

Project Electronic Content Management (ECM) Process

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1 Scope

The scope of this document is to define the global project electronic content management (ECM) processes, rules, roles and responsibilities. This procedure applies to ECM of capital transportation project documents. This document supplements Executive Orders: 1032.01 – Project Management and 1042.00 – Project Management and Reporting System (PMRS).

Specific business unit processes/guidance provides additional information for document entry and system use in relation to WSDOT project documentation.

2 Purpose

The vision of the ECM system is to create a fully integrated document archive and retrieval system that enables the WSDOT to create, use, and share working and final documents in electronic format across all WSDOT boundaries.

The purpose of this document is to establish and standardize WSDOT project ECM processes for capturing, storing and retrieving project documents within the Project Management and Reporting System (PMRS).

Benefits of ECM use include, but are not limited to:

- Central repository. Share files globally, all file types
- Content indexed and full text searchable
- View and edit content offline. Avoid attachments in email. Use direct web link to the content in Livelink
- Minimal change to normal everyday processes. Fully integrated with Microsoft Office suite and Adobe Acrobat programs which allow users to save directly into Livelink
- Ability to e-mail documents from the system
- Manage access privileges at any level
- Version control for file updates
 - Reduces the redundancy and confusion of versions made available to staff
- Ability to "lock" or reserve documents while editing
- Content auditing (who and when viewed)
- Automatic notification of content changes
- Ability to search emails and their attachments in the system

- Drag and Drop functionality from your desktop
- System Taxonomies (folder structures) and Categories (groupings of attributes) ensure a standard and compliance to WSDOT business practices
- Ability to generate usage reports and statistics on documents
- Ability to automate the review and approval process for documents (workflow)
- Ability to apply retention to documents
- Ability to create e-forms and capture data for future reporting

3 Livelink Roles and Responsibilities

The identified roles are provided as a guide to assigning the tasks included in the PMRS processes. Each region has the flexibility to delegate the regional and project team roles to the appropriate functional level to meet project and project office needs and to accommodate current and planned organizational structures.

3.1 Capital Program Development & Management (CPDM) Headquarters (HQ) ECM Administrator

Headquarters ECM Administrator is responsible for:

- Training
- Application change management
- ECM documentation
- Secondary support to the Regional Tools Administrators for all regions.
- Working with Regional Tools Administrators to fulfill requests for access/security inside of Livelink and the Active Directory group
- Implementation, deployment and managing the overall ECM system

3.2 Regional Tools Administrator

The Regional Tools Administrator is the liaison to the CPDM HQ ECM Administrator and is responsible for:

- Creating and maintaining project folders and inputting/modifying project information category attributes that are inherited by all documents assigned to the project
- Fulfilling requests for access/permissions inside of Livelink and coordinating with CPDM HQ ECM Administrator for security related to the Active Directory group
- Providing support to add, edit, and delete all published documents
- Initial support to their regional users

3.3 Project Team

The project team is comprised of the members from the project office, the WSDOT Specialty Groups, Consultant (when applicable), and any others that are needed to deliver the project. It is the responsibility of each project team member to insure project documents are created in or added to the ECM with the applicable attributes.

3.4 Document Controller

The Document Controller is responsible for:

- Document and attribute quality assurance/control
- Moving approved documents from the Staging folder to the Published folder. By moving documents to the appropriate Published folder, the document can be viewed by all licensed users.

Additional responsibilities may include:

- Distribution of documents to ECM and project team
- Scanning and Kofax scan validation
- Attribute data entry
- Document Originator/Contributor responsibilities

3.5 Document Originator/Contributor

The Document Originator/Contributor is responsible for:

- Creating, editing, adding project documents to the ECM according to business unit processes
- Entering attributes to documents in the ECM according to business unit processes
- Moving documents from the Working folder to Staging folder when documents are finalized and ready to publish

3.6 Read Only User

Licensed Livelink user with read only access to documents according to their security permissions. Read Only Users have the ability to search and view documents in the ECM.

4 Livelink Project Electronic Content Management (ECM) Procedure Steps

The following process steps are taken from the Project Electronic Content Management (ECM) Process Maps.

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Process%20Maps.vsd>

The sub-numbers listed below correspond to the numbered activity on the process map. For example, item 4.1 corresponds to activity 1 of the process map.

4.1 New User Setup

4.1.1 Does the user have access to Livelink?

- Identify whether the user has access to Livelink
- If user already exists in Livelink with the correct permissions, see the ECM Add or Create Document steps (4.3)

4.1.2 Send request for user access to Regional Tools Administrator

- Document Originator/Contributor sends request to Regional Tools Administrator.

4.1.3 New Livelink user?

- Is this a new Livelink user?
- The Regional Tools Administrator works with HQ ECM Administrator to setup user permissions according to the user access guidelines and user requests.
- If a new user, Regional Tools Administrator sends request to HQ ECM Administrator (step 4.1.4).
- If an existing Livelink user, Regional Tools Administrator assigns the user(s) to the appropriate groups and folders in Livelink per request (step 4.1.6).

4.1.4 Assign license and add user to Active Directory Group

- HQ ECM Administrator assigns Livelink license and adds user to Active Directory group.

4.1.5 Notify Regional Tools Administrator

- HQ ECM Administrator notifies Regional Tools Administrator new user(s) have been assigned a license and added to Active Directory group.

4.1.6 Assign user(s) to group(s) and to folders in ECM per request

- Regional Tools Administrator assigns user(s) to the appropriate groups and folders in Livelink per request.

4.1.7 Notify ECM user(s)

- Regional Tools Administrator notifies user(s).

4.2 New Project setup in ECM

4.2.1 Does the project exist in Livelink?

- Is the project already setup in Livelink? If the project is not setup proceed to step 4.2.2

- If project already exists in Livelink see the ECM Add or Create Document steps (4.3) or contact the Regional Tools Administrator for other requests.

4.2.2 Send request for new project to Regional Tools Administrator

- Document Originator/Contributor sends request to the Regional Tools Administrator to add a new project to Livelink.

4.2.3 Create and assign attributes to new project in Livelink

- Regional Tools Administrator verifies project doesn't exist.
- Regional Tools Administrator assigns project level attributes in Livelink according to the project setup guidelines and proceeds to step 4.1.6.

4.3 Add or Create Documents

4.3.1 New project document

- New document needs to be added or created in Livelink.

4.3.2 Identify appropriate Business unit

- Identify the appropriate business unit for the document i.e. is it Environmental, Traffic, Right-of-Way related. See business unit/office processes for guidance.

4.3.3 Published/Final or Working/Draft

- Determine if project document is working/draft or published/final. See business unit/office processes for guidance.
- If published /final proceed to step 4.3.4
- If working/draft proceed to step 4.3.13

4.3.4 Do you know the document attributes?

- After business unit and status of the document are determined, see Appendix B – Global Categories and business unit/office processes for guidance on required attributes.

4.3.5 Is the document electronic or paper?

- If attributes are known and the document is paper, you will need to scan it (step 4.3.6).
- If the attributes are known and the document is electronic, you can proceed to step 4.3.7.
- If attributes are not known go to step 4.3.10 for electronic and step 4.3.11 for paper documents.

4.3.6 Scan document and assign identified business unit attributes

- If published/final project document is paper and Document Originator/Contributor knows the attributes, scan the document using Kofax separator sheets to identify attributes and make an electronic file. This is saved to the staging folder.
- If you are not using Kofax for scanning documents, scan the paper document to create an electronic file and go to step 4.3.7.

4.3.7 Save to staging folder with attributes

- If the published/final document is electronic, the Document Originator/Contributor adds document to project staging folder under correct business unit and assigns applicable attributes.

4.3.8 Quality Assurance/ Quality Control

- Document Controller provides quality assurance/control on the document in the staging folder by checking that the document:
 - Is in text searchable and level playing field format
 - Is saved in the correct location in Livelink
 - Attributes are entered correctly in Livelink.

4.3.9 Move from staging to published folder

- Document Controller moves only the final version of the document from staging to published folder.

4.3.10 Add/Create in unfiled folder (temporary)

- If the published/final project document is electronic and the Document Originator/Contributor does not know the attributes, save or create the document in the unfiled folder in Livelink.
- The unfiled folder is a temporary location only. When the attributes are identified go to step 4.3.12. See business unit/office processes for guidance.

4.3.11 Scan document using “Unfiled” Kofax sheet (temporary)

- If the published/final project document is paper and Document Originator/Contributor does not know the attributes, scan the document using Kofax “unfiled” separator sheets to create an electronic file in the Livelink unfiled folder.
- If you are not using Kofax for scanning documents, scan the paper document to create an electronic file and go to step 4.3.10.
- The unfiled folder is a temporary location only. When the attributes are identified go to step 4.3.12. See business unit/office processes for guidance.

4.3.12 Identify attributes

- Document Originator/Contributor assigns the attributes (See Appendix B for detailed project information and global attribute categories, and business unit/office processes for guidance) and Livelink moves the document from unfiled to staging folder. Proceed to step 4.3.8.

4.3.13 Save to working folder with attributes

- Document Originator/Contributor adds document to project working folder under correct business unit and assigns applicable attributes.

4.3.14 Review or edit document

- Document Originator/Contributor makes edits or sends hyperlink to reviewers for comment and editing.
- Document Originator/Contributor determines when the document is final and ready to publish. When electronic document is final, go to step 4.3.4.

5 Livelink Project Electronic Content Management (ECM) Rules

By June 1, 2010, each region will develop an initial ECM Implementation Plan. The region ECM Implementation Plan will be based on region priorities and resources and will identify which project documents should be incorporated into the tool initially. The following ECM rules are intended to provide guidance for project use of ECM tool.

5.1 Project Information and Global Attributes

- All project information category attributes shall match CPMS project information as applicable. See Appendix B for detailed project information and global attribute category details.

5.2 ECM and Project Documents

- Project teams must use Livelink as their ECM for the selected project final/published documents and files according to the region ECM Implementation Plan. See business unit/office processes for guidance.
- It is strongly recommended that project teams use Livelink as their ECM for all project draft/working documents and files. See business unit/office processes for guidance.

- See Executive Orders 1032.01 – Project Management and 1042.00 – Project Management and Reporting System (PMRS) regarding project use of PMRS tools.
- Final electronic documents must be in text searchable and WSDOT level playing field format. See the following hyperlink for information regarding WSDOT IT standards for level playing field:
<http://wwwi.wsdot.wa.gov/IT/PoliciesStandards/Standards/100-Desktop/101.00LPFDesktopTools.htm>
- It is required that file size is limited to 2 GB or less per uploaded file.

5.3 Scanning

- It is strongly recommended that project teams use Kofax software and compatible scanners for capturing hard copy documents.
- It is strongly recommended that teams scan and save documents in Optical Character Recognition (OCR), prior to adding files to the ECM. This allows the system to search the text of documents and increases the probability users will find documents they are searching for.
- It is required that image quality be set at 300dpi or greater, so the document will be reproducible in PDF format.

5.4 Attributes

- Attributes shall be entered for all project documents according to business unit processes/guidelines.

6 Public Disclosure Requests

Open records/public disclosure requests must comply with WSDOT and Washington state standards. For more information see <http://wwwi.wsdot.wa.gov/adminservices/records/>

7 Retention – Agency Level Requirements

Processes related to records retention/disposal must comply with WSDOT and Washington state standards. For more information see <http://wwwi.wsdot.wa.gov/Publications/Manuals/M3012.htm>

[The project office is responsible for maintaining both paper and electronic documents according to current retention schedules.](#)

8 Performance Measurement/Management & Reporting related to Livelink ECM Usage

Performance measurement/management and reporting shall be determined by Regional or project office management teams. For more information on existing WSDOT standards see

<http://wwwi.wsdot.wa.gov/docs/manuals/M3012.htm> ,
<http://www.wsdot.wa.gov/publications/manuals/fulltext/M3028/ElectronicEngDataStandards.pdf> , or other WSDOT engineering publications.

9 Other WSDOT ECM Systems/Document Storage Systems

Other WSDOT ECM/Document Management and storage systems use will be specified in the business unit procedure/guidance documents. Other WSDOT ECM and storage systems include, but are not limited to the following:

- Stellent/Oracle
- Primavera Contract Manager
- Bentley ProjectWise
- Microsoft SharePoint
- WSDOT Network Shared drives

10 Term

This standard is effective immediately upon signature and continues in force until modified in writing by the Chief Engineer.

11 References

- 11.1 Executive Order 1042.00 – Project Management and Reporting System (PMRS)
- 11.2 Executive Order E 1032.01 – Project Management
- 11.3 ECM Process Maps – Add New Users or Projects, Add or Create Documents

Appendix A - Definitions

Active Directory

Software used to administer user accounts on the WSDOT network and workstations. There is a particular security group within active directory that allows single log on for Livelink users.

Attributes

A property of a document/file that has a value. There are global attributes that are inherited by all documents; some are required as indicated in Appendix B – Global Categories. Examples of attributes include Project Name, Work Item Number (WIN), and Document Date.

Business Unit

WSDOT business grouping that develops and manages content and documentation. Guidelines for WSDOT business units have been determined by our Manuals, Chart of Accounts and other WSDOT publications. The following is the list of WSDOT business units:

- Agreements
- Bridges & Structures
- Buildings
- Construction Management
- Environmental
- Geotech
- Hydraulics
- Landscape Architecture
- Materials
- Project Administration
- Project Design
- Public Involvement
- Real Estate & Right of Way
- Survey Photogrammetry CAE
- Traffic Services
- Utilities & Railroads

Categories

Grouping of attributes within the Livelink system.

Discipline

Specific area of business within a business unit.

Document Types

Specific project documents within a discipline(s).

Kofax

WSDOT will use Kofax as the application for document capture/scanning.

Livelink

Livelink is the web based application that WSDOT will use as the core ECM system for project documents.

Optical Character Recognition (OCR)

The electronic translation of images of handwritten, typewritten or printed text (usually captured by a scanner) into editable, readable, searchable text.

Project Electronic Content Management (ECM)

Project Electronic Content Management (ECM) is the electronic system used to satisfy document filing and retrieval, business process management (workflow), records management, and retention requirements. ECM is the set of processes and systems employed to manage the life cycle (capture, storage, security, revision control, retrieval, distribution, preservation, and destruction) of documents and other content.

For WSDOT statewide, Document Control is evolving into ECM. ECM at WSDOT will include content management (for digital and hard copy documents), electronic forms, and workflow routing and processing of documents and content integrated with the ECM.

Project Records

All documents and content relating to WSDOT projects, whereas, a project is a work item and has a work item number (WIN).

Published

Published documents are final approved documents. This folder is available to anyone within the agency with a Livelink license to view documents. Only Document Controllers for the business unit can move documents from staging to published.

Staging

Staging is the folder where documents are temporarily stored when moving the document from the working folder to the published folder. Document contributors move documents to the staging folder for

document approval. Once the document is approved and attributes assigned, the document is moved to the published folder. This staging folder is only available to those who have permission to contribute documents within the Business Unit.

Taxonomy

Classification of documents in a hierarchical structure.

Unfiled

Unfiled is a folder where documents are held while the appropriate attribute information is added to the document. Once the attributes are assigned the document is moved to the appropriate folder. The unfiled folder is only available to those who have permission to contribute documents within their Business Unit.

WSDOT Electronic/eDoc Importer (WEI)

WEI is an extension of the Kofax Importer. The purpose of the WEI is to provide a quick and accurate way to release eDocs (electronic documents) into Kofax. After batch validation in Kofax they are released into Livelink where these documents will be stored. Some of the benefits of importing include conversion to Optical Character Recognition (OCR) and automatic application of file naming conventions.

Working

Working documents are shared, allowing a collaborative effort to develop the final document. The working folder is only available to those who have permissions to contribute within the Business Unit.

Appendix B - Global Categories

Category Attributes (A) / Attribute Values (v)

MODE			
Type	Attribute	(field) Values	Rules
A	Mode Name	(text popup)	
v		Highways	
v		Rail	
v		Ferries	
REGION			
Type	Attribute	(field) Values	Rules
A	Region Number	(text popup)	
v		0	
v		1	
v		2	
v		3	
v		4	
v		5	
v		6	
v		7	
v		8	
v		9	
v		Rail	
A	Region Code	(text popup)	
v		520	
v		AWV	
v		EA	
v		HQ	
v		NC	
v		NW	
v		OL	
v		Rail	
v		SC	
v		SW	
v		TD	
v		WSF	
PROJECT INFORMATION			
Note: These attributes are inherited by all project documents.			
Type	Attribute	(field) Values	Rules
A	Project Name	(text popup)	Required Field - Same as WIN title in CPMS
A	Project Also Known As (AKA)	(text field - multiple entries allowed)	
A	PMRS Project	(text field)	Primavera Scheduler project number

A	Work Item Number (WIN)	(text field)	Required field for all highway projects - WIN number associated with Project Name attribute. This must match number in CPMS.
A	Program Item Number (PIN)	(text field - multiple entries allowed)	Required Field
A	Federal Aid Eligible Phase	(text popup - multiple entries allowed)	
		PE	
		RW	
		CN	
A	Federal Aid Number	(text field - multiple entries allowed)	Number including prefix, if applicable
A	PE Work Order Number	(text field - multiple entries allowed)	
A	RW Work Order Number	(text field - multiple entries allowed)	
A	CN Work Order Number	(text field - multiple entries allowed)	
A	City or Municipality	(text popup - multiple entries allowed)	
v		Click here to view value list	
A	Legislative District	(text popup - multiple entries allowed)	
v		Click here to view value list	
A	Congressional District	(text popup - multiple entries allowed)	
v		Click here to view value list	
A	County	(text popup - multiple entries allowed)	
v		Click here to view value list	
A	Terminal I.D.	(text popup - multiple entries allowed)	
		Click here to view value list	
A	Rail Line Identifier	(text field - multiple entries allowed)	
A	Maintenance Area	(text popup - multiple entries allowed)	
v		Click here to view value list	
A	Project Comments	(multi-line text)	These comments will be inherited by all documents within this project.
A	SRMP Information	(set)	
A	State Route (SR)	(text popup)	
v		Click here to view value list	

A	Begin SRMP	(text field)	
A	End SRMP	(text field)	
A	Related Route Type (RRT)	(text field)	
A	Related Route Qualifier (RRQ)	(text field)	
A	DirectiontoInventory	(text popup)	
v		Increasing	
v		Decreasing	
v		Both	
v		Center	
v		Left	
v		Left of Center	
v		Right	
v		Right of Center	
A	State Route Offset (feet)	(text field)	
	GIS Information	(set)	
A	Latitude - Degrees	(text field)	
A	Latitude - Minutes	(text field)	
A	Latitude - Seconds	(text field)	
A	Latitude - Direction	(text popup)	Default to N
v		N	
v		S	
A	Longitude - Degrees	(text field)	
A	Longitude - Minutes	(text field)	
A	Longitude - Second	(text field)	
A	Longitude - Direction	(text popup)	Default to W
v		E	
v		W	
	Accumulated Route Miles (ARM)	(set)	
A	State Route Number	(text popup)	
v		Click here to view value list	
A	Accumulated Mileage	(text field)	

