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Project Development Division  
Bridge Design Section  
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John Bel Edwards, Governor  
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## MEMORANDUM

TO: SECTION 25

FROM: ZHENGZHENG "JENNY" FU, P.E. **Zhengzheng Fu**  
BRIDGE DESIGN ENGINEER ADMINISTRATOR

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Date: 2021.03.17 08:58:25 -0500

SUBJECT: BRIDGE DESIGN TECHNICAL MEMORANDUM NO. 101 (BDTM.101) -  
PUBLICATION OF STANDARD OPERATING PROCEDURE (SOP) -  
DOCUMENT MANAGEMENT PROCEDURES

DATE: March 17, 2021

Effective immediately, the attached SOP is to be used by Section 25 for document management on the R:\Drive and ProjectWise.

The SOP primary intentions are:

- To facilitate project folder and file migration from current locations in "Unit" folders to new locations in the R:\Drive "Projects" folder.
- To provide folder and file migration implementation schedule (see SOP Section 2.3).
- To provide folder and file usage requirements for the R:\Drive in general.
- To provide folder and file usage requirements for ProjectWise, which allows deletion of BDTM.05 - Publish ProjectWise Document Control Procedure.

This technical memorandum is posted on the LA DOTD Website under [Inside La DOTD > Divisions - Engineering > Bridge Design > Technical Memoranda – BDTMs.](#)

Please contact Kelly Kemp (kelly.kemp@la.gov or 225-379-1809) if you have questions or comments.

ZZF/kmk

c: Christopher P. Knotts (Chief Engineer)  
Edward Wedge (Deputy Engineer Administrator)  
Chad Winchester (Chief, Project Development Division)



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# Document Management Procedures

Standard Operating  
Procedure

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Bridge & Structural Design  
Section 25

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3/11/2021

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Inactive

**DOCUMENT MANAGEMENT PROCEDURES  
SECTION 25**

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Inactive

**DOCUMENT MANAGEMENT PROCEDURES  
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**1.0 Introduction**

This SOP establishes policies and procedures for Section 25 active document management during Stage 0 through Stage 5. Stage definitions are found in the LA DOTD Project Delivery Manual.

For Section 25 document archiving procedures, see the BDEM Part I, Ch. 3 Appendix.

Document management will utilize the R:\ Drive (Section 25 server) and ProjectWise.

**2.0 R:\Drive Usage**

The R:\Drive will be used to store documents not designated for ProjectWise. Such documents include, but are not limited to, project correspondence, letters/memos, reports, calculations, data, and consultant contract development. For projects with Project Managers (PMs) and Task Managers (TMs) outside of Bridge Design, the above listed documents may be stored in ProjectWise with a link provided on the R:\drive to the document/folder in ProjectWise. Documents are not to be duplicated and kept in more than one location.

Table 1 below shows the R:\Drive main folder structure.

**Table 1 - R:\Drive Main Folder Structure**

<b>Folder Name</b>	<b>Storage Purpose</b>
Unit 1 Common	Section 25 administrative and other documents affecting all Units.
Unit 1 IDIQ	IDIQ consultant contract management.
Unit 1 SOP	Section 25 Standard Operating Procedures (SOPs). Within this folder, SOPs are organized by the developing/owning Unit.
Project Folder	Centralized Section 25 project documents. Primary organization within this folder will consist of one (1) folder for each State Project Number. See Section 3.0 for project folder requirements.
Unit Folders	Documents specific to administration and work specific to each Unit.

**2.1 R:\Drive Project Folder Establishment**

Upon project assignment to a Section 25 PM or TM, verify that the desired folder does not exist. Following verification, establish R:\Drive folders using the following procedure.

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PMs or TMs are to request R:\Drive Project Folder creation by sending an e-mail to the Section 25 IT Management Consultant 2-DCL (IT) and copy the IT's supervisor.

**2.2 R:\Drive Project Folder Documents and Procedures**

Store project documents developed during project Stage 0 through Stage 5 in accordance with the requirements of this section. Refer to the DOTD Project Delivery Manual for DOTD's Project Delivery Process and definitions of project stages.

The "Project Folder Structure Template" shown in Appendix A shall be used for all projects. The IT will set up the folders in **bold** upon receiving the request. The remaining folders, listed in Appendix A, may be created by the user on an as needed basis. The folders underlined may be modified by the users. Folders not included in the template shall not be created without the approval of the Bridge Design Engineer Administrator.

Avoid storing identical documents (whether active or final) in more than one location.

