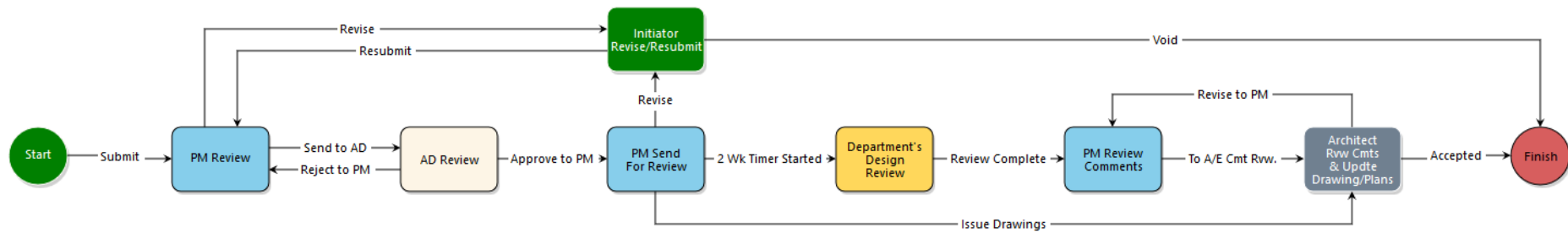




A Guide On Drawing & Design Plan Review (DDPR) Process

*Prepared by e-Builder / UCF
07 February 2022*



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) and Associate Director (AD) for review. Once the PM and AD 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)
3. Associate Director (AD)







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 for the Associate Director (AD) to review.
3. Once the AD approves, the process moves forward to the PM who can 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.
4. 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.
5. 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.

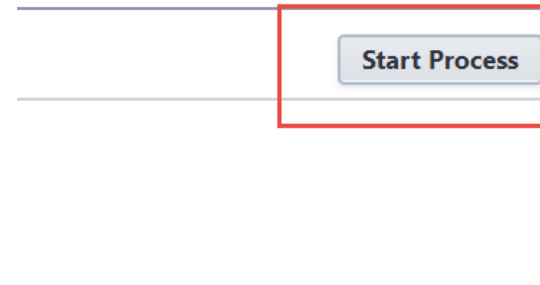
Initiation of Process:

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.
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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.

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04 - Drawing & Design Plan Review (DDPR) Instructions

Start Process

PM Review:

- 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								

- 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 allows 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 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:

- BUSINESS SERVICES
- PLANNING & CONST. (FRAC)
- OFF. OF INSTRUCTIONAL RELOR
- PLUMBY & ENER/SERV. USE
- COM. SERV. & TELCOM (CSAT)
- INCLIVES CREATION (IC)
- DARINGS SERVICES
- ENV HEALTH & SAFETY (EH&S)
- LAND & NAT. RESOURCES (LAND)
- OFF. OF EMERGENCY MGMT (OEM)
- POLICE DEPARTMENT (PD)
- SUSTAINABILITY INITIATIVES (S)
- P&S RESOURCE MGMT (P&S)

- Select an action and click **Take Action** button to move process along; possible actions are:
 - Send to AD**– Select this action if all information is correct and process is ready to move forward to the AD for additional review.
 - 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.

04 - Drawing & Design Plan Review (DDPR)

AD Review:

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

Processes Reports (0)

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

Print Log

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:

View File

#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Notes	Architect Response	Status
4						
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

- Click on the [Comments] tab
- Click on the "Request Comment" button (right); make sure popups are allows 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
 COMP. SERV. & TELCOM (CSAT)
 ENV. HEALTH & SAFETY (EHS)
 FAS RESOURCE MGMT (FM)
 FAS PLANNING & CONST. (FRAC)
 FACILITIES CREATION (FC)
 LAND & NAT. RESOURCES (LAND)
 OFF. OF EMERGENCY MGMT (OEM)
 OFF. OF INSTRUCTIONAL RELAT.
 PARKING SERVICES
 POLICE DEPARTMENT (PD)
 SUSTAINABILITY INITIATIVES (S)
 UTILITY & ENERGY SERV. (UES)

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Approve to PM**– 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.
 - b. **Reject to PM**– 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.

