



Deconstructing the e-Builder UDR Process

May 12, 2023



Why Deconstruct the UDR Process?

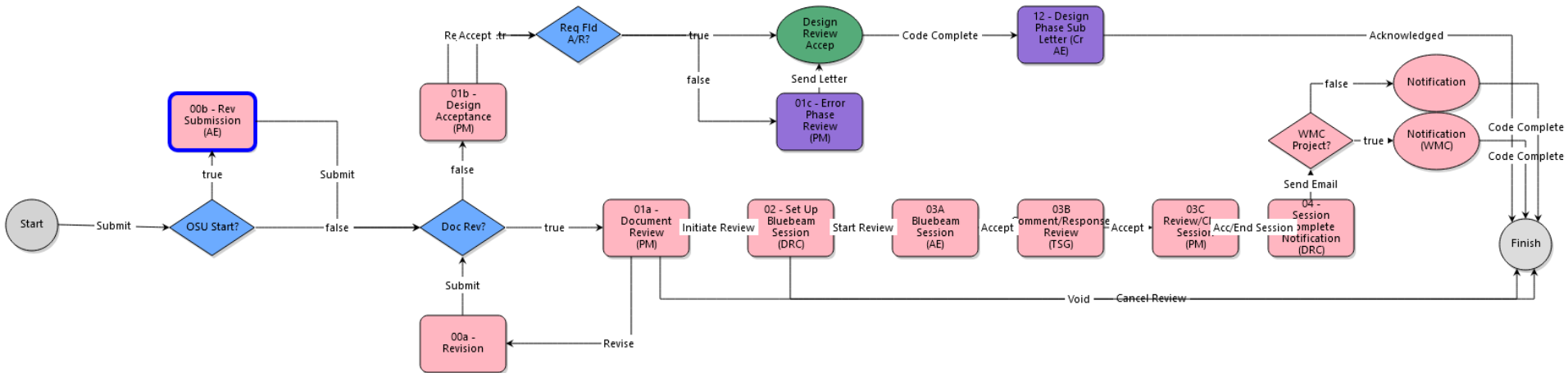
1. Many projects have multiple UDRs (SD, DD, etc.) and they often don't end with GC Bidding
2. Confusing to use "UDR" process designation for bidding and addenda
3. Difficult to track number of actual UDRs, rebids, number of addenda when all are designated "UDR"
4. Process itself is large and unwieldy (35 steps!); can get "stuck" particularly in the addendum cycle (last addendum)



Deconstructed UDR Process will become three separate e-Builder processes:

1. Stand-Alone University Design Review (UDR) Process
2. New GC Bidding (GCBid) Process
3. New Bid Addendum (BidAd) Process

Stand-Alone UDR Process



Process can be initiated by AE, DB or PM

Step 00 – Submission (AE/DB)

Start Process

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Project: * Angie Andujar - Sandbox
Project Number: EUT-280005
Process: University Design Submission Review
* Subject:

[Details](#) [Documents \(0\)](#) [Attached Processes \(0\)](#) [Attached Forms \(0\)](#) [Attached Viewpoints \(0\)](#) [PO Approval \(0\)](#)

Process Initiator

Who is starting the process?: OSU/FDC Project Manager

Design Stage

* Document Stage:
* Review Type: University Stakeholder Review (Bluebeam)
 Design Phase Submission Review

Submission Documents

Design Stage Deliverable Checklist: [Download a copy of the Checklist and provide it below as PDF.](#)
[Design Stage Deliverable Checklist](#)

[Video Guide for Design Deliverable Checklist](#)

This checklist has been completed by the AE. Refer to Exhibit C of the AE Agreement and the university's Building Design Standards Division 00 for the complete list and description of submission requirements.

or [Browse Computer](#) [Browse e-Builder](#)

* Current Design Stage Deliverable Checklist:

Use this section to identify the work disciplines included in the design documents. This will aid FOD Operations in completing a timely and thorough review.

