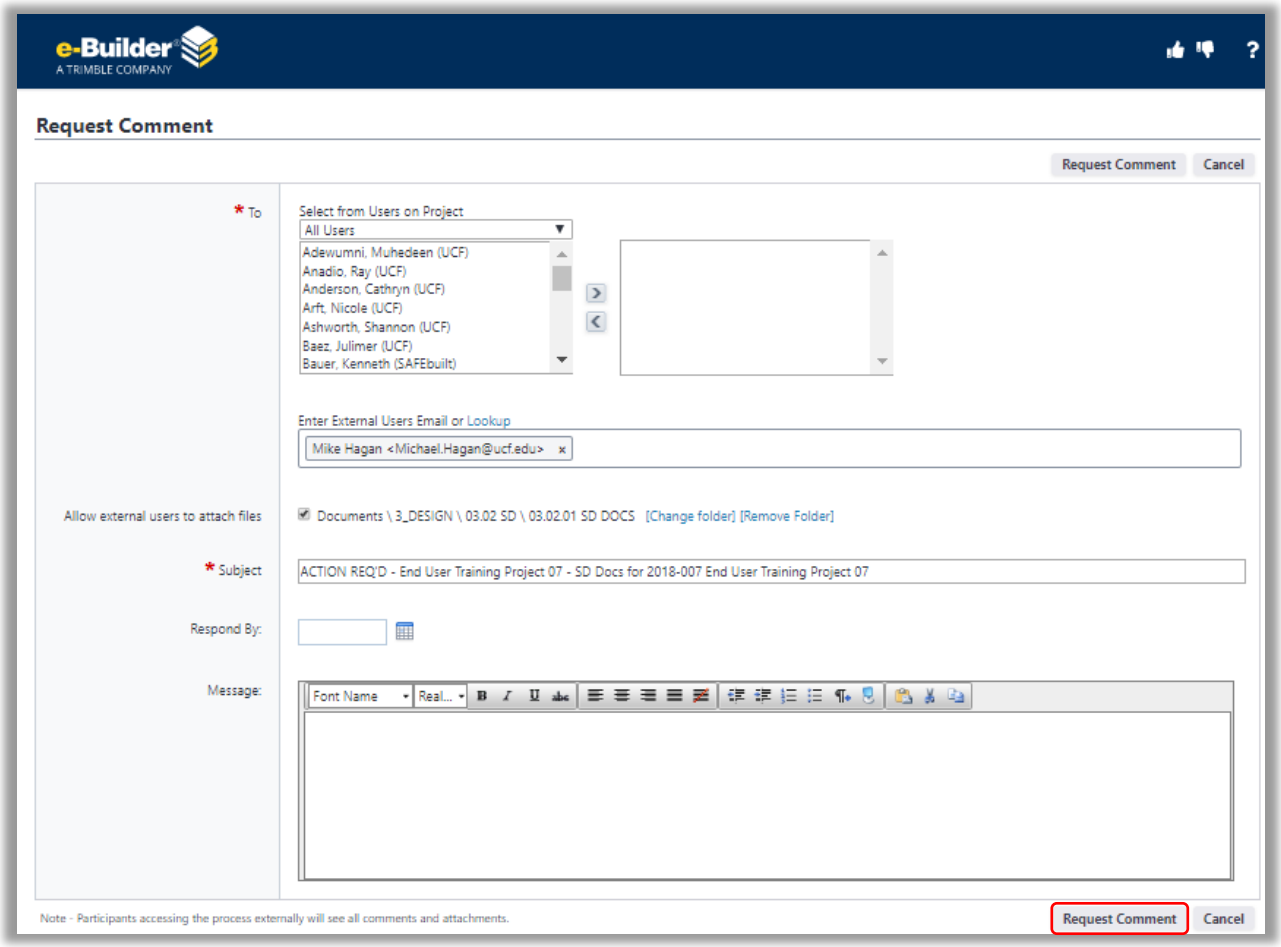


- Enter the email addresses for all recipients you wish to receive an email notification containing a link, which allows them to access the document and add comments. External users <u>must</u> have e-Builder accounts.
- Select the **Allow external users to attach files** checkbox
    - A [Select Folder]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



