

# NCDOT

## Location & Surveys Unit

### SharePoint Guidelines

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## Document Introduction and Notes

NCDOT is constantly changing to better serve and connect with our Customers and Business Partners and thus is transitioning to Connect NCDOT Site's "SharePoint" for Project Management and Delivery.

- ❖ This documentation is provided specific to the NCDOT Location and Surveys Unit and our Business Partners as we transition our unit's Project Development and Transmittal Process to SharePoint.
- ❖ The Location & Surveys Unit will be utilizing SharePoint for project delivery of Data and also CADD files until such time as we switch to Bentley - Geopak "Project Wise" to manage CADD files.
- ❖ Understanding SharePoint "structure" and at what level we work as L&S Users is critical to using SharePoint effectively.
- The Location and Surveys Unit is a member of the "Preconstruction" Team Site on SharePoint and is represented across all Projects as a specific SharePoint "Discipline" – Location and Surveys.
- ❖ The Location and Surveys Transmittal Database will continue to be used in coordination with SharePoint.
  - A PDF file of the transmittal will be created and placed in the L&S Topic "DOT Transmittals."
- ❖ This document creates a "new" Consultant (PEF) Submittal Process.
- ALL Consultant (PEF) deliverables will be uploaded to the L&S Topic "Consultant Submittals."
  - This will be the Storage Bin for ORIGINAL consultant files as delivered.
  - Files should be placed in a "Document Set" (tip#\_type\_firm\_date).
    - TIP = Project Number
    - TYPE = Survey Type
    - PEF = 3 digit PEF designator
    - DATE = Date transmitted
- Consultant files will be downloaded and reviewed at the local level.
  - A "Redline" file may be created if significant edits are needed.
  - The PEF will make necessary edits and Re-Upload the file into the "same" Document Set.
  - This will allow SharePoint "versioning" to document changes.

## Accessing the Connect NCDOT Home Page

- 1) To access the Connect NCDOT Home Page - **Simply hold your Ctrl “key” down and click on this link ...**  
<https://connect.ncdot.gov/Pages/default.aspx>
- 2) **Sign-in** as a Team Site User to access SharePoint.

PEFs - For help signing in - See the following **Quick Reference Link**

<https://connect.ncdot.gov/site/preconstruction/Preconstruction%20Help/Quick%20Reference%20for%20Consulting%20Firm%20Users.pdf>

The screenshot displays the Connect NCDOT Home Page. At the top, a dark navigation bar includes links for Home, Help, and Site Map, along with a search bar. Below this, a horizontal menu lists categories: Doing Business, Bidding & Letting, Projects, Resources, and Local Governments. A yellow callout bubble with the number '1' points to a banner that reads 'Connect NCDOT Home Bringing Business and Government together with online collaboration.' The main content area is divided into four sections: 'Browse All Sections' (listing Doing Business, Bidding & Letting, Projects, Resources, and Local Governments), 'More Site Content' (listing Manuals, Maps, Training, Groups & Committees, Events, and Contenido en Espanol), 'Team Site Users: Sign in Here' (featuring a sign-in prompt, a yellow callout bubble with the number '2' pointing to a 'Sign In' button, and a 'Get An Account' button), and 'Support & Help' (listing New User?, Signing In, Your Account, Technical Information, and Need More Help?). At the bottom, a dark footer bar contains the text 'Was this page helpful?' with thumbs up/down icons, and a navigation bar with links for Connect Home, Sign In, Employee Directory, and ncdot.gov.



## [Accessing the Connect NCDOT Home Page](#) - Continued

- ❖ The Location and Surveys Unit is a member of the “**Preconstruction**” Team Site on SharePoint and is represented across all Projects as a specific SharePoint “Discipline” – Location & Surveys.
- 3) Click “**Preconstruction**.”

**Connect NCDOT**  
BUSINESS PARTNER RESOURCES

Home Help Team Sites Site Map

Doing Business Bidding & Letting Projects Resources Local Governments

Search...

### Connect NCDOT Home

Bringing Business and Government together with online collaboration.

#### Browse All Sections

- Doing Business**  
How to work with the North Carolina Department of Transportation.
- Bidding & Letting**  
Bidding and letting information for Central, Division, Design/Build and Bridge & Culvert Lets.
- Projects**  
For businesses working on NCDOT Projects and Contracts.
- Resources**  
Data and documents needed to work with the NCDOT.
- Local Governments**  
Municipalities, local government agencies and other non-business groups working with NCDOT.

#### More Site Content

- Manuals**  
Important guides and handbooks from NCDOT.
- Maps**  
County, statewide and project-specific maps.
- Training**  
Certifications, course descriptions and online classes.
- Groups & Committees**  
Private and public organizations working with NCDOT.
- Events**  
Upcoming meetings, conferences, and gatherings.
- Contenido en Espanol**  
Contenido para nuestros socios de habla hispana.

#### Your Team Sites

Find your team site **All Team Sites**

Go directly to Co **3** **Preconstruction** sites.

- Century Center**
- Teams**
- C203592 - R-2514D**
- C203834**

#### Support & Help

- New User?**  
Read this brief section to get started.
- Signing In**  
Trouble signing in? Get quick solutions to common issues.
- Your Account**  
Find answers to questions about managing your account.
- Technical Information**  
Information on downloading files, supported browsers and security settings.

## [Preconstruction Projects Home Page](#)

### 4) **Preconstuction Projects Home**

- For QUICK Access to Preconstruction Site - **Simply hold your Ctrl “key” down and click this link ...**  
<https://connect.ncdot.gov/site/preconstruction/SitePages/Home.aspx>

Connect NCDOT  
BUSINESS PARTNER RESOURCES

Doing Business

Bidding & Letting

Projects

Resources

Local Governments

Preconstruction 4

**Preconstruction Projects Home**

Preconstruction information for NCDOT Highway and Bridge projects. Send any problems or concerns to [preconstructionhelp@ncdot.gov](mailto:preconstructionhelp@ncdot.gov).

Preconstruction

Home

SharePoint Help

Discipline Specific Links

Division Specific Guidance

Site Requests

Consulting Firm Access Requests

Preconstruction Help

Preconstruction Search

Usage Assessment

Find a Site

Division 01

15BPR.11 Camden 43 and 44

15BPR.41 Dare No.9

Division 02

15BPR.7 Currituck No 15

Division 03

17BP.1.R.76 Gates 20

17BP.1.R.77 Gates 27

Division 04

17BP.1.R.78 Gates 29

Division 05

17BP.1.R.84

17BP.1.R.85 Camden 19 (B-4453)

Division 06

17BP.1.R.86 Martin 71 (B-4577)

Division 07

17BP.1.R.87 Tyrrell 17 (B-4648)

17BP.1.R.88 Pasq 5 (B-4783)

Division 08

17BP.1.R.89 North 14 (B-4919)

17BP.1.R.90 North 15 (B-4920)

Division 09

17BP.1.R.91 (B-5501)

17BP.1.R.91 Chowan 3 (B-5501)

Division 10

17BP.1.R.92 North 13 (B-5502)

17BP.1.R.93 Perq 29 (B-5416)

Division 11

17BP.1.R.94 Hyde 21 (B-5508)

17BP.1.R.95 Hert 10 (B-5608)

Division 12

17BP.1.R.96 Martin 194 (B-5955)

17BP.1.R.97 Pasq 15 (B-5969)

17BP.1.R.98 Hertford 97

Division 13

Division 14

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Version 1.0



## [Searching to find your Project Site](#)

❖ For the purposes of this manual; the “Training02” project site will be used. This would normally be the project TIP number ... B-3159, etc.

➤ For QUICK Access to Preconstruction Site - **Simply hold your Ctrl “key” down and click this link ...**  
<https://connect.ncdot.gov/site/preconstruction/SitePages/Home.aspx>

1) Find your project on the NCDOT Preconstruction (SharePoint) Site. Type in your project name in the “Find a Site” search box.

BROWSE PAGE

Connect NCDOT  
BUSINESS PARTNER RESOURCES

Doing Business Bidding & Letting Projects Resources Local Governments

**Preconstruction** ▶ Preconstruction

Home

SharePoint Help

Discipline Specific Links

Division Specific Guidance

Site Requests

Consulting Firm Access Requests

Preconstruction Help

Preconstruction Search

**Find a Site**

Type in TIP number here x Ex = Training02

Division 01	15BPR.11 Camden 43 and 44
Division 02	15BPR.41 Dare No.9
Division 03	15BPR.7 Currituck No 15
Division 04	17BP.1.R.76 Gates 20
Division 05	17BP.1.R.77 Gates 27
Division 06	17BP.1.R.78 Gates 29
Division 07	17BP.1.R.84
Division 08	17BP.1.R.85 Camden 19 (B-4453)
Division 09	17BP.1.R.86 Martin 71 (B-4577)
Division 10	17BP.1.R.87 Tyrrell 17 (B-4648)
Division 11	17BP.1.R.88 Pasq 5 (B-4783)
Division 12	17BP.1.R.89 North 14 (B-4919)
Division 13	17BP.1.R.90 North 15 (B-4920)
Division 14	17BP.1.R.91 (B-5501)
	17BP.1.R.91 Chowan 3 (B-5501)
	17BP.1.R.92 North 13 (B-5502)
	17BP.1.R.93 Perq 29 (B-5416)
	17BP.1.R.94 Hyde 21 (B-5508)
	17BP.1.R.95 Hert 10 (B-5608)

## [Searching to find your Project Site](#) - Continued

2) Our search for “Training02” brings us to the corresponding project site.

### **Traini 2 Training02** Training and Demonstration project Carteret

🏠 ▶ Division 02 Preconstruction ▶ Training02

#### Project Site

- [Preconstruction Home](#)
- [Grant Consulting Firm Access](#)
- [Lock/Unlock Plans or Provisions](#)
- [Key Documents](#)
- [Discipline Specific Links](#)
- [Preconstruction Help](#)
- [Project Commitments](#)
- [Project Contacts](#)
- [Project Structures](#)
- [Recently Modified](#)

#### ▸ General

#### ▸ Disciplines

#### ▸ Collaboration

#### ▸ LET Preparation

#### Precon Project Map

There is no Map for this TIP



## [Searching to find your Project Site](#) - Continued

- ❖ If the site has not been created ... Click this link for instructions on how to request a preconstruction site.
- <https://connect.ncdot.gov/site/preconstruction/Preconstruction%20Help/Quick%20Reference%20for%20Preconstruction%20Project%20Site%20Owners.pdf>

## Reference for DOT Preconstruction Project Site Owners

### Site setup and access procedure

1. **Check** if a precon project site already exists for your project.
2. **Create Site Request**
3. **Grant access** to the consulting firm(s) involved
4. **Inform the consulting firm(s)** that the site will shortly be available for their use. Provide them with a link to the site and the Quick Reference for Precon Site users.

### 1. Finding Preconstruction Project Sites



From Connect.ncdot.gov, look for “Preconstruction” under Your Team Sites or go directly to <https://connect.ncdot.gov/site/preconstruction/SitePages/Home.aspx>.

From the Preconstruction home page, you can navigate to your division and select from the list of sites shown, or you can use the “Find a Site” search box to find your project site. If you will only be working with a few projects, you may want to add favorites in your browser for those projects individually.

Clicking on the project ID will open the project site and display the document libraries for that project.

### 2. Requesting New Preconstruction Project Sites

If the project you want to work with does not already have a preconstruction project site:

- Click **Site Requests** from the left menu.
- Click  **new item** to open the request form.
- Provide the **TIP** and/or **WBS**, if there is one.
- Use **WBS Extension** to:
  - Provide a short project name of convenience appended to the TIP or WBS
  - Differentiate between projects that share a WBS
  - Be *the* project identifier for non-TIP/non-WBS projects
- Select the **Division** where the project will be built
- Select and  the counties where the project will be built
- Provide a brief **Project Description**
- Click **Save** (Do NOT change the Status.)

The request will be marked complete when the site is created, normally within 2 working days.

## Location and Surveys – Discipline

- 3) Once inside your Project Site - **Drill down** into “*Disciplines*” to ...
- 4) “*Location and Surveys*” to manage the project.

➤ **Add project site to favorites menu** for easy access in the future (STEP not shown).

### Training02 ▶ Training02

Training and Demonstration project  
Carteret

Home ▶ Division 02 Precast ▶ 2 ▶ Training02

**Project Site**

- ➔ Preconstruction Home
- ➔ Grant Consulting Firm Access
- ➔ Lock/Unlock Plans or Provisions
- ➔ Key Documents
- ➔ Discipline Specific Links
- ➔ Preconstruction Help
- ➔ Project Commitments
- ➔ Project Contacts
- ➔ Project Structures
- ➔ Recently Modified

**General**

**3** **Disciplines**

- Congestion Management (3)
- Erosion Control (1)
- Geoenvironmental (0)
- Geotechnical (10)
- Human Environment (36)
- Hydraulics (6)
- Intelligent Traffic Systems and Signals (0)
- 4** • **Location and Surveys (0)**
- Natural Environment (10)
- Project Development (24)
- Rail (0)
- Right of Way (1)
- Roadway Design (14)
- Signing and Delineation (2)
- Structures Design (31)
- Utilities (43)
- Work Zone Traffic Control (31)

**Collaboration**

**LET Preparation**



## Location and Surveys – TOPICS and STATES

❖ Location and Surveys will use SharePoint “Topics” to manage project structure.

