

## Design Submission Management & Completion

### What is a Design Submission?

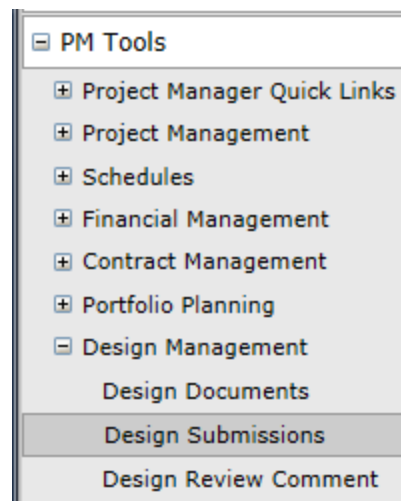
A design submission represents a collection of design documents sent to a series of reviewers for feedback. The managing contact then reviews this feedback and makes a final determination on each item in the submission. Processing a Design Submission into a workflow begins the Design Review process. The identified reviewers will receive a workflow notice prompting them to begin their reviews.

### Who Will Use This?

- ✓ General Contractor
- ✓ Construction Manager
- ✓ Architect/Engineer
- ✓ Project Manager

## Steps to Create a Design Submission

1. Log into ePM as a user with the Drawing Creator security role, and then navigate to the appropriate project.
2. Navigate to PM Tools > Design Management > Design Submissions to display the Design Submissions register.



- Click the 'New' button to open a blank Design Submission document. In the Details section, enter a Title, a Package Name, and a Revision Number. In the More Details section, enter the Review End Date, Leave the 'Parties' section blank.

The screenshot shows the 'DESIGN SUBMISSION: 35% set (012)' interface in a 'Draft' state. The top navigation bar includes 'General', 'References', 'Workflow', 'Activity Log', and 'Attachments'. Below the navigation is a breadcrumb trail: 'Main | Design Documents | Review Steps | Reviewer Feedback | Properties'. The main content area is divided into sections: 'SUMMARY', 'DETAILS \*', 'MORE DETAILS', and 'PARTIES'. The 'SUMMARY' section shows 'Current State' as 'Draft', 'Revision Number' as 'R00', 'Title' as '35% set', and 'Number' as '012'. The 'DETAILS \*' section contains input fields for 'Current State' (Draft), 'Title \*' (35% set), 'Number' (012), 'Package Name \*' (35%), and 'Revision Number \*' (R00). The 'MORE DETAILS' section has a 'Review End Date' field set to '10/29/2014'. The 'PARTIES' section is a table with columns for 'Company', 'Contact', and 'Contract', and rows for 'Manager' and 'Source', each with an empty input field and a search icon.

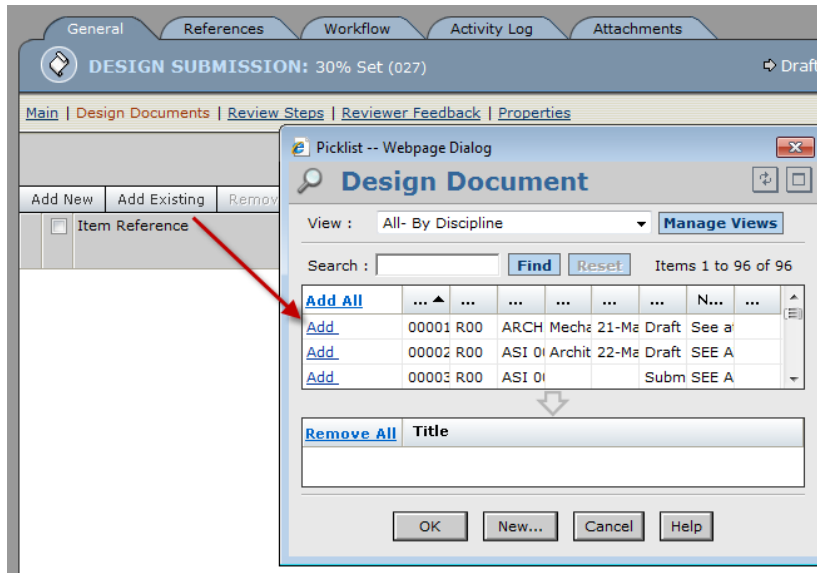
SUMMARY	
<b>Current State</b>	Draft
<b>Revision Number</b>	R00
<b>Title</b>	35% set
<b>Number</b>	012

DETAILS *	
Current State	Draft
Title *	35% set
Number	012
Package Name *	35%
Revision Number *	R00

MORE DETAILS	
Review End Date	10/29/2014

PARTIES			
	Company	Contact	Contract
Manager	<input type="text"/>	<input type="text"/>	<input type="text"/>
Source	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click the 'Design Documents' page, then click the 'Add Existing' button to see a list of available design documents that can be added to the package



5. Select one, multiple, or all design documents to add to the submission.
6. Select Submit from the Workflow dropdown, and then Execute. The workflow dialog box should show at least one user in the To box. If not, use the lookup button to select a user. The recipient must have security permissions that will allow him or her to edit the submission, as well as execute workflow to put the document into Review.

