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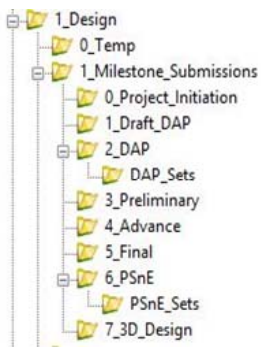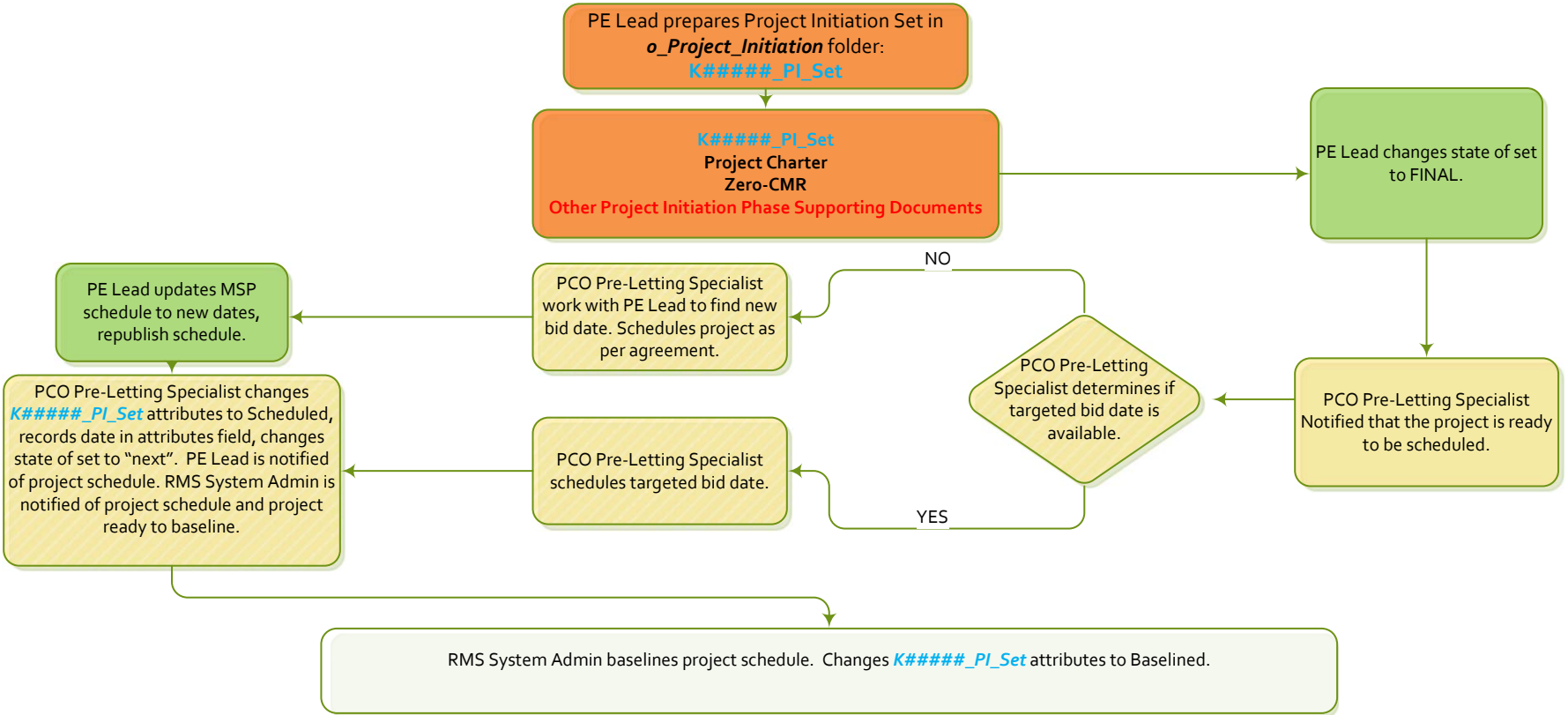
Note 2:
For the purposes of this document, PE Lead consists of Transportation Project Manager or Resident Engineer – Consultant, assigned to project.