ENTERPRISE CONTROL CATEGORY			
Note: These attributes are document specific, therefore not inherited.			
Type	Attribute	(field) Values	
A	WSDOT Doc ID	(text field)	Optional unique document identifier, established by the project team i.e. 0702220081008 If required by the project.
A	Document Description	(multi-line text)	This description field is populated by Kofax when documents are scanned or imported. Another description field is on the general tab of the functions menu in Livelink and is the field that is available when adding documents through Livelink. The two description fields can not be merged.
A	Document Date	(date popup)	Date on the actual document
A	Received Date	(date popup)	Date delivered to address on document/project office
A	Sent Date	(date popup)	Date document was sent from project office to recipient
A	IsAdministrativeRecord	(text popup)	
v		Y	
v		N	
v		Unknown	
A	IsSubmittal	(text popup)	
v		Y	
v		N	
v		Unknown	
A	IsDesignDocumentationPackage	(text popup)	
v		Y	
v		N	
v		Unknown	
A	IsConstructionFinalRecord	(text popup)	
v		Y	
v		N	

v		Unknown	
A	External Storage Location	(text field)	Physical file location
A	Status	(text popup)	
v		Click here to view value list	
A	Attention Required	(text popup)	
v		Y	
v		N	
A	Description of Attention Required	(multi-line text)	
A	Agreement Number	(text field)	
A	MDL	(text field)	Master Deliverables List (MDL) number/code

Common Document Types			
Taxonomy (t) / Category Attributes (A) / Attribute Values (v) / Common Elements (ce) / Design Common Elements (dce)			
[Business Unit] COMMON CATEGORY - Common Elements List Only			
Type	Attribute	(field) Values	
A	Doc Type	(text popup)	
v, ce		Application	a formal and usually written request for something
v, ce		Audio	the recording and reproduction of sound; Audio files (multimedia)
v, ce		Checklist	a list of names, items, or points for consideration or action
v, ce		Commitment	an obligation; a planned arrangement or activity that cannot be avoided
v, ce		Contacts	people who may be professionally helpful; such as WSDOT personnel list, Emergency contact lists, etc.
v, ce		Correspondence	communication by means of exchanged written messages such as letters or e-mail
v, dce		Design Criteria	an accepted standard used in making a decision or judgment about something
v, ce		Diary	a factual record of events

v, ce		Drawing	a sketch of something made with a pencil, pen, usually consisting of lines, often with shading, but generally without color and done by hand
v, ce		Form-Template	a document in a desired format, usually with blank spaces for answers or information to be supplied; completed forms/templates such as as-built coversheet
v, ce		Graphic	visual display of data produced by a computer program representing something in the form of images; graphic files (multimedia)
v, ce		Map	a visual representation that shows geographic features (roads, a facility, other details) of a defined area.
v, ce		Meeting Agenda - Minutes	an official record of what is said or done during a meeting
v, ce		Notice	advance warning or notification of something
v, dce		Package	a number of different components intended to constitute a single item
v, ce		Photo	an image produced by a camera, especially a print, slide or file made from the image/photo files (multimedia)
v, ce		Report	a document that gives information about an investigation or a piece of research; an account of an event, situation, or episode
v, dce		Specification	a detailed description, especially one providing information needed to make, build, or produce something

v, ce		Video	visual information, especially that which can be viewed on a television or computer; video files (multimedia)
v, ce		Worksheet-Computation	a sheet of paper used for keeping a record of work done or scheduled; a sheet of paper used for making a rough draft or preliminary notes; a document showing calculations used to come up with an estimated cost or to support a conclusion

Enterprise Control Category (ECC)

City or Municipality	Legislative District	Congressional District	County	Terminal I.D.	Maintenance Area	State Route (SR)	Status
Aberdeen	0	1	Adams	Anacortes	Northwest Area 1 - Bellingham	2	Approved
Airway Heights	1	2	Asotin	Bainbridge	Northwest Area 2 - Mount Vernon	3	Approved as Noted
Albion	2	3	Benton	Bremerton	Northwest Area 3 - Everett	4	Closed
Algona	3	4	Chelan	Clinton	Northwest Area 4 - Kent	5	Conceptual
Almira	4	5	Clallam	Eagle Harbor	Northwest Area 5 - Bellevue	6	Concurrence
Anacortes	5	6	Clark	Edmonds	North Central Area 1 - Wenatchee	7	Draft
Arlington	6	7	Columbia	Fauntleroy	North Central Area 2 - Ephrata	8	Filed
Asotin	7	8	Cowlitz	Friday Harbor	North Central Area 3 - Okanogan	9	Final
Auburn	8	9	Douglas	Keystone	Olympic Area 1 - Tacoma	10	Informational
Bainbridge Island	9	Return to Taxonomy	Ferry	Kingston	Olympic Area 2 - Port Orchard	11	New Item
Battle Ground	10		Franklin	Lopez	Olympic Area 3 - Port Angeles	12	Pending
Beaux Arts Village	11		Garfield	Mukilteo	Olympic Area 4 - Aberdeen	14	Preliminary
Bellevue	12		Grant	Orcas	Southwest Area 1 - Vancouver	16	Received Not Reviewed
Bellingham	13		Grays Harbor	Point Defiance	Southwest Area 2 - Chehalis	17	Rejected
Benton City	14		Island	Port Townsend	Southwest Area 3 - Raymond	18	Returned for Correction
Bingen	15		Jefferson	Seattle	Southwest Area 4 - Goldendale	19	Reviewed
Black Diamond	16		King	Shaw	South Central Area 1 - Cle Elum	20	UnSubmitted
Blaine	17		Kitsap	Southworth	South Central Area 2 - East Selah	21	Return to Taxonomy
Bonney Lake	18		Kittitas	Tahlequah	South Central Area 3 - Pasco	22	
Bothell	19		Klickitat	Vashon	South Central Area 4 - Walla Walla	23	
Bremerton	19A		Lewis	System Wide Emergency Repair	Eastern Area 1 - Spokane	24	
Brewster	19B		Lincoln	System Wide Terminals	Eastern Area 2 - Colfax	25	
Bridgeport	20		Mason	Return to Taxonomy	Eastern Area 3 - Davenport	26	
Brier	21		Okanogan		Eastern Area 4 - Colville	27	
Buckley	22		Pacific		Return to Taxonomy	28	
Bucoda	23		Pend Oreille			31	
Burien	24		Pierce			41	
Burlington	25		San Juan			82	
Camas	26		Skagit			90	
Carbonado	27		Skamania			92	
Carnation	28		Snohomish			96	
Cashmere	29		Spokane			97	
Castle Rock	30		Stevens			99	
Cathlamet	31		Thurston			100	
Centralia	32		Wahkiakum			101	
Chehalis	33		Walla Walla			102	
Chelan	34		Whatcom			103	
Cheney	35		Whitman			104	
Chewelah	36		Yakima			105	
Clarkston	37		Return to Taxonomy			106	
Cle Elum	38					107	
Clyde Hill	39					108	
Colfax	39A					109	
College Place	39B					110	
Colton	40					112	
Colville	41					113	
Conconully	42					115	
Concrete	43					116	
Connell	44					117	
Cosmopolis	45					119	
Coulee City	46					121	
Coulee Dam	47					122	
Coupeville	48					123	
Covington	49					124	
Creston	Return to Taxonomy					125	
Cusick						127	
Darrington						128	
Davenport						129	

Enterprise Control Category (ECC)

City or Municipality	Legislative District	Congressional District	County	Terminal I.D.	Maintenance Area	State Route (SR)	Status
Dayton						131	
Deer Park						141	
Des Moines						142	
DuPont						150	
Duvall						153	
East Wenatchee						155	
Eatonville						160	
Edgewood						161	
Edmonds						162	
Electric City						163	
Ellensburg						164	
Elma						165	
Elmer City						166	
Endicott						167	
Entiat						169	
Enumclaw						170	
Ephrata						171	
Everett						172	
Everson						173	
Fairfield						174	
Farmington						181	
Federal Way						182	
Ferndale						193	
Fife						194	
Fircrest						195	
Forks						197	
Friday Harbor						202	
Garfield						203	
George						204	
Gig Harbor						205	
Gold Bar						206	
Goldendale						207	
Grand Coulee						211	
Grandview						215	
Granger						221	
Granite Falls						223	
Hamilton						224	
Harrah						225	
Harrington						231	
Hartline						240	
Hatton						241	
Hoquiam						243	
Hunts Point						260	
Ilwaco						261	
Index						262	
lone						263	
Issaquah						270	
Kahlotus						271	
Kalama						272	
Kelso						274	
Kenmore						278	
Kennewick						281	
Kent						282	
Kettle Falls						283	
Kirkland						285	
Kittitas						290	
Krupp						291	
La Center						292	

Enterprise Control Category (ECC)

City or Municipality	Legislative District	Congressional District	County	Terminal I.D.	Maintenance Area	State Route (SR)	Status
La Conner						300	
Lacey						302	
LaCrosse						303	
Lake Forest Park						304	
Lake Stevens						305	
Lakewood						307	
Lamont						308	
Langley						310	
Latah						395	
Leavenworth						397	
Liberty Lake						401	
Lind						405	
Long Beach						409	
Longview						410	
Lyman						411	
Lynden						432	
Lynnwood						433	
Mabton						500	
Malden						501	
Mansfield						502	
Maple Valley						503	
Marcus						504	
Marysville						505	
Mattawa						506	
McCleary						507	
Medical Lake						508	
Medina						509	
Mercer Island						510	
Mesa						512	
Metaline						513	
Metaline Falls						515	
Mill Creek						516	
Millwood						518	
Milton						519	
Monroe						520	
Montesano						522	
Morton						523	
Moses Lake						524	
Mossyrock						525	
Mount Vernon						526	
Mountlake Terrace						527	
Moxee						528	
Mukilteo						529	
Naches						530	
Napavine						531	
Nespelem						532	
Newcastle						534	
Newport						536	
Nooksack						538	
Normandy Park						539	
North Bend						542	
North Bonneville						543	
Northport						544	
Oak Harbor						546	
Oakesdale						547	
Oakville						548	
Ocean Shores						599	
Odessa						702	

Enterprise Control Category (ECC)

City or Municipality	Legislative District	Congressional District	County	Terminal I.D.	Maintenance Area	State Route (SR)	Status
Okanogan						705	
Olympia						706	
Omak						730	
Oroville						821	
Orting						823	
Othello						900	
Pacific						902	
Palouse						903	
Pasco						904	
Pateros						906	
Pe Ell						908	
Pomeroy						970	
Port Angeles						971	
Port Orchard							Return to Taxonomy
Port Townsend							
Poulsbo							
Prescott							
Prosser							
Pullman							
Puyallup							
Quincy							
Rainier							
Raymond							
Reardan							
Redmond							
Renton							
Republic							
Richland							
Ridgefield							
Ritzville							
Riverside							
Rock Island							
Rockford							
Rosalia							
Roslyn							
Roy							
Royal City							
Ruston							
Sammamish							
SeaTac							
Seattle							
Sedro-Woolley							
Selah							
Sequim							
Shelton							
Shoreline							
Skykomish							
Snohomish							
Snoqualmie							
Soap Lake							
South Bend							
South Cle Elum							
South Prairie							
Spangle							
Spokane							
Spokane Valley							
Sprague							
Springdale							

Enterprise Control Category (ECC)

City or Municipality	Legislative District	Congressional District	County	Terminal I.D.	Maintenance Area	State Route (SR)	Status
St. John							
Stanwood							
Starbuck							
Steilacoom							
Stevenson							
Sultan							
Sumas							
Sumner							
Sunnyside							
Tacoma							
Tekoa							
Tenino							
Tieton							
Toledo							
Tonasket							
Toppenish							
Tukwila							
Tumwater							
Twisp							
Union Gap							
Uniontown							
University Place							
Vader							
Vancouver							
Waitsburg							
Walla Walla							
Wapato							
Warden							
Washougal							
Wash Tucna							
Waterville							
Waverly							
Wenatchee							
West Richland							
Westport							
White Salmon							
Wilbur							
Wilkeson							
Wilson Creek							
Winlock							
Winthrop							
Woodinville							
Woodland							
Woodway							
Yacolt							
Yakima							
Yarrow Point							
Yelm							
Zillah							
Return to Taxonomy							

Agreements Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Agreements workspace. WSDOT has multiple Business Units within the organization and Agreements is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Agreements processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Agreements content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Agreements Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Agreements Business Unit uses the following categories and attributes:

- 1) Agreements Common Category
 - Discipline
 - Doc Type
 - Agreement-Contract Type
 - Agreement-Contract Jurisdiction

For a complete list of attribute values see Appendix A – Agreements Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Agreement-Contract Type – When the Agreement – Contract Doc Type is selected, the user must select one Agreement-Contract Type from a drop-down list containing multiple values.

Agreement-Contract Jurisdiction – When the Agreement – Contract doc type is selected, the user must select the Agreement – Contract Jurisdiction(s) from a drop-down list containing multiple values. If multiple Agreement-Jurisdictions are applicable, user must select all that apply.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Agreements business unit is to be used for project (WIN) specific documents. Master On-Call agreements may not be project specific and should be stored at a different location in Livelink, i.e. Enterprise or headquarters level.

The Construction discipline for this business unit only stores contracts between Contractor and WSDOT (the two page document typically held by headquarters). PSE and Ad copy documents are stored in Project Design business unit.

The Lease & Rentals discipline is specifically for leasing of facilities and land by WSDOT from another party.

The Rates discipline has restricted permissions due to sensitivity of the documents.

Agreements file naming convention for published/final document will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Agreements%20Separator%20Sheets.xlsx>

Appendix A – Agreements Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Agreements

categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Agreements Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Architectural & Engineering Services (A&E)

Architectural & Engineering Services (A&E) Document Type	<i>Livelink users are required to select a document type. The following lists typical Architectural & Engineering Services (A&E) documents generated for each document type.</i>
Advertisement	Note: Not to be used for Master On-Call ▪
Agreement - Contract	<ul style="list-style-type: none"> ▪ Consultant Task Orders ▪ Amendments to Consultant Task Orders ▪ Stand alone project specific Agreements for A&E ▪ Supplements to stand alone project specific Agreements for A&E ▪ Consultant Selection documentation ▪ Record of negotiations ▪ Schedule of deliverables
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪ Independent Estimate (WSDOT) for Consultant services ▪ Consultant's Estimate for Services to be provided ▪ Breakdown of "cost for services" ▪ Exhibit attached to an Agreement-Contract, also independent estimates by consultant and state to use in negotiations for contract. Can be in several different types of payment versions, such as negotiated rates, cost plus fixed fee and/or lump sum
Form - Template	<ul style="list-style-type: none"> ▪ Request for Consultant Services ▪ Formatted document to use in developing estimates and/or scopes and/or other documents for contract
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪ Notice to Proceed
Permit	▪

Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪ Final Reports
Request for Information (RFI)	▪ Note: Not to be used for construction contract RFI's from a contractor
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 2 – Construction

Construction Document Type	<i>Livelink users are required to select a document type. The following lists typical Construction documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	<p>Note: The Construction discipline for this business unit only stores contracts between Contractor and WSDOT (the two-page document typically held by headquarters.) PSE and Ad copy documents are stored in Project Design business unit. Construction documentation is stored in the Construction Management or other business units as appropriate.</p> <p>▪</p>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <p>▪</p>
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <p>▪</p>
Request for Proposal (RFP)	<ul style="list-style-type: none"> ▪ Design-Build RFPs are to be stored in the Project Design business unit. See Project Design Project ECM Process for more information.
Request for Qualifications (RFQ)	<ul style="list-style-type: none"> ▪ Design-Build RFQs are to be stored in the Project Design business unit. See Project Design Project ECM Process for more information.
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 3 –Developer Services

Developer Services Document Type	<i>Livelink users are required to select a document type. The following lists typical Developer Services documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	<ul style="list-style-type: none"> ▪ Easements, Right of Entry (temporary) or Permit to Enter (if these documents have a parcel or IC number they should be stored in the Real Estate & Right of Way business unit)
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <ul style="list-style-type: none"> ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 4 – Information Technology

Information Technology Document Type	<i>Livelink users are required to select a document type. The following lists typical Information Technology documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <p>▪</p>
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <p>▪</p>
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 5 – Inter-Agency

Inter-Agency Document Type	<i>Livelink users are required to select a document type. The following lists typical Inter-Agency documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	<ul style="list-style-type: none"> ▪ Amendments & Supplements to the agreement - contract ▪ Schedule of Deliverables ▪ Grants
Application	▪ Grant Application
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪ Independent Cost Estimate (WSDOT) ▪ Breakdown of cost for services
Form - Template	▪ "Boiler Plate" agreement form templates
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	<ul style="list-style-type: none"> ▪ Access Permit ▪ Right of Way Use Permit ▪ Road Use Permit ▪ Street Permit ▪ Easements, Right of Entry (temporary) or Permit to Enter (if these documents have a parcel or IC number they should be stored in the Real Estate & Right of Way business unit)
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <ul style="list-style-type: none"> ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 6 – Leases & Rentals

Leases and Rentals Document Type	<i>Livelink users are required to select a document type. The following lists typical Leases and Rentals documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <p>▪</p>
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <p>▪</p>
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 7 – Personal Services

Personal Services Document Type	<i>Livelink users are required to select a document type. The following lists typical Personal Services documents generated for each document type.</i>
Advertisement	Note: Not to be used for Master On-Call ▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate. ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	Note: Not to be used for construction contract RFI's from a contractor ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 8 – Purchased Services & Goods

Purchased Goods & Services Document Type	<i>Livelink users are required to select a document type. The following lists typical Purchased Goods & Services documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate. ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	Note: Not to be used for construction contract RFI's from a contractor ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 9 – Railroad

<p>Railroad Document Type</p>	<p><i>Livelink users are required to select a document type. The following lists typical Railroad documents generated for each document type.</i></p>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <ul style="list-style-type: none"> ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 10 – Rates

<p>Rates Document Type</p>	<p><i>Livelink users are required to select a document type. The following lists typical Rates documents generated for each document type.</i></p>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪ Approved Min-Max Rate Table
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <ul style="list-style-type: none"> ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 11 – Specialty Group Internal Agreements

Specialty Group Internal Agreements Document Type	<i>Livelink users are required to select a document type. The following lists typical Specialty Group Internal Agreements documents generated for each document type.</i>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <ul style="list-style-type: none"> ▪
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 12 – Utilities

<p align="center">Utilities Document Type</p>	<p><i>Livelink users are required to select a document type. The following lists typical Utilities documents generated for each document type.</i></p>
Advertisement	▪
Agreement - Contract	▪
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Project Administration or Real Estate & Right of Way business unit, as appropriate.</p> <p>▪</p>
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Memorandum of Understanding	▪
Notice	▪
Permit	▪
Photo	▪
Purchase Order – Field Order	▪
Rate Sheet	▪
Report	▪
Request for Information (RFI)	<p>Note: Not to be used for construction contract RFI's from a contractor</p> <p>▪</p>
Request for Proposal (RFP)	▪
Request for Qualifications (RFQ)	▪
Schedule	▪
Scope of Work	▪
Video	▪
Worksheet - Computation	▪

Table 13 – Agreement-Contract Type – *When Agreement – Contract document type is selected, users are required to select an Agreement-Contract type from a drop-down list containing the following values:*

Agreement - Contract Type
Consultant Services (Y)
Developer or Property Owner (UC)
Federal Aid Project
General Maintenance (GM)
Governmental Contract – Inter-Agency (GCA)
Grant
Haul Road or Detour (HRD)
Information Technology (DP) (K)
Internal
Local Agency (LA)
Local Mitigation (LM)
Overhead Reciprocal (OH)
Prime Contractor
Procurement
Railroad (RR)
Regional Minor Work – Payable (D)
Regional Minor Work – Reimbursable (J)
Rental or Lease of Building & Land (OP)
Title Insurance (SF)
Turnback (TB)
Utility Agreement (UT)
Utility Service Agreements (S)

Table 14 – Agreement-Contract Jurisdiction Type - *When Agreement-Contract document type is selected, users are required to select an Agreement-Contract jurisdiction from a drop-down list containing the following values:*

Agreement – Contract Jurisdiction Type
City
County
Federal
Private
State
Tribal

Bridges & Structures Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Bridges & Structures workspace. WSDOT has multiple Business Units within the organization and Bridges & Structures is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Bridges & Structures processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Bridges & Structures content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Bridges & Structures Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Bridges & Structures Business Unit uses the following categories and attributes:

- 1) Bridges & Structures Common Category
 - Discipline
 - Doc Type
 - Bridges & Structures Element
 - Package Type

Report Type

For a complete list of attribute values see Appendix A - Bridges & Structures Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Bridges & Structures Element - User must select the Bridges & Structures Element(s) from a drop-down list containing multiple values. If multiple elements are applicable, user must select all that apply.