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

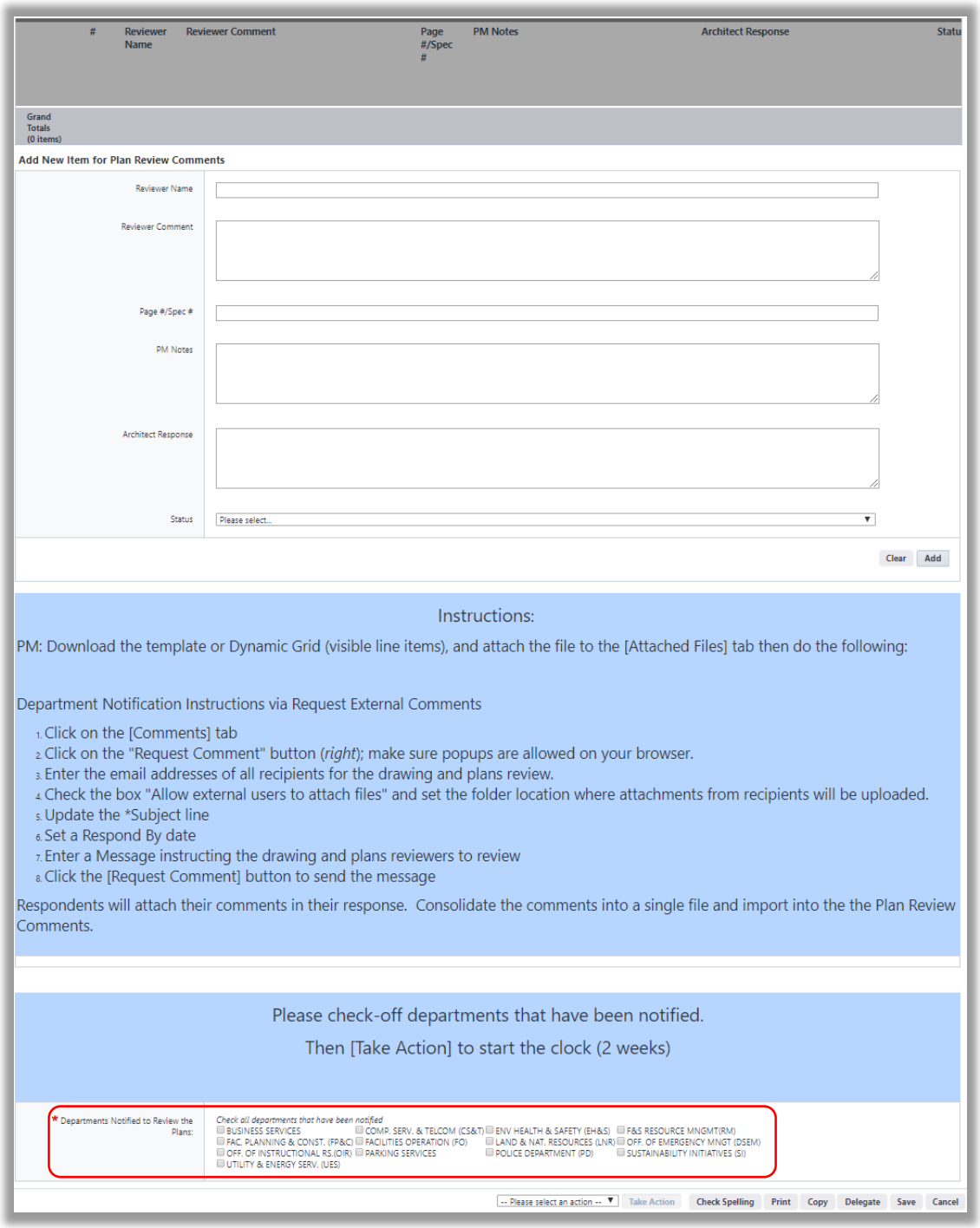
From the Request Comment pop-up window



- 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

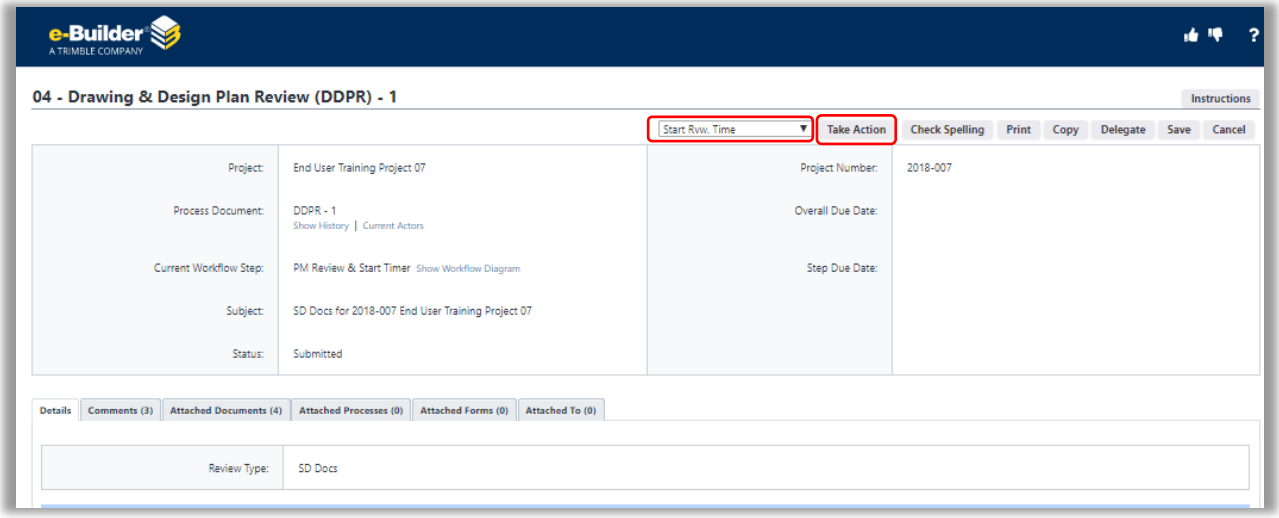


- Select all applicable checkboxes in the Departments Notified to Review the Plans field