1) LS “Topic”

The screenshot shows the 'Connect NCDOT BUSINESS PARTNER RESOURCES' portal. The navigation bar includes 'Doing Business', 'Bidding & Letting', 'Projects', 'Resources', and 'Local Governments'. The main heading is 'Training02 ▸ New Document'. Below this is a breadcrumb trail: 'Home ▸ Division 02 Preconstruction ▸ Training02'. The form is titled 'Project Site' and contains a list of links on the left: 'Preconstruction Home', 'Grant Consulting Firm Access', 'Lock/Unlock Plans or Provisions', 'Key Documents', 'Discipline Specific Links', 'Preconstruction Help', 'Project Commitments', 'Project Contacts', 'Project Structures', and 'Recently Modified'. The main form area has fields for 'Name \*', 'State', 'Precon Notes', and 'Description'. A 'Spelling...' button is located above the 'Name' field. A dropdown menu is open for the 'Name' field, showing 'LS Topic' selected. A list of document categories is displayed on the right, including 'Consultant Attestations', 'Consultant Submittals', 'Correspondence', 'DOT Transmittals', 'Final DTM and TIN files', 'Final Surveys', 'Property & R/W', 'Quality Control', 'Reference Info and Links', 'Survey Control', 'Utility Data', and 'Working Files'. A yellow callout '1' points to the 'LS Topic' dropdown, and a yellow callout '2' points to the document category list.

Connect NCDOT  
BUSINESS PARTNER RESOURCES

Doing Business Bidding & Letting Projects Resources Local Governments

Training02 ▸ New Document

Home ▸ Division 02 Preconstruction ▸ Training02

**Project Site**

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

ABC Spelling...

Name \*

LS Topic

State

Precon Notes

Description

Consultant Attestations  
Consultant Submittals  
Correspondence  
DOT Transmittals  
Final DTM and TIN files  
Final Surveys  
Property & R/W  
Quality Control  
Reference Info and Links  
Survey Control  
Utility Data  
Working Files

A description of the Document Set

2) SharePoint “Topics” with a description of each.

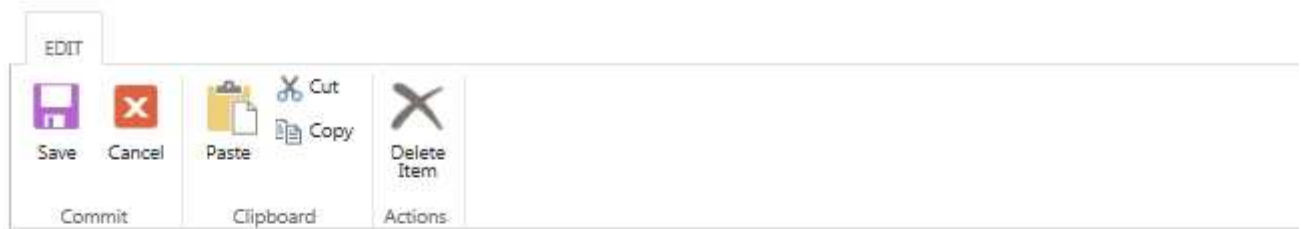
- **Consultant Attestations** – May contain signed and sealed “PDF” files of Consultant deliverables.
- **Consultant Submittals** – Will now contain “ALL” Consultant Deliverables as transmitted.
- **Correspondence** – May contain important project documentation (Emails, etc.).
- **DOT Transmittals** – Will now contain PDF file of Transmittal from L&S Transmittal Database.
- **Final DTM and TIN files** – Will now contain the “final” DTM and TIN files formerly stored on Project Share.
- **Final Surveys** – Will now contain the “Final Survey” file. (formerly stored on Project Share)
- **Property & R/W** – Includes Original DGN files needed for future R/W Plans and Revisions.
- **Quality Control** – Will now contain the EDM Calibration Report and the Project Review Checklist (PRC)
- **Reference info and Links** – May contain Project related “Data” files not placed elsewhere.
- **Survey Control** – Will now contain Project Control Data.
- **Utility Data** – May contain Utility Data
- **Working Files** - Area for files shared with Consultants and/or others.

## Location and Surveys – TOPICS and STATES - Continued


❖ Location and Surveys will use SharePoint “States” to designate the status of a file.

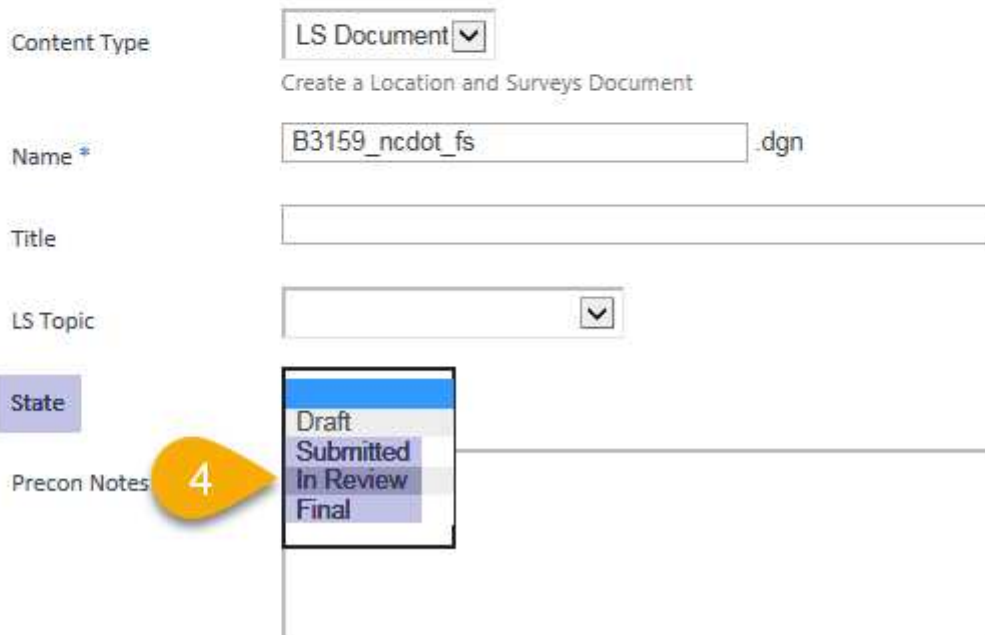
3) Document “State”

LOCATION AND SURVEYS - B3159\_NCDOT\_FS.DGN



A SharePoint document toolbar for the file 'LOCATION AND SURVEYS - B3159\_NCDOT\_FS.DGN'. It includes an 'EDIT' tab, a 'Save' button (floppy disk icon), a 'Cancel' button (red X icon), a 'Paste' button (clipboard icon), a 'Cut' button (scissors icon), a 'Copy' button (document with plus icon), and a 'Delete Item' button (X icon). Below the buttons are labels: 'Commit' under Save, 'Clipboard' under Paste/Cut/Copy, and 'Actions' under Delete Item.

 The document was uploaded successfully. Use this form to update the properties of the document.



A form for updating document properties. It includes a 'Content Type' dropdown set to 'LS Document' with a link 'Create a Location and Surveys Document'. The 'Name' field contains 'B3159\_ncdot\_fs' and '.dgn'. There is an empty 'Title' field. The 'LS Topic' field is a dropdown menu. The 'State' dropdown is highlighted with a yellow callout bubble containing the number '3'. Below it, the 'Precon Notes' field is highlighted with a yellow callout bubble containing the number '4'. A dropdown menu for the 'State' is shown, with options: 'Draft', 'Submitted', 'In Review', and 'Final'.

4) SharePoint “States” with a description of the use of each one.

- **Draft** – Used if the reviewer returns the file for corrections or feedback.
- **Submitted** – Used for all “Consultant Submittals.”
- **In Review** – Used to show that a file is currently being reviewed.
- **Final** – Used for “final” files that the field office has checked and uploaded to applicable SharePoint topic.



## Uploading files in SharePoint (Using Drag and Drop)

❖ Files OR “documents” can be dragged and dropped into any document library or document set that you have contribute access to. The files will show up in the library without Topic or other values set. If dropped into a document set the files will acquire the “State” property of the document set.

- 1) Highlight file in Windows Explorer
- 2) Drag
- 3) Drop into Location and Surveys

### Training02 · Location and Surveys

The screenshot illustrates the process of uploading a file to a SharePoint document library. On the left, the SharePoint interface for the 'Location and Surveys' library is shown. It features a 'Project Site' sidebar with various links and a main content area with a 'new document or drag files here' prompt. A 'Drop' button is visible in the main area. On the right, a Windows Explorer window is open, showing a file named '83159\_ncdot\_fs.dgn' selected. A red arrow with numbered callouts (1, 2, 3) indicates the drag-and-drop process: (1) Highlight the file, (2) Drag the file, and (3) Drop the file into the SharePoint library.

Project Site

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

+ new document or drag files here

By Topic All Documents ... Find a file

✓ Name Modified

- LS Topic : Consultant Attestations (1)
- LS Topic : Consultant Submittals (1)
- LS Topic : Correspondence (1)
- LS Topic : DOT Transmittals (4)
- LS Topic : Final DTM and TIN files (2)
- LS Topic : Final Surveys (1)
- LS Topic : Property & R/W (3)
- LS Topic : Quality Control (1)
- LS Topic : Reference Info and Links (3)
- LS Topic : Survey Control (4)
- LS Topic : Utility Data (1)
- LS Topic : Working Files (1)

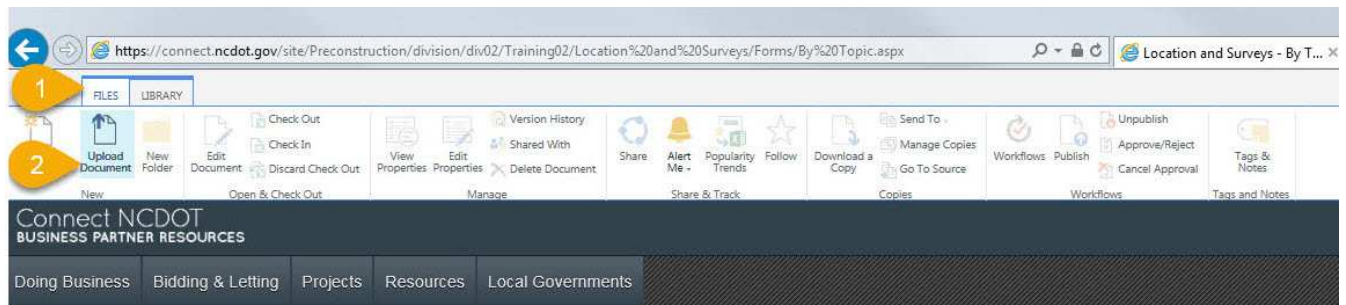
Connect Home View My Profile Manage My Alerts

© North Carolina

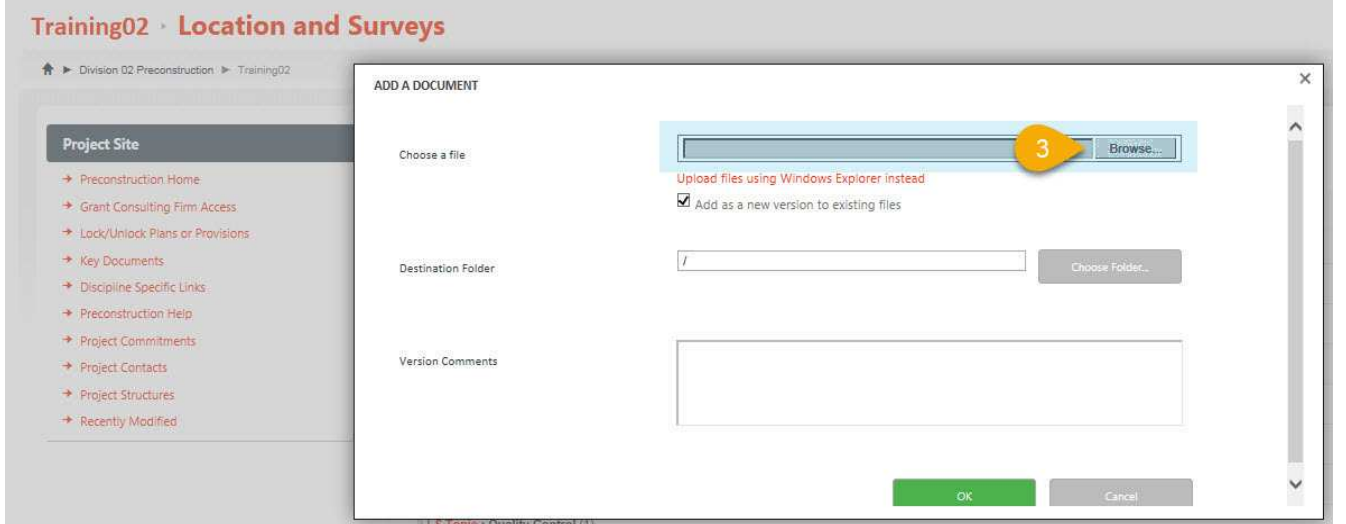
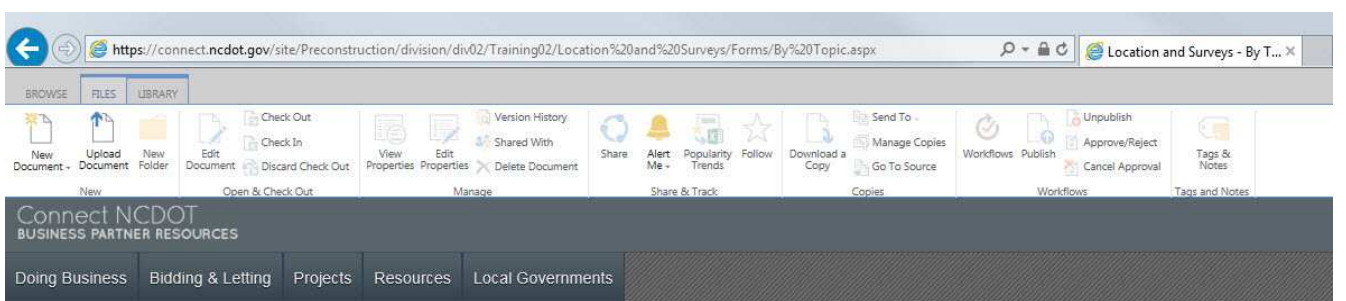
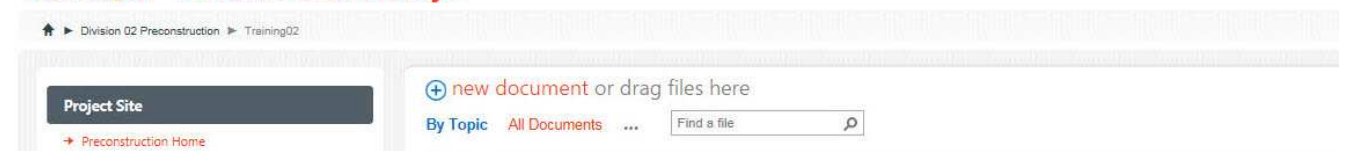
83159\_ncdot\_fs.dgn Date modified: 11/8/2017 10:22 AM Date created: 7/10/2015 10: Bentley MicroStation Design Size: 776 KB Offline availability: Not available