Blue Text indicates PW sets
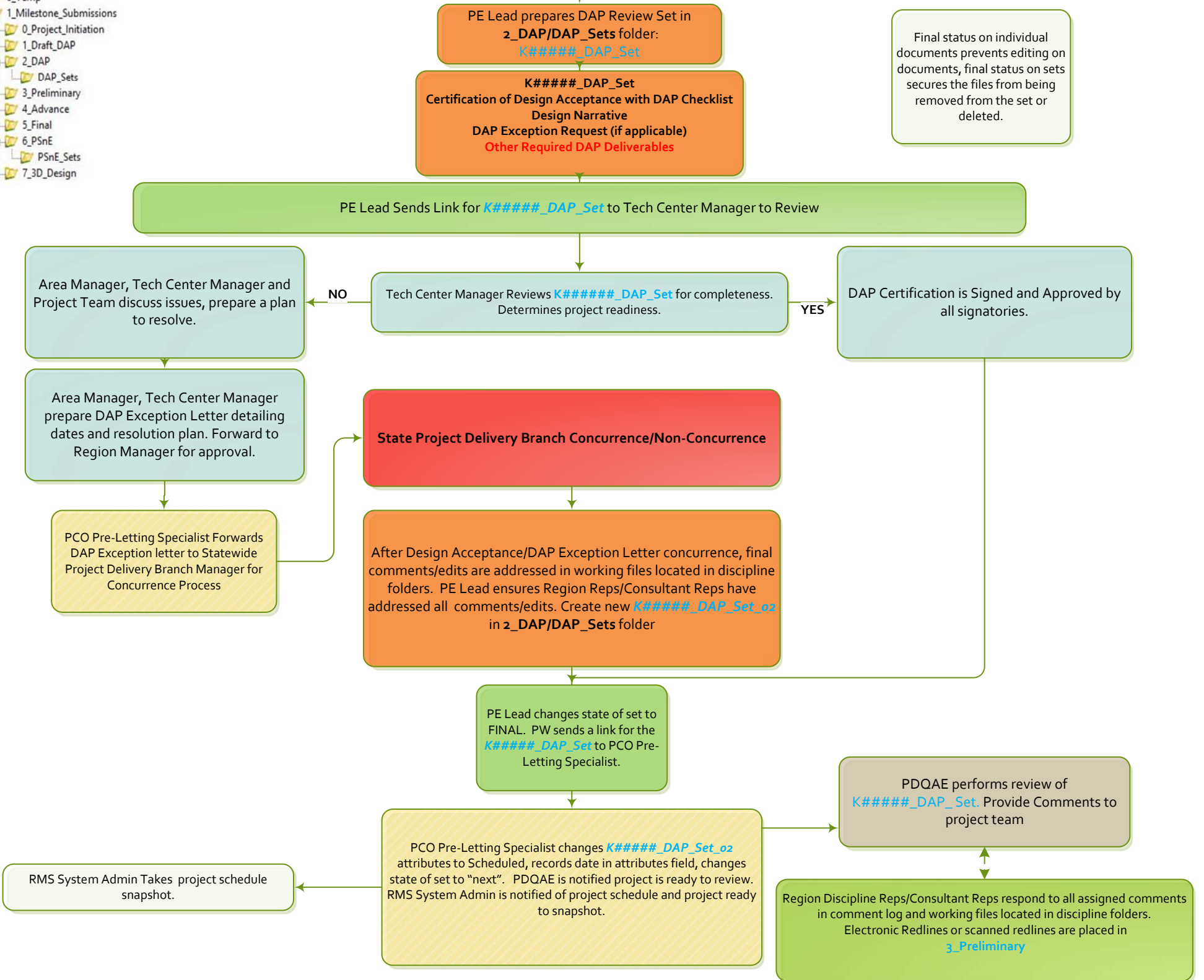**Bold Black Text** indicates document names

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
- Tan Boxes correspond with Project Delivery Quality Assurance Engineer (PDQAE) tasks
- Yellow Boxes correspond to PCO Pre-Letting Specialist

PROJECT INITIATION PHASE

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

K#####_PI_Set
Project Charter
Zero-CMR
Other Project Initiation Phase Supporting Documents

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.