* Facility Maintenance / Operation Disciplines:

Select all that apply

| | | | |
|---|---|--|--|
| <input type="checkbox"/> Doors, Hardware, and/or Access control | <input type="checkbox"/> Fire Alarm and/or Fire Suppression | <input type="checkbox"/> Elevators | <input type="checkbox"/> HVAC and/or Building Automation Systems (BAS) |
| <input type="checkbox"/> Plumbing | <input type="checkbox"/> Electrical and/or Generator | <input type="checkbox"/> Envelope and/or Roofing | <input type="checkbox"/> Site, Roadway, Hardscape, and/or Landscape |
| <input type="checkbox"/> Water, Sanitary, and/or Storm | <input type="checkbox"/> OCIO | <input type="checkbox"/> Other | |

Other Disciplines:

Add Design Documents for review in the "Documents" tab above



Step 00 – Submission (AE)

- Requires a process subject (*i.e., DD Submission*)
- Document Stages Dropdown Includes: Study (Final Report), POR, Program Verification, SD, DD, GMP, CD, Backcheck, Permit, Bid Set, Conformed Set
- Review type determines whether Bluebeam session or not.
 - If not, goes to PM for Design Acceptance (same as old UDR process)
- Design Stage Deliverables Checklist (no change – AE downloads .xls file, fills out and uploads as PDF)
- Facility Maintenance / Operation Disciplines (*helps determine who needs to be involved in Bluebeam session*)



Step 01 – PM Review (OSU)

- Add dates for beginning and end of Bluebeam Reviews and AE Responses
- Add stakeholders (internal – check boxes / external – add email addresses)

Step 02 – Set up Bluebeam Session (DRC)

Design Review Coordinator (OSU)

- Sets up Bluebeam session and adds documents
- Copies Bluebeam link and adds to process
- Creates Outlook Invite and sends out to all Stakeholders listed in the e-B process

Step 03A – Bluebeam Session (AE)

| | | | |
|------------------------|---|-------------------|------------|
| Project: | * Angie Andujar - Sandbox | Project Number: | EUT-280005 |
| Process Document: | UDR - 3 | Overall Due Date: | |
| | Show History Current Actors | | |
| Current Workflow Step: | 03A Bluebeam Session (AE) Show Workflow Diagram | Step Due Date: | |
| * Subject: | <input type="text" value="Test"/> | | |
| Status: | Submitted | | |

- Details
- Comments (0)
- Documents (0)
- Attached Processes (0)
- Attached Forms (0)
- Attached To (0)
- Attached Viewpoints (0)
- PO Approval (0)

Instructions

During this step the review is in progress. Stakeholders are commenting and the A/E is responding.

Once the A/E has completed the review and responded to comments, the process will be sent for TSG review. Once TSG accepts the responses, the process will go to the PM to accept and end the Bluebeam session.

The Design Review Coordinator will finalize the session to check the reviewed documents back into e-Builder. These documents will be updated in the Documents tab and within the Document structure.

Review and Response Duration

| | | | |
|----------------------------------|------------|--------------------------------|------------|
| Stakeholder Review Period Start: | 05.01.2023 | Stakeholder Review Period End: | 05.02.2023 |
| A/E Response Period Start: | 05.03.2023 | A/E Response Period End: | 05.04.2023 |

Bluebeam Revu Session Link

| |
|---|
| Bluebeam Revu Session Link: ? |
|---|

Step 03A – Bluebeam Session (AE)

- AE is notified and gets session number, etc.
- Process **stays in this step** until review is completed and AE has completed their responses
 - AE/DB should not move this step forward until after Stakeholder review end date and all comments are addressed
- Once AE finishes responses and accepts, process moves to new TSG step
- Reminder goes to PM if process stays in this step for more than 21 days

Step 03B – Comment/Response Review (TSG)