## Uploading files in SharePoint (Using Ribbon)

- 1) Using the FILES tab from the ribbon in the top left corner above the Connect NCDOT logo.
- 2) Choose Upload Document.
- 3) Select Browse to choose the file you want to upload.

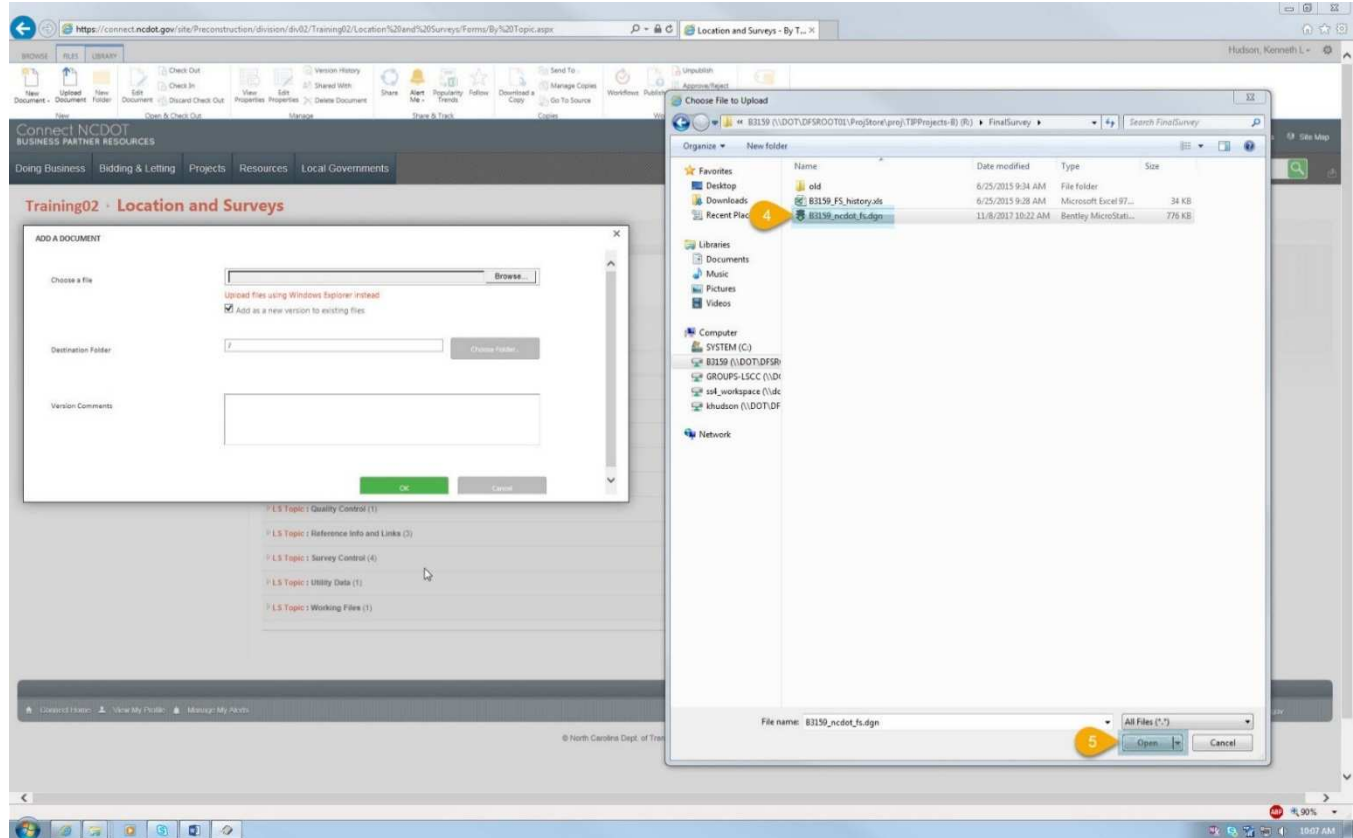


### Training02 · Location and Surveys



## Uploading files in SharePoint (Using Ribbon) - Continued

- 4) Choose the file you wish to upload.
- 5) Select OPEN.





## Uploading files in SharePoint (Using Ribbon) - Continued

- 6) The Notification of successful document upload and properties update form - b3159\_ncdot\_fs.dgn appears.
- 7) Choose the appropriate Topic from drop down – “Final Survey” in this case.
- 8) Set the State of File – “Final” in this case.
- 9) SAVE properties.

https://connect.ncdot.gov/site/Preconstruction/div02/Training02/Location%20and%20Surveys/Forms/By%20Topic.aspx

Location and Surveys - By T... X

BROWSE FILES LIBRARY

New Document Upload Document New Folder Edit Document Check Out Check In View Properties Edit Properties Shared With Delete Document Manage

Share Alert Me Popularity Trends Follow Download a Copy Manage Copies Go To Source Workflows Publish Approve/Reject Cancel Approval Tags & Notes Unpublish

Connect NCDOT BUSINESS PARTNER RESOURCES

Doing Business Bidding & Letting Projects Resources Local Governments

Training02 Location and Surveys

Division 02 Preconstruction Training02

Project Site

Preconstruction Home

+ new document or drag files here

By Topic All Documents ... Find a file

LOCATION AND SURVEYS - B3159\_NCDOT\_FS.DGN

EDIT

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

6 The document was uploaded successfully. Use this form to update the properties of the document.

Content Type LS Document Create a Location and Surveys Document

Name B3159\_ncdot\_fs.dgn

Title

7 LS Topic Final Surveys

8 State Final

Precon Notes

9 Save Cancel

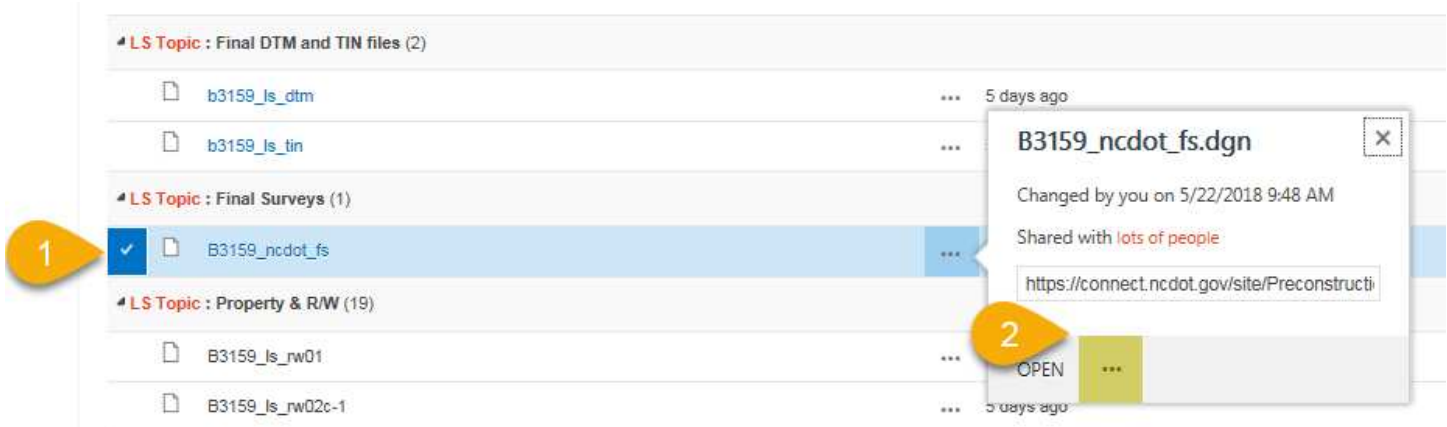
Version: 0.1  
Created at 5/7/2018 10:08 AM by Hudson, Kenneth L  
Last modified at 5/7/2018 10:08 AM by Hudson, Kenneth L

transportation | Privacy Statement | Accessibility

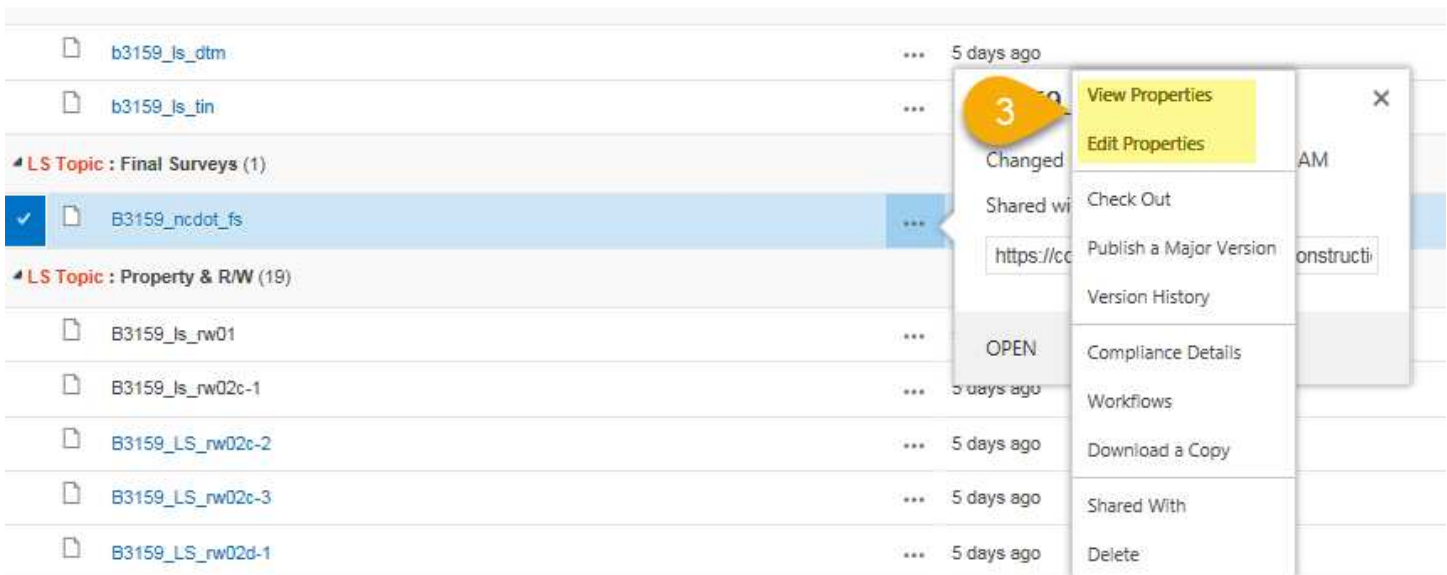


## Viewing and editing file properties

- 1) Highlight file
- 2) Choose the ellipsis "..."/>by the open button.



- 3) Choose **View or Edit Properties** depending on what you need to do.



## [Viewing and editing file properties](#) - Continued

- 4) **View Properties** Dialog Box
- 5) Notice that the “**State**” is incorrectly set to Submitted.
  - This is a Final Survey file residing in “Final Surveys” Topic and thus should have a state of final.

### Training02 • Location and Surveys

The screenshot shows the SharePoint interface for 'Division 02 Preconstruction' > 'Training02'. On the left, the 'Project Site' sidebar lists various links. A callout '4' points to this sidebar. The main content area displays the properties of a file named 'B3159\_ncdot\_fs.dgn'. A callout '5' points to the 'State' field, which is set to 'Submitted'. A 'View Properties Dialog box' callout points to the dialog box itself. The dialog box also shows the 'Submitted' button and a 'Close' button.