YES → PCO Pre-Letting Specialist schedules targeted bid date.

PE Lead updates MSP schedule to new dates, republish schedule.

PCO Pre-Letting Specialist changes *K#####_PI_Set* attributes to Scheduled, records date in attributes field, changes state of set to "next". 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 schedule. Changes *K#####_PI_Set* attributes to Baselined.

DESIGN ACCEPTANCE PHASE

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

K#####_DAP_Set
Certification of Design Acceptance with DAP Checklist
Design Narrative
DAP Exception Request (if applicable)
Other Required DAP Deliverables

Final status on individual documents prevents editing on documents, final status on sets secures the files from being removed from the set or deleted.

PE Lead Sends 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.

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

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

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/DAP_Sets** folder

PE Lead changes state of set to FINAL. PW sends a link for the *K#####_DAP_Set* to PCO Pre-Letting Specialist.

PCO Pre-Letting Specialist changes *K#####_DAP_Set_o2* attributes to Scheduled, records date in attributes field, changes state of set to "next". PDQAE is notified project is ready to review. RMS System Admin is notified of project schedule and project ready to snapshot.

RMS System Admin Takes project schedule snapshot.

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

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*

Folder tree (left sidebar)
- 1_Design
  - 0_Temp
  - 1_Milestone_Submissions
    - 0_Project_Initiation
    - 1_Draft_DAP
    - 2_DAP
      - DAP_Sets
    - 3_Preliminary
    - 4_Advance
    - 5_Final
    - 6_PSnE
      - PSnE_Sets
    - 7_3D_Design

Milestone Process

PSnE

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

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

Tan Boxes correspond with Project Delivery Quality Assurance Engineer tasks

Yellow Boxes correspond to PCO Pre-Letting Specialist

K#####_PSnE_Set
PSnE Set Created in Region
Saved to **6_PSnE/PSnE_Sets** Folder

PSnE Submittal Checklist
Civil Rights Goal Email (Inc DBE & OJT)
Estimate
Environmental Certification
Fuel Escalation Worksheet
Steel Escalation Worksheet
Mobility Certification
Project Contract Time Schedule
Special Provision Integrity Certification
Risk Assessment Summary
Right of Way Certification
Utility Certification
Buy America Waiver (if applicable)
PD-02 Exception Letter (if applicable)

K#####_PlanSet
Plan Set Created in Region
Saved to **6_PSnE/PSnE_Sets** Folder

Title Sheet (signed by Tech Ctr Manager, signature field for Chief Engineer)
Plan Sheets (submitted in set as individual pdfs and signed)

Check expiration date on stamps

K#####_BIDSet
Bid Set Created in Region
Saved to **6_PSnE/PSnE_Sets** Folder

Consolidated Special Provisions (word format, track changes)
Individual Professional of Record Certifications (POR Sheets) (signed)

Check expiration date on stamps

Final status on individual documents prevents editing on documents, final status on sets secures the files from being removed from the set or deleted.

PE Lead submits email to PCO Pre-Letting Specialist with links for PSnE Submittal (standard template located in PW_Standards)
Name: ODOT_PreLetting_PSnE_Submittal_K#####

PCO Pre-Letting Specialist performs check-in process.
Upon PSnE Submittal ACCEPTANCE, PCO Pre-Letting Specialist changes **K#####_PSnE_Set** attributes to **Accepted**, records date in attributes field, changes state of set to "next". RMS System Admin is notified of project acceptance and project ready to snapshot.

RMS System Admin Takes project schedule snapshot.