SAME Infrastructure Forum U.S. Army Corps of Engineers

1 December 2011

Sharing Documentation

TOOLS AND TECHNOLOGY



Content

- Fort Bliss Program Overview
- Reasons for Document Control
- Dashboard, EKO, and Project Wise
- Manage and Control Process
- Program and Document Governance
- What worked Well
- What didn't work Well
- Recommendations
- Questions



Engineering Challenge



Reasons for Document Control

- Efficient Method to Share Documents
- Capture Project Documents
- Retain Latest Version
- Maintain consistency
- Access to team and customers
- Track Deliverables
- Audit Trail



HOW WILL TEAM SHARE THE DOCUMENTATION WITH MAJOR STAKEHOLDERS?

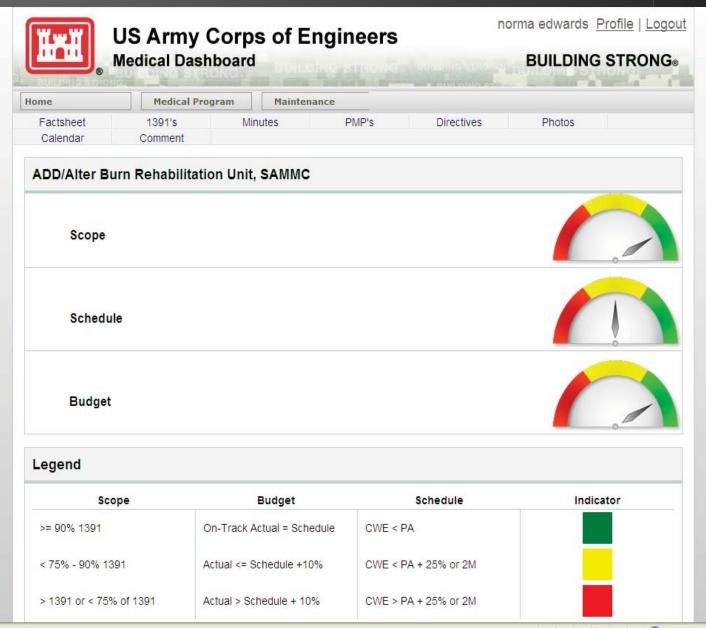


Questions to Consider

- What documents to capture?
- Who needs access?
- What would you like to share?
- How big are the files being shared?
- What features would best serve the team?
- Do you have testimonials from other teams?

