ODOT ProjectWise

Milestone Process

Project Initiation to PSnE

Note 1:
ProjectWise sets are a way to allow others access to files in multiple discipline folders without having to navigate to multiple folders. When placed in a set, links to the original documents within their discipline folder allows access to these files without needing to move them to a new location. This avoids duplication of files, and allows files to remain with the appropriate discipline throughout the lifecycle of a project. Allows for the final tracking of legally signed documents that are part of the bids and contract. This workflow attempts to minimizes the number of sets passed on and the number of times a files needs to be added to set.

Note 2:
For the purposes of this document, PE Lead consists of Transportation Project Manager or Resident Engineer – Consultant, assigned to project.
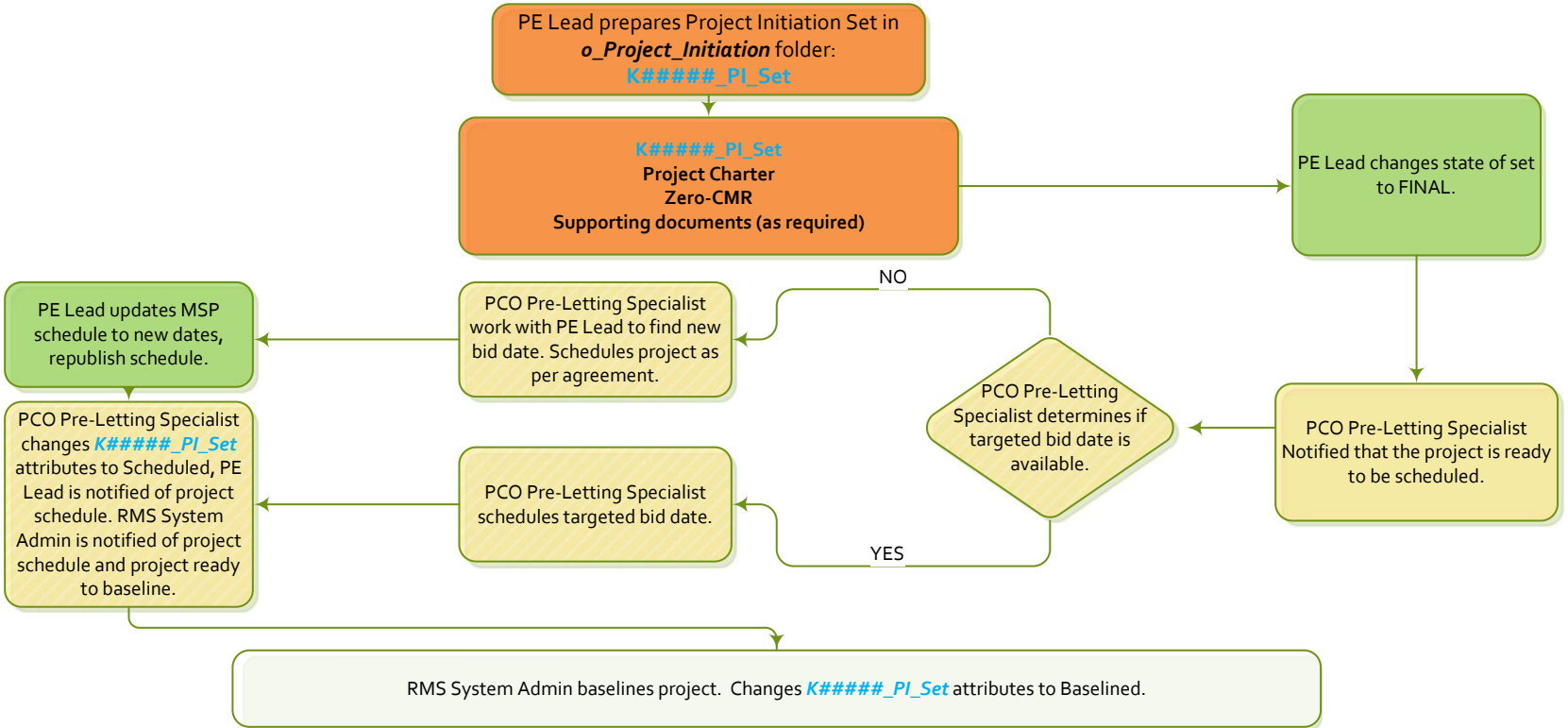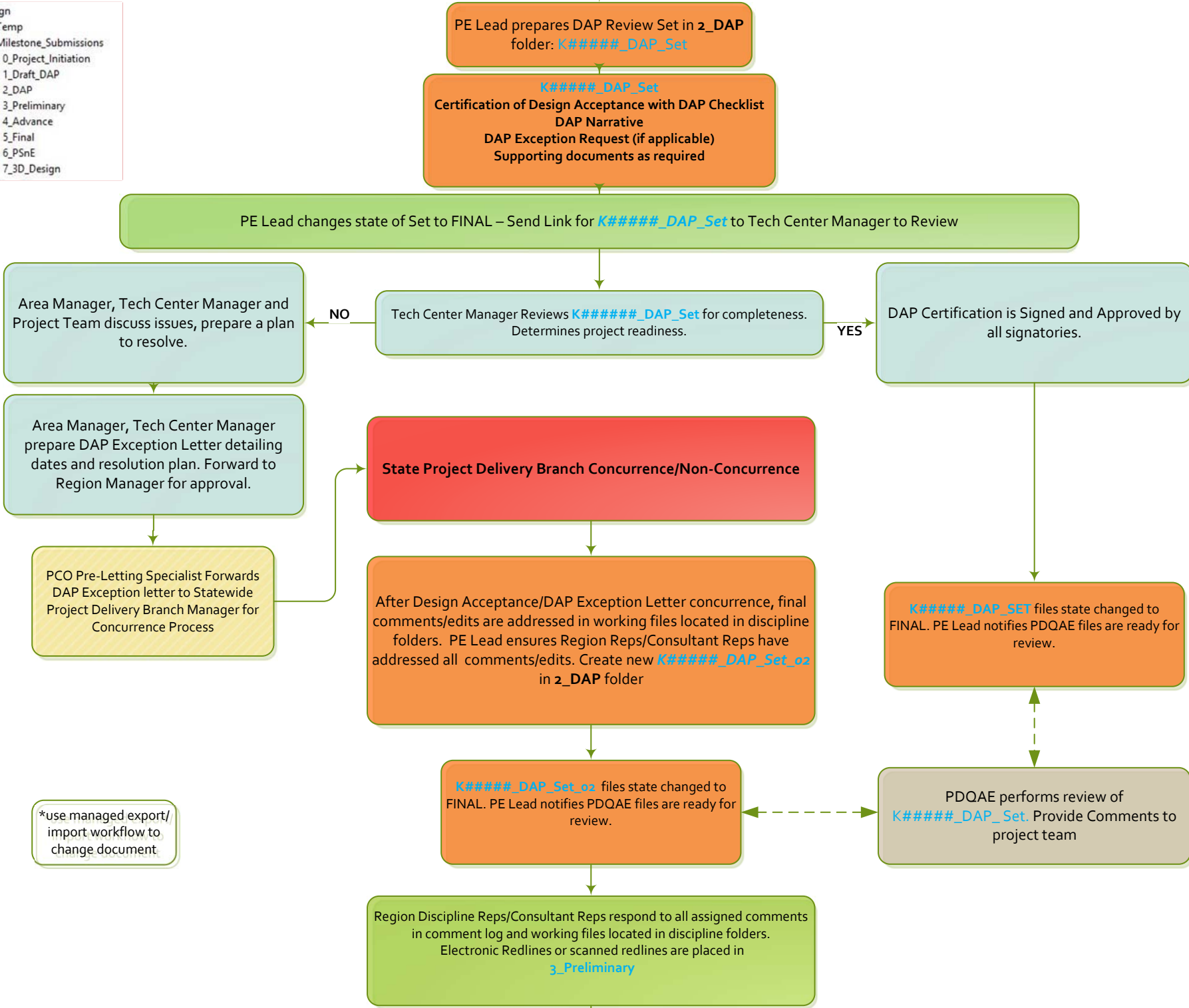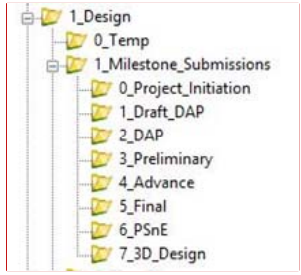
Legend

