

SMU SharePoint Guidelines for Bridge Program Projects

SMU Bridge Program SharePoint Guidelines

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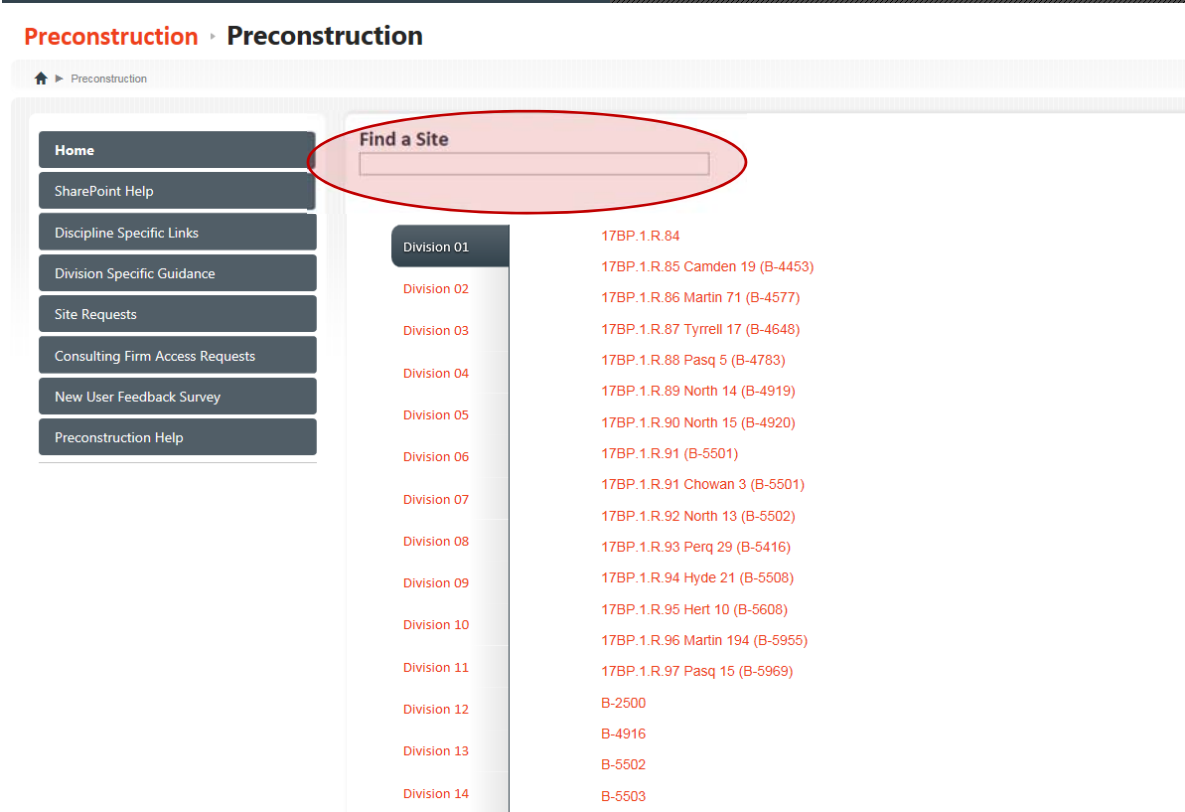
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Structures Management will be utilizing SharePoint for project delivery. Here are instructions on how to setup your projects.

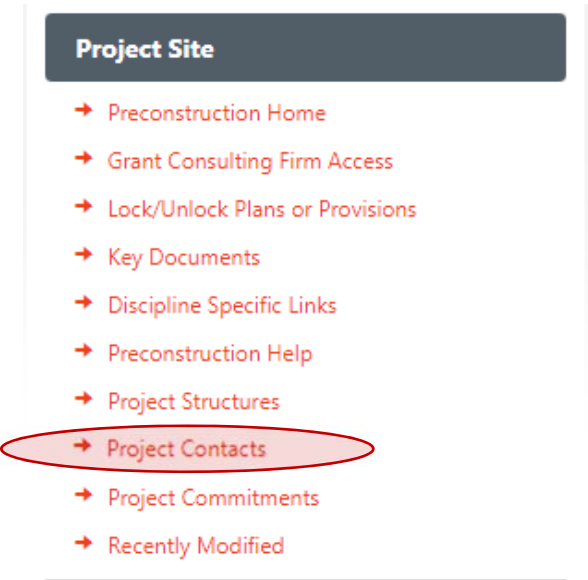
Site Overview Instructions

- 1) You will need to use the Preconstruction Site:
<https://connect.ncdot.gov/site/preconstruction/SitePages/Home.aspx>
- 2) Find your project on the NCDOT Preconstruction (SharePoint) Site. Type in your project name in the “Find a Site” search box.



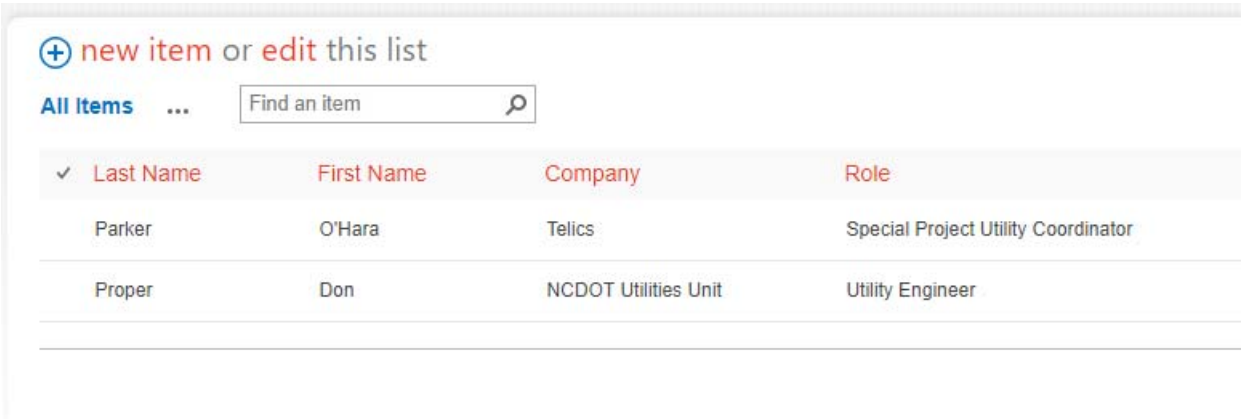
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3) Fill out the Project Contacts. See Link on the left side of page.



