

ePM Quick Reference Guide #018

Design Submission Management & Completion

WHAT IS...

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.

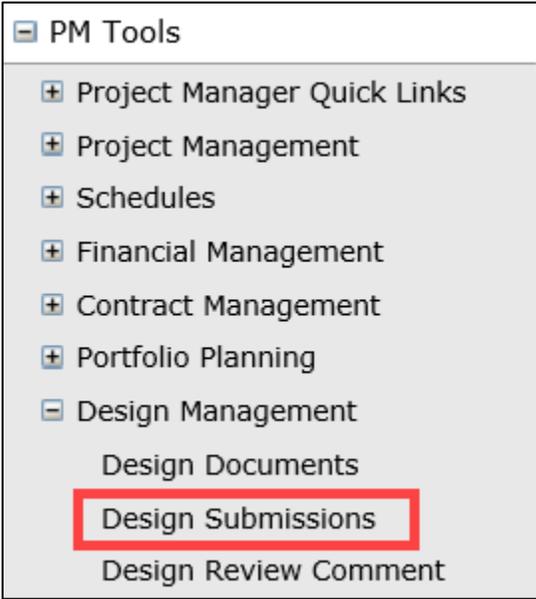
WHO USES...

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

HOW TO...

A. 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



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

DESIGN SUBMISSION: New Document Draft

Main | [Design Documents](#) | [Review Steps](#) | [Reviewer Feedback](#) | [Properties](#)

SUMMARY

Current State	Draft	Revision Number	R00
Title			
Number			

DETAILS *

Current State	Draft
Title *	<input type="text"/>
Number	<input type="text"/>
Package Name *	<input type="text"/>
Revision Number *	R00

MORE DETAILS

Review End Date	<input type="text"/>
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PARTIES

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

5. 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

DESIGN SUBMISSION: New Document Draft

Main | [Design Documents](#) | [Review Steps](#) | [Reviewer Feedback](#) | [Properties](#)

Rows: 0 Columns: 8

Add New **Add Existing** Remove Transfer ▼ Set All Items To

<input type="checkbox"/>	Item Reference	Accepted Cou	Rejected Cou	Comments Cc	Workflow Status

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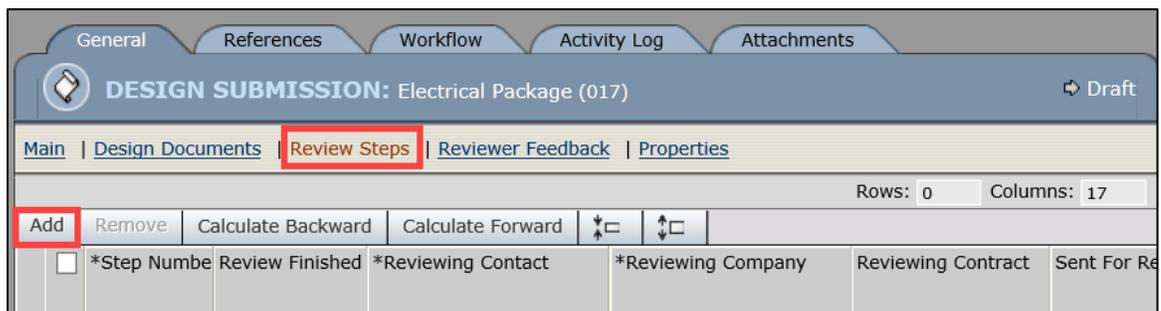
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6. Select one, multiple, or all design documents to add to the submission.
7. Select Submit from the Workflow dropdown, and then Execute. The workflow dialog box should show at least one user in the To box. If not, use the lookup button to select a 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”.

B. 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.



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.

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*Step Number	Review Finished	*Reviewing Contact	*Reviewing Company	Reviewing Contract	Sent For Reason	Original Planned Sta	Original Planned Fini	Original Planned Rev	Current Planned Star
1	✘	Susan Mills	Solution Guidance Co...		FYI : For Inf...	May 29, 2019	June 08, 2019	10	
2	✘	Alida Rodriguez	Meridian Systems Inc.		FYI : For Inf...	June 08, 2019	June 18, 2019	10	

- 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

- 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.
- Click on the ‘Reviewer Feedback’ page to view the comments and recommendations made by each reviewer.
- 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 Cou	Rejected Cou	Comments Co	Workflow Status	Change Status On Completion	Due Date	Synch with Package?
CertificateOfCompletion_Progr...	0	0	0	Accepted	Accepted		<input type="checkbox"/>
1800 F Slide show revised 111...	0	0	0	Cancelled	Cancelled		<input type="checkbox"/>
CertificateOfCompletion_Six Sl...	0	0	0	Accepted	Accepted		<input type="checkbox"/>
December 2018 Online Class S...	0	0	0	Accepted	Accepted		<input type="checkbox"/>
December 2018 Online Class S...	0	0	0	Accepted	Accepted		<input type="checkbox"/>

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

- 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.
- ePM automatically creates a new design submission with the next revision number



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REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#)

- QRG 01 – Navigating ePM
- QRG 02 – Using the ePM Address Book
- QRG.017 Design Submission Review