Project Site

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

Name: B3159\_ncdot\_fs.dgn

Title:

LS Topic: Final Surveys

State: Submitted

Precon Notes:

Content Type: LS Document

Version: 0.3

Created at 5/18/2018 3:41 PM by [User]

Hudson, Kenneth L

Last modified at 5/22/2018 9:48 AM by [User]

Hudson, Kenneth L

Close

## Viewing and editing file properties - Continued

- ❖ **Choosing “Edit Properties” in STEP “3” above allows you to both view AND edit file properties.**
- **Let’s change the “State” to final using Edit Properties.**
- 6) Choose Final from the “State” drop down.
- 7) SAVE changes.

Division 02 Preconstruction > Training02

**Project Site**

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

Content Type: LS Document (dropdown)  
Create a Location and Surveys Document

Name: B3159\_ncdot\_fs.dgn

Title:

LS Topic:

State: **Final** (dropdown menu open showing Draft, Submitted, In Review, Final)

Precon Notes:

Version: 0.3  
Created at 5/18/2018 3:41 PM by

**Save** **Cancel**

- 8) Viewing file properties now shows “State” is set to final.

Division 02 Preconstruction > Training02

**Project Site**

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

Name: B3159\_ncdot\_fs.dgn

Title:

LS Topic: Final Surveys

State: **Final**

Precon Notes:

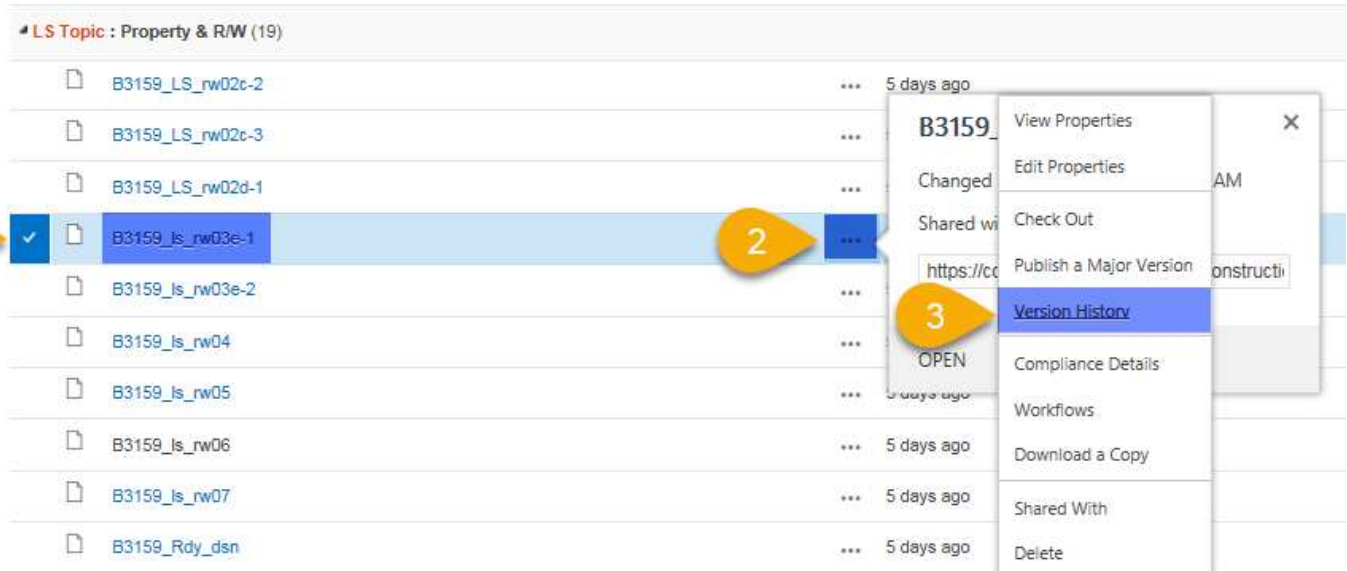
Content Type: LS Document  
Version: 0.4  
Created at 5/18/2018 3:41 PM by

**Close**



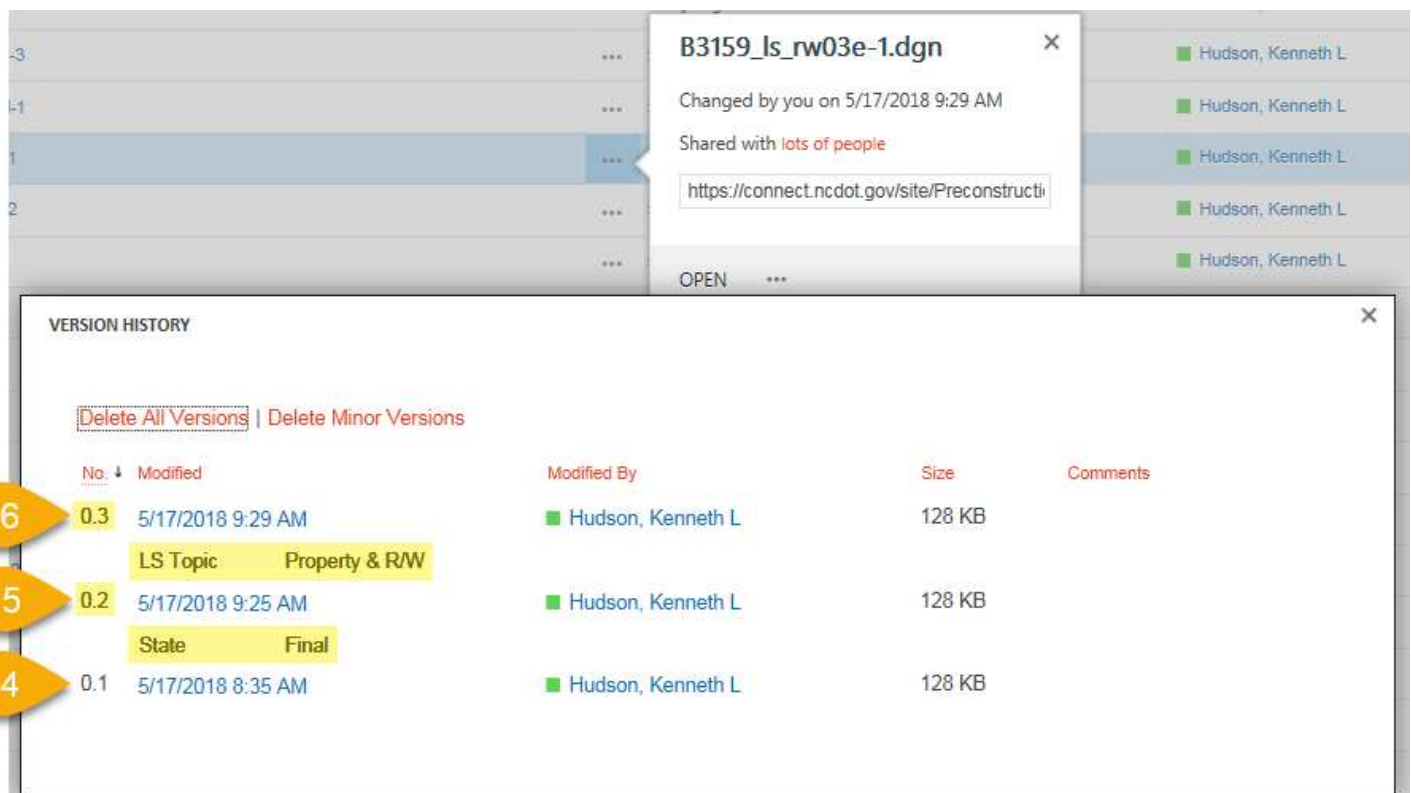
## Viewing file version history

- 1) Highlight file.
- 2) Click on ellipsis “...”
- 3) Choose “Version History”



➤ **Upon review - we see how “versioning” tracks revisions including edits to a file and its properties.**

- 4) Version “0.1” – The file was uploaded.
  - 5) Version “0.2” - The “State” was set to final by editing the file properties.
  - 6) Version “0.3” - The “LS Topic” was set to Property and RW by editing files properties.
- Both “State” and “LS Topic” could have been set at the time of upload but were left blank to show versioning.





## Checking Out Files - Review or Revise

- ❖ SharePoint “CHECK OUT” allows you to designate that a file is in use by you as a user and WILL NOT allow the file to be overwritten as long as you have it checked out.
  - The only way to insure that the file IS NOT overwritten while you are working on it is to check it out.
  - So if there is a chance that you might make revisions to the file; then check the file out.
  - Best practice is to be ready to make your revisions when you check the file out and then check the file back in as soon as possible making sure to describe revisions in the comments box.
- 1) Highlight the file you want to check out
  - 2) Choose the ellipsis “...” besides OPEN button
  - 3) Choose “Check out.”

### Training02 • Location and Surveys

The screenshot shows the SharePoint interface for 'Division 02 Preconstruction' > 'Training02'. On the left is a 'Project Site' sidebar with links like 'Preconstruction Home', 'Grant Consulting Firm Access', etc. The main area shows a list of files under the 'Final Surveys' folder. The file 'B3159\_ncdot\_fs' is highlighted. A context menu is open for this file, showing options like 'View Properties', 'Edit Properties', 'Check Out', 'Publish a Major Version', 'Version History', 'Compliance Details', 'Workflows', 'Download a Copy', 'Shared With', and 'Delete'. Numbered callouts 1, 2, and 3 indicate the steps: 1. Highlight the file, 2. Click the ellipsis menu, 3. Click 'Check Out'.

- 4) Notice the Green diagonal arrow that indicates file is checked out.



## Checking Files Back In - Versioning & Comments

- ❖ SharePoint “Versioning and Comments” will be used to manage and document file revisions.
- Once you are finished making revisions to a file – Check it back in and replace the file on SharePoint.
- 1) Highlight the file you want to check back In
- 2) Choose the ellipsis “...” besides OPEN button
- 3) Choose “Check In.”

### Training02 ▸ Location and Surveys

The screenshot shows the SharePoint interface for 'Division 02 Preconstruction' > 'Training02'. On the left is a 'Project Site' sidebar with links like 'Preconstruction Home', 'Grant Consulting Firm Access', 'Lock/Unlock Plans or Provisions', 'Key Documents', 'Discipline Specific Links', 'Preconstruction Help', 'Project Commitments', 'Project Contacts', 'Project Structures', and 'Recently Modified'. The main area displays a list of documents under the heading 'new document or drag files here'. The list has columns for 'Name' and 'Modified'. The document 'B3159\_ncdot\_fs' is highlighted. A context menu is open for this document, showing options like 'View Properties', 'Edit Properties', 'Check In', 'Discard Check Out', 'Version History', 'Compliance Details', 'Workflows', 'Download a Copy', 'Shared With', and 'Delete'. Three yellow callout boxes with numbers 1, 2, and 3 indicate the steps: 1) Highlight the file, 2) Click the ellipsis menu, and 3) Click 'Check In'.

## Checking Files Back In - Versioning & Comments - Continued

- 4) Upon Check In you will be asked as to what kind of version you want to Check In.
- 5) At this time the L&S Unit will use the “default” setting of “Minor version (draft).”
  - SharePoint allows unlimited minor versions.
- 6) Adding comments upon check in replaces the need for previous FS\_History.xls file.
  - SharePoint allows comments to be stored with the file instead of maintain a separate history file.
- 7) Select green OK button to save.

The screenshot shows the 'CHECK IN' dialog box in SharePoint. It has a title bar with 'CHECK IN' and a close button. The dialog is divided into several sections:

- Version:** A section with a sub-header 'What kind of version would you like to check in?'. It contains three radio button options:   
- ☒ 0.2 Minor version (draft) (highlighted with a yellow box and callout 5)  
- ☐ 1.0 Major version (publish)  
- ☐ 0.1 Overwrite the current minor version
- Retain Check Out:** A section with the text 'Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.' and two radio button options:   
- ☐ Yes  
- ☒ No
- Comments:** A section with the text 'Type comments describing what has changed in this version.' and a text area containing the comment 'Updated file to show R/W revisions on parcels 12, 36 and 72.' (highlighted with a blue box and callout 6).
- Buttons:** At the bottom right, there are two buttons: a green 'OK' button (highlighted with a yellow callout 7) and a grey 'Cancel' button.

Callout 4 points to the 'Version' section header. Callout 5 points to the '0.2 Minor version (draft)' option. Callout 6 points to the 'Comments' text area. Callout 7 points to the 'OK' button.