Project Site

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




+ new item or edit this list

All Items ... Find an item

✓	Last Name	First Name	Company	Role
	Parker	O'Hara	Telics	Special Project Utility Coordinator
	Proper	Don	NCDOT Utilities Unit	Utility Engineer

4) Use the “By Phase and Topic” view to sort files by Milestone (aka Phase). This is the default view on all projects.

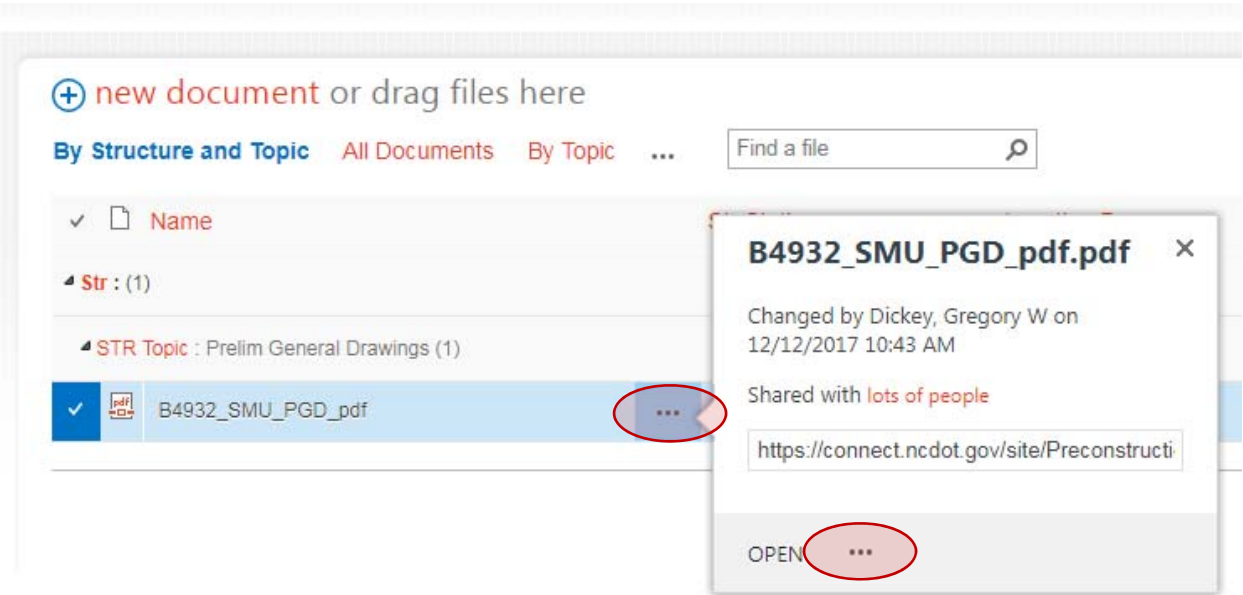


+ new document or drag files here

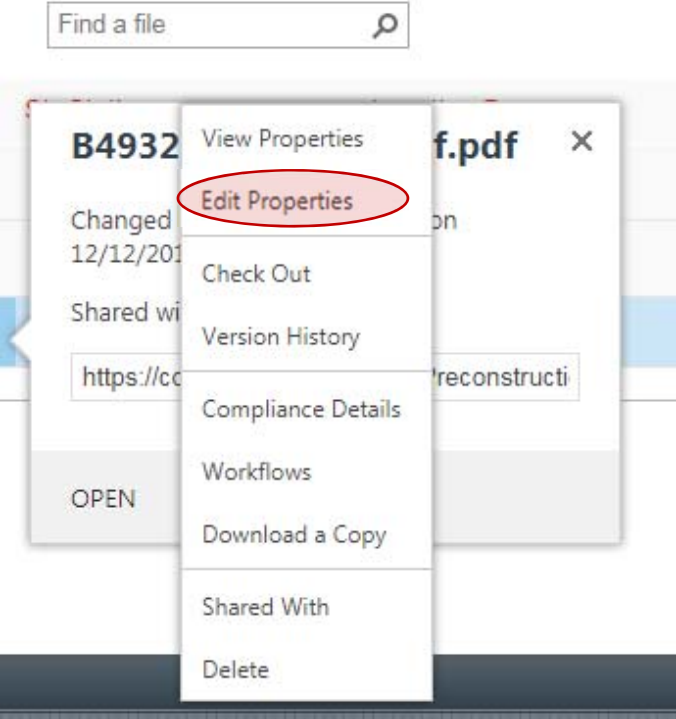
By Phase by Topic All Documents By Topic ... Find a file

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- 5) **METADATA** : SharePoint allows for files to have more information/details to be attached to each individual file, so please utilize this feature when uploading files.
 - a. Click the ellipsis icon next to a file or document set to add metadata.



- b. Click Edit Properties.



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c. Fill out the metadata in this section. (See *Roadway Design Submittal Instructions* for more detail.)