Package Type – When the Package doc type is selected, the user must select one Package type from a drop-down list containing multiple values.

Report Type – When the Report doc type is selected, the user must select one Report type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Bridges & Structures file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Bridges%20and%20Structures%20Separator%20Sheets.xlsx>

Appendix A – Bridges & Structures Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Bridges & Structures categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Bridges & Structures Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pdrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Design Documentation

Design Documentation Document Type	<i>Livelihood users are required to select a document type. The following lists typical Design Documentation documents generated for each document type.</i>
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Notice ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Package	<ul style="list-style-type: none"> ▪ Bridge Site Data ▪ Preliminary Plans ▪ Intermediate Design Plans ▪ Scoping
Permit	<ul style="list-style-type: none"> ▪ Coast Guard permits and applications for permits
Photo	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ Architectural Guidelines ▪ Bridge Condition ▪ Technical Memorandum ▪ Type Size & Location (TS&L) ▪ Wind-Wave Analysis
Specification	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Structural calculations ▪ Handwritten calculations - scanned

Table 2 – Plans Specifications & Estimates

Plans Specifications & Estimates Document Type	<i>Livelink users are required to select a document type. The following lists typical Plan Specifications & Estimates documents generated for each document type.</i>
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Notice ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Package	<ul style="list-style-type: none"> ▪ Ad Copy (Bridges & Structures portion only). See Project Design Project ECM Process for entire project Ad Copy Package. ▪ Plans Specifications & Estimates package (Bridges & Structures portion only). See Project Design Project ECM Process for entire project PS&E Package.
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ Technical Memorandum
Specification	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Structural calculations ▪ Handwritten calculation - scanned

Table 3 – Bridges & Structures Element – *When Bridges & Structures document type is selected, users are required to select the Bridges & Structures Element(s) from a drop-down list containing the following values. If multiple elements are applicable, user must select all that apply.*

Bridges & Structures Element
Bridge
Dolphin
Noise Wall
Overhead Loading
Retaining Wall
Transfer Span
Trestle
Wingwall
Other

Table 4 – Package Type – *When Package document type is selected, users are required to select a Package type from a drop-down list containing the following values:*

Package Type
Ad Copy
Bridge Site Data
Intermediate Design Plans
Plans Specifications & Estimates
Preliminary Plans
Scoping
Other

Table 5 – Report Type – *When Report document type is selected, users are required to select a Report type from a drop-down list containing the following values:*

Report Type
Architectural Guidelines
Bridge Condition
Technical Memorandum
Type Size & Location (TS&L)
Wind-Wave Analysis
Other

Buildings Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Buildings workspace. WSDOT has multiple Business Units within the organization and Buildings is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Buildings processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Buildings content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Buildings Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Buildings Business Unit uses the following categories and attributes:

- 1) Buildings Common Category
 - Discipline
 - Doc Type

For a complete list of attribute values, see Appendix A - Buildings Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Buildings file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Buildings%20Separator%20Sheets.xlsx>

Appendix A – Buildings Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Buildings categories/attributes taxonomy document (excel spreadsheet) is available at

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Buildings Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Architectural

Architectural - Document Type	<i>Livelink users are required to select a document type. The following lists typical Architectural documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Building Permit submittal file
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ Design decision ▪ Building Permit submittal ▪ Construction requirement ▪ Obligation ▪ Leadership in Energy and Environmental Design (LEED)
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ Spreadsheet listing of project team
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪ Snow load ▪ Wind load ▪ Seismic ▪ Frost depth
Diary	<ul style="list-style-type: none"> ▪ Project Manager daily report
Drawing	<ul style="list-style-type: none"> ▪ Conceptual sketch
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT ▪ Specified format for information sharing or reporting
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Vicinity map
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting notes
Notice	<ul style="list-style-type: none"> ▪ Official letter identifying status (Notice to Proceed, Notice of Conformity, etc.)
Permit	<ul style="list-style-type: none"> ▪ Building ▪ Conditional use ▪ Shoreline
Photo	<ul style="list-style-type: none"> ▪ Pre-construction picture ▪ Construction pictures ▪ Post-construction pictures
Plan Sheet	<ul style="list-style-type: none"> ▪ Project design files ▪ Construction plans
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪ Recorded installation or construction method
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 2 – Electrical

Electrical - Document Type	<i>Livelink users are required to select a document type. The following lists typical Electrical documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Building Permit submittal file
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording ▪ Recorded meeting minutes
Checklist	<ul style="list-style-type: none"> ▪ Design decision ▪ Permit submittal ▪ Construction requirement ▪ Obligation ▪ Leadership in Energy and Environmental Design (LEED)
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ Spreadsheet listing of project team
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪ Power/electrical current use ▪ Power/electrical future needs
Diary	<ul style="list-style-type: none"> ▪ Project Manager daily report
Drawing	<ul style="list-style-type: none"> ▪ Conceptual sketch
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT ▪ Specified format for information sharing or reporting
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Vicinity Map
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting notes
Notice	<ul style="list-style-type: none"> ▪ Official letter identifying status (Notice to Proceed, Notice of Conformity, etc.)
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪ Pre-construction picture ▪ Construction picture ▪ Post-construction picture
Plan Sheet	<ul style="list-style-type: none"> ▪ Project design files ▪ Construction plans
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 3– Foundations

Electrical - Document Type	<i>Livelink users are required to select a document type. The following lists typical Foundation documents generated for each document type.</i>
Application	▪
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording ▪ Recorded meeting minutes
Checklist	<ul style="list-style-type: none"> ▪ Design decision ▪ Permit submittal ▪ Construction requirement ▪ Obligation ▪ Leadership in Energy and Environmental Design (LEED)
Commitment	▪
Contacts	▪ Spreadsheet listing of project team
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪ Current use ▪ Future needs
Diary	▪ Project Manager daily report
Drawing	▪ Conceptual sketch
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT ▪ Specified format for information sharing or reporting
Graphic	▪
Map	▪ Vicinity Map
Meeting Agenda - Minutes	▪ Meeting notes
Notice	▪ Official letter identifying status (Notice to Proceed, Notice of Conformity, etc.)
Permit	▪
Photo	<ul style="list-style-type: none"> ▪ Pre-construction picture ▪ Construction picture ▪ Post-construction picture
Plan Sheet	<ul style="list-style-type: none"> ▪ Project design files ▪ Construction plans
Report	▪
Specification	▪
Video	▪
Worksheet - Computation	▪

Table 4 – Mechanical

Mechanical - Document Type	<i>Livelink users are required to select a document type. The following lists typical Mechanical documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Permit submittal file
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording ▪ Recorded meeting minutes
Checklist	<ul style="list-style-type: none"> ▪ Design decision ▪ Permit submittal ▪ Construction requirement ▪ Obligation ▪ Leadership in Energy and Environmental Design (LEED)
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ Spreadsheet listing of project team
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪ Efficiency – current ▪ Efficiency – needs
Diary	<ul style="list-style-type: none"> ▪ Project Manager daily report
Drawing	<ul style="list-style-type: none"> ▪ Conceptual sketch
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT ▪ Specified format for information sharing or reporting
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Vicinity map
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting notes
Notice	<ul style="list-style-type: none"> ▪ Official letter identifying status (Notice to Proceed, Notice of Conformity, etc.)
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪ Pre-construction picture ▪ Construction picture ▪ Post-construction picture
Plan Sheet	<ul style="list-style-type: none"> ▪ Project design files ▪ Construction plans
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 5 – Superstructures

Mechanical - Document Type	<i>Livelink users are required to select a document type. The following lists typical Superstructures documents generated for each document type.</i>
Application	▪
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording ▪ Recorded meeting minutes
Checklist	<ul style="list-style-type: none"> ▪ Design decision ▪ Permit submittal ▪ Construction requirement ▪ Obligation ▪ Leadership in Energy and Environmental Design (LEED)
Commitment	▪
Contacts	▪ Spreadsheet listing of project team
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪ Current use ▪ Future needs
Diary	▪ Project Manager daily report
Drawing	▪ Conceptual sketch
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT ▪ Specified format for information sharing or reporting
Graphic	▪
Map	▪ Vicinity map
Meeting Agenda - Minutes	▪ Meeting notes
Notice	▪ Official letter identifying status (Notice to Proceed, Notice of Conformity, etc.)
Permit	▪
Photo	<ul style="list-style-type: none"> ▪ Pre-construction picture ▪ Construction picture ▪ Post-construction picture
Plan Sheet	<ul style="list-style-type: none"> ▪ Project design files ▪ Construction plans
Report	▪
Specification	▪
Video	▪
Worksheet - Computation	▪

Construction Management Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Construction Management workspace. WSDOT has multiple Business Units within the organization and Construction Management is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Construction Management processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions, which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Construction Management content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

Construction Management also uses other ECMs – SharePoint and Contract Manager.

SharePoint is used to: Manage Inspector Daily Reports and Field Note Records

Although Contract Manager is used to manage cost and contains workflows to manage data associated with some project documentation i.e. document reviews and approvals, it is not an ECM.

Final project documentation files are to be stored in the Project ECM/Livelink. If there are working/draft files or other project information in other ECM systems, web links can be stored in Project ECM/Livelink.

Construction Management Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Construction Management Business Unit uses the following categories and attributes:

- 1) Construction Management Common Category
 - Discipline
 - Doc Type
 - Worksheet - Computation Type

For a complete list of attribute values, see Appendix A - Construction Management Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Worksheet – Computation Type – When the Worksheet - Computation doc type is selected, the user must select one Worksheet - Computation Type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Construction Management business unit folders are not intended to include all documents for the construction phase. Some examples of other business unit folders containing documents that may be used in the construction phase are as follows:

- Project Administration for schedules, pay estimates, etc.
- Agreements for street use, right of entry and other permits
- Project Design for plans, specifications & estimates ad copy package
- Environmental for environmental permits

The Payroll & Other Confidential Information discipline has restricted permissions due to sensitivity of the documents.

Construction Management file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Construction%20Separator%20Sheets.XLSX>

Appendix A – Construction Management Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Construction Management categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Construction Management Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Construction Administration

Construction Administration Document Type	<i>Livelihood users are required to select a document type. The following lists typical Construction Administration documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Change Order	<ul style="list-style-type: none"> ▪ Change Order Request for Quote/Proposal ▪ Change Order Quote ▪ All Construction Change Orders - Type A, B, and Minor Changes
Checklist	<ul style="list-style-type: none"> ▪ WA State Patrol (WSP) Field Check List
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ WSDOT Personnel List
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Contract Compliance Review Request for Additional Information ▪ Request for Information ▪ Equipment List (unless it's pay note related, in which case it would be filed in Project Administration correspondence) ▪ Transmittal coversheet
Diary	<ul style="list-style-type: none"> ▪ PE Diary ▪ Chief Inspector Diary
Drawing	<ul style="list-style-type: none"> ▪ Shop Drawing ▪ Transmittal of Falsework, Form and Shop Drawing
Final Records Package	<ul style="list-style-type: none"> ▪ Final Record
Form – Template	<ul style="list-style-type: none"> ▪ Affidavit of wages paid ▪ As Built Cover Sheet ▪ Contractor and Subcontractor or Lower-Tier Subcontractor Certification ▪ Contractor's Construction Process Evaluation ▪ Federal Certification of Compliance ▪ Final Inspection and Acceptance of Federal Aid Interstate Project ▪ Final Record Notes Title Page ▪ Release – Retained Percentage (Except Landscaping) ▪ Statement of Intent to Pay Prevailing Wages ▪ Title Sticker – Final Record Book ▪ Trainee Interview Questionnaire
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪ Notice to Proceed ▪ Notice to Work at Night ▪ Order to Resume Work ▪ Order to Suspend Work ▪ Plan Change

	<ul style="list-style-type: none"> ▪ Shutdown Notice
Permit	<ul style="list-style-type: none"> ▪ Haul Route Permit ▪ Construction Permit
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Fall Protection ▪ Training Program
Plan Sheet	<ul style="list-style-type: none"> ▪ As Built Plan ▪ Plan Set
Policy - Procedure	<ul style="list-style-type: none"> ▪ Welding Procedure
Report	<ul style="list-style-type: none"> ▪ Annual Report of Amounts Paid as MBE/WBE Participants ▪ Annual Reports of Amounts Paid as MBE/WBE ▪ Commercial Pesticide Application Record ▪ Contractor's Daily Report of Traffic Control - Summary ▪ Contractor's Daily Report of Traffic Control - Traffic Control Log ▪ Contractors Traffic Control Report ▪ Daily Report of (Bituminous Surface Treatment) BST Operations ▪ Employee Interview Report ▪ Dewater Monitoring ▪ Drilling-Piping Report ▪ Examination Sheet for Contract Items ▪ Federal-Aid Highway Construction Annual Project Training Report ▪ Federal-Aid Highway Construction Contractors' Annual EEO Report ▪ Federal-Aid Highway Construction Cumulative Training Report ▪ Federal-Aid Highway Construction Summary of Employment Data ▪ Field Audits ▪ Follow-Up Documentation Review for Federal-Aid Projects ▪ Initial/Final Documentation Review ▪ Inspector's Daily Report ▪ Inspection of Federal-Aid Project ▪ M/D/WBE On-Site Review ▪ Monthly Employment Utilization Report ▪ Noise Monitoring Report ▪ Post-Tensioning Record ▪ Prime Contractor Performance Report ▪ Quarterly Report of Amounts Credited as DBE Participation ▪ Record of Collision-Accident ▪ Report of Protested Work ▪ Test Pile Record ▪ Traffic Control Report ▪ Vibration Monitoring ▪ Water Quality Report
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Field Volumetrics Worksheet ▪ Load Tally Sheet ▪ Pile Book ▪ Quality Computation Sheets

Table 2 – Payroll & Other Confidential Information

Payroll & Other Confidential Information	<i>Livelink users are required to select a document type. The following lists typical Payroll & Other Confidential Information documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Change Order	▪
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Drawing	▪
Final Records Package	▪
Form – Template	▪ Apprentice/Trainee Approval Request ▪ Certification of Laborers for certain activities i.e. guardrail installer ▪ Request to Sublet Work
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Permit	▪
Photo	▪
Plan	▪
Plan Sheet	▪
Policy - Procedure	▪
Report	▪ Contractors Payroll (Certified Payroll) ▪ Payroll ▪ Wage Rate Interview
Video	▪
Worksheet - Computation	▪

Table 3 – Worksheet-Computation Type - *When Worksheet-Computation document type is selected, users are required to select a Worksheet-Computation type from a drop-down list containing the following values:*

Worksheet-Computation Type
Load Tally
Lump Sum Breakdown
Pile Book
Quantity Computation
Other

Environmental Project Electronic Content Management (ECM) Process

Effective Date: January 20, 2009

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Environmental workspace. WSDOT has multiple Business Units within the organization and Environmental is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Environmental processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Environmental content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Environmental Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Environmental Business Unit uses the following category and attributes:

- 1) Environmental Common Category
 - Discipline
 - Doc Type
 - IsComment
 - Comment Type
 - Comment Source
 - Cultural Resource Type
 - Endangered Species Act Consultation Type

Hazardous Materials Investigation Type
NEPA-SEPA Discipline
NEPA-SEPA Type
Permit Type

For a complete list of attribute values see Appendix A – Environmental Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline –User must select one discipline from a drop-down list containing multiple values.

Doc Type –User must select one doc type from a drop-down list containing multiple values.

Endangered Species Act Consultation Type – When the Endangered Species Act (ESA) discipline is selected, the user must select one ESA Consultation type from a drop-down list containing multiple values

NEPA-SEPA Discipline – When the NEPA-SEPA discipline is selected, the user must select the NEPA-SEPA discipline(s) from a drop-down list containing multiple values. If multiple NEPA-SEPA disciplines are applicable, user must select all that apply.

NEPA-SEPA Type – When NEPA-SEPA discipline is selected, the user must select one or both NEPA-SEPA types from a drop-down list containing multiple values.

Permit Type - When Permit doc type is selected, the user must select one Permit type from a drop-down list containing multiple values.

Cultural Resources Type - When Cultural Resources discipline is selected, the user must select one Cultural Resources type from a drop-down list containing multiple values.

Hazardous Materials Investigation Type - When Hazardous Materials discipline is selected, the user must select one Hazardous Materials type from a drop-down list containing multiple values.

Is Comment – When Correspondence doc type is selected, the default is set to “N”. If user selects “Y” then Comment Type and Comment Source are required.

Comment Type – The user must select a comment type when “Is Comment?” is answered with a “Y”. The user must select one Comment type from a drop-down list containing multiple values.

Comment Source - The user must select a comment source when “Is Comment?” is answered with a “Y”. The user must select one Comment type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

The Archaeological & Other Confidential Information discipline has restricted permissions due to sensitivity of the documents.

Environmental file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – DocType – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelihoodECM/Shared%20Documents/Kofax%20Separator%20Sheets/Environmental%20Separator%20Sheets.xlsx>

Appendix A: Environmental Taxonomy

The taxonomy identifies the filing structure for each business unit's documents.