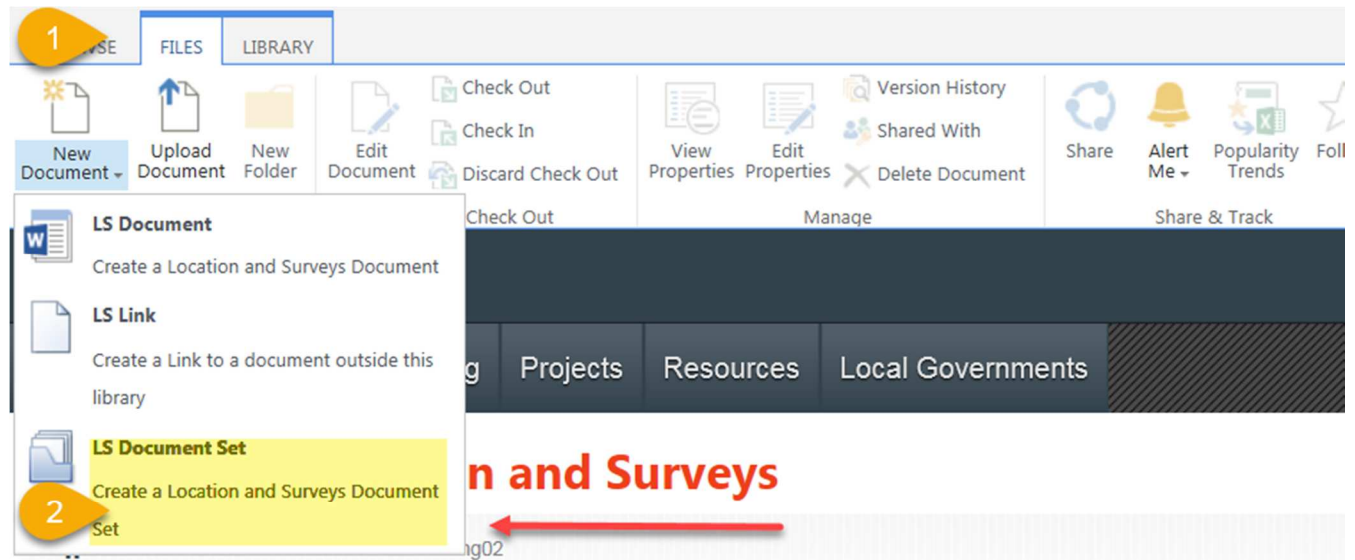
## **Consultant Submittals (Creating a Document Set for Project Delivery)**

✚ See this link if more specific details are needed on *How to Create a Document Set*:  
<https://connect.ncdot.gov/site/preconstruction/Preconstruction%20Help/Design%20Document%20Sets%20Help.pdf>

➤ **ALL Consultant Deliverables will be uploaded as a Document Set to the SharePoint - Location and Surveys Discipline Library Topic “Consultant Submittals.”**

○ This will be the Storage Bin for ORIGINAL consultant files as delivered.

- 1) Once you are inside the Location and Surveys Discipline; Choose the FILES tab from the ribbon in the top left corner above the Connect NCDOT logo.
- 2) Drill down as shown below to create Document Set ...



### Project Site

- ➔ Preconstruction Home
- ➔ Grant Consulting Firm Access
- ➔ Lock/Unlock Plans or Provisions
- ➔ Key Documents
- ➔ Discipline Specific Links
- ➔ Preconstruction Help

+ new document or drag files here

By Topic All Documents ...

Find a file



Name

Modified

There are no files in the view "By Topic".

## Consultant Submittals – Document Sets - Continued

- 3) Name the Document Set using (TIP#\_type\_firm\_DATE) as the format.
  - Type = “2-3” character Survey Type whereas:  
CON = Conventional  
SUE = Subsurface Utility Engineering  
MS = Mobile Scanner  
TS = Terrestrial Scanner  
HS = Hydrographic Surveys
  - Firm = “3” digit PEF designator.
  - Date = the date that the Document Set was created with (yymmdd) as the date format.
  - EXAMPLE – B3159\_con\_dei\_180415  
A Document Set is created for job B-3159 for **Conventional Surveys** by Private Eng. Firm **DEI** on **April 15, 2018**.
- 4) Choose “**Consultant Submittals**” for the Topic.
- 5) Set the STATE to Submitted.
- 6) If necessary - Enter appropriate information in Precon Notes and Description fields.
- 7) SAVE Document Set.

Connect NCDOT  
BUSINESS PARTNER RESOURCES

Doing Business | Bidding & Letting | Projects | Resources | Local Governments

### Training02 ▸ Location and Surveys

🏠 ▸ Division 02 Preconstruction ▸ Training02

#### Project Site

- [Preconstruction Home](#)
- [Grant Consulting Firm Access](#)
- [Lock/Unlock Plans or Provisions](#)
- [Key Documents](#)
- [Discipline Specific Links](#)
- [Preconstruction Help](#)
- [Project Commitments](#)
- [Project Contacts](#)
- [Project Structures](#)
- [Recently Modified](#)

Content Type: LS Document Set Create a Location and Surveys Document Set

Name \*: 3

LS Topic: 4 Consultant Submittals

State: 5 Submitted

Precon Notes:

Description: 6

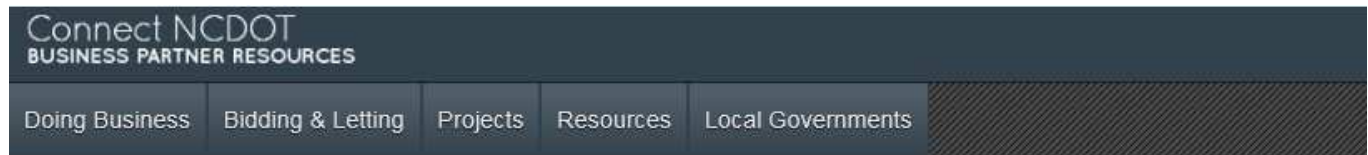
A description of the Document Set

Version: 1.0  
Created at 3/14/2018 5:11 PM by ☐ Hudson, Kenneth L  
Last modified at 5/17/2018 7:59 AM by ☐ Hudson, Kenneth L

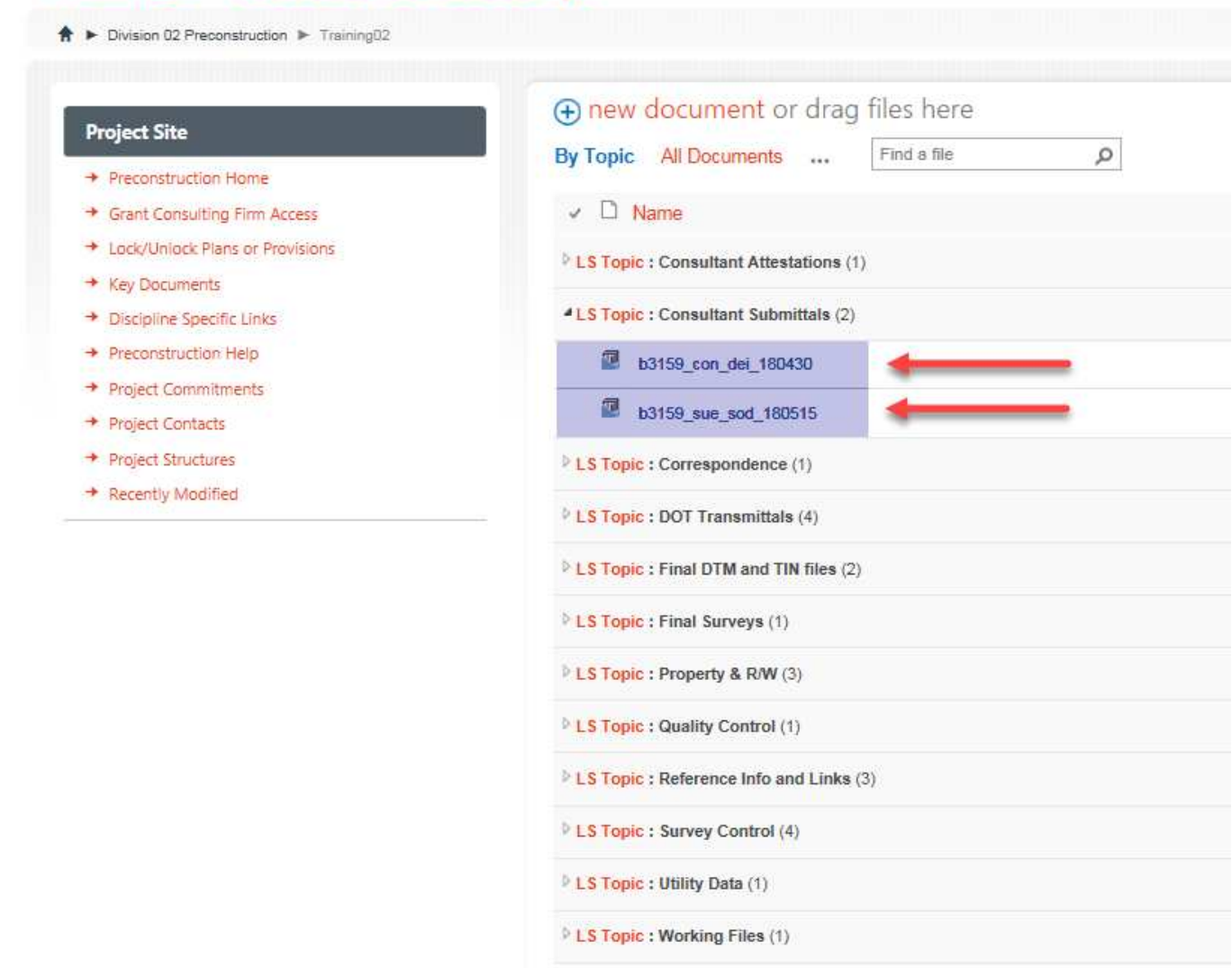
7 Save Cancel

## Consultant Submittals – Document Sets - Continued

- ❖ Using Document Sets in the Consultant Submittal Topic enables us to manage and store deliverables from multiple Consultants in one location on SharePoint.
- Shown below – “Consultant Submittals” Topic with multiple Document Sets for different types of survey work performed and submitted from multiple PEFs.



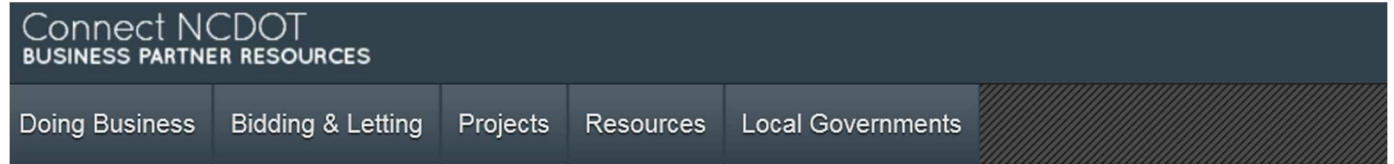
### Training02 ▸ Location and Surveys





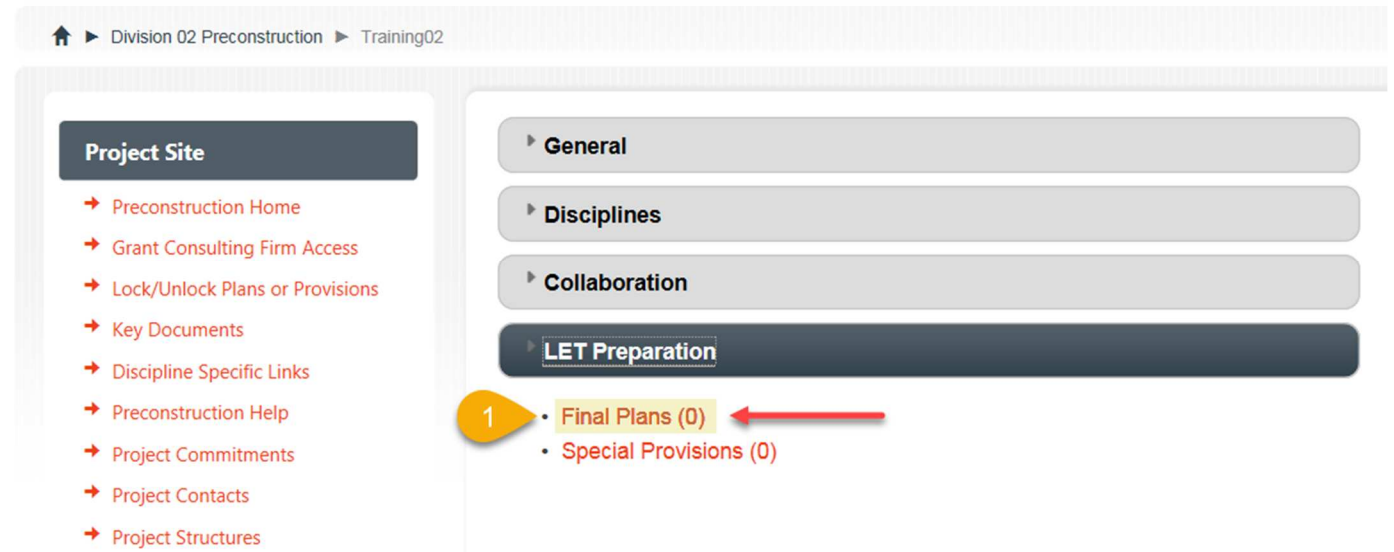
## [Right of Way Plans](#)

- 1) Final Right of Way Plan Sheet PDFs (Signed and sealed if applicable) for printing and recordation will be placed in a new Document Set “outside” of the Location and Surveys Discipline under **LET Preparation > Final Plans**.



## **Training02** ▶ **Training02**

Training and Demonstration project  
Carteret



## Right of Way Plans - Continued

- 2) Create a new Final Plans Document set.
- 3) Choose Plan Set Type from drop down menu – **150 Right of Way Plans**.
- 4) Name of document set must be same as choice in step 3.
- 5) Set State to “Final.”
- 6) Add Document Set Description.
- 7) Add Precon Notes as needed.
- 8) Click green SAVE button.

