

ePM Quick Reference Guide #088

Creating and Viewing Design Documents

WHAT IS...

The Design Documents document type is one component of the GSA's Document Management solution. Design Documents represent floor plans, blueprints, and other illustrations that must be circulated for approval by all stakeholders before construction can begin. These documents can be circulated for review individually, but more preferably through the Design Submissions document as a package. For example, Design Documents and/or Specifications relating to a specific floor, room, or area and is categorized by specific discipline classifications such as architectural, mechanical, electrical, structural, etc. These multiple Design Documents can be packaged into a single Design Submission for review such as "Architectural – Floor Plan 1". It is most recommended to use the review process within the Design Submissions document workflow. However, it is important to upload the specific drawings and/or specifications to the individual Design Documents so when the package is under review, each individual uploaded file within the Design Document can be reviewed with all of the metadata associated with that document.

Design Documents are one of three document types that support ePM Document Management Redlining/Markup collaboration.

For more information about using Brava! redlining feature functionality, packaging Design Documents within Design Submission for review and/or creating a design document, please review the QRGs under the 'Reference' section below.

WHO USES...

- General Contractor/CMc
- Construction Manager (CMa)
- Architect/Engineer
- Project Manager
- Project Management Staff
- Contracting Officer
- Contracting Officer Staff

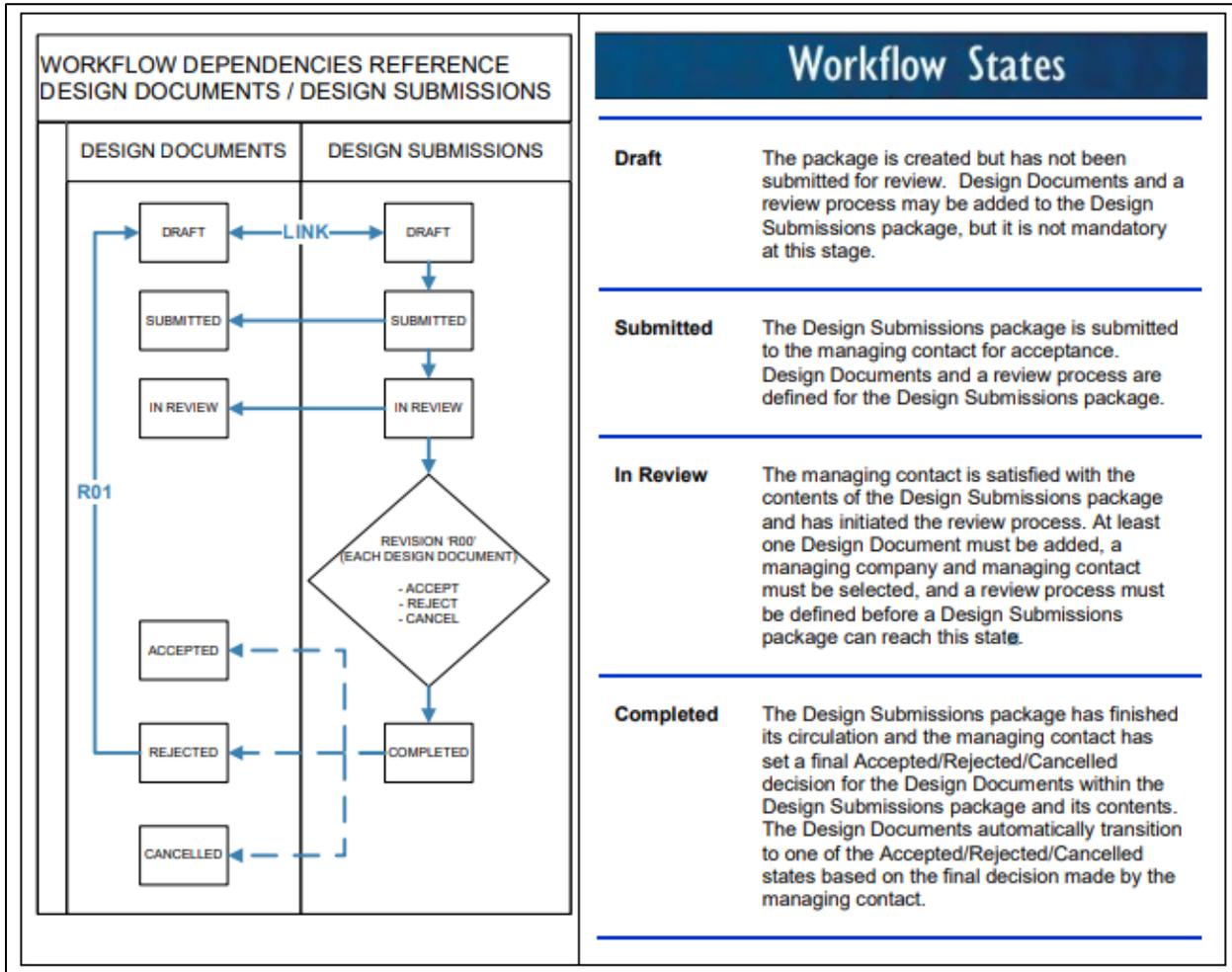
HOW TO...