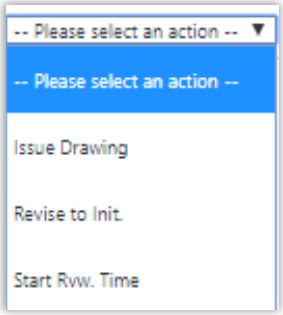
Setting the Timer

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

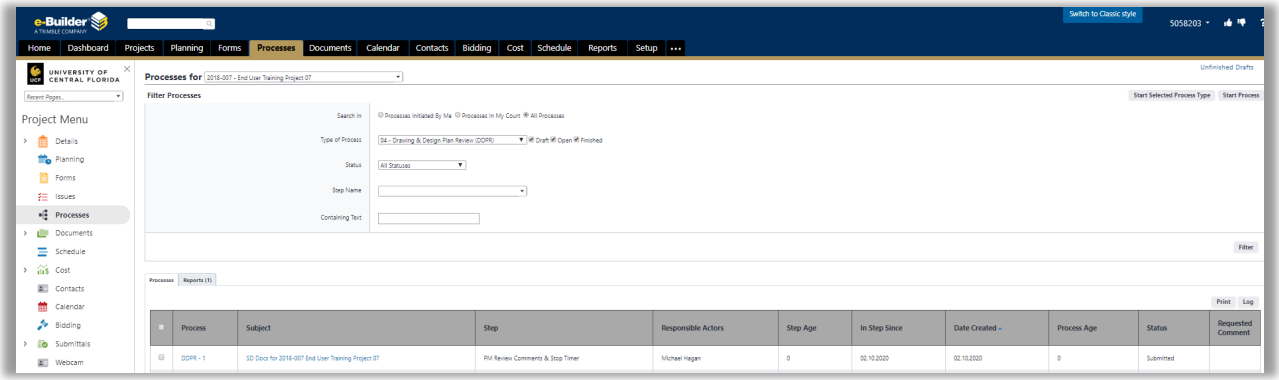


- Select the dropdown menu to the left of the Take Action button



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

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

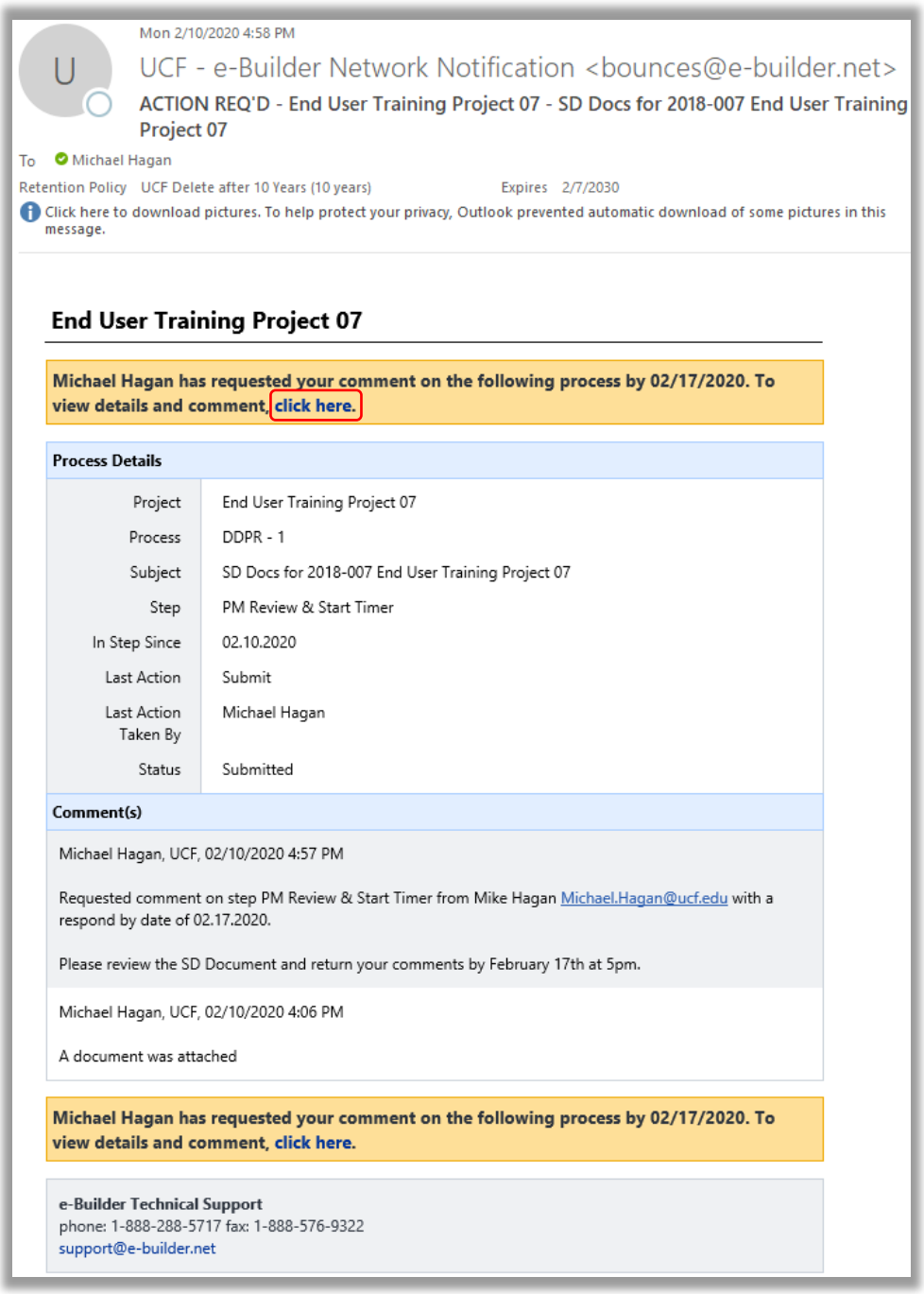


- The PM waits until the comment period has passed, then updates the process with all comments received

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.