The screenshot shows a SharePoint metadata form for an RDY Document. The form includes the following fields and options:

- Content Type:** RDY Document (dropdown menu). Below it, the text "Create a new Roadway Design Document" is displayed.
- Name *:** B-5326_Rdy_DP_PFL (text input field) followed by ".pdf".
- Title:** (empty text input field).
- RDY Topic:** (empty dropdown menu). Below it, the text "Folder-like grouping to organize working files." is displayed.
- Precon Phase:** 25% - To Hydro (dropdown menu).
- State:** Final (dropdown menu).
- KeyRDY:** (empty dropdown menu). Below it, the text "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." is displayed.
- Precon Notes:** (empty text area).

At the bottom of the form, the following information is visible:

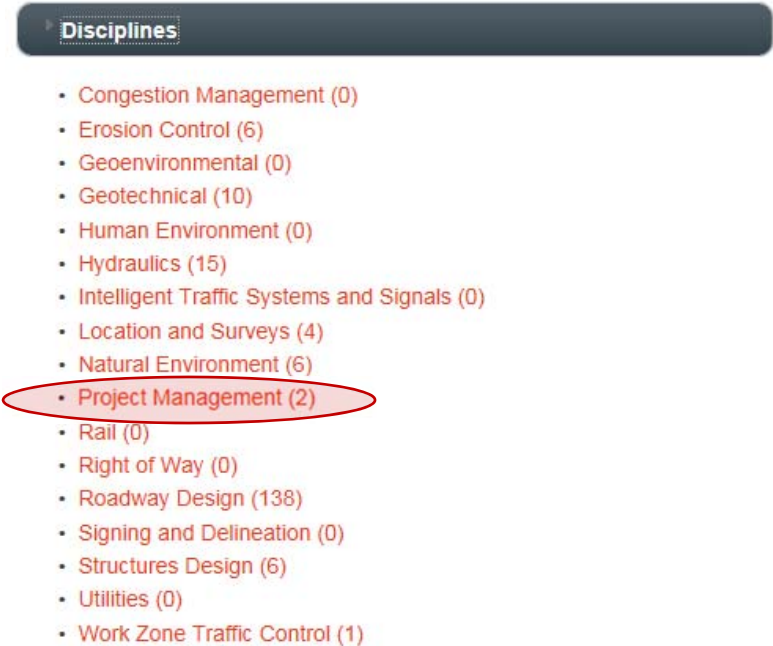
- Version: 3.0
- Created at 2/9/2018 8:29 AM by [user icon]
- Save button (green)
- Cancel button (grey)

d. Click Save.

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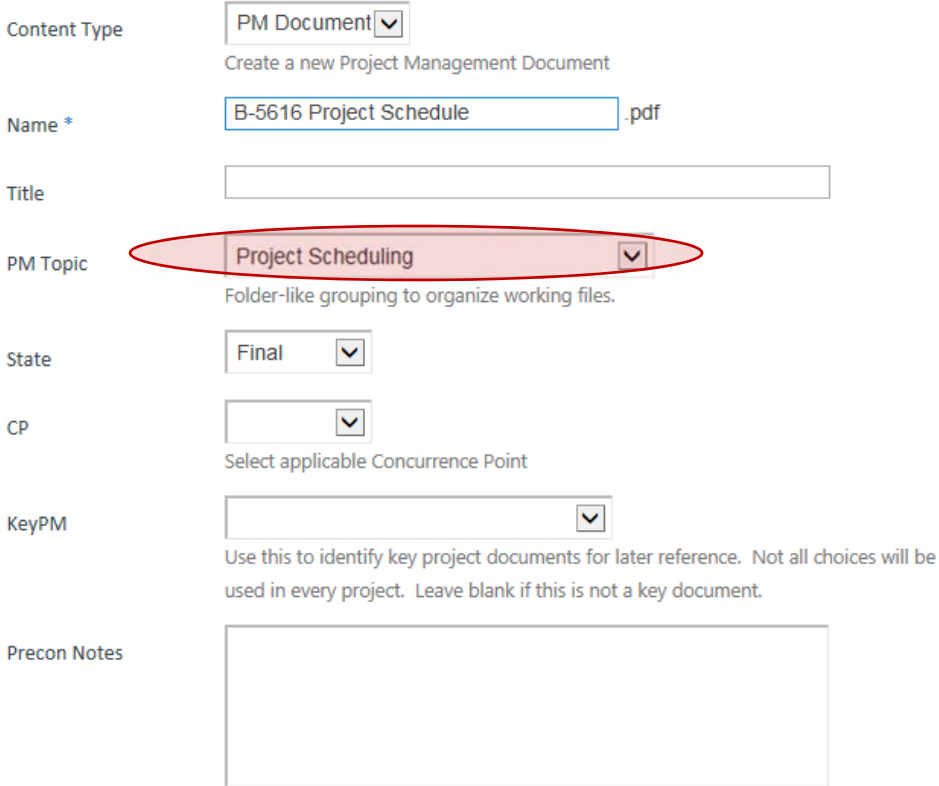
Project Management Instructions

1) Click on the Project Management Discipline library.



The screenshot shows a dark grey header with the word "Disciplines" in white. Below it is a list of disciplines, each with a red bullet point and a count in parentheses. The "Project Management (2)" item is circled in red. The other items are: Congestion Management (0), Erosion Control (6), Geoenvironmental (0), Geotechnical (10), Human Environment (0), Hydraulics (15), Intelligent Traffic Systems and Signals (0), Location and Surveys (4), Natural Environment (6), Rail (0), Right of Way (0), Roadway Design (138), Signing and Delineation (0), Structures Design (6), Utilities (0), and Work Zone Traffic Control (1).