The taxonomy includes the Livelihood folder structure, categories and attribute values associated with each business unit. The Environmental

categories/attributes taxonomy document (excel spreadsheet) is available at

<http://sharedot/pd/cpdm/pmrs/LivelihoodECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B - Environmental Process and for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Archaeological & Other Confidential Information

Archaeological & Other Confidential Information Document Type	<p><i>Livelihood users are required to select a document type. The following lists typical Archaeological & Other Confidential Information documents generated for each document type.</i></p> <p>NOTE: REPORTS, SITE FORMS AND MAPS THAT SHOW THE PHYSICAL LOCATION(S) OF ARCHAEOLOGICAL SITES ARE CONFIDENTIAL UNDER BOTH STATE AND FEDERAL LAW AND SHOULD BE CONTAINED IN THE ARCHEOLOGICAL and OTHER CONFIDENTIAL INFORMATION DISCIPLINE.</p>
Agreement-Contract	▪
Application	▪
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Letters ▪ Transmittal coversheets
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	▪
Graphic	▪
Legal Notice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Permit	▪
Photo	▪
Plan	▪
Report	▪
Video	▪

Table 2 – Cultural Resources

<p>Cultural Resources Document Type</p>	<p><i>Livelink users are required to select a document type. The following lists typical Cultural Resources documents generated for each document type.</i></p> <p>NOTE: REPORTS, SITE FORMS AND MAPS THAT SHOW THE PHYSICAL LOCATION(S) OF ARCHAEOLOGICAL SITES ARE CONFIDENTIAL UNDER BOTH STATE AND FEDERAL LAW AND SHOULD BE CONTAINED IN THE ARCHEOLOGICAL and OTHER CONFIDENTIAL INFORMATION DISCIPLINE.</p>
<p>Agreement-Contract</p>	<ul style="list-style-type: none"> ▪ Memorandum of Agreement between Federal Highways Administration (and/or Federal Transit Administration), WSDOT and the State Historic Preservation Officer (SHPO) who is the Director of the Dept of Archaeological and Historic Preservation (and/or Tribal Historic Preservation Officer) ▪ Project Specific Programmatic Agreement (PA) between Federal Highways Administration (and/or Federal Transit Administration), WSDOT and the State Historic Preservation Officer (SHPO) who is the Director of the Dept of Archaeological and Historic Preservation (and/or Tribal Historic Preservation Officer) ▪ Cultural Resources Survey Scope of Work ▪ Tribal services contract/agreement documents
<p>Application</p>	<ul style="list-style-type: none"> ▪
<p>Audio</p>	<ul style="list-style-type: none"> ▪
<p>Commitment</p>	<ul style="list-style-type: none"> ▪
<p>Contacts</p>	<ul style="list-style-type: none"> ▪
<p>Correspondence</p>	<ul style="list-style-type: none"> ▪ Section 106 Initiation and Area of Potential Effects (APE) Letter to State Historic Preservation Officer (SHPO) ▪ Section 106 Initiation and APE Letter to Tribal Historic Preservation Officer (THPO) ▪ Recommendation for National Register Eligibility Letter to SHPO/THPO ▪ Determination of Project Effects Letter to SHPO/THPO ▪ Section 106 APE Letter(s) to Tribe(s) ▪ SHPO Comment Letter(s) ▪ THPO Comment Letter(s) ▪ Tribe(s) Comment Letter(s) ▪ SHPO/THPO Concurrence Letter(s) ▪ Emails ▪ Letters ▪ Transmittal coversheets
<p>Diary</p>	<ul style="list-style-type: none"> ▪
<p>Drawing</p>	<ul style="list-style-type: none"> ▪
<p>Estimate</p>	<ul style="list-style-type: none"> ▪
<p>Form - Template</p>	<ul style="list-style-type: none"> ▪ Unanticipated Discovery Plan template
<p>Graphic</p>	<ul style="list-style-type: none"> ▪
<p>Legal Notice</p>	<ul style="list-style-type: none"> ▪
<p>Map</p>	<ul style="list-style-type: none"> ▪ Area of Potential Effects Map or Drawing ▪ Site Maps or Drawings
<p>Meeting Agenda - Minutes</p>	<ul style="list-style-type: none"> ▪ Meeting agendas for meetings with Department of Archaeology and Historic Preservation and/or with Tribal representatives ▪ Meeting minutes for meetings with Department of Archaeology

	<ul style="list-style-type: none"> and Historic Preservation and/or with Tribal representatives ▪ Other Meeting agendas and meeting minutes for meetings regarding cultural resources
Notice	▪
Permit	▪
Photo	▪ Digital archive
Plan	▪
Report	<ul style="list-style-type: none"> ▪ Cultural Resources Survey/Assessment ▪ National Register Eligibility Criteria for Evaluation ▪ National Register of Historic Places Nomination Form ▪ Archaeological Site Report of Findings ▪ Marketing Sale or Donation Plan (for historic bridges prior to demolition) ▪ Cultural Resources Report (i.e., Discipline Report, Technical Report)
Video	▪
Cultural Resource Type	<i>When Cultural Resources discipline is selected, users are required to select the Cultural Resources type from a drop-down list containing the following values:</i>
Executive Order 0505	Select this field when the document pertains to cultural resources investigation/consultation per the Governor's Executive Order 05-05 (usually in situations where there is a capital project that does not have federal funding or a federal nexus)
Section 106	Select this field when the document pertains to cultural resources investigation/consultation is per Section 106 of the National Historic Preservation Act (in situations where the project is receiving Federal Funding or there is a federal nexus such as a federal permit)
<p>Note: If a cultural resources document is being done for SEPA, but not for EO 0505 or Section 106 (usually in cases where project has neither federal funding, a federal nexus nor is a capital project), then select the NEPA-SEPA Discipline rather than the Cultural Resources Discipline.</p>	

Table 3 – Endangered Species Act (ESA)

ESA Document Type	<i>Livelihood users are required to select a document type. The following lists typical ESA documents generated for each document type.</i>
Agreement-Contract	▪
Application	▪
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ No Effect Letter to National Marine Fisheries Service (NMFS) ▪ No Effect Letter to US Fish and Wildlife Service (USFWS) ▪ Concurrence Letter from NMFS and/or USFWS ▪ Non-concurrence Letter from NMFS and/or USFWS ▪ Emails ▪ Letters ▪ Transmittal coversheets
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	▪
Graphic	▪
Legal Notice	▪
Map	▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting agendas and meeting minutes for meetings regarding ESA
Notice	▪
Permit	▪
Photo	▪
Plan	▪
Report	<ul style="list-style-type: none"> ▪ Project-Specific Species List ▪ Biological Assessment ▪ ESA Evaluation ▪ Biological Opinion from NMFS and/or USFWS
Video	▪
Endangered Species Act Consultation Type	<i>When the Endangered Species Act (ESA) discipline is selected, users are required to select one ESA Consultation type based on whether the document is related to a formal consultation, informal consultation (with either US Fish and Wildlife Service or National Marine Fisheries Service) or no effect for listed species.</i>
Formal - Biological Opinion	
Informal - Concurrence	
No Effect	

Table 4 – Hazardous Material

Hazardous Material Document Type	<i>Livelink users are required select a document type. The following lists typical Hazardous Material documents generated for each document type.</i>
Agreement-Contract	▪
Application	▪
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Underground Storage Tank Removal Notification Letter(s) to Ecology (per WAC 173-360) ▪ Encountering Contamination Notification Letter to Ecology (per Model Toxics Control Act 173-340-3) ▪ Emails ▪ Letters ▪ Memorandums (Internal and external) ▪ Transmittal coversheets
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	▪
Graphic	▪
Legal Notice	<p>The following legal documents specifically related to property located within the project boundaries should be included:</p> <ul style="list-style-type: none"> ▪ Agreed Orders or Record of Decisions ▪ Deed and Land Use Restrictions ▪ Indemnification Clauses in Purchase & Sale Agreement <p>The following permits may be required:</p> <ul style="list-style-type: none"> ▪ 30 Day Notice of Intent to Decommission a UST ▪ Local Permit for UST removal (depends on county) ▪ Notice of Intent to Install a Well and/or Soil Boring ▪ Notice of Intent to Decommission a Well
Map	▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting agendas and meeting minutes for meetings regarding hazardous materials
Notice	▪
Permit	▪
Photo	▪
Plan	▪
Report	<ul style="list-style-type: none"> ▪ Phase I Environmental Site Assessments - Research ▪ Phase II Environmental Site Assessments - Sampling ▪ Underground Storage Tank Site Assessment and Removal Reports ▪ Hazardous Material Management Plan ▪ Spill Prevention, Control and Countermeasures (SPCC) Plan
Video	▪
Hazardous Material Investigation Type	<i>When Hazardous Material discipline is selected, users are required to select one Hazardous Material type from a drop-down list containing the following values:</i>
Phase I Environmental Site Assessment	

Phase II Environmental Site Assessment	
Phase III Remedial Feasibility-Cleanup Study	
Not Applicable	

Table 5 – NEPA - SEPA

NEPA/SEPA Document Type	<i>Livelink users are required to select a document type. The following lists typical NEPA and SEPA documents generated for each document type.</i>
Agreement-Contract	▪
Application	▪
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ EIS Notification Letter ▪ EIS Project EIS Initiation Letter from WSDOT to FHWA ▪ EIS Participating Agency Invite Letter ▪ EIS Participating Agency Response Letter ▪ EIS Cooperating Agency Invite Letter ▪ EIS Cooperating Agency Response Letter ▪ Public Comment Letters and Correspondence ▪ Emails ▪ Letters ▪ Transmittal coversheets
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	<ul style="list-style-type: none"> ▪ Discipline Study QA/QC Review Comment and Response Form ▪ NEPA/SEPA Document QA/QC Review Comment and Response Form ▪ Environmental Review Summary form
Graphic	▪
Legal Notice	<ul style="list-style-type: none"> ▪ Notice of Intent in Federal Register for EIS Scoping ▪ SEPA Register Determination of Significance/Scoping Notice ▪ Federal Register Notice of Availability of EIS and/or EA ▪ Public Hearing Notice ▪ Statute of Limitations Notice ▪ State Register Notice of Action Taken ▪ SEPA Notice of Administrative Review
Map	▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ SAGES Meeting Agenda and Minutes ▪ EIS Scoping Meeting Minutes ▪ Environmental Hearing Meeting Notes ▪ Meeting agendas and meeting minutes for meetings associated with the NEPA and/or SEPA process
Notice	<ul style="list-style-type: none"> ▪ Newspaper Notice of Availability of EIS and/or EA ▪ Newspaper Notice of Action Taken ▪ Newspaper Public Hearing Notice
Permit	▪
Photo	▪
Plan	▪
Report	<ul style="list-style-type: none"> ▪ EIS Coordination Plan ▪ Public Involvement Plan ▪ Environmental Document QA/QC Plan ▪ EIS Scoping Report ▪ Methods and Data Reports ▪ Discipline Studies (including Discipline Reports, Technical Memorandums, and etc.)

	<ul style="list-style-type: none"> ▪ Environmental Classification Summary ▪ NEPA Categorical Exclusion (CE) ▪ NEPA Documented Categorical Exclusion (DCE) ▪ NEPA and/or SEPA Draft Environmental Impact Statement (DEIS) ▪ NEPA Environmental Assessment (EA) ▪ SEPA Determination of Significance ▪ SEPA Determination of Non-Significance (DNS) ▪ SEPA Mitigated Determination of Non-Significance (MDNS) (Note: WSDOT does not typically issue MDNS, because it incorporates mitigation into the project action.) ▪ NEPA and/or SEPA Final Environmental Impact Statement (FEIS) ▪ NEPA Finding of No Significant Impacts (FONSI) ▪ NEPA Re-Evaluation ▪ Record of Decision (ROD) ▪ State Environmental Policy Act (SEPA) Checklist ▪ SEPA Adoption of Existing Environmental Document ▪ Environmental Reevaluation/Consultation Form ▪ Supplemental Draft Environmental Impact Statement (SDEIS) ▪ Supplemental Final Environmental Impact Statement (SFEIS) ▪ Supplemental Environmental Assessment
Video	▪
NEPA-SEPA Discipline	<i>When the NEPA-SEPA discipline is selected, users are required to select at least one NEPA-SEPA discipline type from a drop-down list containing the following values:</i>
All Disciplines	
Air	
Climate Change	
Coastal Areas & Shorelines	
Ecosystems	
Energy	
Environmental Justice	
Farmland	
Floodplain	
Geology & Soil	
Groundwater	
Hazardous Materials	
Historic - Cultural - Archaeological Resources	
Land Use	
Noise	
Public Services & Utilities	
Social & Economic	
Surface Water	
Transportation	
Visual Impacts	
Water Resources	
Wetlands	
Wild & Scenic Rivers	
Wildlife, Fish & Vegetation	

NEPA-SEPA Type	<i>When the NEPA-SEPA discipline is selected, users are required to select one or both NEPA-SEPA types from a drop-down list containing the following values:</i>
NEPA	<ul style="list-style-type: none"> ▪ NEPA-SEPA EIS & ROD ▪ NEPA Categorical Exclusion ▪ NEPA Environmental Assessment & FONSI
SEPA	<ul style="list-style-type: none"> ▪ NEPA-SEPA EIS & ROD ▪ SEPA Categorical Exemption ▪ SEPA Threshold Determination (DS, DNS, MDNS)

Table 6 – Permits

Permits Document Type	<i>Livelink users are required to select a document type. The following lists typical Permit documents generated for each document type.</i>
Agreement-Contract	▪
Application	<ul style="list-style-type: none"> ▪ Joint Aquatic Resource Permit Application (JARPA) ▪ Notice of Intent – NPDES Construction Stormwater Permit ▪ Federal Land Use Authorization Permit ▪ Other Permit Application
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Letters ▪ Transmittal coversheets ▪ Telephone logs or notes taken during telephone conversation
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	▪
Graphic	▪
Legal Notice	<ul style="list-style-type: none"> ▪ Notice of Intent for Soil Boring (when decommissioning monitoring wells)
Map	▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting agendas and meeting minutes for meetings regarding a permit
Notice	Newspaper Public Notice for Application of NPDES Construction Stormwater Permit
Permit	<p>Federal Permits:</p> <ul style="list-style-type: none"> ▪ Section 404 Individual Permit or Nationwide Permit ▪ Section 10 Permit ▪ Section 9 Permit ▪ Archeological Resources Protection Act Permit ▪ Authorization for Use of Federal Land ▪ FAA Determination for Work Affecting Navigable Airspace <p>Tribal Permits (when work occurs on tribal land):</p> <ul style="list-style-type: none"> ▪ Section 401 Water Quality Certification ▪ Archeological Resources Protection Act Permit ▪ Hydraulic Project Approval <p>State Permits:</p> <ul style="list-style-type: none"> ▪ Section 401 Water Quality Certification ▪ Coastal Zone Management Consistency Determination ▪ Hydraulic Project Approval ▪ Stormwater NPDES Municipal Stormwater Permit (General) ▪ NPDES Industrial Stormwater Permit (Individual) ▪ NPDES Sand and Gravel Permit (General or Individual) ▪ NPDES Waste Discharge Permit (Bridge Washing) ▪ State Waste Discharge Permit ▪ Aquatic Lands Use Authorization

	<ul style="list-style-type: none"> ▪ Forest Practices Permit ▪ Surface Mining Reclamation Permit ▪ Survey Monument Removal Permit ▪ Archaeological Excavation and Removal Permit ▪ Air Quality Permit ▪ Other state permits <p>Local Permits:</p> <ul style="list-style-type: none"> ▪ Shoreline Permit ▪ Floodplain Development Permit ▪ Critical Areas Ordinance Review ▪ Clearing, Grading and Building Permits ▪ Land Use Permit ▪ Noise Variance ▪ Other local permits and approvals
Photo	▪
Plan	<ul style="list-style-type: none"> ▪ Stormwater Pollution Prevention Plan (SWPPP), which includes: <ul style="list-style-type: none"> ○ Temporary Erosion and Sediment Control Plan (TESC) ○ Spill Prevention Control and Countermeasures Plan (SPCC) ○ Stormwater Site Plan (SSP)
Report	<ul style="list-style-type: none"> ▪ Conceptual Wetland and Stream Mitigation Report ▪ Preliminary Draft Wetland and Stream Mitigation Report ▪ Draft Wetland and Stream Mitigation Report ▪ Final Wetland and Stream Mitigation Report ▪ Wetland Mitigation Site Feasibility Memo/Report ▪ Wetland Mitigation Site Wetland Technical Memo ▪ Critical Areas Fish and Wildlife Habitat report and potentially a Fish and Wildlife Habitat mitigation report ▪ Eelgrass Survey/Report <p>Note: Any report that is prepared for permitting purposes should be included here.</p>
Video	▪

Table 7 - Public Lands, Sections 4(f) & 6(f)

Public Lands, Sections 4(f) and 6(f) Document Type	<i>Livelink users are required to select a document type. The following lists typical 4(f) and 6(f) documents generated for each document type.</i>
Agreement-Contract	▪
Application	▪
Audio	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Letters ▪ Correspondence concerning 4(f) ▪ Correspondence concerning 6(f) ▪ Transmittal coversheets
Diary	▪
Drawing	▪
Estimate	▪
Form - Template	▪
Graphic	▪
Legal Notice	▪
Map	<ul style="list-style-type: none"> ▪ ▪
Meeting Agenda - Minutes	▪ Meeting agendas and meeting minutes for meetings regarding 4(f) and/or 6(f)
Notice	▪
Permit	▪
Photo	▪
Plan	▪
Report	<ul style="list-style-type: none"> ▪ Section 4(f) Evaluation ▪ Section 6(f) Evaluation
Video	▪

Table 8 – Permit Type - *When Permit document type is selected, users are required to select one Permit type from a drop-down list containing the following values:*

Permit Type
City
County
State
Federal
Tribal

Table 9 – IsComment - *When Correspondence document type is selected, default is set to "N". If user selects "Y" then Comment Type and Comment Source are required.*

IsComment
Y
N (default)

Table 10 – Comment Source - *When "Is Comment?" is answered with a "Y", the user can select one Comment Source from a drop-down list containing the following values.*

Comment Source
Agency
Elected Official
Public
Tribal
Other

Table 11 – Comment Type - *When "Is Comment?" is answered with a "Y", the user can select one Comment Type from a drop-down list containing the following values*

Comment Type
Document Review
Hearing
Meeting – Open House
Scoping
Web
Other

Geotech Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Geotech workspace. WSDOT has multiple Business Units within the organization and Geotech is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Geotech processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Geotech content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Geotech Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document.

The Geotech Business Unit uses the following categories and attributes:

- 1) Geotech Common Category
 - Discipline
 - Doc Type
 - Geotech Element
 - Report Type

For a complete list of attribute values, see Appendix A - Geotech Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select the discipline.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Geotech Element – User must select the Geotech Element(s) from a drop-down list containing multiple values. If multiple elements are applicable, user must select all that apply.

Report Type– When the Report doc type is selected, the user must select one Report type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Geotech file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Geotech%20Separator%20Sheets.xlsx>

Appendix A – Geotech Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Geotech categories/attributes taxonomy document (excel spreadsheet) is available at

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Geotech Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Geotech

Geotech Document Type	<i>Livelink users are required to select a document type. The following lists typical Geotech documents generated for each document type.</i>
Audio	▪
Boring Log	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Notice ▪ Transmittal coversheet
Design Criteria	▪
Drawing	▪
Field Boring Log	▪
Field Investigation	▪
Form-Template	▪
Graphic	▪
Map	▪
Meeting Agenda – Minutes	▪
Photo	▪
Plan Sheet	▪
Report	Note: Materials Source and Soil Reports should be stored in the Materials business unit.
Specification	▪
Study	▪
Video	▪
Worksheet - Computation	▪

Table 2 – Geotech Element Type - *Users must select the Geotech Element(s) from a drop-down list containing the following values. If multiple elements are applicable, user must select all that apply.*

Geotech Element Type
Embankment
Foundation for Structures
Hydraulic Structure – Note: pertains to ecology embankments, CAVFS, vaults, culverts, ponds, bio-swales, and infiltration.
Landslide Stabilization
Offshore Structures for WSF
Retaining Structures
Rock Fall Mitigation
Rock Slope
Soil Cut
Other

Table 3 – Report Type - *When Report document type is selected, users are required to select a Report type from the drop-down list containing the following values:*

Report Type
Geotechnical Baseline
Geotechnical Report
Geotechnical Data
Summary of Geotechnical Conditions
Other

Hydraulics Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Hydraulics workspace. WSDOT has multiple Business Units within the organization and Hydraulics is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Hydraulics processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf).
<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Hydraulics content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Hydraulics Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Hydraulics Business Unit uses the following categories and attributes:

- 1) Hydraulics Common Category
 - Discipline
 - Doc Type
 - Plan Sheet Type
 - Report Type

For a complete list of attribute values see Appendix A - Hydraulics Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select the discipline.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Plan Sheet Type – When the Plan Sheet doc type is selected, the user must select one Plan Sheet type from a drop-down list containing multiple values.