End User Training Project 07

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 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

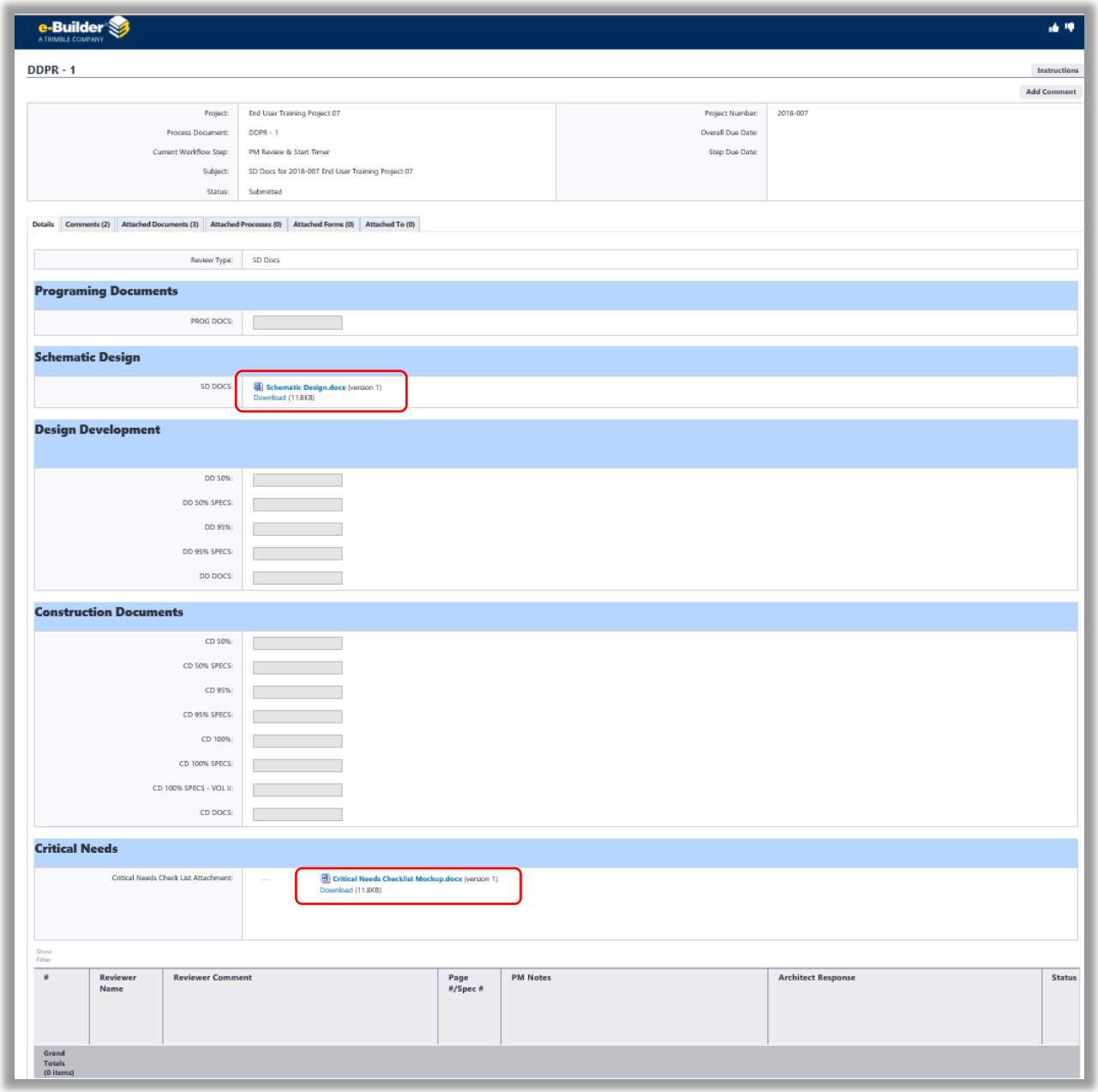
A document was attached

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

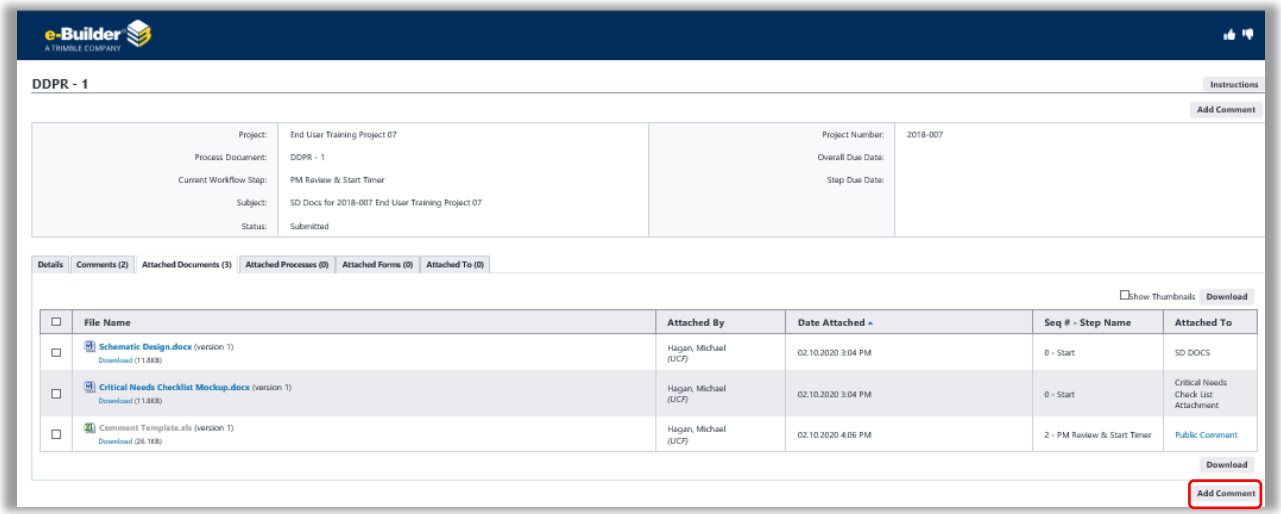
- When a reviewer selects the **click here** link, they will be taken to the DDPR process

