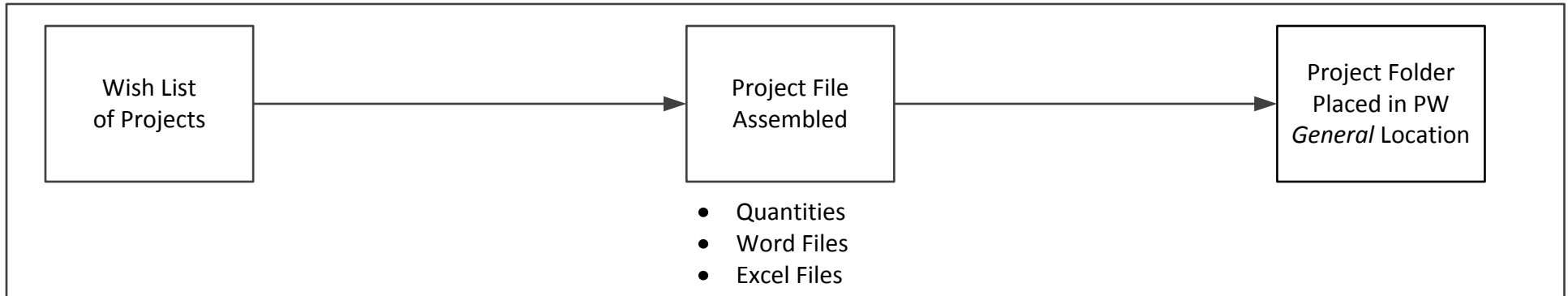


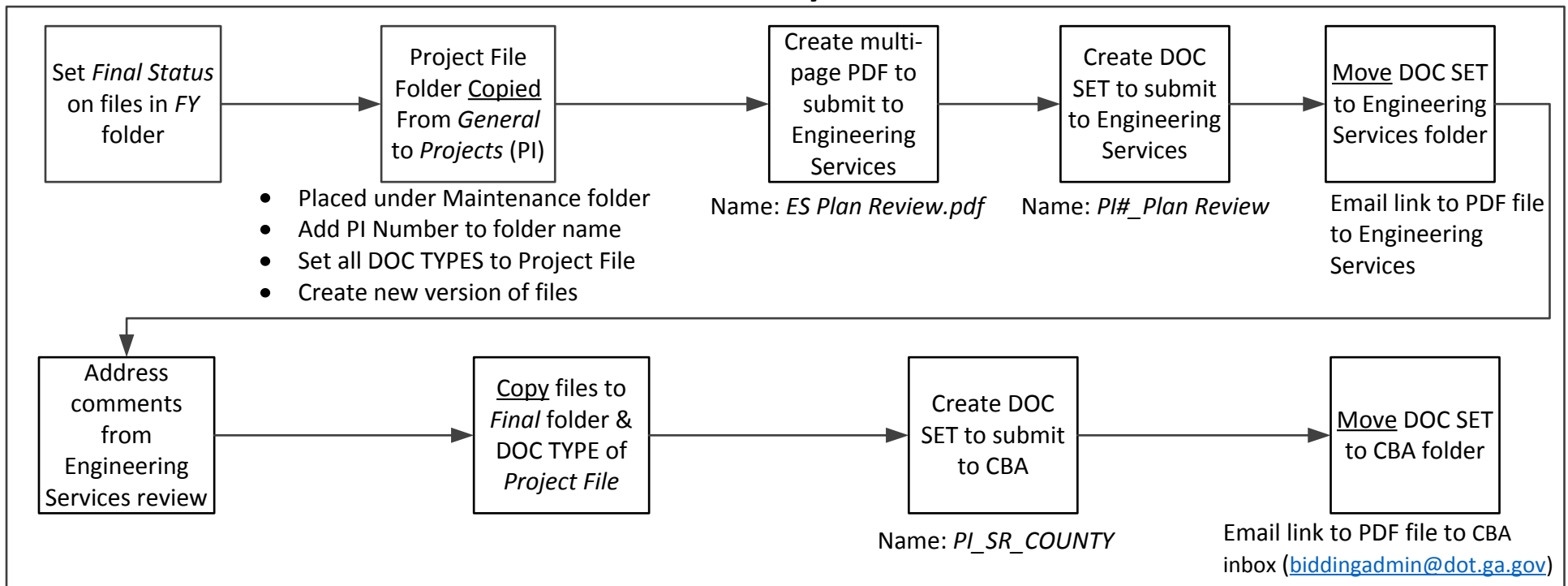
Maintenance Project Workflow

Work Performed By District



(PI Number assigned by Financial Management)

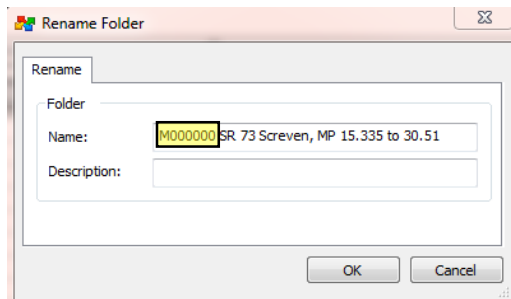
Work Performed By General Office



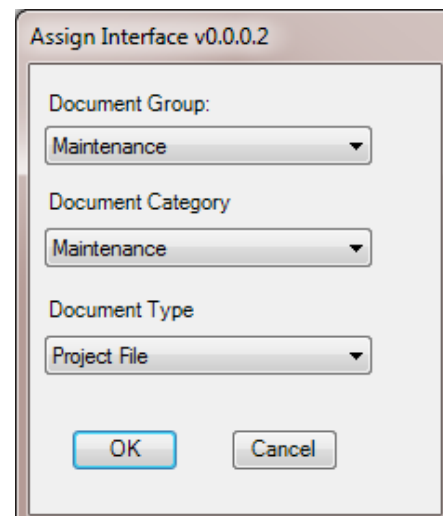
Work Performed by General Office:

COPY PROJECT FILES TO NEWLY CREATED PI PROJECT:

1. Set Final Status on the submitted files to lock the files from any changes being made.
 - a. Select all the files in the *FY* folder.
 - b. Right-click on the selected files and select **Change State=>Set Final Status**.
 - c. Click **OK**.
2. Once the PI number is assigned, navigate to the *FY* file folder above.
3. Right-click on the on the appropriate *FY* folder and select **Copy**.
4. Navigate to the appropriate *PI/Maintenance* folder
5. Right-click on the *PI/Maintenance* folder, select **Paste**, and then **OK** to copy the folder.
6. Right-click on the copied folder and select **Rename**.
7. In the **Name** field, enter the assigned PI number at the beginning of the folder name and click on **OK**.



8. Select all the files copied to the *PI/Maintenance* folder.
9. Right-click on the selected files, select **Assign Document Type**, select *Maintenance/Maintenance/Project File* as shown, and click on **OK**.



10. Version the files to preserve the original version.

- a. Select each file in the *PI/Maintenance* folder.
- b. Right-click on the files and select **New=>Version**.
- c. Enter "*Original*" in the *Document, Version* field in the dialog.
- d. Enter the current date in the *New Version, Version* field in the dialog.

NOTE: Date must be entered in the format of *mmddyy* or *020917*.

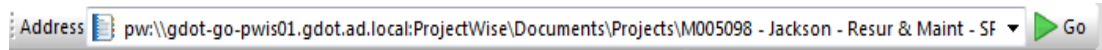
The screenshot shows the 'New Document Version' dialog box. It has two tabs: 'Version' and 'Comments'. The 'Version' tab is selected. The dialog is divided into three main sections: 'Folder', 'Document', and 'New version'. The 'Folder' section shows 'Name: Current Plans' and 'Description: Most current construction plans based on the current construction phase'. The 'Document' section shows 'Name: 654321_0008_FINAL_012317.pdf', 'Description: 654321_0008', 'Version: Original C' (where 'Original' is highlighted in yellow and 'C' is red), and 'Sequence: 0'. The 'New version' section shows 'Version: 030717 d' (where '030717' is highlighted in yellow and 'd' is red). There is an 'Edit' button with a dropdown arrow next to the 'New version' field. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

REVIEW AND FINALIZATION OF PROJECT FILES:

1. Create a multi-page PDF file of the project files to send to Engineering Services for review. The new PDF file will be named *ES Plan Review.pdf*.
2. Create Document Set of all files for Final Plans Package to send to Engineering Services.
 - a. Select all appropriate files in the *PI/Maintenance* folder.
 - b. Right-click on the selected files and select **Set=>New**.
 - c. Enter a **Name** (*PI#_Plan Review* or *1234567_Plan Review*) for the new set and click on **OK** to create it
 - d. Click on the newly created document set, right-click and select **Cut**.
 - e. Navigate to the *PI/PE/Engineering Services/Design Review/Corrected FFPR/Final Plans* folder and right-click and select **Paste**, and then select **Yes** to move the file.

NOTE: If you already have the destination folder open, simply click on **SHIFT** and hold and then select the file and drag and drop and it will be moved.

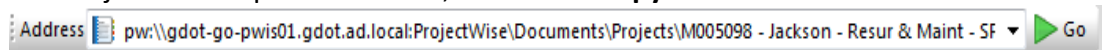
- f. Click on the Document Set, right-click in the **Address** bar (see below) at the top of the ProjectWise Explorer window, and select **Copy URN**.



- g. Open a new email and click on **Paste** to paste the link to the files into the email to send to Engineering Services.
3. Receive comments from Engineering Services and update/correct files
- Copy the letter provided by Engineering Services in their folder structure and add “_RESPONSES” to the end of the filename and include responses in that file.
4. Copy files to the *PI/Maintenance/Final* folder
- Select the appropriate project files in the *PI/Maintenance* folder, right-clicking on the files, and select **Copy**.
 - Click on the *Final* folder in the menu structure in the left to select it.
 - Right-click on the *Final* folder and select **Paste** and **Yes** to copy the documents.
 - When prompted to copy documents and their versions, select **No**.
 - Copy the existing multi-page PDF file submitted to Engineering Services if no changes were made as a result of the Engineering Services review or create a new multi-page PDF if changes were made. Either way, the new PDF file will be named *Final Plans.pdf*.
5. Create *Document Set* of all files for Final Plans Package to send to CBA
- Select all appropriate files in the *PI/Maintenance/Final* folder.
 - Right-click on the selected files and select **Set=>New**.
 - Enter a **Name** (*PI#_SR_COUNTY* or for example, *M005098_SR11_JACKSON*) for the new set and click on **OK** to create it
 - Click on the newly created document set, right-click and select **Cut**.
 - Navigate to the *PI/CST/Construction Plans/PSE to CBA* folder and right-click and select **Paste**, and then select **Yes** to move file.

NOTE: If you already have the destination folder open, simply click on **SHIFT** and hold and then select the file and drag and drop and it will be moved.

- f. Click on the Document Set, right-click in the **Address** bar (see below) at the top of the ProjectWise Explorer window, and select **Copy URN**.



- g. Open a new email and click on **Paste** to paste the link to the file into the email to send to the CBA inbox (biddingadmin@dot.ga.gov).