**Note:** The following section in this Quick Reference Guide relate to setting up design submission review steps. For instructions on reviewing design submissions, refer to the Quick Reference Guide titled "QRG.017 Design Submission Review".

## Setting Up Design Submission Reviews

1. Log into ePM as a user with the Drawing Submitter security role, and then navigate to the appropriate project and to the My Notices register. Click the appropriate package to open the design submission document.
2. In the 'Parties' section, select a contact as Manager who will manage the submittal package. This person is responsible for completing the submission, which will change the state of all the items within the submission. This will normally be the Lead Architect. The Source contact is the person responsible for providing the content of the submission.



3. Click the 'Design Documents' page and confirm that the appropriate individual design documents are included in the submission.
4. Click the 'Review Steps' page. Click the 'Add' button for each reviewer who will receive the design submission for review. Step Number indicates whether the reviews will be done in sequence or parallel. Numbering the steps 1,2,3, etc relates to wanting the first reviewer to finish before the next reviewer is notified. Numbering the steps 1,1,1, etc relates to wanting the reviewers to do reviews concurrently. Select each reviewer from the 'Contact' lookup list.

Add	Remove	Calculate Backward	Calculate Forward	↕	↕		
<input type="checkbox"/>	*Step Number	Review Finished	*Reviewing Contact	*Reviewing Company	Reviewing Contract	Sent For Reason	Original Planned Start Date
<input type="checkbox"/>	1 ✖		👤 Test AE1	🏢 AE Training Company			
<input type="checkbox"/>	2 ✖		👤 Test AE2	🏢 AE Training Company			

In the fields 'Original Planned Start Date', 'Original Planned Finish Date' and 'Original Planned Review Days', enter information in each field, or simply enter an Original Planned Start Date for the first reviewer. Then enter the number of days in Original Planned Review Days field for each reviewer, and click the 'Calculate Forward' button and ePM will automatically calculate and fill in the start and finish dates for the remaining reviews. Alternatively, enter the Original Planned Finish Date for the last reviewer, enter the number of days in the Original Planned Review Days field for each reviewer, and then click the 'Calculate Backward' button.

5. Select Start Review in the Workflow drop-down menu and Execute workflow. Notices are sent to the submission Manager and Source (located on the Main Page). In addition, the first reviewer will receive a notice to begin their review.

For instruction on reviewing Design Submissions, see the Quick Reference Guide titled "QRG.17 Design Submission Review".

**Note:** The following section in this Quick Reference Guide relates to completing a design submission once the reviews are completed.



# Completing Design Submissions

1. Log into ePM as a user with the Drawing Reviewer role, open the appropriate project, and then navigate to the Received Notices register. Find the notice related to completing a Design Submission, and click on it to open the document.
2. Click on the 'Reviewer Feedback' page to view the comments and recommendations made by each reviewer.
3. Click on the Design Documents page. The 'Accepted Count', 'Rejected Count' and 'Comments Count' columns show results summaries from the reviews of each design document in the submission. In the 'Change Status on Completion' field, choose 'Accepted', 'Rejected' or 'Cancelled'. What is chosen will become the workflow state for the selected design document.

Item Reference	Accepted Count	Rejected Count	Comments Count	Workflow Status	Change Status On Completion	Due D
<a href="#">A101.pdf</a>	1	0	0	In Review	Accepted	
<a href="#">A102.pdf</a>	0	1	0	In Review	Accepted	
<a href="#">A103.pdf</a>	1	0	0	In Review	<div style="border: 1px solid #ccc; padding: 2px;">                     Accepted                      Cancelled                      Void                      Rejected                 </div>	

**Note:** If an individual design document is rejected, upon completion of the submission, two things will happen:

- a. ePM automatically creates a new design document (in Draft state) with the next revision number, and sets the workflow state of the previous revision to Cancelled.
- b. ePM automatically creates a new design submission with the next revision number

### Tips

- ✓ Required fields are marked with an asterisk.

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- ✓ Use the 'Forward' button if collaboration is required from other users.

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- ✓ Click on the Activity Log tab to view the audit trail of the document.

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- ✓ Clicking the online help button provides generic help related to design submissions, NOT for the specific uses of GSA's design submission documents.

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- ✓ To explode or collapse sections in a document, click on the double headed arrow buttons:

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- ✓ Notices with yellow icons require action; blue means a document was forwarded; white means user was cc'd.

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- ✓ If the Design Documents require more attachments than what can be attached in the 'File/URL Information' section, use the 'Attachments' tab, which appears after saving the Design Document.

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- ✓ For additional help and support, contact the local ePM Regional Point of Contact

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