From the reviewer DDRP screen



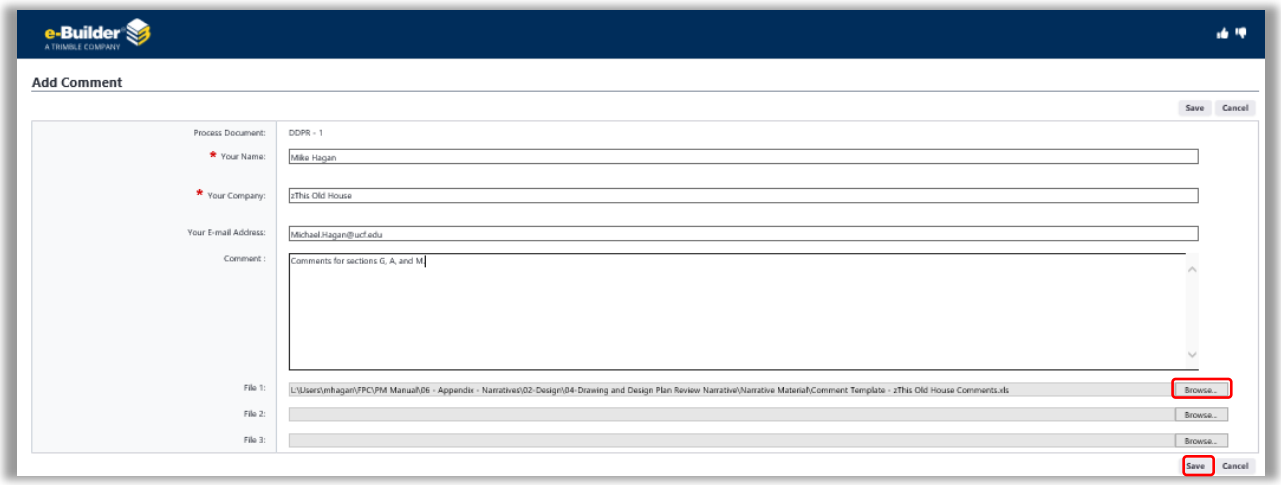
- They can access the
  - Critical Needs Checklist
  - Schematic Design document

From the Attached Documents tab



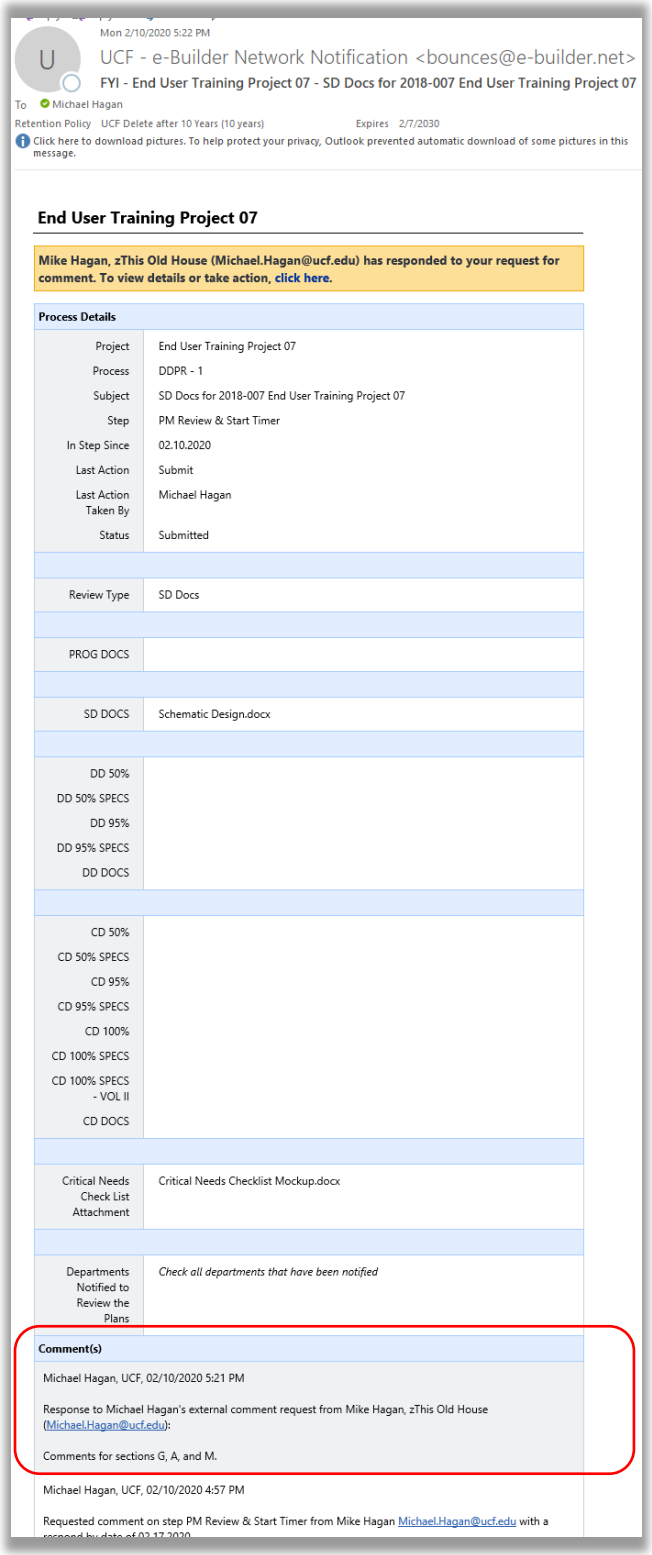
- A reviewer can download the
  - Schematic Design document
  - Critical Needs Checklist
  - Comment Template
- Once the reviewer has completed their review and updated the Comment Template, they select the **Add Comment** button