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04 - Drawing & Design Plan Review (DDPR)

Delete Instance Workflow Override All Fields View Instructions

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

PM Send For Review:

- 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								

- 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 allows 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 COMP. SERV. & TELCOM (CSAT) ENV. HEALTH & SAFETY (EHS) FAS RESOURCE MGMT (FM) FAS PLANNING & CONST. (FRAC) FACILITIES CREATION (FC) LAND & NAT. RESOURCES (LAND) OFF. OF EMERGENCY MGMT. (OEM) OFF. OF INSTRUCTIONAL REL. (OIR) PARKING SERVICES POLICE DEPARTMENT (PD) SUSTAINABILITY INITIATIVES (SI) UTILITY & ENERGY SERV. (UES)

- 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.

04 - Drawing & Design Plan Review (DDPR) Delete Instance Workflow Override All Fields/View Instructions

- 1

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

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
<input checked="" type="checkbox"/>	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				
	Make 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: []
 Process Document: 04 - Drawing & Design Plan Review
 Overall Due Date: []
 Current Workflow Step: []
 Step Due Date: []
 * Subject: []
 Tracking Prefix: []
 Status: []
 * Review Type: [Please select an option]

Programming Documents

PROG DOCS: [] or [Browse e-Builder] [Browse Computer]

Schematic Design

SD DOCS: [] or [Browse e-Builder] [Browse Computer]

Design Development

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

DD 50% SPEC: [] or [Browse e-Builder] [Browse Computer]

DD 95%: [] or [Browse e-Builder] [Browse Computer]

DD 95% SPEC: [] or [Browse e-Builder] [Browse Computer]

DD DOCS: [] or [Browse e-Builder] [Browse Computer]

Construction Documents

CD 50%: [] or [Browse e-Builder] [Browse Computer]

CD 50% SPEC: [] or [Browse e-Builder] [Browse Computer]

CD 95%: [] or [Browse e-Builder] [Browse Computer]

CD 95% SPEC: [] or [Browse e-Builder] [Browse Computer]

CD 100%: [] or [Browse e-Builder] [Browse Computer]

CD 100% SPEC: [] or [Browse e-Builder] [Browse Computer]

CD DOCS: [] or [Browse e-Builder] [Browse Computer]

Critical Needs

* Critical Needs Check List Attachment: [] or [Browse e-Builder] [Browse Computer]

Show Filter [] Download []

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 Q&B "Visible Line Items" to download the existing information on the grid.

#	Reviewer Name	Reviewer Comment	Page #/Spec #	PM Note	Architect Response	Status
4						
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.

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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]

PM Review Comments & Stop Timer:

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. Review the following information:

Project: 04 - Drawing & Design Plan Review

Process Document: 04 - Drawing & Design Plan Review

Overall Due Date:

Current Work/Step Step:

Step Due Date:

Subject:

Tracking Info:

Status:

Review Type:

Programming Documents

PROD 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:

Show Filter Download

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

- Click on the [Comments] tab
- Click on the "Request Comment" button (right); make sure popups are allows 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

Comment Consolidation Instructions

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

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **To A/E Review Comments**– Select this action when the process is ready to move forward. Comments will be required upon taking this action.

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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

Architect Rvw Cmts & Updte Drawing/Plans:

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. 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: Overall Due Date:

Step Due Date:

* Subject:

Tracking Prefix:

Status:

Review Type:

Programing Documents

PROG DOCS:

Schematic Design

SD DOCS:

Design Development

DD 50%:

DD 50% SPECS:

DD 65%:

DD 65% SPECS:

DD DOCS:

Construction Documents

CD 50%:

CD 50% SPECS:

CD 65%:

CD 65% SPECS:

CD 100%:

CD 100% SPECS:

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 all 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 Consolidation 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

* Architect Acknowledgement:

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.

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04 - Drawing & Design Plan Review (DDPR)

- 1

Delete Instance Workflow Override All Fields View 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:

Training Resources

Please visit the FP&C website for a variety of e-Builder training resources both in print and video.

<http://fp.ucf.edu/resources/ebuilder/>

Need e-Builder Help?

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

For UCF Project Support

e-Builder System Admins can be reached at eBuilderadmin@ucf.edu

Notes and Comments: