Project Team Initiation Process (PTIP) in ProjectWise

One of the main purposes of the state-wide implementation of ProjectWise as the Department's electronic document management system is to centralize the project record set in one location for all projects. Several documents and files are generated as part of the PTIP meetings that need to be contained within the project record set. Therefore, PTIP is being transitioned from using the existing SharePoint site to using ProjectWise to contain all documents and files pertaining to the process. Guidance is provided below for the use of ProjectWise in the Project Team Initiation Process (PTIP). Guidance for the process itself is available through the Office of Program Delivery.

NOTE:

1) During this transition time, some projects may have not been brought into ProjectWise when you are ready to begin the PTIP process. In those cases, please submit a request to the Solutions Center with a subject of *ProjectWise* and request that the required project be created. Please provide all project information in order for it to be created.

2) Any projects in which PTIP has already begun in SharePoint, those projects will be completed in SharePoint and then moved to ProjectWise sometime in the future.

Meeting Request:

Most all documents required to be submitted to request the PTIP meeting reside in the ProjectWise folder structure in the various office folders. It is the responsibility of the Project Manager (PM) to gather together the various documents needed for the request. The documents will be used to create a ProjectWise Document Set. Documentation related to document sets is contained on the ProjectWise web page: http://www.dot.ga.gov/PS/DesignSoftware/Projectwise.

However, specific commands are listed below to create the document set.

a. Click on the *PI\PE\Director of Engineering\PTIP* folder
b. From the ProjectWise menu click **Document=>Set=>New**
c. For Name enter *PTIP Request Package* (the description is optional)
d. Click **OK**
e. Locate the required documents and drag them into the set.
f. Select all the files in the new Document Set and click on the **Lock to Version** checkbox next to any of the files
g. When finished, close the document set.

The standard template for the PTIP request letter is included as part of the standard folder structure when a project is created in ProjectWise. It is located in the *PE\Director of Engineering\PTIP* folder so it can be easily edited and completed from within that folder. Once

the letter is complete, it can also be added to the new document set just created by opening the document set and dragging the document into it.

Once the project schedule has been exported from P6 into a PDF file, that file can be added to the *PI\PE\Director of Engineering\PTIP* folder by dragging and dropping and then added to the document set by dragging it into it as with the other documents.

*****NOTE: If the dialog box does not appear to allow the user to set the Document Type in the steps below, please contact the Solutions Center by email with a subject line of "ProjectWise" and request that the ProjectWise Document Wizard be installed.**

NOTE:
Whenever a new document is created in a ProjectWise project or a file is dragged and dropped into a ProjectWise project, a Document Group, Category, and Type must be selected. A dialog will automatically appear when creating or adding documents. The following options are to be selected for all PTIP documents.*******

Document Group: *Preliminary Engineering*
Document Category: *PTIP*
Document Type: *PTIP Document*

Once the package has been created, a link to the document set can be sent by the PM (see steps below) to the Director of Engineering as a link from the ProjectWise *PI\PE\Director of Engineering\PTIP* folder.

a. Right click on the document set
b. Select **Send To=>Mail Recipient As Link…**
c. An email message will be created and opened containing the link to the document set

This same link to the document set can be copied by the Director of Engineering from the email from the PM and included in the Outlook PTIP meeting request.

Meeting:
All photos, documents, Powerpoint presentation, etc. used in the PTIP meeting should be placed in and accessed from *PI/PE\Director of Engineering\PTIP* folder. If needed, the PM can create sub-folders under this folder to better organize information.

Meeting Follow-Up:
In addition to the PTIP request letter standard template being located in the *PI/PE\Director of Engineering\PTIP* folder, the standard man-hour estimate spreadsheet is also included as part of the standard folder structure when a project is created in ProjectWise. It is also located in the *PI/PE\Director of Engineering\PTIP* folder in all projects. The file can be edited and completed directly in ProjectWise.

Furthermore, if consultant services are needed for the project, a draft master scope of services is also included in the *PI/PE\Director of Engineering\PTIP* folder for all projects. This document can be edited in ProjectWise during and after the meeting to make necessary changes for the specific project. Additionally, it is the responsibility of the Project Manager to place all executed agreements and their associated notices to proceed into ProjectWise.

All other PTIP documents (including meeting minutes, meeting response documents, etc.) are to be created, maintained, and distributed (by email link) from the *PI/PE\Director of Engineering\PTIP* folder in ProjectWise. There should be no need to export documents from ProjectWise or attach files as email attachments.