

## WFLHD SUPPLEMENT 9.6.10-1

### 9.6.10 CONTRACT ASSEMBLY

Add the following:

#### 9.6.10.1 PS&E Document Handoff Process

This supplement documents the process for transferring PS&E documents through ProjectWise between the Cross Functional Team (CFT), Administrative Services and Acquisitions during the project development phase. For additional guidance on versioning and changing the file state in ProjectWise see the [WFLHD ProjectWise User Manual](#).

##### 9.6.10.1.1 SCR Preparation

The Designer will assemble the SCR package into four stand-alone MS Word (DOCX) documents as shown in [Figure A](#) where the prefix is the same filename prefix as used in the WFLHD [file naming convention](#). Develop the SCR documents in the project's ...\\Development\\SCR\\Working SCR\\ folder. This folder has a workflow (shown in [Figure B](#)) to facilitate document development. The Designer should use the ProjectWise versioning tool to capture milestone review versions of the SCR's (50%, 70%, 95%, final).

**Figure A Typical SCR Filenames**

Filename	Content	Header/Section
<prefix>_NTB_fp-03.docx	Solicitation Table of Contents Notice to Bidders	(none) A-(page number)
<prefix>_Section_100.docx	SCR Table of Contents? Division 100 SCR Division 150 SCR	(none) E-(page number)
<prefix>_Section_200-600.docx	Division 200 SCR Division 250 SCR Division 300 SCR Division 400 SCR Division 500 SCR Division 550 SCR Division 600 SCR	F-(page number)
<prefix>_Section_700.docx	Division 700 SCR	G-(page number)

Develop supplemental sections of the SCR package in the ...\\Development\\SCR\\Working H+I+J\\ folder. This folder also makes use of the workflow shown in [Figure B](#). These sections include:

- Section H: Permits – Environmental Specialist is the lead
- Section I: Erosion and Sediment Control Plan – Environmental Specialist is the lead
- Section J: Fire Protection and Suppression – Designer is the lead

**Figure B SCR Workflow**

State	Description
Collaboration	This is the initial state. The designer (or as applicable the environmental specialist) takes the lead in assembling the documents. All members of the CFT may make edits to the SCR documents and may create files.
Finalization	At some point when the SCR documents near completion and CFT collaboration is finished, the designer (or environmental specialist) restricts editing in order to make final changes.
Formatting	Prior to completion of the SCR document Administrative Services formats the document so that they visually conform to the office standards. Before changing to this state, the designer (or environmental specialist) makes a new version of the document.
Review	Allows document originator to review the document one last time before it is sent to Acquisition.

Once Administrative Services is finished formatting the documents, they will change the state to *Review* and e-mail the document originator, letting them know that their work is complete.

#### 9.6.10.1.2 Final PS&E Delivery to Acquisitions

When preparing the final PS&E for delivery to Acquisitions, the designer will complete the following:

- Provide one paper copy of the final Plan set with the signoff book. (A paper copy of the SCRs is not necessary.) Inform Acquisitions if color printing is required for paper copies of the plan sheets. Generally color printing is only required where color is necessary to distinguish the details on the plan sheets. Indicate which sheets require color.
- Place the **PDF** version of the final plan set in the *...\\Acquisitions\PS and E\Plan Sheet PDF files\* project folder, and send an e-mail notification to the PM and Acquisitions.
- Move (not copy) the final SCR documents (in MSWord format) to the *...\\Development\SCR\Final for Contracts\* project folder. Only send the four documents shown in [Figure A](#). Work with Environment to ensure that all supplemental sections (H, I, and J) are moved to the same folder. Send an e-mail notification to the PM and Acquisitions that the SCRs are complete. Documents in this folder will be viewable by others, but may not be changed.

#### 9.6.10.1.3 Amendments to the PS&E

Amendments to the PS&E will be coordinated through ProjectWise. Acquisitions will use the versioning tool when the SCRs are modified by amendment. If modifications to the plans are required, Design will provide PDF files of the modified sheets to Acquisitions who will

incorporate the amended sheets into a new version of the master PDF plan set. The latest version of these documents will be fully complete and stand-alone, including any and all changes from previous amendments.

#### **9.6.10.1.4 Archiving**

Acquisitions will keep the final version of the PS&E (both MSWord and Acrobat formats), including any amendments in the project folders mentioned earlier after the project is awarded. At award they will send a notification e-mail to the PM and Designer. The files will be read only.

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