Report Type – When the Report doc type is selected, the user must select one Report type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Hydraulics file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Hydraulics%20Separator%20Sheets.xlsx>

Appendix A – Hydraulics Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Hydraulics categories/attributes taxonomy document (excel spreadsheet) is available at

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Hydraulics Processes and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Hydraulics

Hydraulics Document Type	<i>Livelink users are required to select a document type. The following lists typical Hydraulics documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Stormshed file ▪ HY8 software application file ▪ HEC-RAS software application file
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ Contacts for the commitment or manufacturers of pipe/culvert products.
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Form - Template	<ul style="list-style-type: none"> ▪ Stormwater Design Documentation.xls file ▪ Summary Forms for Fish Passage Design Data
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Scoping drainage meeting ▪ Maintenance drainage review ▪ Public agencies review
Notice	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪ Photos for different phases such as scoping, design, or old asbuilt photos
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪ Drainage profile ▪ Drainage plan sheet ▪ Drainage details ▪ Drainage structure note ▪ Site Preparation ▪ As built from preconstruction
Report	<ul style="list-style-type: none"> ▪ Hydraulic Summary ▪ Roadway Hydraulic Reports (Type A & B)
Specification	<ul style="list-style-type: none"> ▪
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪ Pipe Inspection Video
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Excel files showing gutter Zd, ditch heights, etc.

Table 2 – Plan Sheet Type – *When Plan Sheet document type is selected, users are required to select a Plan Sheet type from a drop-down list containing the following values:*

Plan Sheet Type
Drainage
Site Preparation
Historical As Built
Other

Table 3 – Report Type – *When Report document type is selected, users are required to select a Report type from a drop-down list containing the following values:*

Report Type
Bridge Hydraulic
Hydraulic Report
Other

Landscape Architecture Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Landscape Architecture workspace. WSDOT has multiple Business Units within the organization and Landscape Architecture is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Landscape Architecture processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Landscape Architecture content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Landscape Architecture Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Landscape Architecture Business Unit uses the following categories and attributes:

- 1) Landscape Architecture Common Category
 - Discipline
 - Doc Type
 - IsComment

For a complete list of attribute values see Appendix A - Landscape Architecture Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

IsComment – The default is set to “N”. The user must select “Y” if document or its content is a comment.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Landscape Architecture file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Landscape%20Architecture%20Separator%20Sheets.xlsx>

Appendix A – Landscape Architecture Taxonomy

The taxonomy identifies the filing structure for each business unit’s documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Landscape Architecture categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Landscape Architecture Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Irrigation

Irrigation Document Type	<i>Livelihood users are required to select a document type. The following lists typical Irrigation documents generated for each document type.</i>
Analysis	<ul style="list-style-type: none"> ▪ Design Decisions Documentation ▪ Zone Determination
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ 60% QA/QC File ▪ 90% QA/QC File
Commitment	<ul style="list-style-type: none"> ▪ Communication from local agency committing to irrigation
Contacts	<ul style="list-style-type: none"> ▪ List of local agency contacts ▪ Project contacts
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Adaptive management communication ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Phone logs
Drawing	<ul style="list-style-type: none"> ▪ Adaptive management plan drawings
Form - Template	<ul style="list-style-type: none"> ▪ Pressure Loss Calculation Templates
Graphic	<ul style="list-style-type: none"> ▪ Electronic Zone Diagram ▪ Cut Sheets
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Draft plan of irrigation systems design (written documentation)
Plan Sheet	<ul style="list-style-type: none"> ▪ 60% plan sheets ▪ 90% plan sheets ▪ Concept plan sheets ▪ Change order plan sheets ▪ Adaptive management plan sheets
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪ 60% specs ▪ 90% specs
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Calculations ▪ Vegetation value calculations

Table 2 – Mitigation & Roadside Design

Mitigation & Roadside Design Document Type	<i>Livelink users are required to select a document type. The following lists typical Mitigation & Roadside Design documents generated for each document type.</i>
Analysis	<ul style="list-style-type: none"> ▪ Piezometer Data ▪ Site/functional analysis plan ▪ Design Decisions Documentation ▪ Site distance analysis ▪ Clear zone analysis
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ Permit level QA/QC file ▪ 60% QA/QC File ▪ 90% QA/QC File
Commitment	<ul style="list-style-type: none"> ▪ Architectural guidelines commitment documentation
Contacts	<ul style="list-style-type: none"> ▪ Project contact sheet ▪ Maintenance contacts
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Vegetation protection communication ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Phone log
Drawing	<ul style="list-style-type: none"> ▪ Concept plans ▪ Design Visualizations
Form - Template	<ul style="list-style-type: none"> ▪ Estimate Template
Graphic	<ul style="list-style-type: none"> ▪ Design Visualizations
Map	<ul style="list-style-type: none"> ▪ Sundry Site vic. map
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Draft Mitigation Plan during review with comments
Plan Sheet	<ul style="list-style-type: none"> ▪ Permit plan sheets ▪ 60% plan sheets ▪ 90% plan sheets ▪ Change order plan sheets
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪ 60% specs ▪ 90% specs
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Roadside Restoration Worksheet ▪ Vegetation value calculations

Table 3 – Plant Establishment

Plant Establishment Document Type	<i>Livelink users are required to select a document type. The following lists typical Plant Establishment documents generated for each document type.</i>
Analysis	<ul style="list-style-type: none"> ▪ Remediation site analysis
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ Pre-activity safety checklist
Commitment	<ul style="list-style-type: none"> ▪ Agency documentation of requirements
Contacts	<ul style="list-style-type: none"> ▪ Construction office crew contacts
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Vegetation protection communication ▪ Adaptive management communication ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Phone logs ▪ Site construction notes
Drawing	<ul style="list-style-type: none"> ▪ Adaptive management plans
Form - Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Site vicinity map
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪ Photo points documentation
Plan	<ul style="list-style-type: none"> ▪ Submittals from contractor ▪ Plant Establishment Plan ▪ Roadside Work Plan ▪ Weed Control Plan
Plan Sheet	<ul style="list-style-type: none"> ▪ Change order plan sheets ▪ Adaptive management plan sheets ▪ As-built plan sheets ▪ Working copy of change orders
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Vegetation value calculations ▪ Plant replacement list

Table 4 – Site Design

Site Design Document Type	<i>Livelink users are required to select a document type. The following lists typical Site Design documents generated for each document type.</i>
Analysis	<ul style="list-style-type: none"> ▪ Site/functional analysis plan ▪ Design Decisions Documentation ▪ Site distance analysis ▪ Clear zone analysis
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ 60% QA/QC File ▪ 90% QA/QC File
Commitment	<ul style="list-style-type: none"> ▪ Local agency commitment communication
Contacts	<ul style="list-style-type: none"> ▪ Project office ▪ Local Agency
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Vegetation protection communication ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Phone logs
Drawing	<ul style="list-style-type: none"> ▪ Concept plans ▪ Design Visualizations
Form - Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪ Design Visualizations
Map	<ul style="list-style-type: none"> ▪ Vicinity maps
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Architectural guidelines that are project specific. Typically they are a deliverable for Site Design.
Plan Sheet	<ul style="list-style-type: none"> ▪ 60% plan sheets ▪ 90% plan sheets ▪ Change order plan sheets
Report	<ul style="list-style-type: none"> ▪ Site distance analysis ▪ Clear zone analysis
Specification	<ul style="list-style-type: none"> ▪ 60% specs ▪ 90% specs
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Vegetation value calculations

Table 5 – Visual Quality

Visual Quality Document Type	<i>Livelink users are required to select a document type. The following lists typical Visual Quality documents generated for each document type.</i>
Analysis	<ul style="list-style-type: none"> ▪ Site/functional analysis plan ▪ Design Decisions Documentation ▪ Visual quality matrix ▪ Viewshed analysis
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Vegetation protection communication ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Phone logs
Drawing	<ul style="list-style-type: none"> ▪ Concept plans ▪ Design Visualizations
Form - Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪ Design Visualizations
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Corridor Plan ▪ Aesthetic guidelines
Plan Sheet	<ul style="list-style-type: none"> ▪ Concept plan sheets
Report	<ul style="list-style-type: none"> ▪ Visual quality report
Specification	<ul style="list-style-type: none"> ▪
Study	<ul style="list-style-type: none"> ▪ Architectural guidelines. Visual quality is generally an EIS contribution and the Architectural guidelines within that context would be a study
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Vegetation value calculations

Materials Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

As part of the Project Management and Reporting System, Livelink, an Electronic Content Management System (or ECM), is used to capture, manage, store, preserve, and deliver content and documents related to project delivery. WSDOT has multiple Business Units within its organization, however, Materials is a Business Unit that has been identified to exist within the Materials Laboratory's existing system called The Materials Tracking Program (MTP). As part of the Project's final documentation, documents related to Materials processes may be included in the various business units of the Livelink ECM. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

It is the project team's responsibility to adhere to the process and procedures put forth by the WSDOT Material Laboratory when working on Materials related documents. It is also the project team's responsibility to include Materials related documents in ECM Business Units that comprise compiled documents of a complete submittal or package.

Livelink users who are managing Materials content in Livelink must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

Materials also uses another ECM – Materials Tracking Program (MTP). MTP is used to:

Provide a process for the Project Offices to maintain the ROM and the bid item list. It also provides for a standardized material document tracking process with an electronic centralized data management storage system, to manage the approvals, acceptance and other material documentation associated with WSDOT construction contracts. The program has reports that can be generated for use by the inspector in the field for verification, by the contractor for acceptance requirements and deficiencies.

The [MTP program](#) links to the ROM, SAM, MATS, QPL, ASA, and the Standard Specifications.

For more information on the MTP and Materials Laboratory go to:
<http://wwwi.wsdot.wa.gov/MaintOps/mats/default.htm>

Materials Categories

Livelihood categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Material Business Unit uses the following categories and attributes:

- 1) Materials Common Category
Discipline
Doc Type

For a complete list of attribute values see Appendix A - Materials Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select the discipline.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Materials file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelihoodECM/Shared%20Documents/Kofax%20Separator%20Sheets/Materials%20Separator%20Sheets.xlsx>

Materials Tracking Program (MTP) and Materials Laboratory
<http://wwwi.wsdot.wa.gov/MaintOps/mats/default.htm>

Appendix A – Materials Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories, and attribute values associated with each business unit. The Materials categories/attributes taxonomy document (excel spreadsheet) is available at
<http://sharedot/pd/cpdm/pMrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Materials Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Materials

Materials Document Type	<i>Livelihood users are required to select a document type. The following lists typical Materials documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪ Contract Materials Checklist ▪ Concrete Batch Plant Inspection Checklist
Commitment	▪
Contacts	▪
Correspondence	▪ Statement of Receipt of Radioactive Material ▪ Concrete Cylinder Transmittal ▪ Preliminary or other Sample Transmittal ▪ Request for Approval of Materials (RAM) ▪ Manufacturer's Certificate of Compliance (MCC) for Ready Mix Concrete ▪ Manufacturer's Certificate of Compliance (MCC) ▪ Catalog Cuts ▪ Proposed Mix Design ▪ HMA Mix Design Submittal Form ▪ Email ▪ Letter ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Transmittal coversheet
Design Criteria	▪
Diary	▪
Drawing	▪
Form - Template	▪ Material Samples Label ▪ Asphalt Sample Label
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Package	▪
Photo	▪
Report	▪ Pit Evaluation Report ▪ Fabrication Progress Report ▪ Asphalt Plant Inspection ▪ Backflow Prevention Assembly Test Report ▪ Certification of Materials Origin ▪ Correlation — Nuclear Gauge to Core Density ▪ Field Density Test ▪ Record of Materials (ROM)

	<ul style="list-style-type: none"> ▪ Inspector's Record of Field Test ▪ Surfacing Depth Check Record ▪ Concrete Pour Report ▪ Daily Compaction Test Report ▪ Field Acceptance/Verification Report (RAM/QPL) ▪ Hot Mix Asphalt Compaction Report ▪ Hot Mix Asphalt Test Section Report ▪ Moisture – Density Relationship Report ▪ Monthly Progress Sampling and Inspection Report ▪ Scale Test Reports ▪ Scaleman's Daily Report ▪ Summary Report of Acceptance, Sampling and Testing ▪ Materials Test Report ▪ Ignition Furnace Worksheet ▪ Rice Density ▪ Gradation Chart – 0.45 Power
Specification	▪
Video	▪
Worksheet - Computation	▪

Project Administration Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Project Administration workspace. WSDOT has multiple Business Units within the organization and Project Administration is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Project Administration processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Project Administration content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

Project Administration also uses other ECMs – Stellent/Oracle and Contract Manager. Stellent/Oracle is used for:

Work Order Authorizations

<http://wwwi.wsdot.wa.gov/ProjectReporting/WOA.htm>

SWAMP- Accounting documentation

<http://wwwi.wsdot.wa.gov/IT/ECM/Stellent/SWAMP>

Contract Manager

Although Contract Manager is used to manage cost and contains workflows to manage data associated with some project documentation i.e. document reviews and approvals, it is not an ECM.

Final project documentation files are to be stored in the Project ECM/Livelink. If

there are working/draft files or other project information in other ECM systems, web links can be stored in Project ECM/Livelink.

Project Administration Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Project Administration Business Unit uses the following categories and attributes:

- 1) Project Administration Common Category
 - Discipline
 - Doc Type
 - Is Attorney/Client Privilege
 - Plan Type
 - Project Summary Type
 - Report Type

For a complete list of attribute values see Appendix A - Project Administration Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple values.

Doc Type – User must select one doc type from a drop-down list containing multiple values.

Is Attorney/Client Privilege – When Legal Documents discipline is selected, the user must select a value from a drop-down list containing N, Y and Unknown, to indicate if the document is Attorney/Client Privilege. The default is set to 'Unknown'.

Plan Type – When the Plan doc type is selected, the user must select one Plan type from a drop-down list containing multiple values.

Project Summary Type – When the Project Summary doc type is selected, the user must select one Project Summary type from a drop-down list containing multiple values.

Report Type – When the Report doc type is selected, the user must select one Report type from a drop-down list containing multiple values.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

The Legal Documents and Vendor Payments (Accounts Payable) disciplines have restricted permissions due to sensitivity of the documents.

The Change Management discipline is for PCRFS, and is not to be used for change order documents – see Construction business unit for change order documents.

Project Administration file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Project%20Admin%20Separator%20Sheets.xlsx>

Appendix A – Project Administration Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Project Administration categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Project Administration Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pdrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Budgeting

Budgeting Document Type	<i>Livelink users are required to select a document type. The following lists typical Budgeting documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate. ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 2 – Change Management

Change Management Document Type	<p><i>Livelink users are required to select a document type. The following lists typical Change Management documents generated for each document type.</i></p> <ul style="list-style-type: none"> • <i>Note: Use for PCRFS, not to be used for change order documents – see Construction business unit for those documents.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪ Detailed or summary cost estimates for changes
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRFS)	<ul style="list-style-type: none"> ▪ Formal Project Change Request Form ▪ Section 603 change request to OFM
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 3 – Contractor Payments

Contractor Payments Document Type	<i>Livelink users are required to select a document type. The following lists typical Contractor Payments documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Force Account Equipment Rate Request
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate. The following are examples of estimates to be stored in Contractor Payments:</p> <ul style="list-style-type: none"> ▪ Contract Estimate Payments (CAPS Estimates) ▪ Final Pay Estimate
Form-Template	▪
Graphic	▪
Invoice	▪ Force Account Invoices
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	<ul style="list-style-type: none"> ▪ Field Note Record ▪ Field Note Record (Sketch Grid) ▪ Field Note Record for Drainage ▪ Daily Traffic Item Ticket ▪ Daily Work Quantities ▪ Water Delivery Record ▪ Daily Report of Force Account Worked ▪ Material on Hand Payments ▪ Item Quantity Ticket
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪ Subcontractor or contractor release
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪ Final Contract Voucher Certificate
Work Order Authorization	▪
Worksheet - Computation	▪

Table 4 – Cost Estimating

Cost Estimating Document Type	<i>Livelink users are required to select a document type. The following lists typical Cost Estimating documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate. The following are examples of estimates to be stored in Cost Estimating:</p> <ul style="list-style-type: none"> ▪ 60% estimate ▪ 90% estimate ▪ Engineer's estimate at bid opening and preliminary versions of the estimate ▪ General estimate to do PSE and project design ▪ Detailed or summary cost estimates for the entire project or multiple business areas of a project ▪ Detailed or summary cost estimates for changes (in Change Management discipline) ▪ Contractor payment (CAPS) estimates (in Contractor Payments discipline),
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪ Lump Sums Breakdowns from Contractor

Table 5 – Cost Performance

Cost Performance Document Type	<i>Livelink users are required to select a document type. The following lists typical Cost Performance documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	<ul style="list-style-type: none"> ▪ PowerPoint presentation ▪ Script for a presentation to a group
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 6 – Document & Content Management

Document & Content Management Document Type	<i>Livelink users are required to select a document type. The following lists typical Document & Content Management documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪ Project Document Management Plan
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 7 – Financial Planning

Financial Planning Document Type	<i>Livelink users are required to select a document type. The following lists typical Financial Planning documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate. ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪ Project financial plan ▪ FHWA-level finance plan, ▪ Toll revenue plan
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 8 – Funds Management

Funds Management Document Type	<i>Livelink users are required to select a document type. The following lists typical Funds Management documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Funds requests
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	<ul style="list-style-type: none"> ▪ CPMS aging update plan ▪ Cost Plan
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 9 – Legal Documents

Legal Documents Document Type	<i>Livelink users are required to select a document type. The following lists typical Legal Documents documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 10 – Project Management Planning & Procedures

Project Management Planning & Procedures Document Type	<i>Livelink users are required to select a document type. The following lists typical Project Management Planning & Procedures documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	<ul style="list-style-type: none"> ▪ Project Work Plan ▪ Project Management Plan
Policy - Procedure	<p>Note: Only project (WIN) specific policy – procedures related to this business unit are to be stored here.</p> <ul style="list-style-type: none"> ▪
Presentation	<ul style="list-style-type: none"> ▪ PowerPoint presentation ▪ Script for a presentation to a group
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 11 – Project Reporting

Project Reporting Document Type	<i>Livelink users are required to select a document type. The following lists typical Project Reporting documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	<ul style="list-style-type: none"> ▪ PowerPoint presentation ▪ Script for a presentation to a group
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	<ul style="list-style-type: none"> ▪ Aging ▪ Confidence ▪ Construction status ▪ Construction cost summary ▪ Earned value ▪ Monthly and quarterly progress reports ▪ Variance
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 12 – Regional & Statewide Programming