### Connect NCDOT BUSINESS PARTNER RESOURCES

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## Training02 ▸ Final Plans

Home ▸ Division 02 Preconstruction ▸ Training02

### Project Site

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

Content Type

FP Document Set

2

Create a new Final Plans Document Set

Name \*

150 Right of Way Plans

5

State

Final

5

KeyFP

Final Plans – Sheet Sets

Use this to identify key project documents for later reference. Not all choices will be used in every project. Leave blank if this is not a key document. Do NOT mark individual plan sheets as key documents; only mark document sets containing plan sheets and consolidated plan PDFs. (This prevents key document searches from returning hundreds of individual plan sheets.)

Plan Set Type

150 Right of Way Plans

6

Description

Add Document Set descriptive information here.

A description of the Document Set

Precon Notes

7

If necessary; add additional notes here.

Version: 1.0

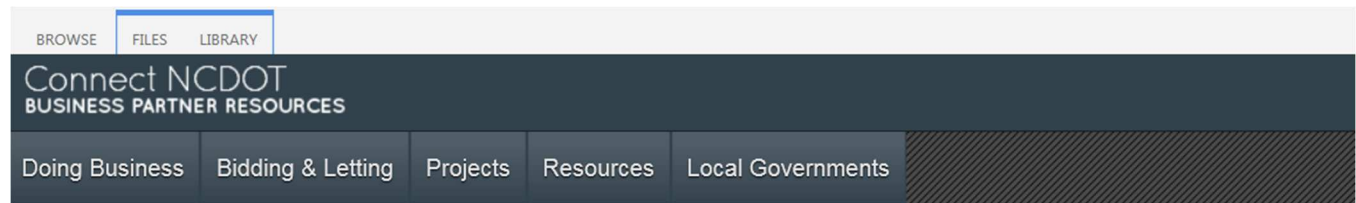
8

Must be named  
same as  
Choice below

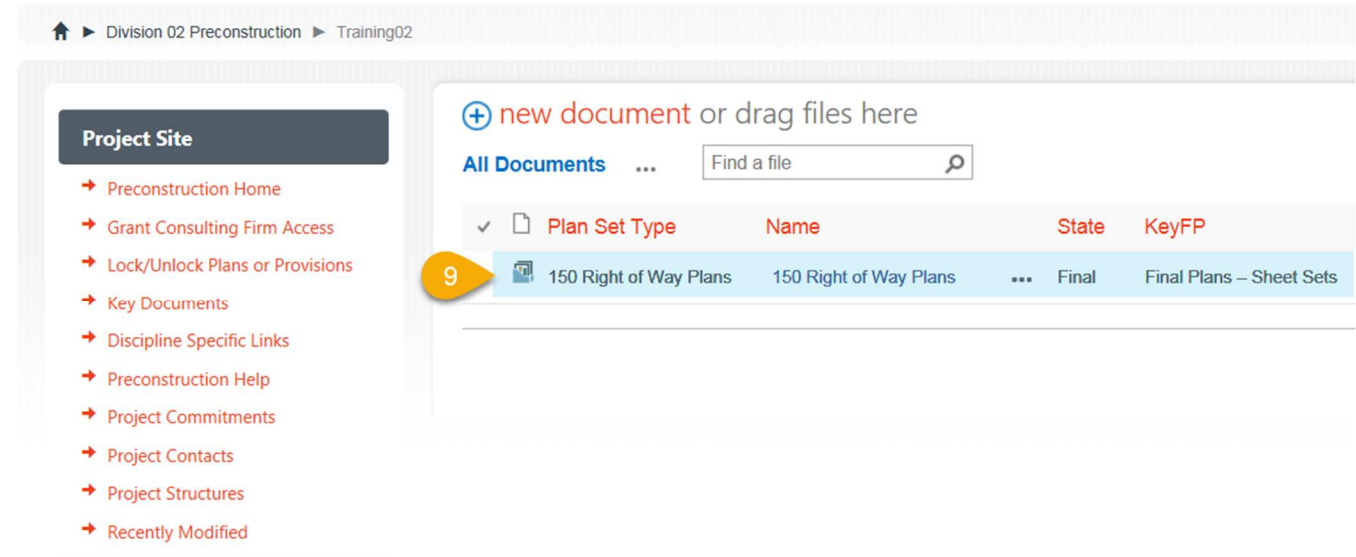
Choose from  
drop down

## [Right of Way Plans](#) - Continued

9) **150 Right of Way Plans Document Set** successfully created.



### Training02 ▶ Final Plans





## Right of Way Plans - Continued

10) The PDF files will need to have a prefix (150\_XXX) prefix added to the filename whereas ...

- 150 designates the Location and Surveys RW Series.
- XXX = page number spacing for possible additional sheets. (001, 003, 006, 009, 012, 015, etc.)

### Connect NCDOT BUSINESS PARTNER RESOURCES

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## Training02 • Final Plans • 150 Right of Way Plans

🏠 ▶ Division 02 Preconstruction ▶ Training02

### Project Site

- [Preconstruction Home](#)
- [Grant Consulting Firm Access](#)
- [Lock/Unlock Plans or Provisions](#)
- [Key Documents](#)
- [Discipline Specific Links](#)
- [Preconstruction Help](#)
- [Project Commitments](#)
- [Project Contacts](#)
- [Project Structures](#)
- [Recently Modified](#)



### 150 Right of Way Plans

Add Document Set descriptive information here.

State: Final  
KeyFP: Final Plans – Sheet Sets  
Precon Notes: If necessary; add additional notes here.  
Plan Set Type: 150 Right of Way Plans

[View All Properties](#)  
[Edit Properties](#)

[+ new document](#) or drag files here

Find a file

✓  Plan Set Type	Name	State
	150_001_B3159_ls_rw01	...
	150_003_B3159_ls_rw02c-1	...
	150_006_B3159_ls_rw02c-2	...
	150_009_B3159_ls_rw02c-3	...
	150_012_B3159_ls_rw02d-1	...
	150_015_B3159_ls_rw03e-1	...
	150_018_B3159_ls_rw03e-2	...
	150_021_B3159_ls_rw04	...
	150_024_B3159_ls_rw05	...
	150_027_B3159_ls_rw06	...
	150_030_B3159_ls_rw07	...

10

## Right of Way Revisions

- 1) Right of Way Revisions will be managed in the “***Property and R/W***” Topic.
  - Note that the PDFs themselves go in “***Final Plans***” Topic as shown in previous section of this manual.

### Connect NCDOT BUSINESS PARTNER RESOURCES

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## Training02 ▸ Location and Surveys

🏠 ▸ Division 02 Preconstruction ▸ Training02

### Project Site

- ➔ Preconstruction Home
- ➔ Grant Consulting Firm Access
- ➔ Lock/Unlock Plans or Provisions
- ➔ Key Documents
- ➔ Discipline Specific Links
- ➔ Preconstruction Help
- ➔ Project Commitments
- ➔ Project Contacts
- ➔ Project Structures
- ➔ Recently Modified

⊕ new document or drag files here

By Topic   property and rw   All Documents   ...   Find a file   🔍   SAVE THIS VIEW

✓ <input type="checkbox"/>	Name	Modified
▸	LS Topic : Consultant Attestations (1)	
▸	LS Topic : Consultant Submittals (2)	
▸	LS Topic : Correspondence (1)	
▸	LS Topic : DOT Transmittals (4)	
▸	LS Topic : Final DTM and TIN files (2)	
▸	LS Topic : Final Surveys (1)	
▸	LS Topic : Property & R/W (19)	

1 - 30 ▸

## Right of Way Revisions - Continued

- 2) It is in this topic that the DGN files used to create the RW Plan Sheet PDFs will be stored.
- 3) Also included are the “source” files used to create the RW Plan Sheet DGN files.

### Connect NCDOT BUSINESS PARTNER RESOURCES

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## Training02 • Location and Surveys

Home ▶ Division 02 Preconstruction ▶ Training02

### Project Site

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

+ new document or drag files here

By Topic   property and rw   All Documents   ...

Find a file

✓ ☐ Name

↳ LS Topic : Consultant Submittals (2)

↳ LS Topic : DOT Transmittals (1)

↳ LS Topic : Final DTM and TIN files (2)

↳ LS Topic : Final Surveys (1)

↳ LS Topic : Property & R/W (19)

☐ B3159\_ls\_rw01

☐ B3159\_ls\_rw02c-1

☐ B3159\_LS\_rw02c-2

☐ B3159\_LS\_rw02c-3

☐ B3159\_LS\_rw02d-1

☐ B3159\_ls\_rw03e-1

☐ B3159\_ls\_rw03e-2

☐ B3159\_ls\_rw04

☐ B3159\_ls\_rw05

☐ B3159\_ls\_rw06

☐ B3159\_ls\_rw07

☐ B3159\_Rdy\_dsn

☐ B3159\_Rdy\_psh\_04

☐ B3159\_Rdy\_psh\_05

☐ B3159\_Rdy\_psh\_06

☐ B3159\_Rdy\_psh\_07

☐ B3159\_Rdy\_row

☐ B3159\_Rdy\_tsh

☐ jobrdy

2

DGN files used to  
create PDFs

3

Source files used to  
create DGN files



## Right of Way Revisions - Continued

- 4) At the time of Right of way revisions - Make sure to contact the designers and get the most up to date source files including an updated ROW file. (STEP not shown)
- 5) Check this updated ROW file using the SurveyControl.ma application and If necessary - REDLINE any discrepancies in the ROW file (STEP not shown)
- 6) The redlined copy for designers can be renamed replacing “rdy” with “ls” to differentiate the filename and stored here as well as shown below - Tip#\_ls\_row.dgn.

### Connect NCDOT BUSINESS PARTNER RESOURCES

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## Training02 • Location and Surveys

🏠 ▶ Division 02 Preconstruction ▶ Training02

### Project Site

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts
- Project Structures
- Recently Modified

+ new document or drag files here

By Topic   property and rw   All Documents   ...

Find a file

✓	Name ↑	Modified
▶	LS Topic : Consultant Attestations (1)	
▶	LS Topic : Consultant Submittals (2)	
▶	LS Topic : Correspondence (1)	
▶	LS Topic : DOT Transmittals (4)	
▶	LS Topic : Final DTM and TIN files (2)	
▶	LS Topic : Final Surveys (1)	
▶	LS Topic : Property & R/W (20)	
📄	b3159_ls_row	... A few seconds ago
📄	B3159_ls_rw01	... 18 minutes ago
📄	B3159_ls_rw02c-1	... 17 minutes ago

6

File renamed replacing “rdy” with “ls” for the REDLINE file for designers.

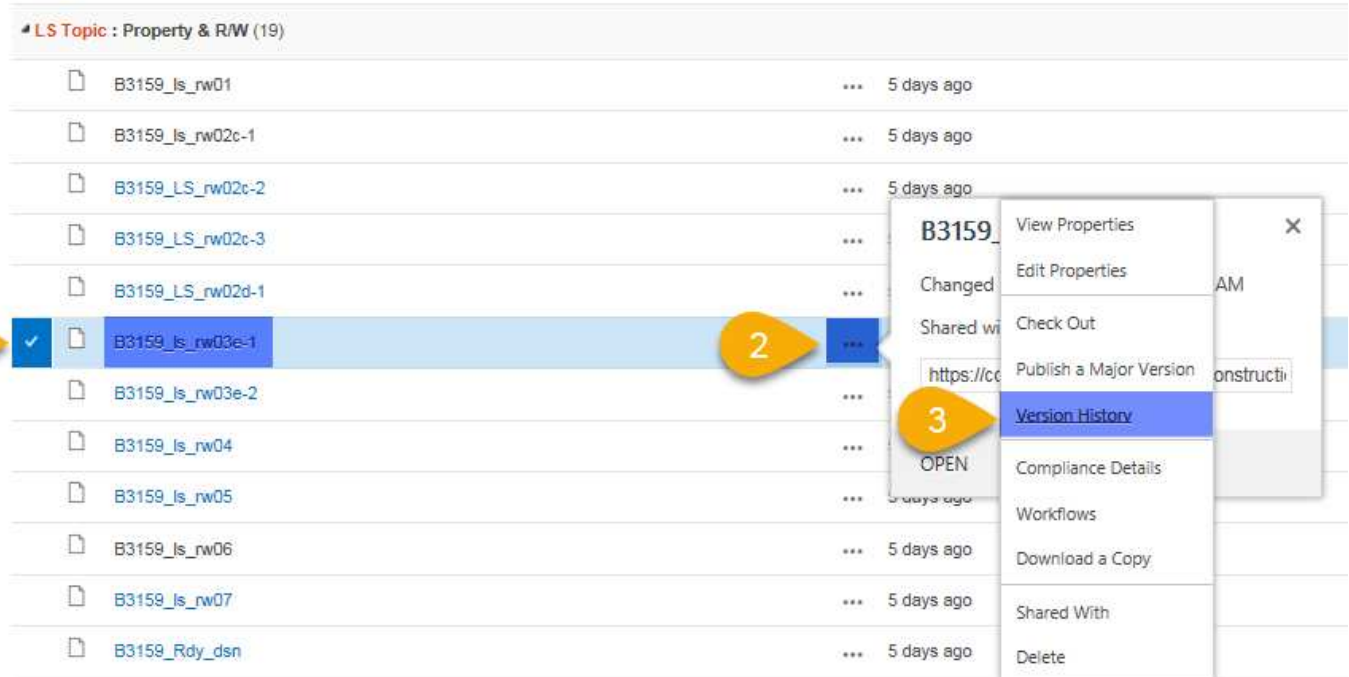
## Right of Way Revisions - Continued

❖ Use SharePoint “Check out/Check in” and “Versioning with Comments” to manage file revisions.