From the Add Comment screen



- 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

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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):

Comments for sections G, A, and M.

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

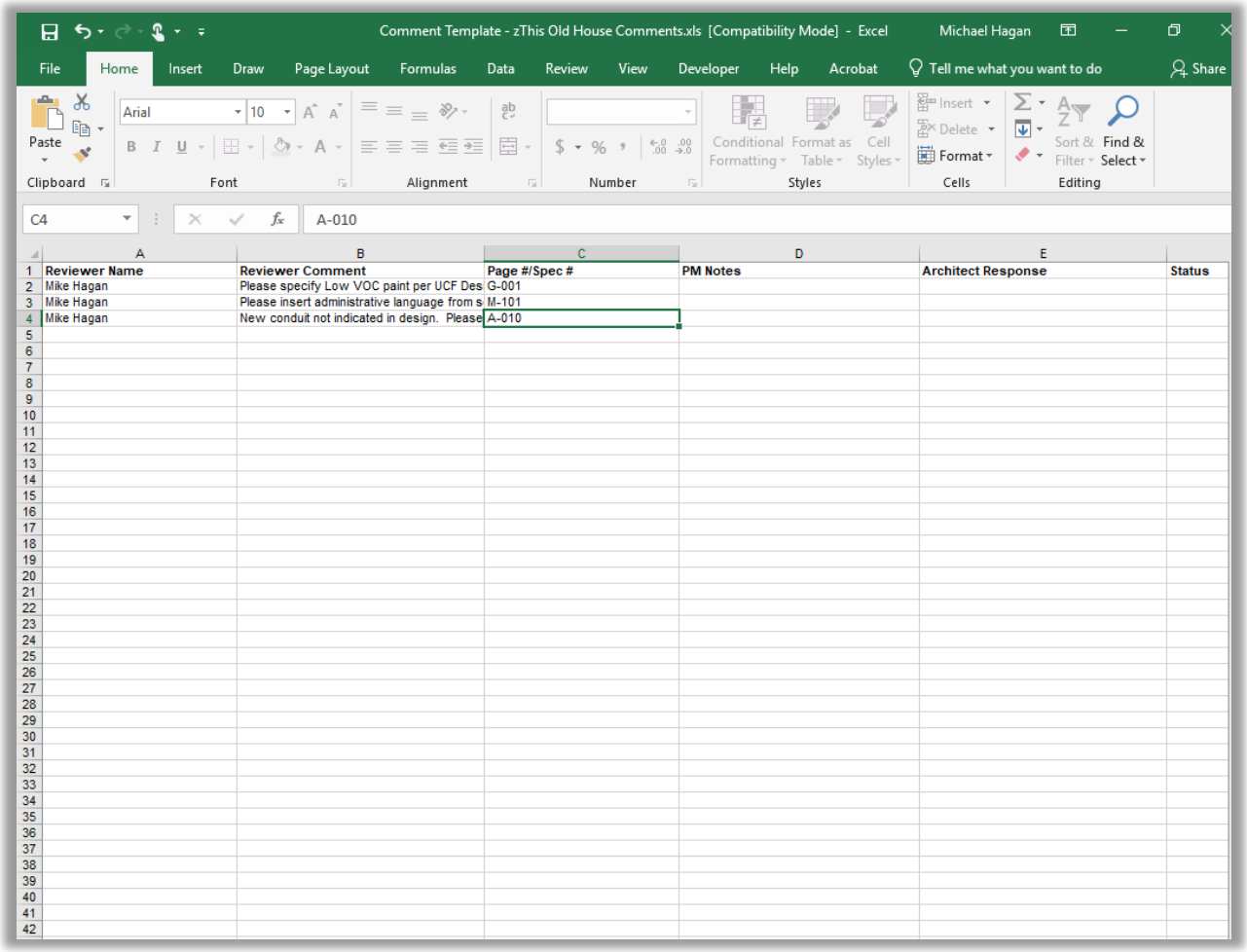
Requested comment on step PM Review & Start Timer from Mike Hagan Michael.Hagan@ucf.edu with a

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.