- 2) Upload the approved project schedule to this library.
- a. Name the schedule: "B/BR-XXXX_Project_Schedule"
 - b. Edit the metadata to label the PM Topic as *Project Scheduling* as shown below.



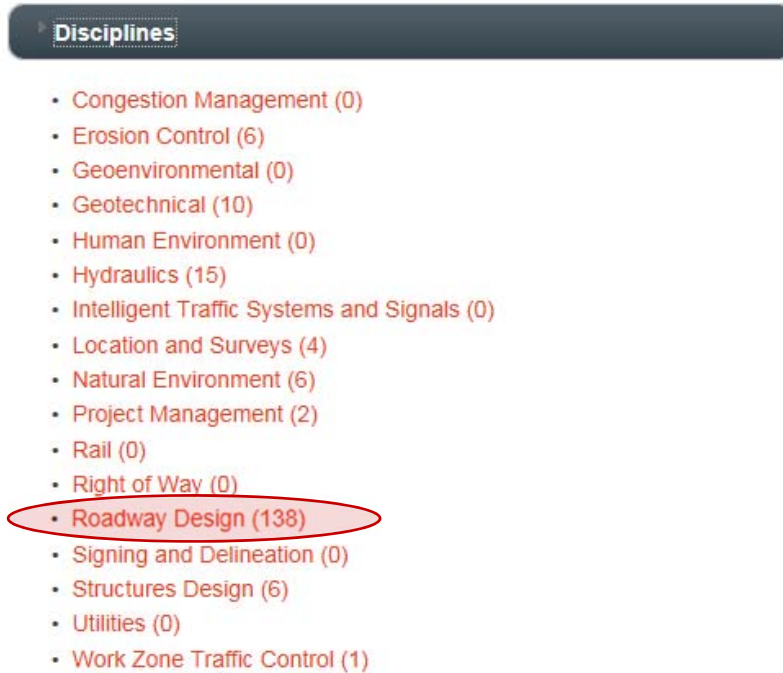
The screenshot shows a metadata form for a "PM Document". The "Content Type" is "PM Document" with a dropdown arrow. Below it is the text "Create a new Project Management Document". The "Name *" field contains "B-5616 Project Schedule" followed by ".pdf". The "Title" field is empty. The "PM Topic" field is "Project Scheduling" with a dropdown arrow, and this field is circled in red. Below it is the text "Folder-like grouping to organize working files.". The "State" field is "Final" with a dropdown arrow. The "CP" field is empty with a dropdown arrow, and below it is the text "Select applicable Concurrence Point". The "KeyPM" field is empty with a dropdown arrow, and below it is the text "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.". The "Precon Notes" field is a large empty text area.

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- c. Maintain the project schedule throughout the life of the project. If the schedule is revised at any point in the project, upload the revised version and denote the revised date in the *Precon Notes* metadata.
- d. Notify the NCDOT Project Manager once the schedule is uploaded.

Roadway Design Submittal Instructions

- 1) Click on the Roadway Design Discipline library.



- 2) In order to organize the Roadway Design library, utilize document sets instead of folders as you can assign metadata to document sets.
 - 3) Create document sets at important Milestones of the project (i.e. 25%, 65%, etc.)
 - a. See link on *How to Create a Document Set*:
<https://connect.ncdot.gov/site/preconstruction/Preconstruction%20Help/Design%20Document%20Sets%20Help.pdf>
 - b. Naming convention should be as follows:
 - i. Functional_Plan_Review
 - ii. Design_Criteria_Review
 - iii. 25_Percent_Plan_Review
 - iv. 65_Percent_Plan_Review
 - v. 75_Percent_Plan_Review
 - vi. 90_Percent_Plan_Review
 - vii. 100_Percent_Plan_Review
 - viii. Past Plans
 - ix. Correspondence
- NOTE: The use of *document sets* should be kept to a minimum.

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- c. Add metadata to each of these document sets.
 - i. Most importantly: Add the State and Precon Phase.
 - ii. For review document sets, label the State as 'In Review' and label the Precon Phase accordingly. *Past Plans* will not have any metadata assigned to it. Any documentation of decisions that affect the design throughout the life of the project and any items that would typically be identified in the "Brown Folder" should be labeled as a "Decision Document" and placed into the *Correspondence* document set.
 - iii. **DO NOT** fill out the Topic metadata field at this time for any of the document sets.
 - iv. See *Final Plan Turn-in Instructions* for an explanation of the *Key Document Metadata*.











The screenshot shows a SharePoint document creation form. The 'Content Type' is set to 'RDY Document'. The 'Name' field contains 'B-5326_Rdy_DP_PFL.pdf'. The 'Precon Phase' dropdown is set to '25% - To Hydro' and the 'State' dropdown is set to 'Final'. Both dropdowns are circled in red. The 'RDY Topic' field is empty. The 'KeyRDY' field is empty. The 'Precon Notes' field is empty. At the bottom, there are 'Save' and 'Cancel' buttons. The version is 3.0 and it was created at 2/9/2018 8:29 AM by [user icon].

NOTE: **ONLY** create the Milestone document sets when you reach that particular Milestone in the project.