- Example – Right of Way revisions made by designers effects RW Plan Sheet “RW04” and which also requires revisions to the Right of Way Monuments and Easement Control Sheet “RW03E-1.”

➤ *Let’s start out by reviewing the existing version history of the DGN files “RW03E-1”and “RW04.”*

- 1) Highlight file.
- 2) Click on the ellipsis “...” next to the OPEN button.
- 3) Choose **Version History**.



## Right of Way Revisions - Continued

- **Upon review of “rw03e-1” - we see how “versioning” tracks file revisions including edits to file properties.**
- 4) Version “0.1” – The file was uploaded.
  - 5) Version “0.2” - The “State” was set to final by editing the file properties.
  - 6) Version “0.3” - The “LS Topic” was set to Property and RW by editing files properties.
- Both “State” and “LS Topic” could have been set at the time of upload but were left blank to show versioning.

**B3159\_ls\_rw03e-1.dgn**

Changed by you on 5/17/2018 9:29 AM

Shared with **lots of people**

<https://connect.ncdot.gov/site/Preconstructi>

OPEN ...

**VERSION HISTORY**

Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
6 0.3	5/17/2018 9:29 AM	Hudson, Kenneth L	128 KB	
	LS Topic: Property & RW			
5 0.2	5/17/2018 9:25 AM	Hudson, Kenneth L	128 KB	
	State: Final			
4 0.1	5/17/2018 8:35 AM	Hudson, Kenneth L	128 KB	

**Upon review of “rw04” - we see that the “State” and “Topic” were set at the time the file was uploaded.**

- 7) Version = 0.1
- 8) State = Final, LS Topic = Property and R/W

**B3159\_ls\_rw04.dgn**

Changed by you on 5/22/2018 2:27 PM

Shared with **lots of people**

<https://connect.ncdot.gov/site/Preconstructi>

OPEN ...

**VERSION HISTORY**

Delete All Versions | Delete Minor Versions

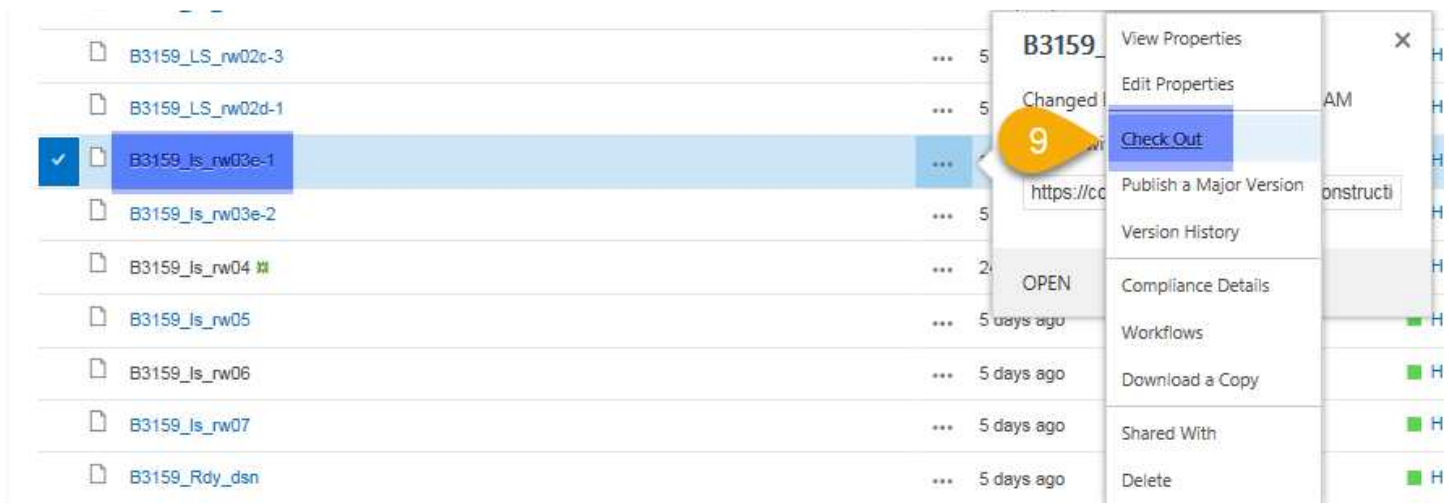
No. ↓	Modified	Modified By	Size	Comments
7 0.1	5/22/2018 2:27 PM	Hudson, Kenneth L	146 KB	
	State: Final			
	LS Topic: Property & RW			



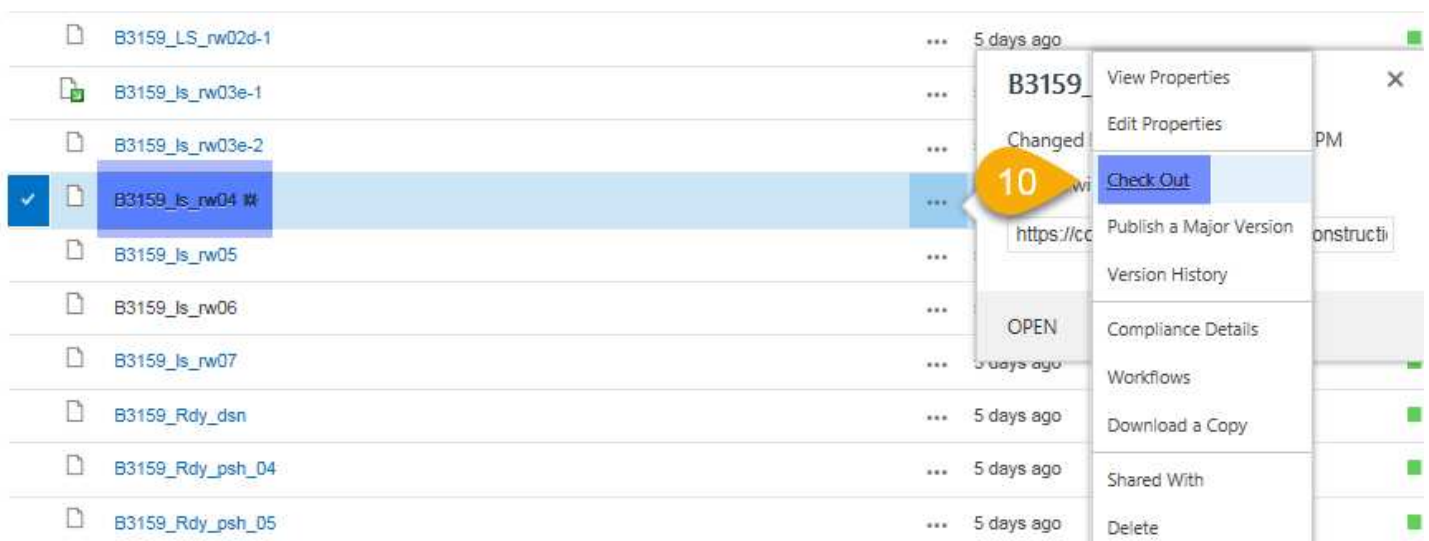
## Right of Way Revisions - Continued

➤ Next let's check out and download both files so they will not be overwritten while we make revisions.

9) Checkout "rw03e-1"



10) Checkout "rw04"



11) Rw03e-1 - Now shows Checked out and cannot be overwritten until checked back in.

12) Rw04 - Now shows Checked out and cannot be overwritten until checked back in.



## Right of Way Revisions – Continued

### ➤ Once revisions are complete ...

13) Check the files back in making sure to add revision “**Comments.**”

14) Upon Check In you will be asked as to what kind of version you want to Check In.

15) At this time the L&S Unit will use the “default” setting of “Minor version (draft).”

- SharePoint has been updated and now allows unlimited minor versions.

16) Adding comments upon check in replaces the need for previous FS\_History.xls file.

- SharePoint allows comments to be stored with the file instead of maintain a separate history file.

17) Select green OK button to save.



**CHECK IN**

Version  
Select the type of version you would like to check in.

What kind of version would you like to check in?

☒ 0.2 Minor version (draft)  
☐ 1.0 Major version (publish)  
☐ 0.1 Overwrite the current minor version

Retain Check Out  
Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?  
☐ Yes ☒ No

Comments  
Type comments describing what has changed in this version.

Updated file to show R/W revisions on parcels 12, 36 and 72.

OK Cancel

## Right of Way Revisions - Continued

*The final step of this process is to convert the revised DGN files to PDFs and replace the appropriate PDF files stored inside the 150 Right of Way Plans “Document Set” that is located outside of the Location and Surveys discipline in LET Preparation > Final Plans as shown below.*

18) Navigate to **LET Preparation > Final Plans**

19) 150 Right of Way Plans document set

**Training02 • Training02**  
Training and Demonstration project  
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Home > Division 02 Preconstruction > Training02

**Project Site**

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links
- Preconstruction Help
- Project Commitments
- Project Contacts

**General**

**Disciplines**

**Collaboration**

**LET Preparation**

- **Final Plans (12)**
- Special Provisions (0)

## **Training02 • Final Plans**

Home > Division 02 Preconstruction > Training02

**Project Site**

- Preconstruction Home
- Grant Consulting Firm Access
- Lock/Unlock Plans or Provisions
- Key Documents
- Discipline Specific Links

+ new document or drag files here

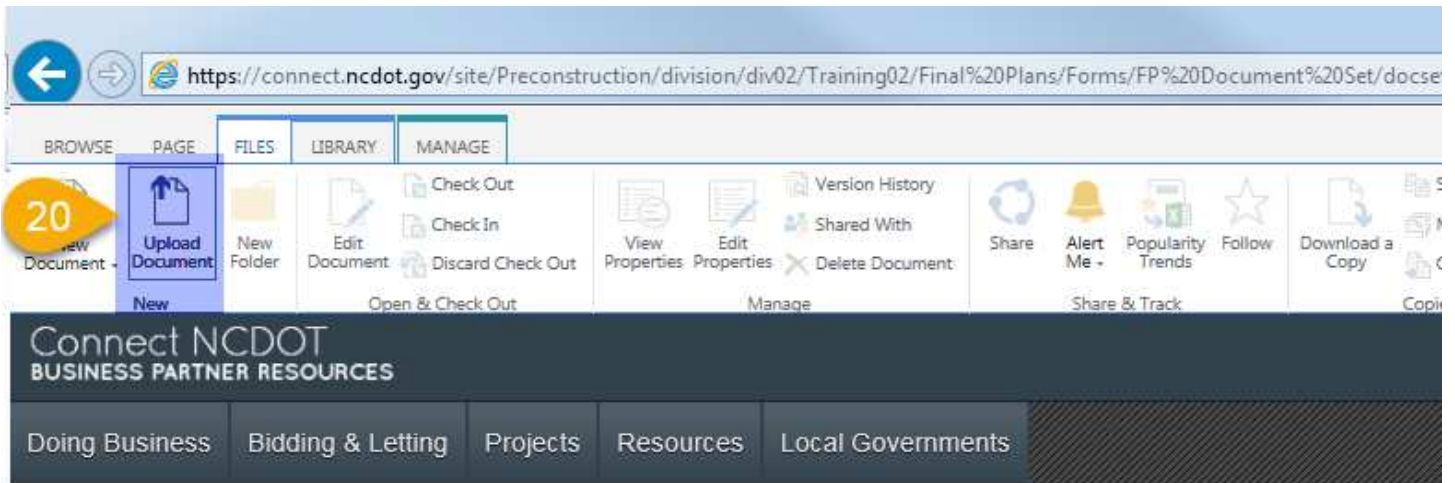
All Documents ... Find a file

✓	Plan Set Type	Name	State
	150 Right of Way Plans	150 Right of Way Plans	... Final



## [Right of Way Revisions](#) - Continued

20) Use **Upload Document** from the FILES ribbon across the top to insure that you have access to enter comments when you replace file.



## Training02 › Final Plans › 150 Right of Way Plans

Home › Division 02 Preconstruction › Training02

### Project Site

- [Preconstruction Home](#)
- [Grant Consulting Firm Access](#)
- [Lock/Unlock Plans or Provisions](#)
- [Key Documents](#)
- [Discipline Specific Links](#)
- [Preconstruction Help](#)
- [Project Commitments](#)



### 150 Right of Way Plans

Add Document Set descriptive inform

State

KeyFP

Precon Notes

Plan Set Type

## Right of Way Revisions - Continued

- 21) Browse to choose the file.
- 22) Enter revision comments for this file.
- 23) Select OK and SAVE.

**150 Right of Way Plans**

**ADD A DOCUMENT**

Choose a file:  [Browse...](#)

Upload files using Windows Explorer instead

☒ Add as a new version to existing files

Destination Folder:  [Choose Folder...](#)

Version Comments:

[OK](#) [Cancel](#)

➤ **Looking at the version history now shows version 0.2 and revision comments added.**

- 24) Version = 0.2
- 25) Revision Comments.