**2.3 R:\Drive Folder and File Migration**

The Bridge Design PM is responsible for coordinating the migration of current Unit project folders and files to the R:\Drive. Files should be evaluated, sorted, and placed in the appropriate folders. The TM shall assist the PM as needed during the migration effort. If the PM is outside of Bridge Design, the TM is responsible for the migration effort. Implementation schedule shall be as follows:

- New Projects – Effective immediately. Request folder upon assignment.
- Current Projects (Prior to Construction Completion) – Migration complete 6 months from SOP implementation date.
- Completed Projects (Post Construction) – TBD

**3.0 ProjectWise Usage**

ProjectWise (PW) shall be the storage location for all plan related documents. Unlike the R:\Drive, PW is shared with outside Sections, and has consultant folders with inboxes for sharing documents.

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### **3.1 ProjectWise Project Folder Establishment**

Upon project assignment to a Section 25 PM or TM, verify that the desired folder does not exist. Following verification, establish ProjectWise folders using the following procedure.

#### 3.1.1 Project Folders

For all projects, a Project Folder will be needed. Project Folders will be created and kept under the following PW location:

*LADOTD\_Corp\Documents\Headquarters*

For projects utilizing consultants, a Project Folder will also be needed under the corresponding Consultant Folder(s) under the following PW location:

*LADOTD\_Corp\Documents\\_Consultants\Consultant Folder*

Project Folder names will be the Project Number using the H.XXXXXX format.

PMs or TMs are to request Project Folder creation by using the online request form found at the following location:

DOTD Intranet → Project Development → Design Programs and Documents → ProjectWise Request Forms → **Request Form for New ProjectWise Projects**

Project Folders under Headquarters will be created using the requested template. Project Folders under Consultant Folders will be created with "Inbox" subfolders for the consultant and DOTD.

#### 3.1.2 Invoicing Folders

For projects utilizing consultants, an Invoicing Folder will be needed. Invoicing Folders will be created and kept under the corresponding Consultant Folder under the following PW location:

*LADOTD\_Corp\Documents\\_Consultants\Consultant Folder*

Currently, Invoicing Folders are sometimes named "Retainer 44-XXXXX" and sometimes named only with a contract number such as "44-XXXXX" or "4400000XXX." In the future, consideration is being given to naming all Invoicing

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Folders as the contract number. Once a decision is finalized, this SOP will be revised accordingly.

PMs or TMs are to request Invoicing Folder creation by using the online request form found at the following location:

DOTD Intranet → Project Development → Design Programs and Documents → ProjectWise Request Forms → **Retainer Request Form for New ProjectWise Projects**

Invoicing Folders will be set up with "Inbox" subfolders for the consultant and DOTD.

### 3.1.3 Consultant Folders

For projects utilizing consultants, a Consultant Folder will be needed. Consultant will be created and kept under the following PW location:

*LADOTD\_Corp\Documents\Consultants*

Consultant Folder names will be the consultant name.

If the required Consultant Folder does not exist, the folder should be requested by sending an e-mail to OTS using the link under "I.T. Help" on the DOTD at the upper left corner of the DOTD Intranet page. Copy Mr. Blake Coffey on the request e-mail.

## **3.2 ProjectWise Documents and Procedures**

PW shall be used primarily for developing and storing DGN plans and publishing documents that need to be made available to outside sections. The preferred file format for Published Submittals is PDF. For sharing documents with consultants, it is preferred to use the Consultant Folder "inbox" subfolders.

### 3.2.1 Project Folders

Project Folders created and kept under the Headquarters folder using the standard template will be set up initially with approximately 180 folders. Designers can add folders and rename folders as needed when permissions allow.

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Project Folders created and kept under Consultant Folders will initially only have "Inbox" subfolders for the consultant and DOTD that will be used for sharing project documents, such as plans, reports, memos, etc. PMs and TMs can create additional folders under these Project Folders.

Project Folders created and kept under Invoicing Folders will initially only have "Inbox" subfolders for the consultant and DOTD that will be used for invoice submitting, reviewing and processing.

3.2.2 DGN Plan Development

PW shall be used for developing and storing active DGN files used for project plan development.