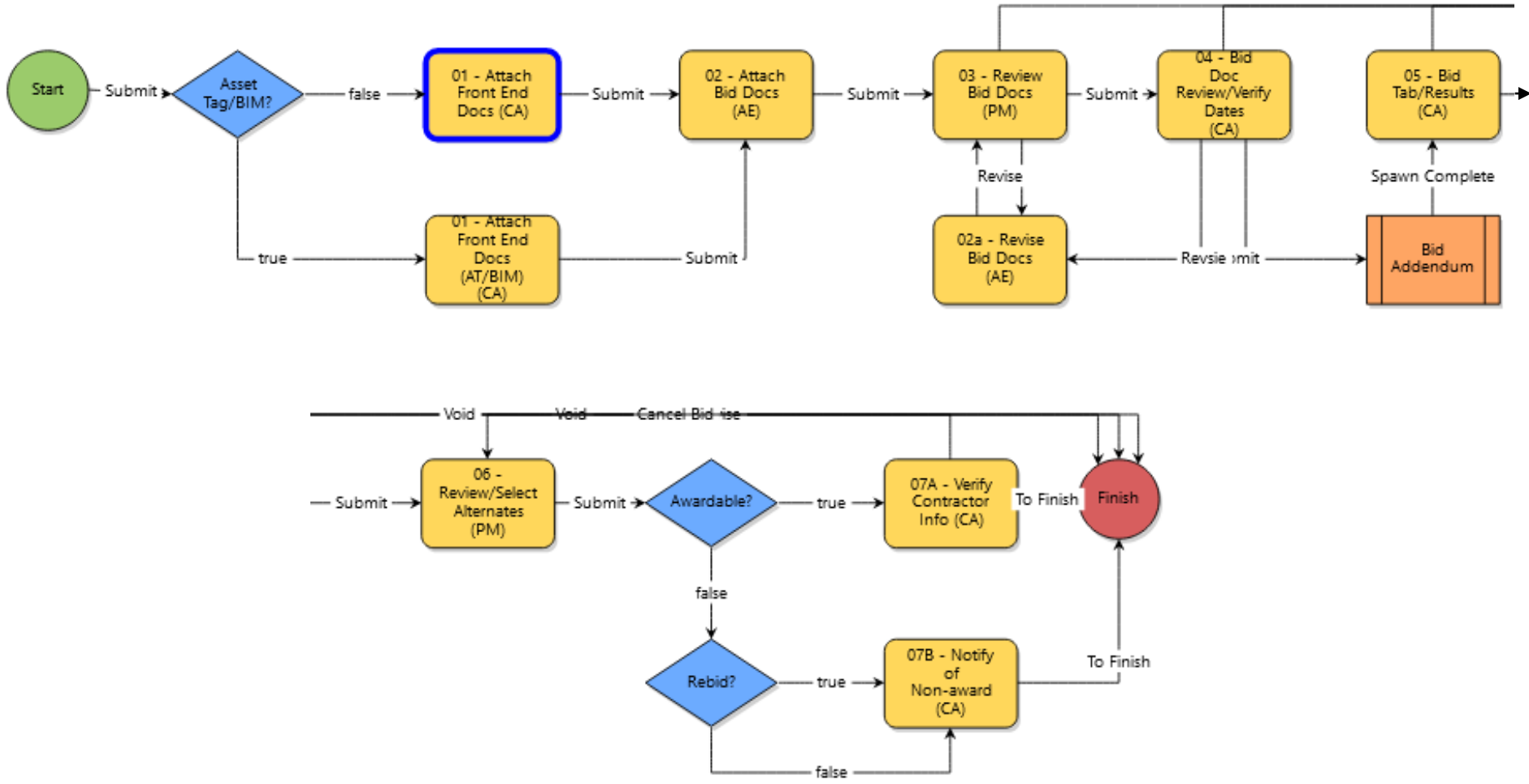
- New Step – formalizes TSG review of comments/responses
- Allows TSG to coordinate with AE and PM
- PM will get notification if process stays in step longer than 3 days

Step 03C – Review/Close Session (PM)

- PM review of both AE and TSG comments/responses
- Moving step forward will alert DRC to finish Bluebeam session

Step 04 –Session Complete Notification (DRC)

- Finish Bluebeam session and notify – final step of UDR process.



Start Step (AE, PM or CA)

GC Bidding (GCBid)

[Instructions](#)

Start Process

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| | |
|-----------------|---------------------------|
| Project: | * Angie Andujar - Sandbox |
| Project Number: | EUT-280005 |
| Process: | GC Bidding |
| * Subject: | <input type="text"/> |

Details | [Documents \(0\)](#) | [Attached Processes \(0\)](#) | [Attached Forms \(0\)](#) | [Attached Viewpoints \(0\)](#) | [Rec. of Award \(0\)](#) | [GC Bidding \(0\)](#) | [PO Approval \(0\)](#)

Rebid

* Is this a rebid?: Yes
 No

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[Cancel](#)

Step 01 (New Step) – Attach Front End Docs (CA)