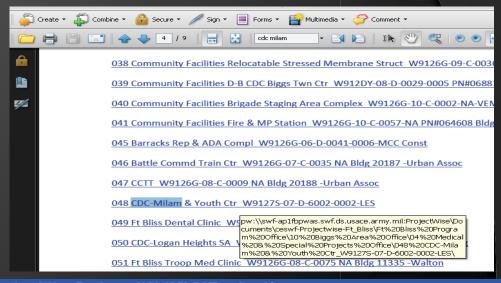


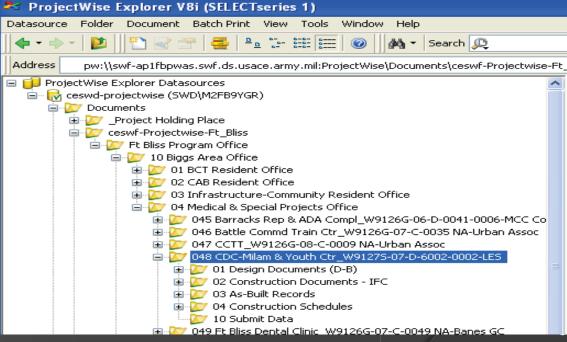
DASHBOARD



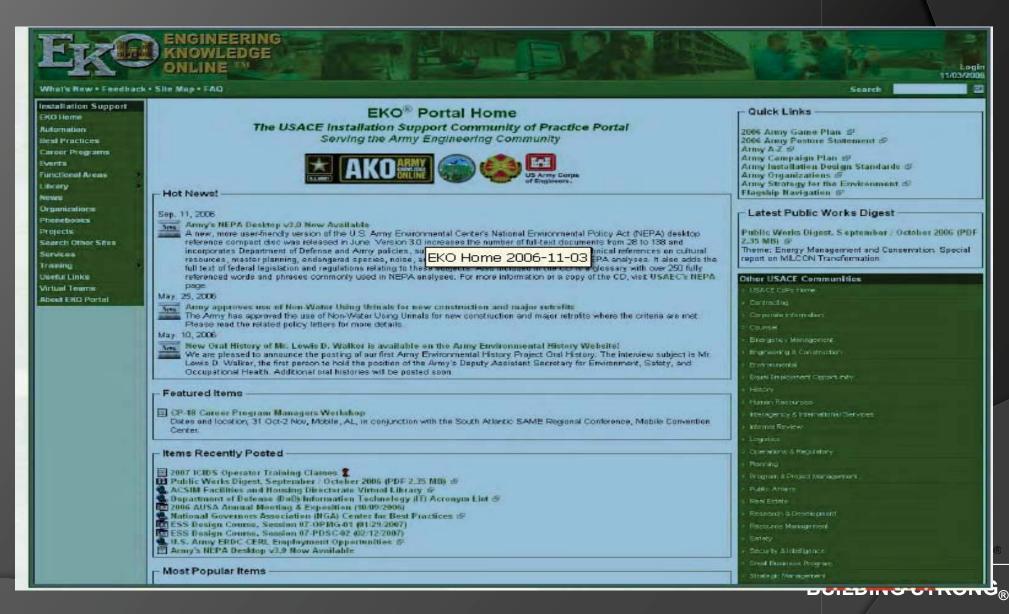
PROJECTWISE

- The projects can be searched by the ProjectWise Index
- The Index is found in the ProjectWise
 Documentation Tab
- Type name, or contract no, or bldg no. on search area
- Click on the link and the project will open automatically on ProjectWise





ENGINEERING KNOWLEDGE ON-LINE



ENGINEERING KNOWLEDGE ON-LINE



Major Stakeholders

- Customer
- Designers
- Field Engineers
- Districts
- USACE Headquarters
- Other Major Programs

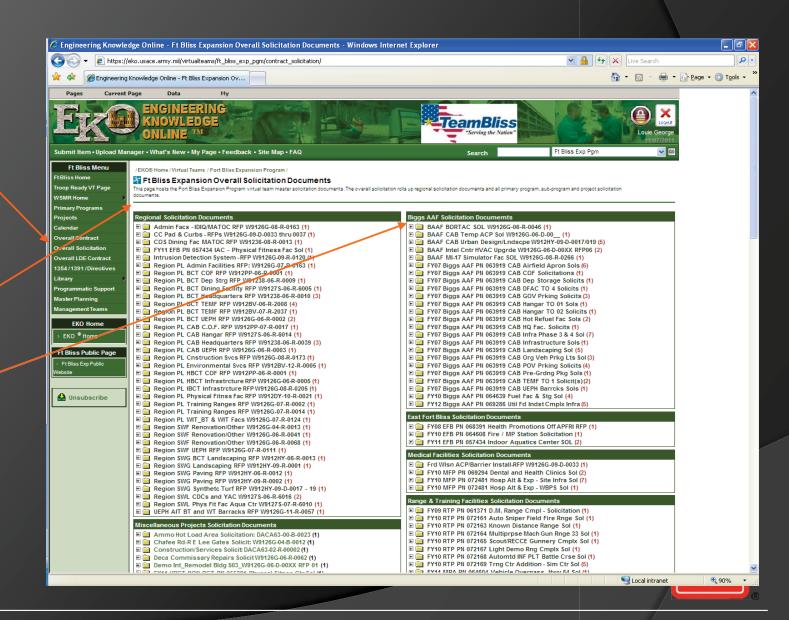


ENGINEERING KNOWLEDGE ON

LINE®

Solicitation
Documents
page section

Regional
Solicitation
and
Biggs AAF
Solicitation
Documents
page
sections



Document Library

- Program or Project Documents (e.g. 1391's, design dir, PMP, briefings, FADs, 1354's, FONSIs)
- Program or Project Guidance Documents (e.g. barracks criteria, HQ guidance, IDG, ADP)
- 3) Solicitation Documents (e.g. RFPs, IFBs, amendments)
- Contract Documents (e.g. awarded proposal, RFP, contract modifications, approved submittals)
- 5) Review Documents (e.g. design submittals, draft RFPs)
- 6) Working Documents (i.e. not obvious which of the buckets above it belongs in)
- 7) Workshop Documents
- 8) Regional Documents
- 9) Presentations
- 10) Standard Designs
- 11) Inherently Governmental Documents (e.g. IGE's, CWE's, select correspondence)
- Miscellaneous Information (Information that doesn't fit in any of the other 11 page sections.)



Document Library Control Principles

ASSUMPTIONS:

ALL WORK ACCOMPLISHED ON THE U.S. ARMY CORPS OF ENGINEERS SUPPORT TO FORT BLISS PROGRAM IS ACCOMPLISHED FOR AND FUNDED BY A PROJECT OR PROGRAM.

PROGRAM EKO® STRUCTURE: THE APPROVED PROGRAM GOVERNANCE STRUCTURE.

PAGE OWNERSHIP:

PROGRAM MANAGERS 'OWN' THEIR PROGRAM PAGE AND OVERSEE SUB-PROGRAM AND PROJECT PAGES BENEATH THEM.