- Orange Boxes correspond to PE Lead tasks
- Green Boxes correspond to Region Rep tasks
- Blue Boxes correspond to Area Manager and Tech Center Manager tasks
- Purple Boxes correspond with Region Specification Writer tasks
- Tan Boxes correspond with Project Delivery Quality Assurance Engineer (PDQAE) tasks

Blue Text indicates PW sets
Bold Black Text indicates document names

PROJECT INITIATION PHASE

PE Lead prepares Project Initiation Set in *o_Project_Initiation* folder: *K#####_PI_Set*

K#####_PI_Set
Project Charter
Zero-CMR
Supporting documents (as required)

PE Lead changes state of set to FINAL.

PCO Pre-Letting Specialist Notified that the project is ready to be scheduled.

PCO Pre-Letting Specialist determines if targeted bid date is available.

NO → PCO Pre-Letting Specialist work with PE Lead to find new bid date. Schedules project as per agreement. → PE Lead updates MSP schedule to new dates, republish schedule.

YES → PCO Pre-Letting Specialist schedules targeted bid date. → PCO Pre-Letting Specialist changes *K#####_PI_Set* attributes to Scheduled, PE Lead is notified of project schedule. RMS System Admin is notified of project schedule and project ready to baseline.

RMS System Admin baselines project. Changes *K#####_PI_Set* attributes to Baselined.

DRAFT DESIGN ACCEPTANCE PHASE

- 1_Design
  - 0_Temp
  - 1_Milestone_Submissions
    - 0_Project_Initiation
    - 1_Draft_DAP
    - 2_DAP
    - 3_Preliminary
    - 4_Advance
    - 5_Final
    - 6_PSnE
    - 7_3D_Design

PE Lead prepares DAP Review Set in **2_DAP** folder: *K#####_DAP_Set*

K#####_DAP_Set
Certification of Design Acceptance with DAP Checklist
DAP Narrative
DAP Exception Request (if applicable)
Supporting documents as required

PE Lead changes state of Set to FINAL – Send Link for *K#####_DAP_Set* to Tech Center Manager to Review

Tech Center Manager Reviews *K######_DAP_Set* for completeness. Determines project readiness.

NO → Area Manager, Tech Center Manager and Project Team discuss issues, prepare a plan to resolve.

Area Manager, Tech Center Manager prepare DAP Exception Letter detailing dates and resolution plan. Forward to Region Manager for approval.

PCO Pre-Letting Specialist Forwards DAP Exception letter to Statewide Project Delivery Branch Manager for Concurrence Process

YES → DAP Certification is Signed and Approved by all signatories.

K#####_DAP_SET files state changed to FINAL. PE Lead notifies PDQAE files are ready for review.

State Project Delivery Branch Concurrence/Non-Concurrence

After Design Acceptance/DAP Exception Letter concurrence, final comments/edits are addressed in working files located in discipline folders. PE Lead ensures Region Reps/Consultant Reps have addressed all comments/edits. Create new *K#####_DAP_Set_o2* in **2_DAP** folder

K#####_DAP_Set_o2 files state changed to FINAL. PE Lead notifies PDQAE files are ready for review.

PDQAE performs review of *K#####_DAP_Set.* Provide Comments to project team

*use managed export/import workflow to change document

Region Discipline Reps/Consultant Reps respond to all assigned comments in comment log and working files located in discipline folders. Electronic Redlines or scanned redlines are placed in *3_Preliminary*

Preliminary Design Phase

ODOT ProjectWise

Legend

Orange Boxes correspond to PE Lead tasks

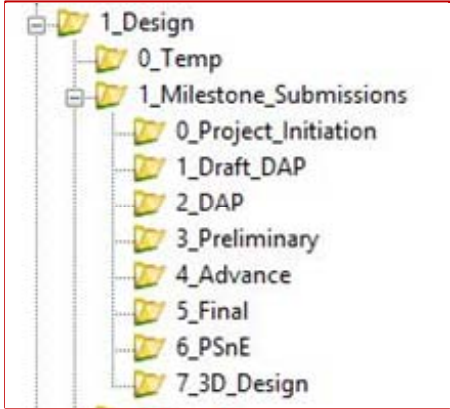Green Boxes correspond to Region Rep tasks

Blue Boxes correspond to Area Manager and Tech Center Manager tasks

Purple Boxes correspond with Region Specification Writer tasks

Tan Boxes correspond with Project Delivery Quality Assurance Engineer tasks

Preliminary Design Phase

Bold Blue text:
indicates PW sets
Bold black text:
indicates document names
Bold Purple text:
indicates added documents

- 1_Design
  - 0_Temp
  - 1_Milestone_Submissions
    - 0_Project_Initiation
    - 1_Draft_DAP
    - 2_DAP
    - 3_Preliminary
    - 4_Advance
    - 5_Final
    - 6_PSnE
    - 7_3D_Design

*use managed export/ import workflow to change document

PE Lead adds pdf of deliverables to **3_Preliminary** folder. Add to *K####_Prelim_Set.* Working documents remain in discipline folders.

PE Lead creates distribution letter. Send to Project Team with set link.

Project Team performs review of *K#####_Prelim_Set.*

Region Discipline Reps/Consultant Reps respond to all assigned comments in comment log and working files located in discipline folders. Electronic Redlines or scanned redlines are placed in **3_Preliminary**

Preliminary Plans Meeting

Region Discipline Reps/Consultant Reps respond to all assigned comments in comment log and working files located in discipline folders.

K#####_Preliminary_SET state changed to FINAL.