- **NEW!** Previously done via email later in process
- CA will drop a zip file into the process containing current OSU Front End Documents (Division 00 and 01), including PW rates and asset tagging / BIM sections, if required for project
- Puts in process as record
- AE to use the documents attached to the process for their Project Manual *(please DO NOT use OFCC documents or versions from previous projects)*

Step 02 – Attach Bid Docs (AE)

| | | |
|------------------------|---|----------------|
| Current Workflow Step: | 02 - Attach Bid Docs (AE) Show Workflow Diagram | Step Due Date: |
| * Subject: | <input type="text" value="Test GC Bidding"/> | |
| Status: | Submitted | |


| | | | | | | | | | |
|---------|--------------|---------------|------------------------|--------------------|-----------------|-------------------------|-------------------|----------------|-----------------|
| Details | Comments (0) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0) | Attached Viewpoints (0) | Rec. of Award (0) | GC Bidding (0) | PO Approval (0) |
|---------|--------------|---------------|------------------------|--------------------|-----------------|-------------------------|-------------------|----------------|-----------------|

Rebid

Is this a rebid?:

Front End Documents





Below is a zip file with the Front End Documents. If Asset Tagging or BIM are required, those documents will be included below.

Front End Documents (zip file):  **BLANK DOC.docx** (version 3)
[Properties](#) | [Download \(11.9KB\)](#) | [Redline](#)

Asset Tagging Required: 01 92 23 Asset Tagging:

BIM Required: 01 11 10 BIM Coordination:

Bid Documents

| | | |
|--|--|--|
| * Solicitation (.doc):  | <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/> | * Advertisement Date (Requested): <input type="text"/>  |
| * Bid Form (.doc):  | <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/> | * Bid Date: <input type="text"/>  |
| * Project Manual (PDF): | <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/> | * Bid Time: <input type="text"/> |

Drawings

Please attach the drawings as a single file. If you have more files to include, please add them in the Documents tab.

* Design Drawings: or

Step 02 – Attach Bid Docs (AE)

- Use the documents attached to process so you have most up-to-date OSU version
- Upload Solicitation and Bid Form as **separate MSWord** files in designated fields
- Upload one combined PDF for Project Manual and one for Drawings in designated fields (*additional documents may be attached in Documents tab*)
- Remember, advertisement must be submitted by the OSU CA to the newspaper by 11:00 AM at least 3 business days prior to advertisement date (*i.e., ad submitted Thursday by 11 AM will run the following Tuesday, after 11 AM will run the following Wednesday; no exceptions*).
- Ads must run weekly for 3 consecutive weeks; last publication date must be at least 8 days prior to bid opening

Step 03 – Review Bid Docs (PM)

Step 04 – Bid Doc Review/Verify Dates (CA)

- CA will update and re-attach PW rates if expired and revise process back to AE
- CA verifies first Advertisement Date and Bid Date/Time and adjusts if needed
- Posts bid docs on Bid Express
- Once CA moves process forward, first Bid Addendum is spawned (*see Bid Addendum process later in presentation*)

Step 05 – Bid Tab/Results (CA)

- Stays in this step until bid opening
- CA download bids from BidExpress
- Attaches bid tab to process
- Notifies Plan Room of results