Project plan sheet DGN files are to be kept under Project Folders in the following subfolder:

*LADOTD\_Corp\Documents\Headquarters\H.XXXXXX\Bridge-Facilities\Bridge-Structural\Plans*

DGN files being referenced into project plan sheets are to be kept in the following folder:

*LADOTD\_Corp\Documents\Headquarters\H.XXXXXX\Bridge-Facilities\Bridge-Structural\Reference Drawings*

3.2.3 Plan Reviews at Various Milestones

PDF Preliminary Plan sets at various milestones required for DOTD review are to be placed in the following folder prior to required review:

*LADOTD\_Corp\Documents\Headquarters\H.XXXXXX\\_Published Submittals\Project Drawings\\_Preliminary Plans*

PDF Final Plan sets at various milestones required for DOTD review are to be placed in the following folder prior to required review:

*LADOTD\_Corp\Documents\Headquarters\H.XXXXXX\\_Published Submittals\Project Drawings\\_Final Plans*

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**3.2.4 Invoicing Folders**

Invoicing Folders are to be used in accordance with the Consultant Contract Invoice Processing SOP.

**3.2.5 Federal Authorization Documents**

Documents used for FHWA review for Construction Authorization are to be kept in the following folder, which has been set up to allow FHWA access:

LADOTD\_Corp\Documents\Headquarters\H.XXXXXX\\_Published Submittals\Project Documents\ Federal Authorization Documents

Such documents include, but are not limited to, the following:

- Final Plans (PDF - from Network Plans Room set)
- DRAFT Proposal
- Estimate
- Federal Authorization Request Form (Checklist)

**4.0 Contact Information**

For questions regarding this Standard Operating Procedure, contact:

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Bridge Design Unit 008

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## **Appendix A – R:\Drive Project Primary Folder Structure Template**

### **Notes:**

Folders in **bold** will be created by the IT.

Folders underlined may be modified by the users.

The remaining folders listed in the Primary Folder Structure Template may be created by the user on an as needed basis. Subfolders to those shown below may be created as needed to assist with data organization.

Information shown in parentheses ( ) are for informational purposes and should not be included in the folder name.

Folders not included in the Primary Folder Structure Template shall not be created without the approval of the Bridge Design Engineer Administrator.

### **Primary Folder Structure Template**

#### ➤ **Stages 0 and 1**

- **Alignment Study**
- **District Questionnaire**
- **Environmental Checklist**
- **Preliminary Scope and Budget Checklist**
- **NEPA/Environmental Document (Environmental Clearance)**

#### ➤ **Stage 3**

- **10\_Design Data and Reference Documents**
  - **Bridge Design Criteria**
  - Design Report
  - Design Exceptions and Waivers
  - Bridge Evaluation Report
  - Existing As-Built Plans
  - **Geotechnical**
  - **Hydraulics**
  - **Survey Data (Topographical, Bathymetrical, and Property)**
  - **Traffic Data**

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- Transportation Management Plan (TMP)
  - **Safety Analysis**
  - Value Engineering Study
  - **20\_Correspondence**
    - **Emails (Store original emails only not cc copies)**
    - **Meeting Minutes**
    - **Memoranda**
    - **Requests**
    - **Transmittals**
  - **30\_Calculations**
    - **Employee 1**
      - Calculations
      - Comments, Markups, and Resolutions
    - **Employee 2**
      - Calculations
      - Comments, Markups, and Resolutions
    - **Engineer's Construction Cost Estimate**
    - **Final Calculation Book**
  - **40\_Bridge Consultant Contracts (Bridge design task orders or project specific contracts)**
    - **P.O. # - Description**
      - Advertisements
      - Contracts (Original Contract, Supplemental Agreements, and Extra Work Letters)
      - Correspondence
      - Invoices
      - Negotiation and Man-hours
  - **50\_As-Designed Rating**
    - **Rating Calculations**
    - **Rating Files**
    - **Rating Report**
- **Stage 4**

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- **Bid Review and Analysis**
- Bidder Inquiries (Falcon questions)
- **Stage 5**
  - **Change Orders**
    - Change Order ### - Description
      - Calculations
      - Design Files
  - **Requests and Proposals**
    - RFIs
      - RFI ### - Description
    - Contractor Proposal
      - YYYY-MM-DD - Description
    - Value Engineering
      - YYYY-MM-DD - Description
  - **Submittals for Record**
    - Formwork Submittal
  - **Submittals for Review**
- **Photos and Videos**
  - YYYY-MM-DD – Description
- **Project Delivery**
  - Agreements (RR/Entity-State/MOA/MOU)
  - Budget Requests
  - Consultant Contracts (Task orders outside of bridge design)
  - Permits
  - Real Estate
  - **Schedule and Estimate**
  - Utilities