**VERSION HISTORY**

[Delete All Versions](#) | [Delete Minor Versions](#)

No. ↓	Modified	Modified By	Size	Comments
0.2	5/23/2018 12:57 PM	Hudson, Kenneth L		Updated PDF file rw03e-1 - R/W revisions to parcels 12, 36 and 72.
0.1	5/23/2018 12:01 PM	Hudson, Kenneth L	230.5 KB	Initial PDF file - rw03e-1

State: Final

Revised 07/30/2018

## **NCDOT LOCATION AND SURVEYS UNIT - FILE NAMING CONVENTION LIST**

This list is provided so that L&S deliverables will be consistent and recognizable by the filenames and placed in the correct "TOPIC" as we transition to SharePoint for project management. "Revisions" in this version include - NEW SharePoint "SP Topic" Column, Right of Way Plan Sheets and Consultant Submittal sections.

L&S Field Office will place CADD and DATA files in SharePoint as listed in the Topic Column shown below.

<b><u>CADD and Data Files:</u></b>	<b><u>Name</u></b>	<b><u>Example (April 15, 2018)</u></b>	<b><u>File Type</u></b>	<b><u>SP Topic</u></b>
Baseline Text	<i>tip#_ls_baseline.txt</i>	u2005_ls_baseline.txt	Text	Survey Control
Control Coordinates	<i>tip#_ls_control.txt</i>	u2005_ls_control.txt	Text	Survey Control
Deed/Plat Book	<i>tip#_ls_deedbook.pdf</i>	u2005_ls_deedbook.pdf	PDF	Property & R/W
DTM (Photo & LS)	<i>tip#_ls_dtm.dgn</i>	u2005ab_ls_dtm.dgn	3d design file	Final DTM/TIN
EDM Calibration Report	<i>tip#_ls_edm.rpt</i>	u2005_ls_edm.rpt	Text	Quality Control
Final Survey	<i>tip#_ls_nodot_fs.dgn</i>	u2005_nodot_fs.dgn	2d design file	Final Survey
GNSS Calibration Report	<i>tip#_ls_gnsscalib.pdf</i>	u2005_ls_gnsscalib.pdf	PDF	Survey Control
GPX	<i>tip#_ls_gpk.gpk</i>	u2005_ls_gpk.gpk	Binary DB	Survey Control
Local Coordinates	<i>tip#_ls_local.txt</i>	u2005_ls_local.txt	Text	Survey Control
Panel Control	<i>tip#_ls_pan_date.txt</i>	u2005_ls_pan_180415.txt	Text	Survey Control
Project Review Checklist	<i>tip#_prc.xlsm</i>	u2005_prc.xlsm	XLSM	Quality Control
PRC - Connection Check	<i>tip#_ls_cc.xlsx</i>	u2005_ls_cc.xlsx	XLSX	Quality Control
PRC - Position Check	<i>tip#_ls_pc.xlsx</i>	u2005_ls_pc.xlsx	XLSX	Quality Control
PropCon Data Base	<i>tip#_ls_poc.mdb</i>	u2005_ls_poc.mdb	Database	Property & R/W
SUE - Graphics	<i>tip#_ls_sue_date.dgn</i>	u2005_ls_sue_180415.dgn	2d - PEF only	Utility Data
SUE - Test Hole rpt	<i>tip#_th_date.pdf</i>	u2005_th_180415.pdf	PDF	Utility Data
Survey Report	<i>tip#_ls_sr.pdf</i>	u2005_ls_sr.pdf	PDF	Ref Information
TIN (Photo & LS)	<i>tip#_ls_tin.tin</i>	u2005ab_ls_tin.tin	Binary	Final DTM/TIN
Transmittal	<i>tip#_ls_transmittal.pdf</i>	u2005_ls_transmittal.pdf	Text	DOT Transmittals
Vertical Clearance Report	<i>tip#_ls_vertclearance.txt</i>	u2005_ls_vertclearance.txt	Text	Survey Control
WGS84 Coordinates	<i>tip#_ls_wgs84.txt</i>	u2005_ls_wgs84.txt	Text	Survey Control

### **Right of Way Plan Sheets**

\* All previous Survey Control sheets are now RW sheets and named as follows.

RW (Title Sheet)	<i>tip#_ls_rw01.dgn</i>	u2005_ls_rw01.dgn	2d design file	Prop - R/W
RW (C - Series)	<i>tip#_ls_rw02c-#.dgn</i>	u2005_ls_rw02c-1.dgn	2d design file	Prop - R/W
RW (D - Series)	<i>tip#_ls_rw02d-#.dgn</i>	u2005_ls_rw02d-1.dgn	2d design file	Prop - R/W
RW (E - Series)	<i>tip#_ls_rw03e-#.dgn</i>	u2005_ls_rw03e-1.dgn	2d design file	Prop - R/W
RW (Plan Sheets)	<i>tip#_ls_rw0#.dgn</i>	u2005_ls_rw04.dgn	2d design file	Prop - R/W

\* PDFs will retain the same names with a prefix of (150\_###\_) added and the file extension changed to .pdf

150 - Right of Way Plan Sheet Series

### - Page number spacing for possible additional sheets. (001, 003, 006, 009, etc.)



## **Notes**

- 1) Panel Control and all SUE related files will continue to include date in the filename.
- 2) Continue to send a separate SUE file with date. L&S PEF will run the Counter Program.
- 3) Using SharePoint "Version Comments" to document revisions replaces need for "history.xls" file.

## **Special Circumstances**

Refer below in the event that Consultant Deliverables need to be split into individual tasks.

E.g. - A consultant (PEF) is contracted to survey ONLY "property" would send in a PRL file.

<b><u>Files:</u></b>	<b><u>Name</u></b>	<b><u>Example</u></b>	<b><u>File Type</u></b>	<b><u>SP Topic</u></b>
Baseline Graphics	tip#_ls_bln.dgn	u2005_ls_bln.dgn	2d design file	Con Submittals
Existing Alignment	tip#_ls_eln.dgn	u2005_ls_eln.dgn	2d design file	Con Submittals
Property Data	tip#_ls_prl.dgn	u2005_ls_prl.dgn	2d design file	Con Submittals
Hydraulics Data	tip#_ls_hyl.dgn	u2005_ls_hyl.dgn	2d design file	Con Submittals
Wetland (LS)	tip#_ls_wll.dgn	u2005_ls_wll.dgn	2d design file	Con Submittals
Utility Data	tip#_ls_utl.dgn	u2005_ls_utl.dgn	2d design file	Con Submittals
DTL (LS data only)	tip#_ls_dtl.dgn	u2005ab_ls_dtl.dgn	3d design file	Con Submittals
TNL (LS data only)	tip#_ls_tnl.tin	u2005ab_ls_tnl.tin	Binary	Con Submittals

## **File Descriptions**

<b>File ID</b>	<b>Explanation:</b>
baseline	Baseline Control Text File
bln	Baseline Graphics
control	Baseline Control Referenced to Design Alignment
cor	Coordinate Comparison Report
dtl	3D DTM containing only L&S data
dtm	3D DTM containing Photogrammetry & L&S data
edm	EDM Calibration Report
eln	Existing Road Alignment
final survey	Final Survey Graphics File
gnsscalib	GNSS Site Calibration Report
gpk	GeoPak (Points, Lines, Curves, Chains, etc.)
hyl	Hydraulics Data by L&S
local	Site Calibration – Localized Coordinates
pan	Photo Control Text File for Aerial Panels
poc	Property Owner Contact Info
prl	Property Line Information by L&S
psd	Property Survey / Condemnation
sr	Survey Report
sue	Utilities by Subsurface U/G Engr (includes Test Holes)
tin	Binary Triangles's for DTM's (Photog. & L&S data)
tnl	Binary Triangles's for DTM's containing only L&S data
utl	Utilities by L&S
wgs84	Site Calibration – Latitude / Longitude
wll	Wetland file by L&S

### **L&S PEF Workflow (Field)**

Email Subject Line	tip#_type_firm	u2005ab_con_esp	---
Request (req)	tip#_type_req	u2005ab_con_req.xls	XLS
Final Estimate (EST/TAM)	tip#_type_firmest	u2005ab_con_espest.xls	XLS
Evaluation	tip#_type_firmevl	u2005ab_con_espevl.xls	XLS
Signed Approved Scoping Minutes	tip#_type_firm_SASM	u2005ab-con-esp-SASM.pdf	PDF
Signed Approved ManHours (Mark-Ups)	tip#_type_firm_SAMH	u2005ab-con-esp-SAMH.pdf	PDF

Emailed EST(TAM) eliminates the need to place the EST at S:\New\_PEF\_Requests\Finalized\_PEF\_Requests

DocuSign eliminates the need to place the eval at S:\New\_PEF\_Requests\Finalized\_PEF\_Requests\Evaluations

2 Signatures required on the SASM (1 Consultant Representative and 1 Field Office Representative)

1 Signature required on the SAMH (1 Field Office Representative)

2-3 character Survey Types:      CON = Conventional                      SUE = Subsurface Utility Engineering  
MS = Mobile Scanner              TS = Terrestrial Scanner              HS = Hydrographic Surveys  
Adding the date to the filename is acceptable.

### **L&S PEF Workflow (Consultant)**

Partial Invoice	tip#_type_firm_%PI	u2005ab_con_esp_50%PI.pdf	PDF
Final Invoice	tip#_type_firm_FI	u2005ab_con_esp_FI.pdf	PDF
Cost Est Package	tip#_type_firm_CEP	u2005ab_con_esp_CEP.pdf	PDF
Email Subject Line	tip#_type_firm	u2005ab_con_esp	----

Cost Estimate Package includes: Cover Sheet, Estimate, Signature Page, RS-2 (SUE includes Man Hour Classification)

Invoices must include Signed DBE-IS and Certification Letter

Progress Reports should be sent to the Field Office on the 1<sup>st</sup> and 15<sup>th</sup> of each month

### **CONSULTANT SUBMITTALS** - "NEW" Consultant (PEF) Transmittal Process and SharePoint Topic

\* PEFs will now place requested deliverables together inside of a single "Document Set" under the Consultant Submittals topic on SharePoint.

\* If an individual file inside of a document set is found to contain errors or omissions, the PEF should upload the revised file (same name) back to the "same" document set AND add revision comments to SharePoint at that time.

<b><u>Files:</u></b>	<b><u>Name</u></b>	<b><u>Example</u></b>	<b><u>File Type</u></b>	<b><u>SP Topic</u></b>
Document Set	tip#_type_firm_date	u2005_con_esp_180415	SharePoint	Con Submittals
Supplemental	tip#_type2_firm_date	u2005_con2_esp_180415	SharePoint	Con Submittals

2-3 character Survey Types:      CON = Conventional                      SUE = Subsurface Utility Engineering  
MS = Mobile Scanner              TS = Terrestrial Scanner              HS = Hydrographic Surveys

### **L&S PSD Naming Convention (Field)**

Property Survey(Legal)	psd#Lf_ls_psd_date.dgn	55506Lf_ls_psd_180101.dgn	2d design file
PSD GPK(Legal)	psd#Lf_ls_gpk_date.gpk	55506Lf_ls_gpk_180101.gpk	Binary(database)
Property Survey(RW)	psd#rwf_ls_psd_date.dgn	55506rwf_ls_psd_180101.dgn	2d design file
PSD GPK(RW)	psd#rwf_ls_gpk_date.gpk	55506rwf_ls_gpk_180101.gpk	Binary(database)
Revised PSD(Legal)	psd#LfR_ls_psd_date.dgn	55506LfR_ls_psd_180101.dgn	2d design file
Revised PSD(RW)	psd#rwfR_ls_psd_date.dgn	55506rwfR_ls_psd_180101.dgn	2d design file

\*Capital L shown for clarity, since lowercase L looks like the number one.

\*Capital "R" makes it easier for Central Office to keep up with revised files. Continue to include DATE in revised filename.

"The \_ls\_psd located to the left of the "." allows the correct version of NCMAP to be loaded.  
That version is titled NCMAP (PSD) and has additional features specific to a PSD drawing.

### **L&S PSD Naming Convention (PDC Group Internal)**

Property Survey(Legal)	psd#L_ls_psd.dgn	55506L_ls_psd.dgn	2d design file
PSD GPK(Legal)	psd#L_ls_gpk.gpk	55506L_ls_gpk.gpk	Binary (data base)
PSD Text Description	psd#L_ls_psd_desc.txt	55506L_ls_psd_desc.txt	Text
Property Survey(RW)	psd#rw_ls_psd.dgn	55506rw_ls_psd.dgn	2d design file
PSD GPK(RW)	psd#rw_ls_gpk.gpk	55506rw_ls_gpk.gpk	Binary (data base)
PSD (RW)Text Description	psd#rw_ls_psd_desc.txt	55506rw_ls_psd_desc.txt	Text
Revised PSD(Legal)	psd#Lr_ls_psd.dgn	55506Lr_ls_psd.dgn	2d design file
Revised PSD(RW)	psd#nwr_ls_psd.dgn	55506nwr_ls_psd.dgn	2d design file
2 <sup>nd</sup> Revision PSD(Legal)	psd#Lr2_ls_psd.dgn	55506Lr2_ls_psd.dgn	2d design file
2 <sup>nd</sup> Revision PSD(RW)	psd#nwr2_ls_psd.dgn	55506nwr2_ls_psd.dgn	2d design file
Preliminary PSD (Legal)	psd#Lp_ls_psd.dgn	55506Lp_ls_psd.dgn	2d design file
Preliminary PSD (RW)	psd#nwp_ls_psd.dgn	55506nwp_ls_psd.dgn	2d design file

\*Capital L shown for clarity, since lowercase L looks like the number one.