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- 4) Once a Milestone is complete, place a *Final* version of that Milestone’s plans and design files outside of the document set into the Roadway Discipline library. Use metadata to label the Precon Phase and State of the files.
 - a. This will include PDFs of the plans and one zipped file with all supporting design files sorted using the Roadway File System Guidelines and Naming Convention:

<https://connect.ncdot.gov/projects/Roadway/RoadwayDesignAdministrativeDocuments/Roadway%20Design%20Consultant%20Coordination%20Guidelines.pdf>

▲ RDY Topic : (14)			
▲ Precon Phase : (1)			
	Past Plans	...	About a minute ago
▲ Precon Phase : 15% - Preliminary (1)			
	Design Assumption Review	... Final	February 1
▲ Precon Phase : 25% - To Hydro (8)			
	25 Percent Plan Review	... In Review	About an hour ago
	B-5326_25 Percent Files ✱	... Final	About an hour ago
	B-5326_Rdy_DP_PFL ✱	... Final	About an hour ago
	B-5326_Rdy_DP_PLAN ✱	... Final	About an hour ago
	B-5326_Rdy_DP_PSH4 ✱	... Final	About an hour ago
	B-5326_Rdy_DP_PSH5 ✱	... Final	About an hour ago
	B-5326_Rdy_DP_TTD ✱	... Final	About an hour ago
	B-5326_Rdy_DP_XSC ✱	... Final	About an hour ago

- 5) Repeat Step 4 at each Milestone when completed and approved. Then, move the previous Milestone’s plans and design files into the *Past Plans* document set.
- 6) All other files that are not a part of plan reviews/turn-ins will be placed into the *Correspondence* document set.
 - a. See *Final Plan Turn-in Instructions* for more detail.

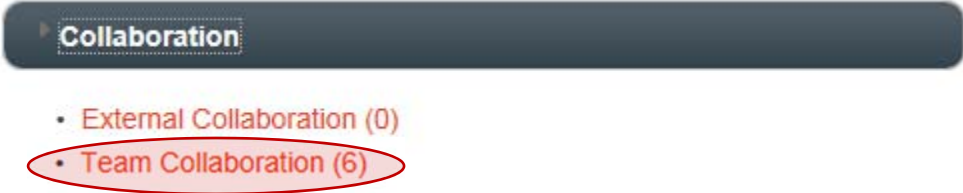
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Field Scoping Meeting (FSM) Preparation Instructions

- 1) Submit Functional Plans and Designs for review into the appropriate location within the Roadway Discipline Library as indicated in previous instructions.
- 2) Begin setting up the SharePoint site for the FSM. This includes using the provided FSM template, inputting the known project history, and coordinating with the Division to set up the meeting.
- 3) Send out the FSM worksheets to the following people for their Discipline’s input and allow two weeks for turnaround:
 - a. Location and Surveys (Dale Burton)
 - b. Utilities Unit (Barry Whitaker)
 - c. Environmental Analysis Unit (Chris Rivenbark - Divisions 1-6 & 8 or Carla Dagnino - Divisions 7 & 9-14)
 - d. Geotechnical Engineering (Chris Kreider - Divisions 1-7 or Eric Williams - Divisions 8-14)
 - e. Work Zone Unit (Steve Kite – Divisions 1-4 & 6, Kenneth Thornewell – Divisions 5, 7-9, or Don Parker – Divisions 10-14)
 - f. Structures Management Unit (Kristy Alford – Divisions 1-7 or Keith Paschal – Divisions 8-14)
 - g. Rail Division (James B. Harris) – **ONLY** for projects involving railroads
 - h. Hydraulics Unit (Galen Cail – Divisions 1-6,8 or Marc Shown – Divisions 7, 9-14)
 - i. SMU’s GEC Reviewers

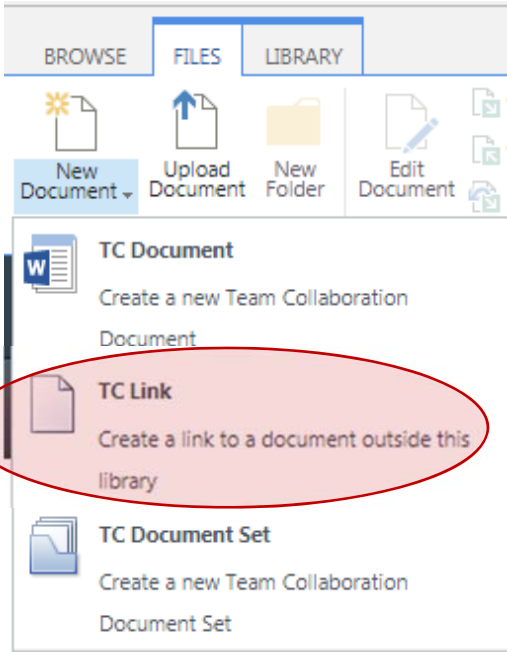
NOTE: This list of contacts is subject to change.

- 4) Coordinate with the Division to set up a date, time, and place. Ask the Division whether they prefer to meet on-site or at the Division office. Once a date and time is chosen, send out a calendar invite to all relevant parties. Include smupef@ncdot.gov in the calendar invite.
- 5) SharePoint Preparation for FSMs:
 - a. Use the **Collaboration** -> **Team Collaboration** Library



- b. Create a *TC Document Set* and name it ***Project Name* FSM** - For the metadata be sure to select the “Field Scoping Meeting” by the TC Topic, then click *Save*.
- c. Include a *link* to the functional plans and any other relevant documents that you have placed in the other Discipline libraries.
 - i. *Adding a link* – In the Team Collaboration Library, click the *File* tab then the word *New Document*, then **TC Link**. Fill out the information that provides a link to the functional plans or any relevant data that you have already uploaded to the SharePoint site. For the metadata, be sure to select the “Field Scoping Meeting” by the TC Topic, then click *Save*. **TIP:** Copy the link you want to use before going to add the link to the library.

