ProjectWise 7_quality folder FAQ's *last updated 10/19/2022 by K. Gladhill*

Why have we implemented the 7_quality folder in ProjectWise for STIP projects?

We want to be able to easily find quality records for a project from one location, without impacting where disciplines store their quality documents in ProjectWise.

How was it decided to do this?

A ProjectWise quality sub-team that met over several months agreed to:

a) Leave quality documents in the folders they have been, no change for discipline folks to be able to find them.
b) Create sets for each discipline in a 7_quality folder, with the quality documents added to the set.

What has changed?

Disciplines are expected to create a set in the 7_quality folder, and put links to all the quality documents from their discipline in that folder – you just drag documents from their regular folder into the set. Dragging creates the link, while leaving the document in its original location.

Does this involve moving files?

No. Documents will continue to be stored in the same discipline folders they have been stored in.

Is this requiring new documents to be created?

No, only the sets.

How do you create a set?

In the 7_quality folder, <right click> in a blank space, select Set/New.
In the "Create a Document Set" dialog box name the set and add the description.
Navigate to folder with files you want to add to the set; select and drag the file(s) into the set.

Who is expected to create the sets?

The sets are expected to be created by the disciplines providing the deliverables.
Once a set has been created, documents can be added as the project progresses.
When there are sub-disciplines, sets are created as appropriate, see the set naming conventions from ProjectWise.

- Environmental sub-disciplines have separate set naming codes.
- Traffic and utilities have decided to have one set that all the sub-disciplines use.

Are sets the only thing that goes in the 7_quality folder?

There may be some quality documents that get stored directly in the 7_quality folder, such as a project level QA review.

Does the consultant quality plan go in the 7_quality folder?

Consultant quality plans that are approved for a price agreement are not project specific, so don't need to be stored in ProjectWise unless the project manager chooses to do so. Approved consultant quality plans will be made available internally on the ODOT intranet, and in an electronic archive in FileNet.

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Where is it documented to do this?

1) The "ODOT Consultant Quality Plan Guidance", requires consultants to "Indicate how you will assure compliance with ODOT's ProjectWise protocols for document naming, storage, and creating sets in the Quality folder for discipline quality documents." That guidance is being used for consultant quality plans going forward, including with the new full service price agreement.

2) The "Discipline Quality Plan Template" Section 4.5 includes language regarding use of the quality sets in the 7_quality folder:
"Quality records in ProjectWise are stored in their regular discipline or milestone directory, with either "QC" or "QA" in the document title or description, to facilitate searches for quality documentation. A set of quality files from each discipline or milestone folder in ProjectWise will be created in the ProjectWise "7_quality" folder. The set naming convention will use the discipline code (TD) as follows: *TD_*K#####_##*"*.
As statewide discipline quality plans get updated over the next year, they will be adding this language.

3) SSOW language updates to reflect use of the 7_quality folder are requested.

How are projects affected?

When are we expected to start using this folder?
When one or more of the following is true:
- Project is a new WOC that is just being executed and calls out this requirement.
- Any project using a consultant quality plan that is approved under the guidance (since February 2022).
- The ODOT statewide discipline quality plan includes this requirement.

Does this new requirement mean I have to amend the contract to add a Task and supporting funding?
No contract amendment or additional funding is required for existing WOC's.

Are these sets considered a deliverable?
No, this is just about how project documents are put into ProjectWise.

What do I tell consultants who are in the midst of design they need to do?
The 7_quality folder is optional on existing projects; it does not have to be used.
The 7_quality folder exists so that it's available as the criteria to create sets are met.
Any active STIP projects are welcome to start creating sets in the 7_quality folder.

Further work

In the months following this implementation, we will be asking the naming committee leads for each discipline to review quality document names and descriptions in place for their discipline, and consider whether there are any updates or additions they would like to make in the ProjectWise_Document_Naming_Tool_Search.xlsx spreadsheet.

If you have any further questions or comments, please contact Kristie Gladhill, kristie.w.gladhill@odot.oregon.gov.