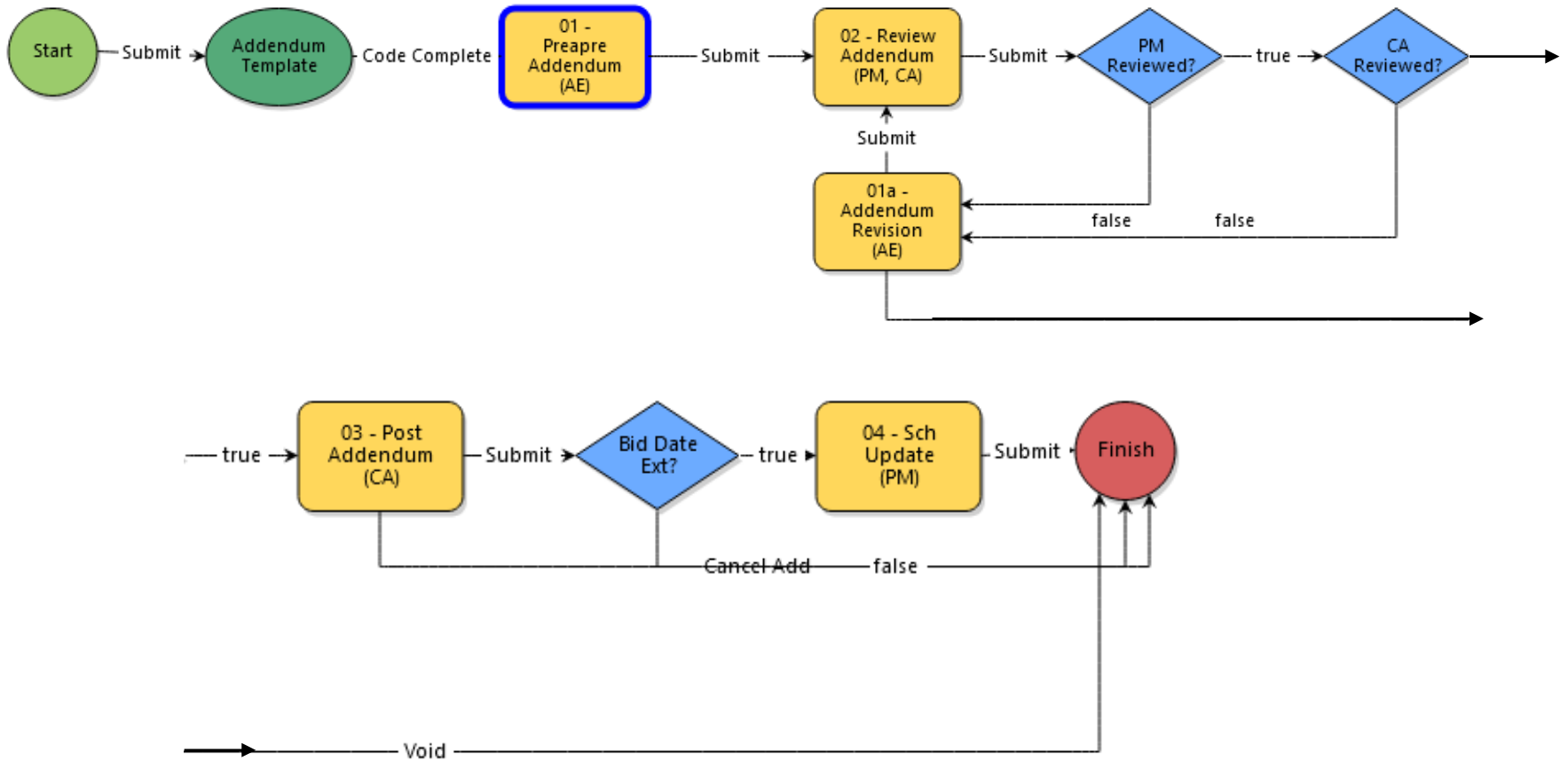
Step 06 – Review/Select Alternates (PM)

- Confirms bids are Awardable (*within 10% of estimate, including accepted alternates*)
- Determines if project will be rebid if not awardable
- Enters selected bidder, total award amount, including accepted alternates, and indicate which alternates accepted, if any

Step 07 – Verify Contractor Info (CA)

- Verifies that selected contractor is set up in OSU system
- Confirms contract amount
- **Spawns ROA process which goes to AE to prepare letter**
- FINISH PROCESS

Bid Addendum (BidAd) Process Workflow



Bid Addendum Process

- Addendum #1 is auto-spawned from Step 04 of GC Bidding Process. Remember that every OSU GC bid project requires at least one addendum for distribution of Pre-Bid Meeting Minutes
- After Addendum #1 issued, AE, PM or CA can start subsequent Bid Addenda
- Each addendum will have its own BidAd process (easy to track how many addenda issued)
- Last addendum must be posted to Bid Express 72 hours prior to bid date or bid date must be extended
- Please upload addenda by at least 5:00 PM on the day prior to date of expected issuance

Start Step (AE, PM or CA)

Bid Addendum (BidAd)

Start Process

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| | |
|-----------------|---------------------------|
| Project: | * Angie Andujar - Sandbox |
| Project Number: | EUT-280005 |
| Process: | Bid Addendum |
| * Subject: | <input type="text"/> |