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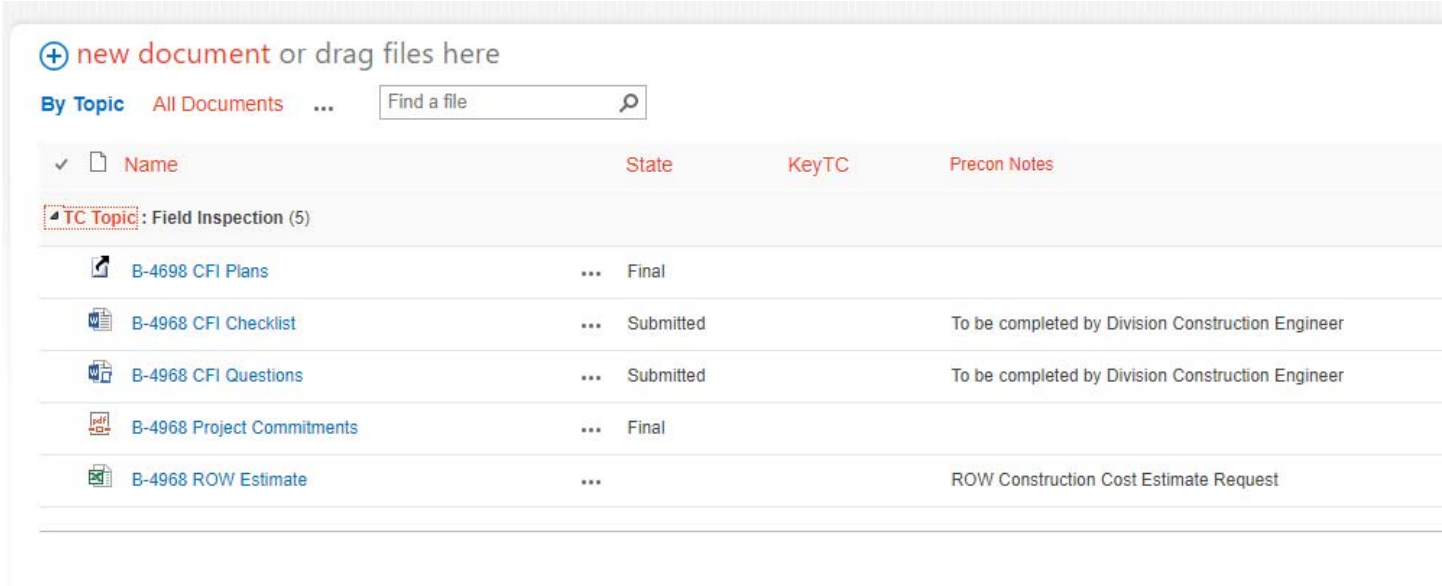
TC Topic : Field Scoping Meeting (2)		
 B5713 FSM	...	A few seconds ago
 Functional Plans	...	A few seconds ago

- d. After the FSM occurs, place the completed FSM worksheet, all correspondence, and any documentation of decisions made at the FSM into this document set. **DO NOT** forget to add that metadata! You will need to identify the completed FSM worksheet as a *Key Document*.

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Combined Field Inspection (CFI) Preparation Instructions

- 1) Contact the Division Construction Engineer (DCE) and Division Staff Construction Engineer (if applicable) for the appropriate Division at least a month before the scheduled CFI Milestone to set up a date, time, and location for the CFI.
 - a. Coordinate with the Division on where and when they would like to hold the CFI.
 - b. Provide the Division with the CFI questions and the Preliminary Estimate after the Roadway plans and design have gone through the 65% review.
 - c. Send out the CFI letter to all Disciplines to notify them of the intended meeting. Fill out the SMU CFI letter template and have the SMU Project Engineer docusign the completed letter.
 - d. Once a preferred date has been set, have the Division place a hold for the meeting. You will need to send the meeting invite out to all Disciplines per the CFI letter. Include the following contacts in addition to all others:
 - i. SMU’s group email: smupef@ncdot.gov
 - ii. SMU’s GEC
- 2) SharePoint Preparations for CFIs:
 - a. See *SharePoint Preparations for FSMs*. The main differences for CFIs will be the labeling of files with metadata, the relevant documents and *links* for the 65%/CFI Milestone.
 - i. Use the *Field Inspection* metadata to organize the CFI files instead of using a document set.
 - ii. These files include: the CFI checklist, Project Commitments (a *link* to the Environmental Documentation), a link to 65%/CFI Plans, CFI questions, etc. Each file that is added to the Team Collaboration Library will need the *Field Inspection* metadata add after they are uploaded.



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Final Plan Turn-in Instructions

Final Plan Turn-in to the Contract Standards and Development Unit will utilize SharePoint. Projects will be advertised from SharePoint in the future.

- 1) Go to the LET Preparations Library. Final Plans, Special Provisions, and Roadway Supporting Documents (aka the Manila Folder) will be placed here for final review by Plan Checking.

▶ LET Preparation

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

NOTE: Hard copies will no longer be required for Final Plan Turn-in.

Final Let -> Roadway Supporting Documents = Manila Folder
Roadway -> Correspondence Folder = Brown Folder

- 2) Create document sets for Roadway Plans, Cross Section Plans, and Roadway Supporting Documents as shown below. If you have been tasked with other disciplines, coordinate with other NCDOT Units for Final Turn-in.