Regional & Statewide Programming Document Type	<i>Livelink users are required to select a document type. The following lists typical Regional & Statewide Programming documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate. ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 13 – Risk Management

Risk Management Document Type	<i>Livelink users are required to select a document type. The following lists typical Risk Management documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	<ul style="list-style-type: none"> ▪ PowerPoint presentation ▪ Script for a presentation to a group
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	<ul style="list-style-type: none"> ▪ Cost Estimated Validation Process (CEVP) report ▪ Cost Risk Assessment (CRA) report
Risk Register	<ul style="list-style-type: none"> ▪ Listing of project risks, including risk probabilities, impacts, mitigation/management strategies and actions, and outcomes
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 14 – Scheduling

Scheduling Document Type	<i>Livelink users are required to select a document type. The following lists typical Scheduling documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪ Schedule Plan
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪ Working Day Statements
Risk Register	▪
Schedule	<ul style="list-style-type: none"> ▪ Contractor's or consultant's schedules ▪ Project schedules ▪ Planned activities, actual activities, milestones, baselines, resources, expenses, activity relationships and timing, etc.
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 15 – Scoping

Scoping Document Type	<i>Livelink users are required to select a document type. The following lists typical Scoping documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	<ul style="list-style-type: none"> ▪ Design Decisions Summary (DDS) ▪ Environmental Review Summary (ERS) ▪ Project Definition ▪ A complete package of the three components listed above
Release	▪
Report	▪ Scope reports
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 16 – Trend Analysis

Trend Analysis Document Type	<i>Livelink users are required to select a document type. The following lists typical Trend Analysis documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪ Trend reports
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 17 – Vendor Payments (Accounts Payable)

Vendor Payments (Accounts Payable) Document Type	<i>Livelink users are required to select a document type. The following lists typical Vendor Payments (Accounts Payable) documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	<ul style="list-style-type: none"> ▪ Agreement invoices ▪ Utility invoices ▪ Miscellaneous invoices received for payment to vendors
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪ Supplier or vendor release
Report	▪
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	<ul style="list-style-type: none"> ▪ Invoice voucher ▪ Payment voucher ▪ Journal voucher
Work Order Authorization	▪
Worksheet - Computation	▪

Table 18 – Work Order Accounting

Work Order Accounting Document Type	<i>Livelink users are required to select a document type. The following lists typical Work Order Accounting documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	<ul style="list-style-type: none"> ▪ Work Order Accounting Plan (as printed from TRAINS showing how work order is set up)
Policy - Procedure	▪
Presentation	▪
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪ Work Order Ledger
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 19 – Workforce Planning

Workforce Planning Document Type	<i>Livelink users are required to select a document type. The following lists typical Workforce Planning documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Transmittal coversheet ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum
Diary	▪
Drawing	▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Real Estate & Right of Way business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form - Template	▪
Graphic	▪
Invoice	▪
Map	▪
Meeting Agenda - Minutes	▪
Notice	▪
Pay Note	▪
Photo	▪
Plan	▪ Workforce Plan
Policy - Procedure	▪
Presentation	<ul style="list-style-type: none"> ▪ PowerPoint presentation ▪ Script for a presentation to a group
Project Change Request Form (PCRF)	▪
Project Summary	▪
Release	▪
Report	▪ Workforce reports
Risk Register	▪
Schedule	▪
Schedule of Values	▪
Video	▪
Voucher	▪
Work Order Authorization	▪
Worksheet - Computation	▪

Table 20 – Is Attorney/Client Privilege – *When Legal Documents discipline is selected, the user must select a value from a drop-down list to indicate if the document is Attorney/Client Privilege. The default is set to 'Unknown'. User may select from a drop-down list containing the following values:*

Is Attorney/Client Privilege
Unknown (default)
No
Yes

Table 21 – Plan Type – *When Plan document type is selected, users are required to select a Plan type from a drop-down list containing the following values:*

Plan Type
Aging
Cost
Finance
Management
Schedule
Work Order Accounting Plan
Workforce
Other

Table 22 – Project Summary Type – *When Project Summary document type is selected, users are required to select a Project Summary type from a drop-down list containing the following values:*

Project Summary Type
Complete
Design Decisions Summary (DDS)
Environmental Review Summary (ERS)
Project Definition
Other

Table 23 – Report Type – *When Report document type is selected, users are required to select a Report type from a drop-down list containing the following values:*

Report Type
Aging
Confidence
Construction Status
Cost Estimated Validation Process (CEVP)
Cost Risk Assessment (CRA)
Construction Cost Summary
Earned Value
Monthly
Quarterly

Schedule
Scope
Trend
Variance
Work Order Ledger
Workforce
Other

Project Design Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Project Design workspace. WSDOT has multiple Business Units within the organization and Project Design is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Project Design processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Project Design content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

The Project Design business unit also uses another ECM – ProjectWise.

ProjectWise is used by some project offices to:

- Manage computer aided engineering (CAE) files (InRoads, Microstation and the associated reference files), drafting or roadway design files. At this time ProjectWise is not deployed agency wide or set up in a consistent WSDOT manner.

In addition to ProjectWise, the project directory structure as referenced in the WSDOT Electronic Engineering Document Standards (EEDS) is intended as the WSDOT standard structure for Computer Aided Engineering (CAE) data storage to consolidate all of a project's electronic data files into one folder structure. The CAE structure will complement a WSDOT Enterprise Content Management (ECM) system, as the ECM is the primary location for project documentation and the CAE structure stores the data files. In the absence of

an ECM, this structure provides guidance for storage of typical, relevant information pertaining to the project.

Final project documentation files are to be stored in the Project ECM/Livelink. If there are working/draft files or other project information in other ECM systems, web links can be stored in Project ECM/Livelink.

Project Design Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Project Design Business Unit uses the following categories and attributes:

- 1) Project Design Common Category
 - Discipline
 - Doc Type
 - Package Type

For a complete list of attribute values, see Appendix A - Project Design Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple choices.

Doc Type – User must select one doc type from a drop-down list containing multiple choices.

Package Type – When the Package Doc Type is selected, the user must select one Package Type from a drop-down list containing multiple choices.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Project Design file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Project%20Design%20Separator%20Sheets.xlsx>

WSDOT Electronic Engineering Document Standards (EEDS)

<http://wwwi.wsdot.wa.gov/eesc/design/cae/Docs/HQCAEHelpdesk.htm>

Appendix A – Project Design Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Project Design categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Project Design Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Design Documentation

Design Documentation Document Type	<i>Livelihood Users are required to select a document type. The following lists typical project Design Documentation documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪
Audio	<ul style="list-style-type: none"> ▪ Recording of meeting ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ Design Documentation Checklist ▪ Deviation Checklist ▪ Evaluate Upgrade Checklist
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪ Project contact list ▪ E-mail addresses
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Letters ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Design Decision	<ul style="list-style-type: none"> ▪ Design Decisions
Design Matrix	<ul style="list-style-type: none"> ▪ Design Matrix
Design Variance	<ul style="list-style-type: none"> ▪ Design Variances ▪ Design Exceptions ▪ Design Deviations
Diary	<ul style="list-style-type: none"> ▪ Daily journal of activities
Drawing	<ul style="list-style-type: none"> ▪ Hand sketches
Evaluation	<ul style="list-style-type: none"> ▪ Evaluations
Form - Template	<ul style="list-style-type: none"> ▪ Design Parameters
Graphic	<ul style="list-style-type: none"> ▪ DGN files ▪ DWG files ▪ JPEG files ▪ TIFF files
Inventory	<ul style="list-style-type: none"> ▪ Design Variance Inventory (DVIS) ▪ Clear Zone Inventory ▪ Sign Inventory
Map	<ul style="list-style-type: none"> ▪ DGN ▪ ArcGIS maps
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Meeting Minutes ▪ Meeting Summaries
Notice	<ul style="list-style-type: none"> ▪
Package	<ul style="list-style-type: none"> ▪ Design Approval ▪ Design Documentation ▪ Project Delivery

	<ul style="list-style-type: none"> ▪ Project Development Approval
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪ JPEG files ▪ TIFF files ▪ RAW files
Plan	<ul style="list-style-type: none"> ▪ Channelization ▪ Roadway Section ▪ Profile
Plan Sheet	<ul style="list-style-type: none"> ▪ Prior Project Sheets
Report	<ul style="list-style-type: none"> ▪ Design File
Review	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪ Prior Project Specifications
Study	<ul style="list-style-type: none"> ▪ Planning Study ▪ Accident Analysis
Summary	<ul style="list-style-type: none"> ▪ Project Summary
Video	<ul style="list-style-type: none"> ▪ MPEG files ▪ Site Video ▪ Meeting Video
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Horizontal and Vertical Alignment Calculations ▪ Sight Distance Calculations

Table 2 – Plans Specifications & Estimates

Plans Specifications & Estimates Document Type	<i>Livelink Users are required to select a document type. The following lists typical project Plans Specifications & Estimates documents generated for each document type.</i>
Application	▪
Audio	▪ Meeting Audio ▪ Voicemail recording
Checklist	▪ PSE Review Checklist
Commitment	▪ MOA/MOU with city, county, tribes, developers
Contacts	▪ Project Contact List ▪ E-mail addresses
Correspondence	▪ Emails ▪ Letters ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Transmittal coversheet
Design Criteria	▪
Design Decision	▪
Design Matrix	▪ Custom Matrix
Design Variance	▪ Project Analysis
Diary	▪ Daily journal of activities
Drawing	▪
Evaluation	▪
Form - Template	▪
Graphic	▪ DGN ▪ DWG ▪ JPEG ▪ TIFF ▪ Electronic Design Files
Inventory	▪
Map	▪ DGN
Meeting Agenda - Minutes	▪ Constructability Review Agenda and Minutes ▪ Round Table Agenda and Minutes ▪ Pre-Bid Meeting Agenda and Minutes
Notice	▪
Package	▪ Ad Copy and Addendums ▪ Design Build RFQ ▪ Design Build RFP
Permit	▪
Photo	▪
Plan	▪
Plan Sheet	▪ Plan Sheets
Report	▪
Review	▪
Specification	▪ Specifications & Special Provisions
Study	▪
Summary	▪
Video	▪
Worksheet - Computation	▪

Table 3 – Package Type – *When Package document type is selected, users are required to select a Package type from a drop-down list containing the following values:*

Package Type
Ad Copy
Design Approval
Design Documentation
Project Delivery
Project Development Approval
Other

Public Involvement Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Public Involvement workspace. WSDOT has multiple Business Units within the organization and Public Involvement is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Public Involvement processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Public Involvement content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Public Involvement Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document.

The Public Involvement Business Unit uses the following categories and attributes:

- 1) Public Involvement Common Category
 - Discipline
 - Doc Type
 - IsComment
 - Comment Source
 - Comment Type

On Web

For a complete list of attribute values see Appendix A - Public Involvement Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline –User must select one discipline from a drop-down list containing multiple choices.

Doc Type –User must select one doc type from a drop-down list containing multiple choices.

Is Comment – When the Correspondence Doc Type is selected and the user selects “Y”, then Comment Type and Comment Source are required. The “IsComment” default is set to “No”.

Comment Type – The user must select a comment type when “Is Comment?” is answered with a “Y”. The user must select one Comment Type from a drop-down list containing multiple choices.

Comment Source - The user must select a comment source when “Is Comment?” is answered with a “Y”. The user must select one Comment Type from a drop-down list containing multiple choices.

On Web – The default is set to “N”. The user must select “Y” if document is published on web. This will help identify technical documents that have been available to the public on the Web site currently or in the past.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Public Involvement file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Public%20Involvement%20Separator%20Sheets.xlsx>

Appendix A – Public Involvement Taxonomy

The taxonomy identifies the filing structure for each business unit's documents.

The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Public Involvement

categories/attributes taxonomy document (excel spreadsheet) is available at

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Public Involvement Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Administrative - Internal Communications

Administrative – Internal Communications Document Type	<i>Livelink users are required to select a document type. The following lists typical project Administrative – Internal Communications documents generated for each document type.</i>
Application	▪
Audio	▪ N/A to Administrative – Internal Communication Doc Type ▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Display Board	▪ N/A to Administrative – Internal Communication Doc Type
Drawing	▪
Fact Sheet – FAQ - Folio - Newsletter	▪ Internal Newsletters
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
News Clipping	▪ N/A to Administrative – Internal Communication Doc Type
Notice	▪ N/A to Administrative – Internal Communication Doc Type
Permit	▪
Photo	▪
Plan	▪ Communication Plans ▪ Work Plan
Presentation - Briefing	▪
Press Release – Media Advisory	▪
Public Disclosure	▪
Report	▪
Talking Points	▪
Video	▪

Table 2 – Informational Materials & Web

Informational Materials & Web Document Type	<i>Livelink users are required to select a document type. The following lists typical project Informational Materials & Web documents generated for each document type.</i>
Application	▪
Audio	<ul style="list-style-type: none"> ▪ Audio recordings ▪ Scripts for audio recordings ▪ Project Hotline script ▪ Podcasts ▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Display Board	▪
Drawing	▪
Fact Sheet – FAQ - Folio - Newsletter	<ul style="list-style-type: none"> ▪ Fact Sheets ▪ Folios ▪ Fliers ▪ Newsletters
Form - Template	▪ Project CD template
Graphic	▪ Images used in fact sheets, folios and presentations
Map	▪
Meeting Agenda - Minutes	▪
News Clipping	▪ N/A to Informational Materials and Web Doc Type
Notice	▪
Permit	▪
Photo	▪ Photos of an outreach event, project area, etc.
Plan	▪
Presentation - Briefing	▪
Press Release – Media Advisory	▪ N/A to Informational Materials and Web Doc Type
Public Disclosure	▪ N/A to Informational Materials and Web Doc Type
Report	▪
Talking Points	▪
Video	▪ Videos

Table 3 – News & Media

News & Media Document Type	<i>Livelink users are required to select a document type. The following lists typical project News & Media documents generated for each document type.</i>
Application	▪
Audio	▪ Radio interview ▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪ Project media contact list
Correspondence	▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Display Board	▪
Drawing	▪
Fact Sheet – FAQ - Folio - Newsletter	▪
Form - Template	▪
Graphic	▪ Graphics
Map	▪
Meeting Agenda - Minutes	▪
News Clipping	▪ News Clippings
Notice	▪
Permit	▪
Photo	▪ Photos of media tours, media-only events
Plan	▪
Presentation - Briefing	▪ Presentations for media events
Press Release – Media Advisory	▪ Press Releases ▪ Media Advisories
Public Disclosure	▪
Report	▪ Media Contact Report
Talking Points	▪
Video	▪ Television Video Reports ▪ Drive-through simulations

Table 4 – Public Outreach & Responses

Public Outreach & Responses Document Type	<i>Livelink users are required to select a document type. The following lists typical project Public Outreach & Responses documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪ Fairs and Festivals Meeting Supply Checklist
Commitment	▪
Contacts	▪ Stakeholder Advisory Committee contact list
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪
Display Board	<ul style="list-style-type: none"> ▪ Display Boards ▪ Display Board text ▪ Traveling Display (for fairs and festivals) ▪ Rotating traveling display schedule
Drawing	▪
Fact Sheet – FAQ - Folio - Newsletter	▪
Form - Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪ Public Meeting Minutes/Summary ▪ Community Meeting Summary ▪ Elected Official Summary
News Clipping	▪ N/A to Public Outreach and Responses Doc Type
Notice	<ul style="list-style-type: none"> ▪ Public Meeting Notice ▪ Field Work Notification ▪ Postcard notification for public meeting or event
Permit	▪
Photo	▪
Plan	▪ Public Involvement Plan
Presentation - Briefing	<ul style="list-style-type: none"> ▪ Community Meeting Briefing ▪ Elected Official Briefing ▪ Common Questions ▪ Frequently Asked Questions
Press Release – Media Advisory	▪ N/A to Public Outreach and Responses Doc Type
Public Disclosure	▪ All materials related to public disclosure requests
Report	▪ Public Events Summaries, such as summaries from fairs, festivals,
Talking Points	▪
Video	▪

Table 5 – Comment Source - *When Correspondence document type is selected and IsComment = Y, users are required to select a Comment Source type from a drop-down list containing the following values:*

Comment Source Type
Agency
Elected Official
Public
Tribal
Other

Table 6 – Comment Type – *When Correspondence document type is selected and IsComment = Y, users are required to select a Comment type from a drop-down list containing the following values:*

Comment Type
Document Review
Hearing
Meeting – Open House
Scoping
Web
Other

Table 7 – On Web – *The default is set to “N”. The user must select “Y” if document is published on web. This will help identify technical documents that have been made available to the public on the Web site currently or in the past:*

On Web
N (default)
Y

Real Estate & Right of Way (RE-ROW) Project Electronic Content Management (ECM) Process

Effective Date: December 16, 2008

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Real Estate & Right of Way (RE-ROW) workspace. WSDOT has multiple Business Units within the organization and Real Estate & Right of Way is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Right of Way processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Real Estate & Right of Way content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

Real Estate & Right of Way also uses another ECM – Stellent/Oracle.

Stellent/Oracle is used to:

1) Manage scanned images of conveyance documents (deeds & easements). All document preparation, scanning and system input is done at HQ (only). WSDOT state-wide access to Stellent is view only for this purpose.

2) Manage scanned images of Real Estate Ownership Maps. All document preparation, scanning and system input is done at HQ (only). WSDOT state-wide access to Stellent is view only for this purpose.

3) To manage the collaboration of comments and documents specific to the property right disposal process. Use of Stellent for this purpose requires a user account.

Real Estate & Right of Way Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Real Estate and Right of Way Business Unit uses the following categories and attributes:

1) RE-ROW Common Category

- Parcel Number
- IC Number
- Tax Assessor Number
- Discipline
- Doc Type
- ROW Plan Title

2) RE-ROW Relocation Category

- Displacee Number
- Displacee Name

For a complete list of attribute values see Appendix A - Real Estate and Right of Way Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Parcel Number – required for all documents when no Inventory Control (IC) Number is available in the Integrated Realty Information System (IRIS). If both a parcel number and an IC number are available, enter both attributes.

IC Number – (Inventory Control Number) required for all documents when no Parcel Number is available in IRIS.

Tax Assessor Number – required for all documents when available in IRIS.

Discipline – a drop-down box containing multiple values; user must select one (See Appendices A and B)

Doc Type – (Document Type) a drop-down box containing multiple values; user must select one (See Appendices A and B)

ROW Plan Title – (Right of Way) required for all documents when available in IRIS.

Displacee Number – required for all relocation documents, and other documents when available in IRIS

Displacee Name – required for all relocation documents, and other documents when available in IRIS

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Either a *Parcel Number* or an *IC Number* must be entered.

Where a drop down box is available (*Discipline and Doc Type*) one of the values must be selected.

When Relocation is selected from the *Discipline* drop-down box, both the *Displacee Number* and *Displacee Name* must be entered.

The Appraisal and Relocations disciplines have restricted permissions due to sensitivity of the documents.