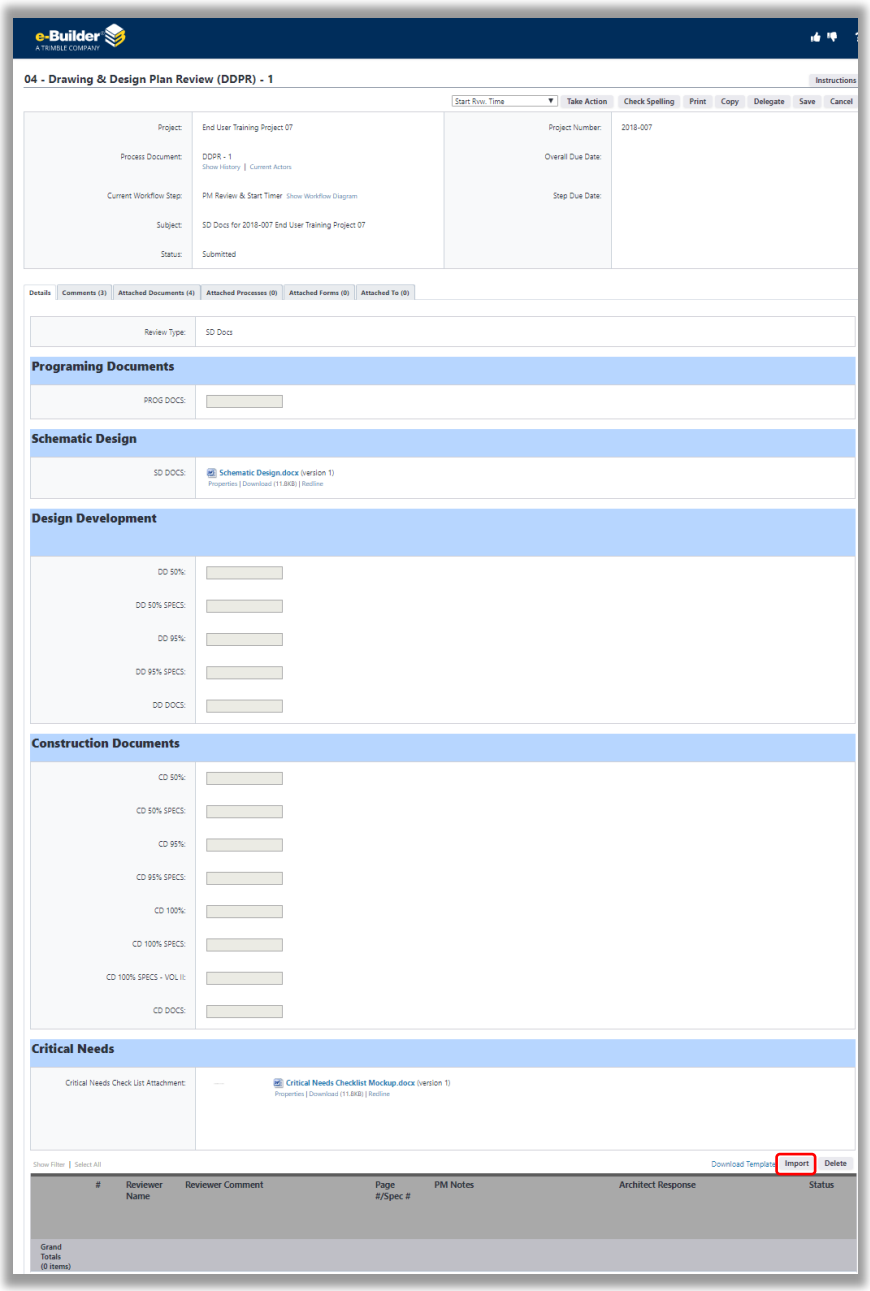
Example Template 1- Reviewer Comments



Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
Mike Hagan	Please specify Low VOC paint per UCF Des	G-001			
Mike Hagan	Please insert administrative language from s	M-101			
Mike Hagan	New conduit not indicated in design. Please	A-010			

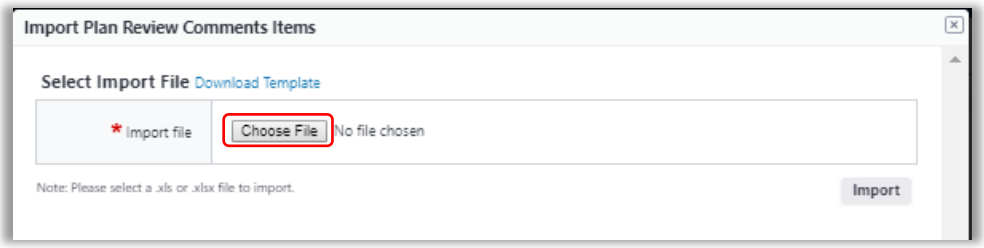
In the following part of the process, the PM will be able to import these templates into e-Builder, which could save them time instead of manually entering the information.