✓ Plan Set Type	Name	State	KeyFP	Precon Notes
	Roadway Supporting Documents	... In Review	Final Plans – Sheet Sets	
100 Roadway Plans	100 Roadway Plans	... In Review	Final Plans – Sheet Sets	
200 Transportation Management Plans	200 Transportation Management Plans	... Final	Final Plans – Sheet Sets	
210 Pavement Marking Plans	210 Pavement Marking Plan	... Final	Final Plans – Sheet Sets	
230 Erosion Control Plans	230 Erosion Control Plans	... Final	Final Plans – Sheet Sets	
240 Reforestation Plans	240 Reforestation Plans	... Submitted	Final Plans – Sheet Sets	
250 Signing Plans	250 Signing Plans	... Final	Final Plans – Sheet Sets	
300 Cross Section Plans	300 Cross Section Plans	... In Review	Final Plans – Sheet Sets	

- a. Roadway Supporting Documents will include the documents listed per the Roadway Guidelines found in Part II, Section 13-1, Page 6:
<https://connect.ncdot.gov/projects/roadway/roadway%20design%20manual/13.%20roadway%20plans.pdf>

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- b. Name Roadway Plans according to standard Project Store-> Common Folder naming convention. See:
<https://connect.ncdot.gov/site/preconstruction/Preconstruction%20Help/Quick%20Reference%20-%20Final%20Plans%20and%20Special%20Provisions.pdf>
 - c. Please match the “Plan Set Type” and “Name” of each plan document set.
 - d. When updated files are requested during the Contract Plan Checking review, overwrite the PDFs in the document set. SharePoint saves older versions of the files if they need to be referenced in the future. Make sure the file names match exactly.
- 3) Once Contracts completes its review, a final Sealed set of plans can be placed in the Final Plans Library overwriting the unsealed, final plans. One set of zipped dgns can be placed in the *Roadway Supporting Documents* document set *TIP Name*_Final_Files.

General SharePoint Instructions

1) KEY DOCUMENTS

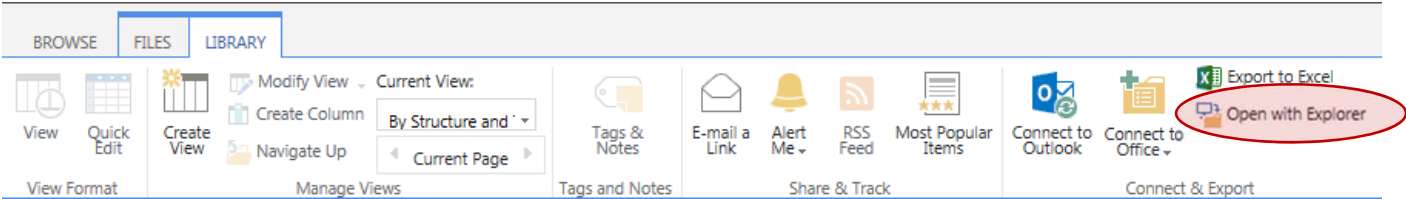
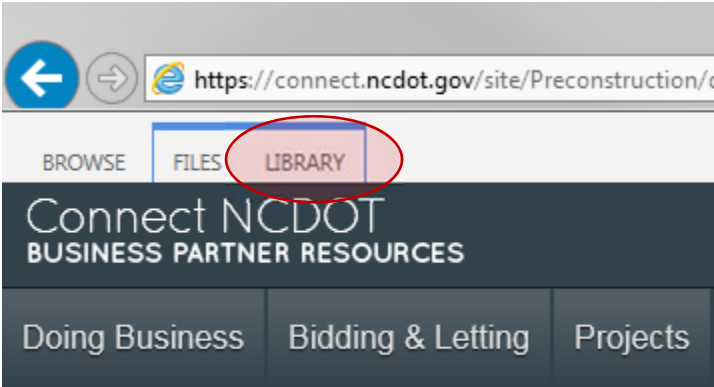
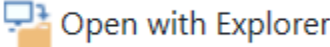
- a. Metadata has been added to SharePoint to label certain documents as “Key Documents” for final plan review purposes. These documents include files such as the Environmental Documents, correspondence in which major project decisions were made, Final Pavement Design, etc.

Key Documents			
This page pulls together the Key Documents that have been marked for this project.			
Key Document	Name	Library	
Bid Proposal	F_B5170 TC 1-2 11-7-17.pdf	Special Provisions - Locked	
Bid Proposal	P_B-5170 Project Special Provisions.pdf	Special Provisions - Locked	
Bid Proposal	J_B-5170 11-17-17.pdf	Special Provisions - Locked	
Bid Proposal	I_B-5170 UBO_PSP 11-17-17.pdf	Special Provisions - Locked	
Bid Proposal	R_B-5170_Mitchell_Permit_PNR_12-4-17.pdf	Special Provisions - Locked	
Bid Proposal	D_5170-Soil Provisions -CONTAMINATED SOIL.pdf	Special Provisions - Locked	
Bid Proposal	C_B5170 11-22-17.pdf	Special Provisions - Locked	
Bid Proposal	B-5170_Mitchell_1-22-18.pdf	Special Provisions - Locked	
Bridge Survey Report	600029 2017 B5170 BIG ROCK CREEK NC 226 DET.PDF	Hydraulics	
Bridge Survey Report	60 0029 2017 B5170 BIG ROCK CREEK NC 226.PDF	Hydraulics	
Decision Document	B5170_GEO_SHRG_Recs.pdf	Geotechnical	
Decision Document	B-5170 EC Transport Quantities.pdf	Erosion Control	
Decision Document	Planning	Roadway Design	
Decision Document	GENCOR Series 200.doc	Roadway Design	
Decision Document	Correspondence	Roadway Design	
Decision Document	B5170_Alt2.pdf	Roadway Design	
Decision Document	B5170_Alt.1.pdf	Roadway Design	
Decision Document	B-5170 Request for Final Pavement Design.pdf	Roadway Design	
Decision Document	B-5170 Final Pavement Design.pdf	Roadway Design	
Decision Document	2009-12-08_B-5170_DSR.pdf	Congestion Management	
Decision Document	B5170_GEO_SHRG_Details.pdf	Geotechnical	
Decision Document	B-5170 Structure Survey Recommendations.pdf	Hydraulics	
Decision Document	B-5170 Design Exception Checklist.docx	Roadway Design	
Field Inspection Minutes	Combined Field Inspection(Answers).pdf	Team Collaboration	
Field Inspection Minutes	CFI_Correspondence.pdf	Team Collaboration	
Field Inspection Minutes	B-5170 Combined Field Inspection (letter).pdf	Team Collaboration	
Final Envt Doc	B-5170_CE_Final_10142016.pdf	Project Development	
Final Plans – Consolidated PDFs	Roadway Supporting Documents	Final Plans	
Final Plans – Sheet Sets	200 Transportation Management Plans	Final Plans	
Final Plans – Sheet Sets	210 Pavement Marking Plans	Final Plans	
Final Plans – Sheet Sets	230 Erosion Control Plans	Final Plans	
Final Plans – Sheet Sets	250 Signing Plans	Final Plans	
Final Plans – Sheet Sets	290 Utility by Others Plans	Final Plans	
Final Plans – Sheet Sets	300 - Cross Sections	Final Plans	
Final Plans – Sheet Sets	400 Structure Plans - Bridges	Final Plans	
Final Plans – Sheet Sets	100 Roadway Plans	Final Plans	
Final Recommendations	B5170_GEO_BRDG0029_SubsurfaceInv.pdf	Geotechnical	
Final Recommendations	B-5170 GEO RDWY Recs.pdf	Geotechnical	
Final Recommendations	B-5170 GEO RDWY Sum of Qty.pdf	Geotechnical	
Final Recommendations	B5170_GEO_BRDG0029_Recs.pdf	Geotechnical	
Final Recommendations	B-5170 GEO RDWY RECS Summary Tables.pdf	Geotechnical	