RE-ROW file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video): Parcel Number or IC Number – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Parcel Number or IC Number – DocType – WSDOT DocID. If both Parcel and IC Number are entered, the Parcel Number will be used in the file name.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/REROW%20Separator%20Sheets.xlsx>

Appendix A – Real Estate and Right of Way Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Real Estate and Right of Way categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B - Real Estate and Right of Way Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pMrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Acquisition

Acquisition Document Type	<i>Livelink users are required to select a document type. The following lists typical Acquisition documents generated for each document type.</i>
Administrative Settlement Letter	<ul style="list-style-type: none"> ▪ Administrative Settlement Letter
Agreement – Contract	<ul style="list-style-type: none"> ▪ Agreement (specific to this business unit discipline) ▪ Compensation Agreement for Condemnation (RES-318) ▪ Escrow Agreement (RES-337) ▪ Exchange Agreement (RES-322) ▪ Fixtures and Improvements Agreement (RES-335) ▪ Possession and Use Agreement (RES-317) ▪ Real Estate Contract ▪ Septic Agreement (RES-314) ▪ Stipulated Possession and Use Agreement (Stipulated Order for Immediate Use and Possession) ▪ Turnback Agreement ▪ Well Agreement (RES-313) <p>NOTE -agreements/contracts not specific to this business unit discipline should be created and/or stored within the Agreements Business.</p>
Application	<ul style="list-style-type: none"> ▪
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Bill of Sale	<ul style="list-style-type: none"> ▪ Bill of Sale (RES-330)
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Consent to Change of Grade	<ul style="list-style-type: none"> ▪ Consent to Change of Grade (RES-323)
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Affidavit ▪ Articles of Incorporation ▪ By-Laws ▪ Certificate ▪ Claim for Damages ▪ Covenant ▪ Decision ▪ Dedication ▪ Disclaimer ▪ Email ▪ Facsimile (FAX) ▪ Forfeiture ▪ Grant ▪ Letter ▪ License ▪ Limited Liability Agreement (Limited Liability Company) ▪ Limited Partnership Agreements ▪ Memo/Memorandums ▪ Memorandum of Title ▪ Notice of Forfeiture

	<ul style="list-style-type: none"> ▪ Order of Dismissal ▪ Order of Vacation ▪ Ordinance ▪ Partnership Agreement (including amendments) ▪ Petition ▪ Power of Attorney ▪ Receipt ▪ Request to Accept Encumbrance (RES-333) ▪ Resignation and Appointment of Successor Trustee ▪ Resolution ▪ Stop Condemnation Request (RES-319) ▪ Subordination ▪ Substitution ▪ Tax Set Over Letter (RES-334) ▪ Transfer of Jurisdiction ▪ Transmittal coversheet ▪ UCC Statement ▪ Waiver ▪ Work Order Authorization
Deed	<ul style="list-style-type: none"> ▪ Bargain and Sale Deed ▪ Quitclaim Deed (RES-306) ▪ Quitclaim Deed (Access Rights Only) (RES-307) ▪ Quitclaim Fulfillment Deed ▪ Special Warranty Deed (RES-303) ▪ Special Warranty Deed (Access Rights Only) ▪ Warranty Deed (RES-302) ▪ Warranty Deed (Access Rights Only) (RES-305)
Diary	<ul style="list-style-type: none"> ▪ Diary (RES-301)
Drawing	<ul style="list-style-type: none"> ▪
Easement	<ul style="list-style-type: none"> ▪ Easement (RES-324) ▪ Temporary Easement(RES-325)
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Project Administration business unit, as appropriate.</p> <ul style="list-style-type: none"> •
Form – Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Judgment & Decree	<ul style="list-style-type: none"> ▪ Stipulated Judgment and Decree of Appropriation ▪ Judgment (Jury)
Lease	<ul style="list-style-type: none"> ▪ Lease (RES-329) ▪ Memorandum of Lease
Lis Pendens	<ul style="list-style-type: none"> ▪ Lis Pendens
Map	<ul style="list-style-type: none"> ▪ Approved Indians Maps ▪ Approved Land Map ▪ Land Plat ▪ Plat ▪ Right of Way Plan ▪ Short Plat
Meeting Agenda – Minutes	<ul style="list-style-type: none"> ▪
Negotiators Report	<ul style="list-style-type: none"> ▪ Negotiator’s Report (RES-320)
Notice	<ul style="list-style-type: none"> ▪ Notice of Intent to Acquire ▪ Notice of Lien (RES-332) ▪ Notice of Default ▪ Notice of Forfeiture
Offer Letter	<ul style="list-style-type: none"> ▪ Offer Letter (RES-350) ▪ Revised Offer Letter (RES-351)
Option	<ul style="list-style-type: none"> ▪ Option to Purchase Lands (RES-328) ▪ Option to Purchase Quarry/Pit (RES-327)
Permit	<ul style="list-style-type: none"> ▪ Permit (RES-326)

Photo	▪
Reconveyance	<ul style="list-style-type: none"> ▪ Request for Partial Reconveyance (RES-310) ▪ Request for Full Reconveyance ▪ Partial Reconveyance (RES-311) ▪ Partial Reconveyance (Access Rights Only) ▪ Full Reconveyance
Release	<ul style="list-style-type: none"> ▪ Partial Release ▪ Partial Release of Assignment of Lease and Security Agreement ▪ Partial Release of Assignment of Rents ▪ Partial Release of Easement ▪ Partial Release of Judgment (RES-316) ▪ Partial Release of Lease (RES-312) ▪ Partial Release of Mortgage (RES-308) ▪ Partial Release of Mortgage (Access Rights Only) (RES-309) ▪ Partial Satisfaction of Mortgage ▪ Release ▪ Release of Assignment of Rents ▪ Release of Damages (RES-315) ▪ Release of Judgment ▪ Release of Lease ▪ Release of Lien
Report	▪
Review	▪
Emergency Permit & Right of Entry	▪ Emergency Permit & Right of Entry (RES-348)
Video	▪

Table 2- Appraisal

Appraisal Document Type	<i>Livelink users are required to select a document type. The following lists typical Appraisal documents generated for each document type.</i>
Administrative Offer	<ul style="list-style-type: none"> ▪ Administrative Offer Summary
Agreement – Contract	NOTE -agreements/contracts not specific to this business unit discipline should be created and/or stored within the Agreements Business Unit.
Application	
Appraisal	<ul style="list-style-type: none"> ▪ Short Form Appraisal ▪ Abbreviated Appraisal ▪ Narrative Appraisal
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Determination of Value	<ul style="list-style-type: none"> ▪ Determination of Value
Diary	<ul style="list-style-type: none"> ▪ Diary
Drawing	<ul style="list-style-type: none"> ▪
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Project Administration business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form – Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda – Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Project Funding Estimate Package	<ul style="list-style-type: none"> ▪ Project Funding Estimate (PFE)
Report	<ul style="list-style-type: none"> ▪
Review	<ul style="list-style-type: none"> ▪ Appraisal Review
Video	<ul style="list-style-type: none"> ▪

Table 3 – Property Management

Property Management Document Type	<i>Livelink users are required to select a document type. The following lists typical Property Management documents generated for each document type.</i>
Agreement – Contract	<ul style="list-style-type: none"> ▪ Interagency Agreement (specific to this business unit discipline) ▪ Real Estate Contract ▪ Cooperative Agreement (specific to this business unit discipline) NOTE -agreements/contracts not specific to this business unit discipline should be created and/or stored within the Agreements Business Unit.
Application	<ul style="list-style-type: none"> ▪ Application for Deferred Payments ▪ Application to Rent State-Owned Property ▪ Application to Lease – Trails and Paths ▪ Application to Lease Unimproved Property or Airspace
Assessment	<ul style="list-style-type: none"> ▪ Forest Protection Assessment ▪ Property Assessment
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ PM Lease Review Checklist
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Deed	<ul style="list-style-type: none"> ▪ Timber Deed
Diary	<ul style="list-style-type: none"> ▪ Diary
Disclosure	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Project Administration business unit, as appropriate. <ul style="list-style-type: none"> ▪
Form – Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Lease	<ul style="list-style-type: none"> ▪ Residential Displacee Lease ▪ Commercial Displacee Lease
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda – Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪
Option	<ul style="list-style-type: none"> ▪ Option Agreement
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪
Review	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪

Table 4 – Relocation

Relocation Document Type	<i>Livelink users are required to select a document type. The following lists typical Relocation documents generated for each document type.</i>
Agreement – Contract	<ul style="list-style-type: none"> ▪ Agreement for Provisional Replacement Housing Payment (518) ▪ Moving Expense Agreements (540-540a) <p>NOTE -agreements/contracts not specific to this business unit discipline should be created and/or stored within the Agreements Business Unit.</p>
Application	<ul style="list-style-type: none"> ▪ Application for Reestablishment Expenses (523) ▪ Application for Fixed Payment (538)
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ Residential Checklist (529) ▪ Non-Residential Checklist (530) ▪ Personal Property Checklist (531)
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Request for Moving Bid Cover Letter (520) ▪ Request for Proposal and Moving Specification (521) ▪ Final Claim Letters (536-536a) ▪ Transmittal coversheet
Determination of Value	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪ Relocation Diary (260-001)
Drawing	<ul style="list-style-type: none"> ▪
Entitlement Instructions	<ul style="list-style-type: none"> ▪ Price Differential Entitlement Instructions (516) ▪ Down Payment Instructions (516a)
Estimate	<p>Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Project Administration business unit, as appropriate.</p> <ul style="list-style-type: none"> ▪
Form – Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Inventory	<ul style="list-style-type: none"> ▪ Pre Move Inventory – Non-Residential (535) ▪ Non-Residential Obsolete Printed Items (545)
Log	<ul style="list-style-type: none"> ▪ Replacement Site Search Log (522)
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda – Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪ General Notice (501-504) ▪ Notice of Eligibility (505-511) ▪ Notice of Non-Eligibility (544)
Occupancy Survey	<ul style="list-style-type: none"> ▪ Residential Occupancy Survey (532) ▪ Non-Residential Occupancy Survey (533) ▪ Personal Property Only Occupancy Survey (534)
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ Vacate Inspection (517) ▪ Eligibility Report (524) ▪ Replacement Dwelling Inspection Report DSS (525) ▪ Price Differential Report (542) ▪ Rent Supplemental Report (543)
Review	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪

Worksheet – Computation

- Mortgage Interest Differential Payment (513)
- Incidental Expense Worksheet (514)
- Documentation of Living Expenses (515)
- Fixed Payment Worksheet Non-Residential (519)
- Loss of Tangibles/Substitute Personal Property Bid Form (526)
- Loss of Tangibles Computation (527)
- Substitute Personal Property Computation (528)
- Monthly Income Verification (539)
- Housing Comparison Worksheet (541)
- Mobile Home Move Cost – Personal Property (546)

Table 5 – Title

Title Document Type	<i>Livelink users are required to select a document type. The following lists typical Title documents generated for each document type.</i>
Agreement – Contract	NOTE -agreements/contracts not specific to this business unit discipline should be created and/or stored within the Agreements Business Unit.
Application	▪
Audio	▪
Checklist	▪ Title Examiners/Reviewers
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile (FAX) ▪ Letter ▪ Memo/Memorandum ▪ Transmittal coversheet
Diary	▪ Diary
Drawing	▪
Estimate	Note: Estimates not specific to this business unit discipline should be created and/or stored within the Agreements or Project Administration business unit, as appropriate. <ul style="list-style-type: none"> ▪
Form – Template	▪
Graphic	▪
Map	▪
Meeting Agenda – Minutes	▪
Notice	▪
Permit	▪
Photo	▪
Policy	<ul style="list-style-type: none"> ▪ Title Policy ▪ Title Policy (Endorsement)
Report	<ul style="list-style-type: none"> ▪ Title Commitment/Report ▪ Supplemental Title Commitment/Report ▪ Commitment/Report Endorsement
Review	▪
Video	▪

Survey Photogrammetry CAE Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Survey Photogrammetry CAE workspace. WSDOT has multiple Business Units within the organization and Survey Photogrammetry CAE is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Survey Photogrammetry CAE processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Survey Photogrammetry CAE content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

Survey Photogrammetry CAE also uses other ECMs – Survey Monument Database, Plans and Documents Archive Database and some offices use ProjectWise. The following provides information or access to these systems:

Survey Monument Database - <http://www.wsdot.wa.gov/monument/>

Ortho Photo Link -

<http://wwwi.wsdot.wa.gov/ppsc/Photogrammetry/ImagePortal.htm>

Plans and Documents Archive - <http://nwweb/pda/PlanSearch.aspx>

ProjectWise - This software application is used by some project offices for managing CAE files (InRoads, Microstation and the associated reference files).

At this time ProjectWise is not deployed agency wide or set up in a consistent WSDOT manner.

In addition to these ECM systems, the project directory structure as referenced in the WSDOT Electronic Engineering Document Standards (EEDS) is intended as the WSDOT standard structure for Computer Aided Engineering (CAE) data storage to consolidate all of a project's electronic data files into one folder structure. The CAE structure will complement a WSDOT Enterprise Content Management (ECM) system, as the ECM is the primary location for project documentation and the CAE structure stores the data files. In the absence of an ECM, this structure provides guidance for storage of typical, relevant information pertaining to the project.

Final project documentation files are to be stored in the Project ECM/Livelink. If there are working/draft files or other project information in other ECM systems, web links can be stored in Project ECM/Livelink.

Survey Photogrammetry CAE Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Survey Photogrammetry CAE Business Unit uses the following categories and attributes:

- 1) Survey Photogrammetry CAE Common Category
 - Discipline
 - Doc Type
 - Report Type

For a complete list of attribute values see Appendix A - Survey Photogrammetry CAE Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple choices.

Doc Type – User must select one doc type from a drop-down list containing multiple choices.

Report Type – When the Report Doc Type is selected, the user must select one Report Type from a drop-down list containing multiple choices.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Survey Photogrammetry CAE file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Survey%20Photogrammetry%20CAE%20Separator%20Sheets.xlsx>

WSDOT Electronic Engineering Document Standards (EEDS)

<http://wwwi.wsdot.wa.gov/eesc/design/cae/Docs/HQCAEHelpdesk.htm>

Appendix A – Survey Photogrammetry CAE Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Survey Photogrammetry CAE categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Survey Photogrammetry CAE Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Aerial Photography

Aerial Photography Document Type	<i>Livelink users are required to select a document type. The following lists typical project Aerial Photography documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Aerial photography requests and applications
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Field Book	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Aerial photography
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Survey Data	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 2 – Computer Aided Engineering (CAE)

Computer Aided Engineering (CAE) Document Type	<i>Livelink users are required to select a document type. The following lists typical project Computer Aided Engineering (CAE) documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Survey Request
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪ InRoads or CAiCE Designer Checklist ▪ Completed inroads or CAiCE Location Survey Checklist
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Field Book	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ CAE maps
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ CAD Project Documentation ▪ InRoads or CAiCE Project Documentation ▪ PS&E Plan Set Project Documentation ▪ PS&E Baseplan Documentation ▪ PS&E Sheet File Documentation
Specification	<ul style="list-style-type: none"> ▪
Survey Data	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 3 – Photogrammetry & Remote Sensing

Photogrammetry & Remote Sensing Document Type	<i>Livelink users are required to select a document type. The following lists typical project Photogrammetry & Remote Sensing documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Photogrammetry requests and applications
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Field Book	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Photogrammetry basemaps and maps
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪
Survey Data	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 4 – Survey

Survey Document Type	<i>Livelink users are required to select a document type. The following lists typical project Survey documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Survey request forms and applications
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Memo/Memorandum ▪ Facsimile(FAX) ▪ Letter ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Field Book	<ul style="list-style-type: none"> ▪ Processed survey data in field books
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪ Survey basemaps and maps ▪ Monumentation maps
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪ Permit to Remove or Destroy Survey Monument
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ Completion of Monument Activity ▪ Existing Monuments ▪ New Monuments ▪ Project Geometric Framework ▪ Record of Survey ▪ Report of Survey Marks ▪ County reports of survey documentation
Specification	<ul style="list-style-type: none"> ▪
Survey Data	<ul style="list-style-type: none"> ▪ Alignment files, profiles ▪ Digital terrain model (DTM) documents ▪ Project datum ▪ Studies ▪ Surface models ▪ Topography ▪ Survey documentation spreadsheet
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪

Table 5 – Report Type – *When Report document type is selected, users are required to select a Report type from a drop-down list containing the following values:*

Report Type
Completion of Monument Activity
Existing Monuments
New Monuments
Project Geometric Framework
Record of Survey
Report of Survey Marks
Other

Traffic Services Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Traffic Services workspace. WSDOT has multiple Business Units within the organization and Traffic Services is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Traffic Services processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Traffic Services content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Traffic Services Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document.

The Traffic Services Business Unit uses the following categories and attributes:

- 1) Traffic Services Common Category
 - Discipline
 - Doc Type
 - Plan Sheet Type
 - Study Type

For a complete list of attribute values see Appendix A - Traffic Services Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple choices.

Doc Type – User must select one doc type from a drop-down list containing multiple choices.

Plan Sheet Type – When the Plan Sheet Doc Type is selected, the user must select one Plan Sheet Type from a drop-down list containing multiple choices.

Study Type – When the Study Doc Type is selected, the user must select one Study Type from a drop-down list containing multiple choices.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Documents relating to collision and volume/capacity should be stored in the Analysis discipline.

Documents relating to intersection control should be stored in the Illumination - ITS – Signals discipline.

Static signing related documents should be filed as Signing - Pavement Marking – Channelization.

Documents relating to temporary signals and speed reduction should be stored in the Work Zone Traffic Control discipline.

Traffic Services file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pMrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Traffic%20Services%20Separator%20Sheets.xlsx>

Appendix A – Traffic Services Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Traffic Services categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pMrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Traffic Services Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process.