A. WORKFLOW: DESIGN DOCUMENT/DESIGN SUBMISSION OVERVIEW

It is important to understand the cohesive and synchronized workflow models as it relates to Design Documents packaged with Design Submissions. To reduce the cycle time it takes to review multiple documents, Design Documents should be packaged as "Linked Added Items" to the Design Submission. As Design Submissions are processed through workflow, the Design Documents are automatically transitioned through workflow. Below is a diagram outlining the business rules as it relates to the workflow dependencies of these two document types:

ePM Quick Reference Guide #088

Creating and Viewing Design Documents



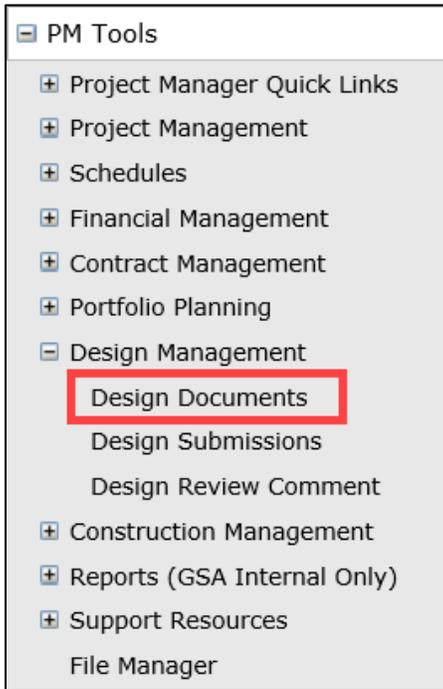
B. CREATE A DESIGN DOCUMENT

1. Log into ePM via the ePM Portal.

ePM Quick Reference Guide #088

Creating and Viewing Design Documents

- Browse to PM Tools > Design Management > Design Documents



- Select New from the toolbar to create a Design Document.
- Enter data for the required Name and Title fields on the Main page.
- In addition to the required fields, there are many other field details to consider such as Specification Section, Classifications, Discipline, etc. All of which support the register view reporting needs. Enter details for this Design Document

The image shows a screenshot of the 'Design Document' form. The 'DETAILS' section is expanded, showing fields for Current State (Draft), Number, Name, Revision Number (R00), Title, Notes, Specification Section, Design Document Classification, Actual Revision Date, Due Date, Received Date, Discipline, Cancelled Reason, and Has Change Marks (No). The 'Specification Section', 'Design Document Classification', 'Actual Revision Date', 'Due Date', 'Received Date', and 'Discipline' fields are highlighted with a red box.

NOTE: The initial default revision number is R00. Design Documents can be auto-versioned through reviews just as Submittals or Catalog Cards review cycles. It is preferable to link Design Documents to Design Submissions and submit the Design Submissions document through the review process.

ePM Quick Reference Guide #088

Creating and Viewing Design Documents

6. Enter the contacts for the Managing and Source parties. The companies will auto-populate.

NOTE: The Managing Contact has the authority to “Accept”, “Reject”, or “Cancel” the document through workflow. Also, the Managing Contact is required to be entered as a party prior to transitioning workflow to the “In Review” state.

7. Select Save from the Design Document toolbar.

C. UPLOAD FILES TO DESIGN DOCUMENTS

Design Documents contain a File/URL Information section unique to supporting uploaded files that can be optionally viewed by either a desktop viewer, or with the Brava! ePM Document Management Viewer. The Brava! ePM Document Management Viewer contains redlining markup feature functionality that isn’t supported with documents uploaded to Attachments tab of ePM documents. Follow the steps below to upload a combination of Source or Presentation files.