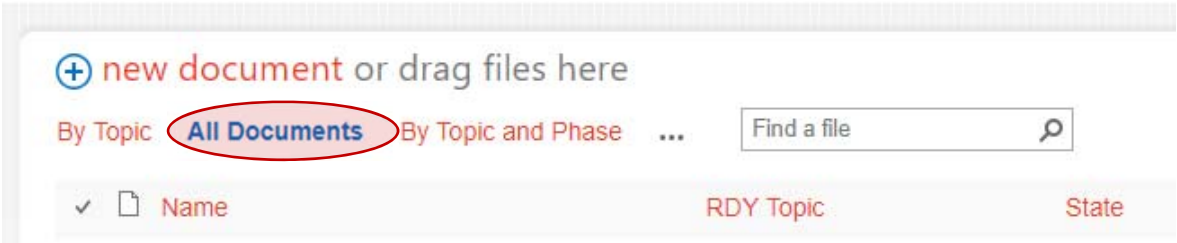
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2) FILE EXPLORER

- a. In the upper left corner of your browser, just under the URL, click on the *Library* Tab
- b. Now click on the *Open with Explorer* button. This should open up the File or Windows Explorer on your computer. *You may need to log in once again.*
- c. This allows you to view files in a more familiar way

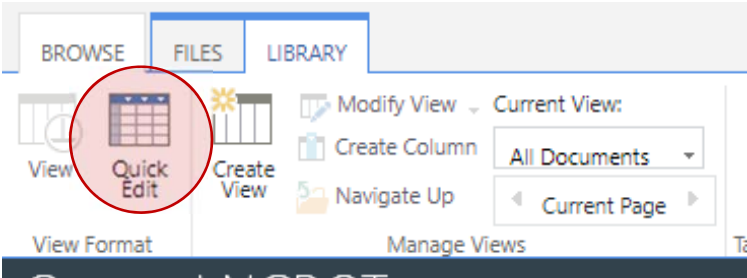


- 3) Quick Edit – This feature allows the user to edit the metadata of several files at once.
 - a. In the Roadway Discipline Library click the “All Documents” link. This will show all the documents that have been uploaded into the library.



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b. Click the Library Tab in the upper left corner of the browser. Then click the “Quick Edit” icon



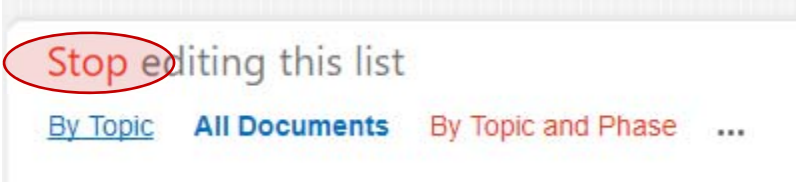
c. Quick Edit will allow you to drag and copy metadata in the metadata table.

Stop editing this list

By Topic **All Documents** By Topic and Phase ... Find a file

Name	RDY Topic	State	KeyRDY	Precon Phase
100 Percent Plan Review	Consultant Submittals	In Review		100% - Final Sealed
25 Percent Plan Review	Consultant Submittals	In Review	(none)	25% - To Hydro
65 Percent Plan Review	Consultant Submittals	In Review	(none)	65%
75 Percent Plan Review	Consultant Submittals	In Review	(none)	75% - ROW
B-5326_25 Percent Files	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_PFL	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_PLAN	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_PSH4	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_PSH5	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_TTD	Consultant Submittals	Final	(none)	25% - To Hydro
B-5326_Rdy_DP_XSC	Consultant Submittals	Final	(none)	25% - To Hydro
Design Assumption Review	Consultant Submittals	Final	(none)	15% - Preliminary
Past Plans	Consultant Submittals		(none)	

d. Click “Stop” when you have finished making edits to the metadata table.



Give someone a high-five!!! You have a beautiful and well organized file structure on SharePoint!!!!

Congratulations, you are now a SharePoint Expert!