[Details](#) [Documents \(0\)](#) [Attached Processes \(0\)](#) [Attached Forms \(0\)](#) [Attached Viewpoints \(0\)](#)

Bid Schedule

If this Addendum does not change the Bid Date and Bid Time, enter the current information. If there will be a change, enter the new Bid Date and Bid Time.

| | | |
|-------------|----------------------|---|
| * Bid Date: | <input type="text"/> |  |
| * Bid Time: | <input type="text"/> | |

[Print](#) [Check Spelling](#) [Submit](#) [Save Draft](#) [Cancel](#)

Start Step (AE, PM or CA)

- Start step when process initiated by AE, PM or CA (after Addendum 1 is issued)
- Subject should be Addendum number (Addendum 2, Addendum 3, etc.)
- Bid Schedule – added to make sure everyone is aware if bid date needs to be extended; if not changing, enter current bid date/time


Step 01 – Prepare Addendum (AE)

| | | |
|------------------------|--|----------------|
| Current Workflow Step: | 01 - Preapre Addendum (AE) Show Workflow Diagram | Step Due Date: |
| * Subject: | <input type="text" value="Test GC Bidding (GCBid - 5)"/> | |
| Status: | Submitted | |

Details | Comments (0) | Documents (1) | Attached Processes (1) | Attached Forms (0) | Attached To (0) | Attached Viewpoints (0)


Addendum

Please provide the Addendum in the data field and not in the Documents tab.

| | |
|----------------------|--|
| Addendum Counter: | 3 |
| Addendum Template: |  BidAd-00003 - Test GC Bidding (GCBid - 5).doc (version 1) Properties Download (69.6KB) Redline Remove |
| * Addendum Document: | <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/> |

Bid Schedule

If the Bid Date and/or Bid Time have changed, please confirm the correct dates are entered below. Please explain any changes in the field provided.

| | |
|-------------------------------|---|
| * Bid Date/Bid Time Changed?: | <input type="radio"/> Yes <input type="radio"/> No |
| * Bid Date: | <input type="text" value="06.09.2023"/>  |
| * Bid Time: | <input type="text" value="2:00 PM"/> |

| | |
|---------------------------------|---|
| Bid Date/Bid Time Change Notes: | <input type="text" value="Please explain the reason for the Bid Date and/or Bid Time change."/> |
|---------------------------------|---|

Step 01 – Prepare Addendum (AE)

- AE downloads Addendum Template from process and enters all data (*please use template attached to process*)
- AE uploads completed Addendum document into process (combined PDF)
- Indicate if extending bid date/time:
 - If changing, enter new bid date/time
 - If not changing, enter current bid date/time
 - Be sure to discuss any changes to bid date/time with OSU PM in advance

Step 02 – Review Addendum (PM & CA)

- Collaborative Review (OSU PM & CA) If either marks “Revise” goes back to AE for revisions (**AE - be sure to look at comments**)

Step 03 – Post Addendum (CA)

- CA posts Addendum to Bid Express
- If Bid Date is changed, CA to **update Bid Express, GC Bidding Process, and Vendor Resources Bid Board**
- Once CA submits, goes to Finish step unless date changed
 - *If date changed, process goes to Step 04 for PM Schedule update*
- Once BidAd process is finished, AE, PM or CA must initiate new BidAd process for the next Addendum (*if needed*)



Rollout of New Processes

- **PLAN TO ROLL OUT NEW PROCESSES ON FRIDAY, 5/12/2023**
- A/E steps don't change significantly, just in separate processes.



Rollout of New Processes – Projects Currently Using Old UDR Process

- **If GC Bidding hasn't started yet, OSU PM can opt to use the new GC Bid and Bid Ad processes – finish Design Review in UDR then go to Finish Step and initiate GC Bidding process. **Please coordinate with OSU PM to determine how to proceed.****
- Projects that are currently using old UDR process that are **in the bidding/addendum steps** will continue in the process they started with (UDR) through the entire bidding process.



QUESTIONS?

Please contact your OSU PM or project CA

If you are having specific problems with any of the processes,
please submit an e-Builder help ticket at:

<https://go.osu.edu/ebuilderhelp>

**Thank you for helping FDC
in our efforts to improve our processes!!**