1. Expand the FILE/URL INFORMATION * section
2. Within the Source File/URL section, Upload the native (.jpg) formatted photo file by selecting the Upload icon under the Options label

Note: **Source files** are normally external files in their original (i.e., proprietary) formats. **Presentation Files** This is a version of the external file in common file format. For example: a drawing file could be converted to Adobe® Acrobat® PDF format and uploaded as the presentation version. A word processor file could be converted to RTF (Rich Text Format) as the presentation version

ePM Quick Reference Guide #088

Creating and Viewing Design Documents

3. The Attach File/URL – Webpage Dialog screen appears. Select the Browse button within the File Attachment option to locate document stored in a network or local drive.
4. Select the file to upload and the Open button to complete the attachment selection.
5. Select the Attach button to close the Attach File/URL – Webpage Dialog screen and complete the upload process.
6. Save the document.
7. The Source File/URL and Options section now has 4 icons in total.



NOTE: For more information about packaging Design Documents within Design Submission for review and automated workflow, please review the 'Reference' section below.

D. VIEW UPLOADED FILE/URL DOCUMENTS

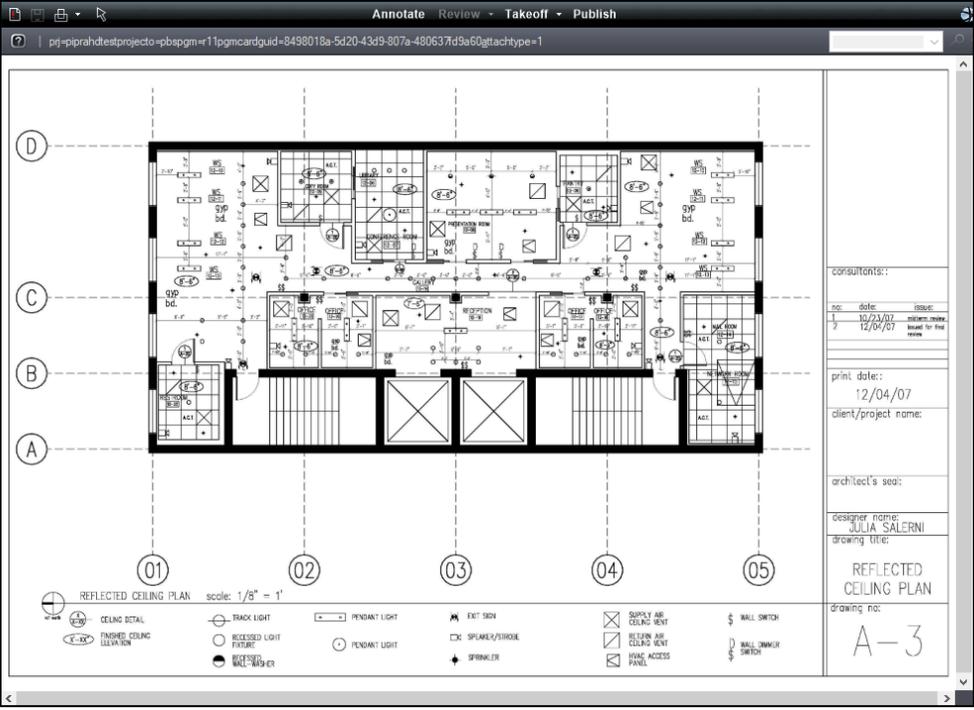
1. To open the document using a native applications installed on the desktop, left-click the uploaded file in either the Source File/URL or Presentation File/URL section.
2. To open the document using the ePM Document Management viewer, select the ePM Document Management viewer icon under **Options**.



3. The Document Management viewer appears. Apply redlines/markups by accessing the Left toolbar as shown below.

ePM Quick Reference Guide #088

Creating and Viewing Design Documents



NOTE: A user account must have a redlining Brava! license in order to use the ePM Document Management viewer. If a user cannot successfully access this viewer, contact epmsupport@gsa.gov with a license request. Additionally, there is a desktop client installation required to install on the PC when the ePM Document Management Viewer is selected for the first time. For GSA users, these will be pushed out to the desktop if a license is granted. For external users, please ensure Administrator rights on the local PC are accessible.

ePM Quick Reference Guide #088

Creating and Viewing Design Documents

REFERENCES

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

Brava! redlining feature functionality

- QRG.091 ePM View & Redlining Document Management
- QRG.092 ePM View & Redlining Toolbars Icon Features
- QRG.093 ePM View & Redlining Supported File Formats

Packaging Design Documents within Design Submission for review

- QRG.017 Design Submission Review
- QRG.018 Design Submission Management

Create a Design Document

- QRG.090 Document Management Batch Creation Wizard (via Excel document format)
- QRG.104 File Manager (drag and drop files into a Silverlight Application)