*final status on sets secures the files from being removed from the set or deleted.

Advance Plans Phase

ODOT ProjectWise

Milestone Process

Project Initiation to PSnE

Legend

Orange Boxes correspond to PE Lead tasks

Green Boxes correspond to Region Rep tasks

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Purple Boxes correspond with Region Specification Writer tasks

Tan Boxes correspond with Project Delivery Quality Assurance Engineer tasks
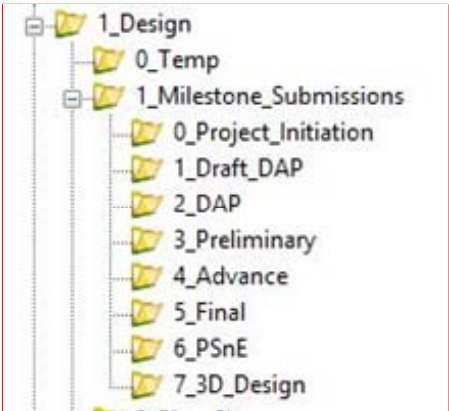

Advance Plans Phase

PE Lead (PL, CPM, LAL or LCE) Pdf of deliverables placed in **4_Advance** folder. Add to **K#####_Advance_Set**.

Specifications and PreCon Estimate are compiled. Construction Schedule is created. Estimate (no prices) is created. All added to **4_Advance** folder. Add to **K#####_Advance_Set**.

K#####_Advance_Set
Narrative
Plans (all sheets in one pdf)
TMZ
Decision Tree
Estimate (no prices)
Specifications
Construction Schedule
Other Project-specific documents as required
Comment Log

All working documents remain in discipline folders

PE Lead creates distribution letter. Send to Project Team/Reviewers with **K#####_Advance_Set** link.

```
1_Design
  0_Temp
  1_Milestone_Submissions
    0_Project_Initiation
    1_Draft_DAP
    2_DAP
    3_Preliminary
    4_Advance
    5_Final
    6_PSnE
    7_3D_Design
```

Plans-in-Hand Workshop

Reviewers place comments into Comment Log. Electronic Redlines or scanned redlines are placed in **4_Advance**

Region Discipline Reps/Consultant Reps respond to all assigned comments in comment log.

Future "workflow" change state on documents – Advance documents set to Final Status by PE Lead

Deliverable Documents set to "Final" Status by PE Lead

Final Plans Phase

ODOT ProjectWise

Milestone Process

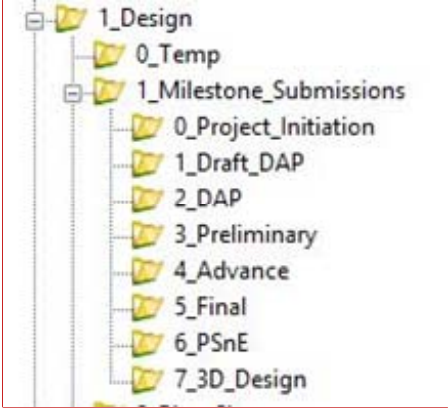**Project Initiation to PSnE**

Legend

Orange Boxes correspond to PE Lead tasks

Green Boxes correspond to Region Rep tasks

Blue Boxes correspond to Area Manager and Tech Center Manager tasks

Purple Boxes correspond with Region Specification Writer tasks

Tan Boxes correspond with Project Delivery Quality Assurance Engineer tasks

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Final Plans Phase

Folder tree:
- 1_Design
  - 0_Temp
  - 1_Milestone_Submissions
    - 0_Project_Initiation
    - 1_Draft_DAP
    - 2_DAP
    - 3_Preliminary
    - 4_Advance
    - 5_Final
    - 6_PSnE
    - 7_3D_Design

PE Lead (PL, CPM, LAL, or LCE) Pdf of deliverables placed in **5_Final** folder. Add to **K#####_Final_Set**.

Specifications and PreCon Estimate are updated. Construction Schedule is adjusted. Estimate (no prices) is updated. All added to **5_Final** folder. Add to **K#####_Final_Set**

K#####_Final_Set
Narrative
Plans (all sheets in one pdf)
TMZ
Decision Tree
Estimate (no prices)
Specifications
Construction Schedule
Other Project-Specific Documents as required
Original Comment Log

PE Lead creates distribution letter. Send to Project Team/Reviewers with set link.

Reviewers place comments into Comment Log. Electronic Redlines or scanned redlines are placed in **5_Final** folder

Region Discipline Reps/Consultant Reps respond to all assigned comments in comment log.

Future "workflow" change state on documents – Final documents set to Final Status by PE Lead

Deliverable Documents set to "Final" Status by PE Lead

PSnE