From the Drawing & Design Plan Review screen



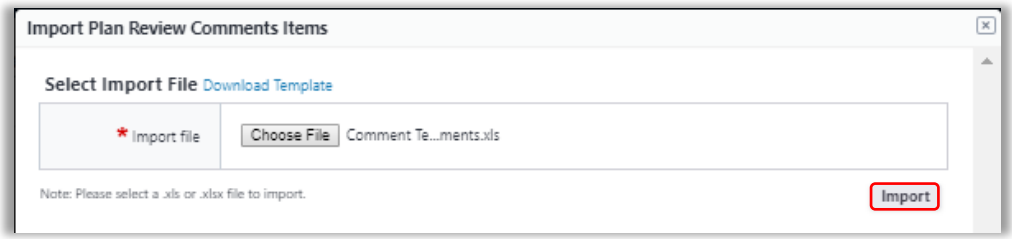
- Select the **Import** button

From the Import Plan Review Comments Items pop-up window



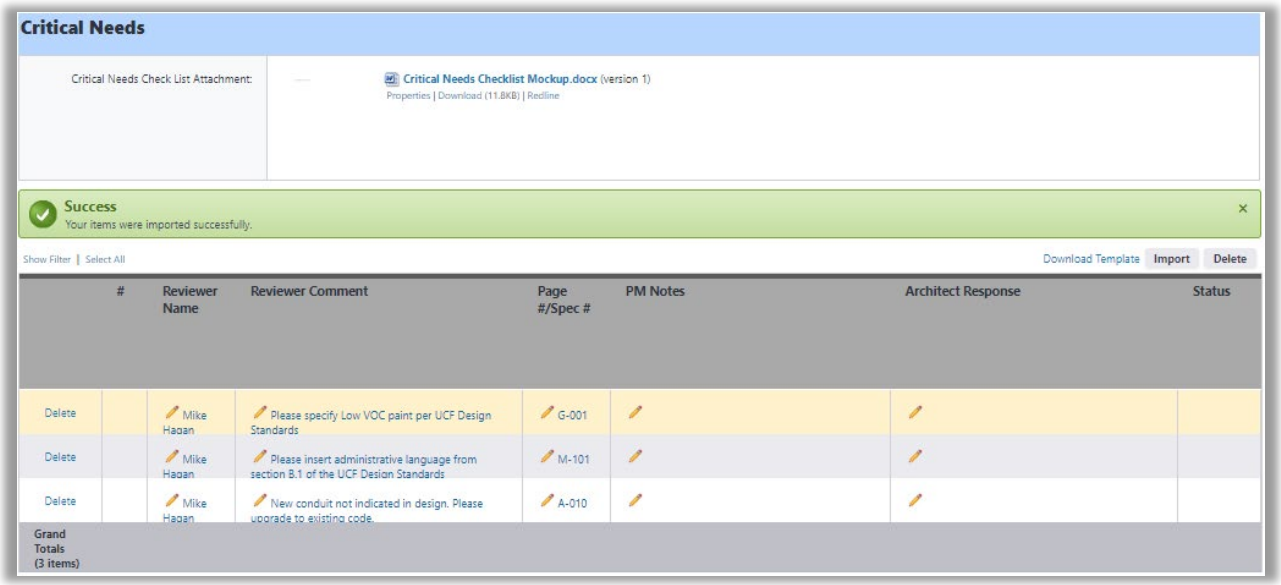
- Select the **Choose File** button
- Navigate to the folder where the updated Comment Template is saved and upload the file

From the Import Plan Review Comments Items pop-up window



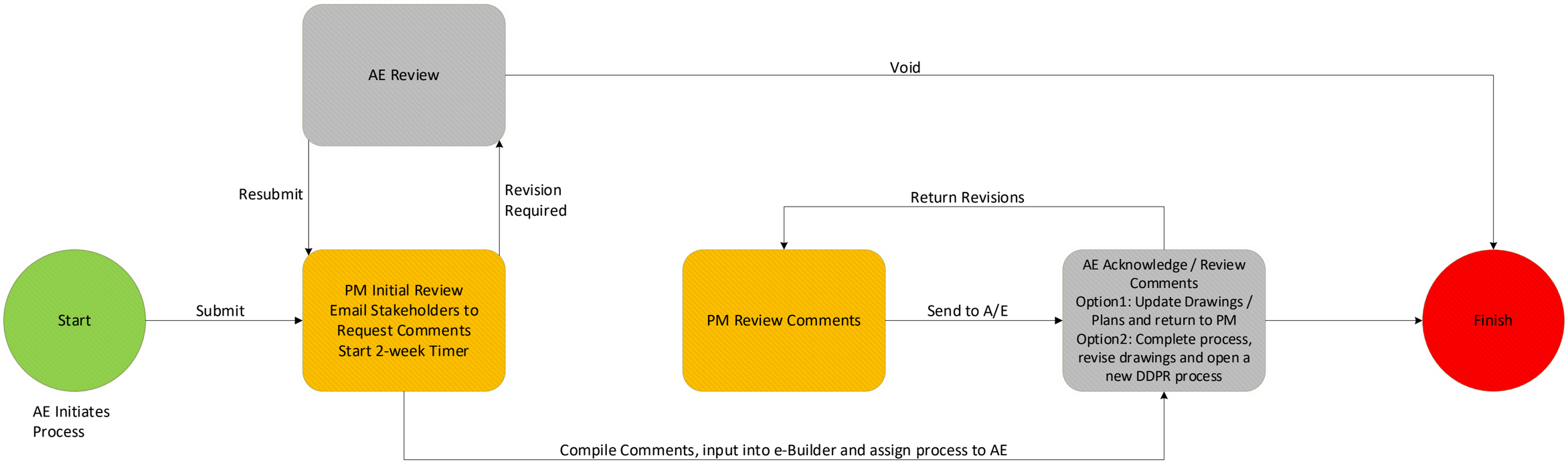
- Select the **Import** button

From the Drawing & Design Plan Review screen

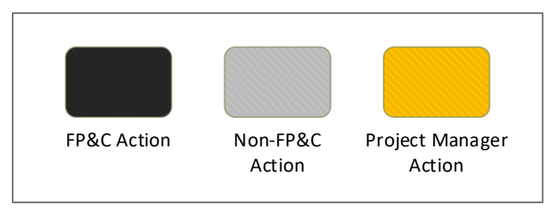


Note: The PM can choose to add their comments to the template before uploading, which would then populate the PM Notes field as well.

04 - Drawing & Design Plan Review (DDPR)



AE – Architect / Engineer
PM – Project Manager
Stakeholders – Campus Client, Building Code Office, Environmental Health & Safety, Project Professionals, and other people deemed appropriate by the PM



LEGEND