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelihood%20Processes.pdf>

Table 1 – Analysis

Analysis Document Type	<i>Livelihood users are required to select a document type. The following lists typical project Analysis documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Facsimile (FAX) ▪ Letters ▪ Memo/Memorandums ▪ Notices ▪ Transmittal coversheets
Design Criteria	▪
Diary	▪
Drawing	▪
Form-Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Permit	▪
Photo	▪
Plan	▪ Transportation Management Plans (TMP) and Traffic Safety
Plan Sheet	▪
Report	<ul style="list-style-type: none"> ▪ Traffic Volume and Movement Report ▪ Vehicle Occupancy Report ▪ Interchange Justification Report/Access Decision Report ▪ Collision Analysis Report
Specification	▪ Project specific specifications, especially variances from the General Special Provisions (GSP)
Study	<ul style="list-style-type: none"> ▪ Collision study ▪ Traffic Planning study
Video	▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Calculations based on speeds and timing ▪ Collision and volume analysis calculations ▪ Calculations for clearances, poles and lights ▪ Calculations for time loss in electric systems

Table 2 – Illumination-ITS-Signals

Illumination-ITS-Signals Document Type	<i>Livelink users are required to select a document type. The following lists typical project Illumination-ITS-Signals documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Signal Permit Applications
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Checklist	<ul style="list-style-type: none"> ▪
Commitment	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Facsimile (FAX) ▪ Letters ▪ Memo/Memorandums ▪ Notices ▪ Transmittal coversheet
Design Criteria	<ul style="list-style-type: none"> ▪
Diary	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Form-Template	<ul style="list-style-type: none"> ▪
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Permit	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪ Project specific specifications, especially variances from the General Special Provisions (GSP)
Study	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Calculations based on speeds and timing ▪ Calculations for clearances, poles and lights ▪ Calculations for time loss in electric systems

Table 3 – Signing-Pavement Marking-Channelization

Signing-Pavement Marking-Channelization Document Type	<i>Livelink users are required to select a document type. The following lists typical project Signing-Pavement Marking-Channelization documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Facsimile (FAX) ▪ Letters ▪ Memo/Memorandums ▪ Transmittal coversheet ▪ Notices – Signs out of Compliance Notices
Design Criteria	▪
Diary	▪
Drawing	▪
Form-Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Permit	▪
Photo	▪
Plan	▪
Plan Sheet	▪
Report	▪
Specification	▪ Project specific specifications, especially variances from the General Special Provisions (GSP)
Study	▪
Video	▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Calculations based on speeds and timing ▪ Calculations for clearances, poles and lights ▪ Calculations for time loss in electric systems

Table 4 – Work Zone Traffic Control

Work Zone Traffic Control Document Type	<i>Livelink users are required to select a document type. The following lists typical project Work Zone Traffic Control documents generated for each document type.</i>
Application	▪
Audio	▪ Voicemail recording
Checklist	▪
Commitment	▪
Contacts	▪
Correspondence	<ul style="list-style-type: none"> ▪ Emails ▪ Facsimile (FAX) ▪ Letters ▪ Memo/Memorandums ▪ Transmittal coversheet ▪ Notices
Design Criteria	▪
Diary	▪
Drawing	▪
Form-Template	▪
Graphic	▪
Map	▪
Meeting Agenda - Minutes	▪
Permit	▪
Photo	▪
Plan	▪ Traffic Control Plan
Plan Sheet	<ul style="list-style-type: none"> ▪ Detour ▪ Work Zone Staging
Report	▪
Specification	▪ Project specific specifications, especially variances from the General Special Provisions (GSP)
Study	▪
Video	▪
Worksheet - Computation	<ul style="list-style-type: none"> ▪ Calculations based on speeds and timing ▪ Calculations for clearances, poles and lights

Table 5 – Plan Sheet Type – *When Plan Sheet document type is selected, users must select a Plan Sheet type from a drop-down list containing the following values:*

Plan Sheet Type
Channelization
Illumination-ITS-Signals
Signing
Work Zone Traffic Control
Other

Table 6 – Study Type – *When Study document type is selected, users must select a Study type from a drop-down list containing the following values:*

Study Type
Classification
Collision
Intersection Control Analysis
Speed
Traffic Analysis
Turning Count
Vehicle Occupancy
Volume
Warrant Analysis
Other

Utilities and Railroads Project Electronic Content Management (ECM) Process

Effective Date: January 19, 2010

Last Revised: March 16, 2010

Document Owner: Chief Engineer

Introduction

This document describes the process for use of ECM within the Livelink Utilities and Railroads workspace. WSDOT has multiple Business Units within the organization and Utilities and Railroads is a Business Unit identified within the scope of the Project Management and Reporting System (PMRS) for ECM. As part of the Project Management and Reporting System, Livelink can be used to capture, manage, store, preserve, and deliver content and documents related to Utilities and Railroads processes. Users can manage documents at a revision level, check documents in and out – one at a time, view, download, and search documents. Users can use Livelink to collaborate on documents with other business units agency-wide. Users are given specific permissions which control access to what can be viewed, created, or modified. Additional information on global ECM processes can be located in the document [ECM Livelink Processes](#).

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Roles & Responsibilities

All Livelink users who are managing Utilities and Railroads content must follow the processes and rules for ECM system use according to this document and the Project ECM Process. See Section 3, Livelink Roles and Responsibilities of the Project ECM Process.

Other ECM Systems

At this time PMRS has identified no other ECM.

Utilities and Railroads Categories

Livelink categories have been standardized by business unit and help to identify a document when the attribute value is not contained in the actual document. The Utilities and Railroads Business Unit uses the following categories and attributes:

- 1) Utilities and Railroads Common Category
 - Discipline
 - Doc Type
 - Permit – Franchise Type
 - Variance Type

For a complete list of attribute values see Appendix A - Utilities and Railroads Taxonomy.

Attribute Rules

There are data entry rules associated with each attribute as follows:

Discipline – User must select one discipline from a drop-down list containing multiple choices.

Doc Type – User must select one doc type from a drop-down list containing multiple choices.

Permit – Franchise Type – When the Permit – Franchise Doc Type is selected, the user must select one Permit – Franchise Type from a drop-down list containing multiple choices.

Variance Type – When the Variance Doc Type is selected, the user must select one Variance Type from a drop-down list containing multiple choices.

See Appendix B for more detailed rules and processes for selecting attribute values.

Notes

Utilities and Railroads file naming convention for published/final documents will be as follows:

- Multimedia document types (Audio, Graphic, Photo and Video):
Discipline – Doc Type – Document Date – Document Description (first 25 characters only) - WSDOT DocID.
- All other document types: Discipline – Doc Type – WSDOT DocID.

See the Project ECM Process for more information on WSDOT DocID and other enterprise attributes.

References

Project Electronic Content Management (ECM) Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Kofax separator sheets

<http://sharedot/pd/cpdm/pmrs/LivelinkECM/Shared%20Documents/Kofax%20Separator%20Sheets/Utilities%20and%20Railroads%20Separator%20Sheets.xls>
[X](#)

HQ Utilities & Railroad SharePoint site – for guidance and policy documents not specific to projects.

<http://sharedot/pd/ura/default.aspx>

The Utility/Franchise Permits System (UFP) allows you to enter, edit and view utilities, franchise and permit information in a variety of formats. Anyone authorized to log in to the system can view and print any information in the database. Some people are allowed to add and edit data for documents and details only within their own region.

<http://citrix/Citrix/AccessPlatform/site/default.aspx>

Appendix A – Utilities and Railroads Taxonomy

The taxonomy identifies the filing structure for each business unit's documents. The taxonomy includes the Livelink folder structure, categories and attribute values associated with each business unit. The Utilities and Railroads categories/attributes taxonomy document (excel spreadsheet) is available at <http://sharedot/pd/cpdm/pdrs/LivelinkECM/Shared%20Documents/Taxonomy,%20Categories%20and%20Attributes/ECM%20Categories-Attributes.pdf>

Appendix B – Utilities and Railroads Process and Rules for Selecting ECM Attribute Values

Appendix B identifies document types by discipline and their detailed physical description. It provides a crosswalk to identify which attribute values should be selected for specific documents within each discipline. The definitions for ECM attribute values are included in the Project ECM Process

<http://sharedot/pd/cpdm/pmrs/Shared%20Documents/PMRS%20Process%20Documents%20and%20Maps/ECM%20Livelink%20Processes.pdf>

Table 1 – Railroads

Railroads - Document Type	<i>Livelink users are required to select a document type. The following lists typical project Railroad documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Permit Application ▪
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Bond	<ul style="list-style-type: none"> ▪
Checklist	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letters ▪ Transmittal coversheet ▪ Notices
Design Criteria	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪ Notice of Completion ▪ Notice of Acceptance
Permit - Franchise	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪
Plan Sheet	<ul style="list-style-type: none"> ▪
Policy - Procedure	<ul style="list-style-type: none"> ▪
Regulatory Approval	<ul style="list-style-type: none"> ▪ Order – Regulatory document signed by the Utilities Transportation Commission (UTC)
Report	<ul style="list-style-type: none"> ▪
Specification	<ul style="list-style-type: none"> ▪ Project specific specifications, especially variances from the General Special Provisions (GSP)
Study	<ul style="list-style-type: none"> ▪
Variance	<ul style="list-style-type: none"> ▪
Video	<ul style="list-style-type: none"> ▪

Table 2 – Utilities

Utilities Document Type	<i>Livelink users are required to select a document type. The following lists typical project Utilities documents generated for each document type.</i>
Application	<ul style="list-style-type: none"> ▪ Permit ▪ Franchise
Audio	<ul style="list-style-type: none"> ▪ Voicemail recording
Bond	<ul style="list-style-type: none"> ▪ Power of Attorney (usually Notarized) ▪ Transfer of Ownership
Checklist	<ul style="list-style-type: none"> ▪
Contacts	<ul style="list-style-type: none"> ▪
Correspondence	<ul style="list-style-type: none"> ▪ Email ▪ Facsimile(FAX) ▪ Memo/Memorandum ▪ Letters ▪ Transmittal coversheet ▪ Notices
Design Criteria	<ul style="list-style-type: none"> ▪
Drawing	<ul style="list-style-type: none"> ▪
Form-Template	<ul style="list-style-type: none"> ▪ Blank form received from outside party to be completed by WSDOT
Graphic	<ul style="list-style-type: none"> ▪
Map	<ul style="list-style-type: none"> ▪
Meeting Agenda - Minutes	<ul style="list-style-type: none"> ▪
Notice	<ul style="list-style-type: none"> ▪ Notice of Completion ▪ Notice of Acceptance
Permit - Franchise	<ul style="list-style-type: none"> ▪
Photo	<ul style="list-style-type: none"> ▪
Plan	<ul style="list-style-type: none"> ▪ Utility Installation (part of the Permit-Franchise documents)
Plan Sheet	<ul style="list-style-type: none"> ▪
Policy - Procedure	<ul style="list-style-type: none"> ▪
Regulatory Approval	<ul style="list-style-type: none"> ▪
Report	<ul style="list-style-type: none"> ▪ Subsurface Utility Investigation ▪ Subsurface Utility Engineering
Specification	<ul style="list-style-type: none"> ▪ Project specific specifications ▪ Variances from the General Special Provisions (GSP)
Study	<ul style="list-style-type: none"> ▪
Variance	<ul style="list-style-type: none"> ▪ Justification Questionnaire for the type of Variance (part of the Permit-Franchise documents)
Video	<ul style="list-style-type: none"> ▪

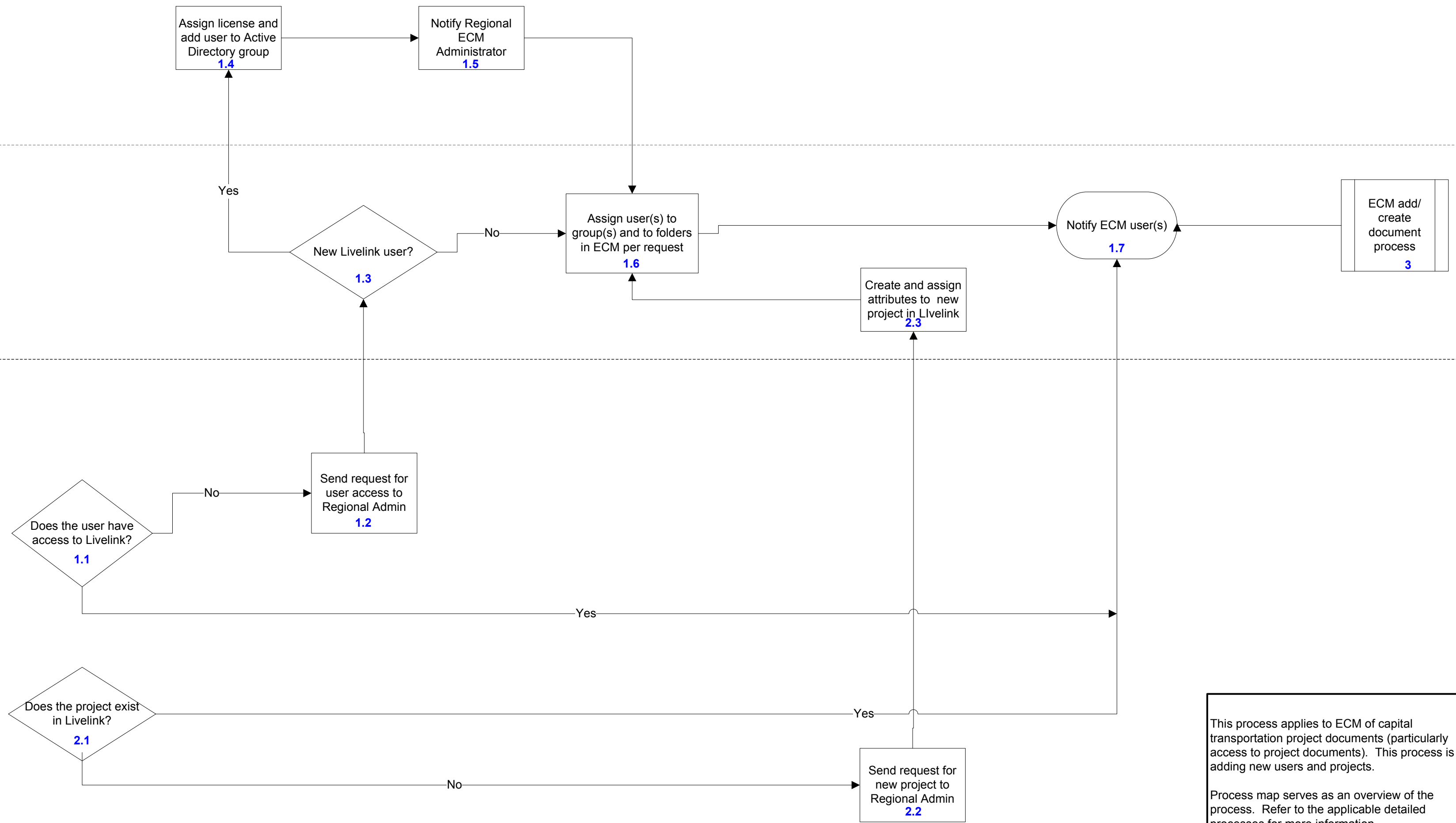
Table 3 – Permit-Franchise Type - *When the Permit-Franchise document type is selected, users are required to select a Permit-Franchise type from a drop-down list containing the following values:*

Permit-Franchise Type
Agricultural
Irrigation
Jet Fuel Pipeline
Natural Gas Line
Petroleum Products Line
Power Cable
Sanitary Sewer
Storm Sewer Line
Telecommunications
Telephone Cable
Television Cable
Water Line
Other

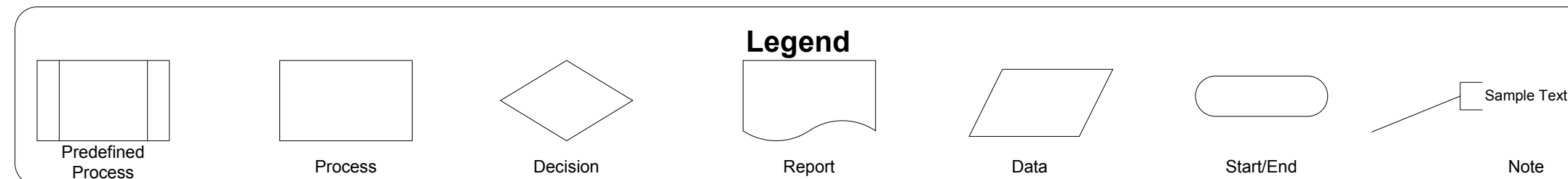
Table 4 – Variance Type - *When Variance document type is selected, users are required to select a Variance type from a drop-down list containing the following values:*

Variance Type
Control Zone
Encroachment
Open Cut
Scenic Class
Shallow Depth
Other

CPDM HQ ECM Administrator
Regional Tools Administrator
Document Originator/Contributor



The identified roles are provided as a guide to assigning the tasks included in the PMRS processes. Each region has the flexibility to delegate the role of Region ECM Administrator (and other functions) to the appropriate functional level to meet project and project office needs and to accommodate current and planned organizational structures.



This process applies to ECM of capital transportation project documents (particularly access to project documents). This process is for adding new users and projects.

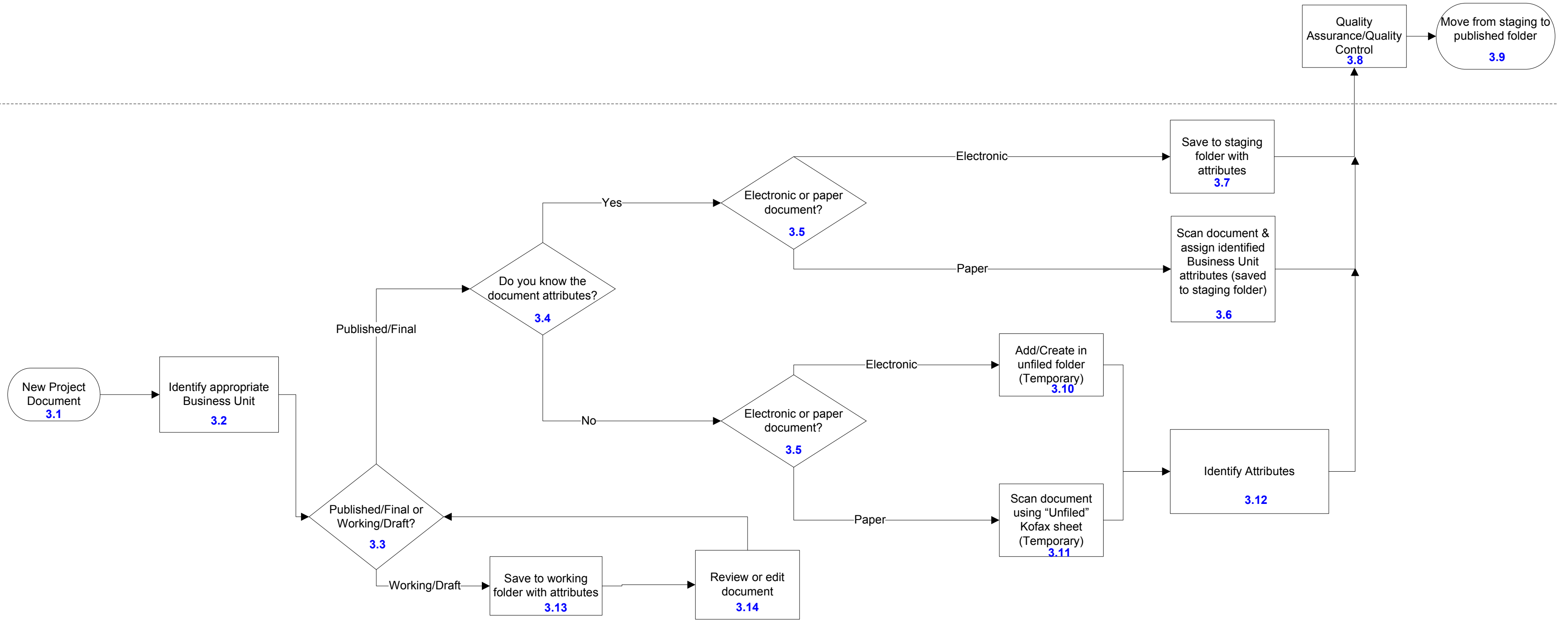
Process map serves as an overview of the process. Refer to the applicable detailed processes for more information.

Document Controller

This process applies to ECM of capital transportation project documents. This process is for individual project documents during all phases.

Process map serves as an overview of the process. Refer to the applicable detailed processes for more information.

Document Originator/Contributor



The identified roles are provided as a guide to assigning the tasks included in the PMRS processes. Each region has the flexibility to delegate the role of Document Controller (and other functions) to the appropriate functional level to meet project and project office needs and to accommodate current and planned organizational structures.