PROJECT MANAGERS 'OWN' THEIR WEB PAGES.

PROGRAM EKO® DOCUMENT CONTROL PRINCIPLES:

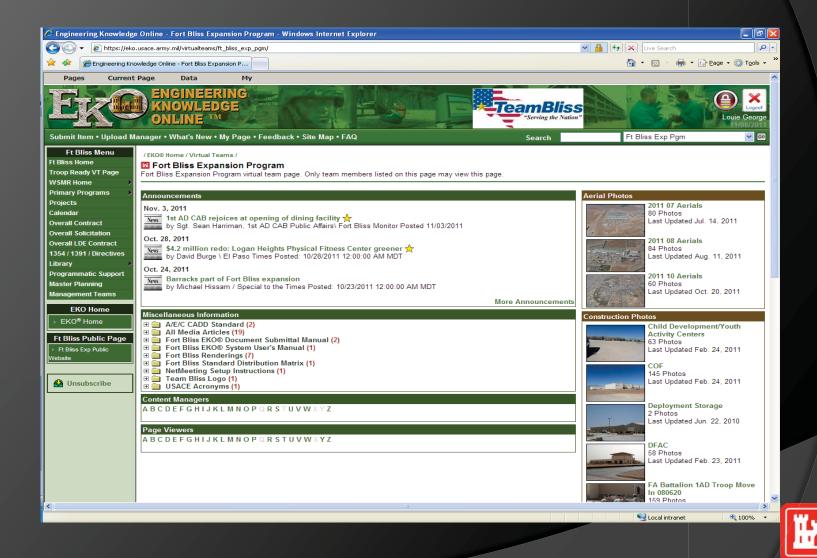
THE EKO® PORTAL IS SET UP WITH THE PAGE SECTIONS AND CATEGORIES OF THE APPROVED FB GOVERNANCE STRUCTURE PLAN. ALL PROJECTS AND SUB-PROGRAMS HAVE A WEBPAGE LOCATED UNDER THEIR APPROPRIATE PROGRAM PAGE (E.G. ALL INDIVIDUAL FACILITY PROJECTS GO UNDER THEIR APPROPRIATE PROGRAM PAGE) ALL PROJECT DOCUMENTS ARE HUNG ON THEIR PAGE OF THE PROJECT THAT FUNDED THEM.

MINIMUM ON ALL PROGRAM AND PROJECT ENTRY PAGE:

NAME OF PROGRAM OR PROJECT MANAGER; DOCUMENT LIBRARY



Program Home Page



Fort Bliss Abbreviations

THE FOLLOWING ARE THE ABBREVIATIONS ASSOCIATED WITH EACH PROGRAM PAGE.

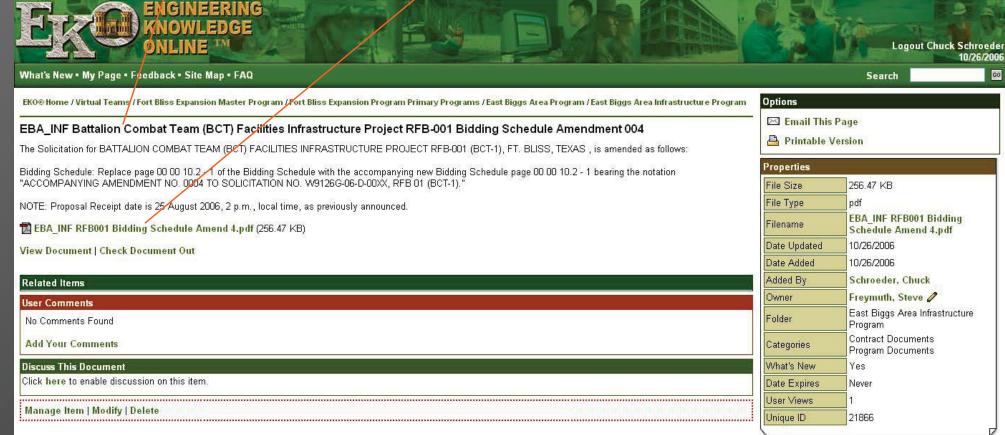
- 1) BIGGS AAF AREA PROGRAM PAGE BIGGS AAF
- 2) EAST FORT BLISS PROGRAM PAGE EFB
- 3) FORT BLISS MEDICAL FACILITIES PROGRAM PAGE MFP
- 4) RANGE AND TRAINING FACILITY PROGRAM PAGE RTP
- 5) REIMBURSABLE PROGRAM PAGE REP
- 6) WEST FORT BLISS WFB
- 7) TROOP READY



Document Naming Structure

Item Title

File Name



Item Title and File Name should use the format: Abbreviation_PN#_ Description

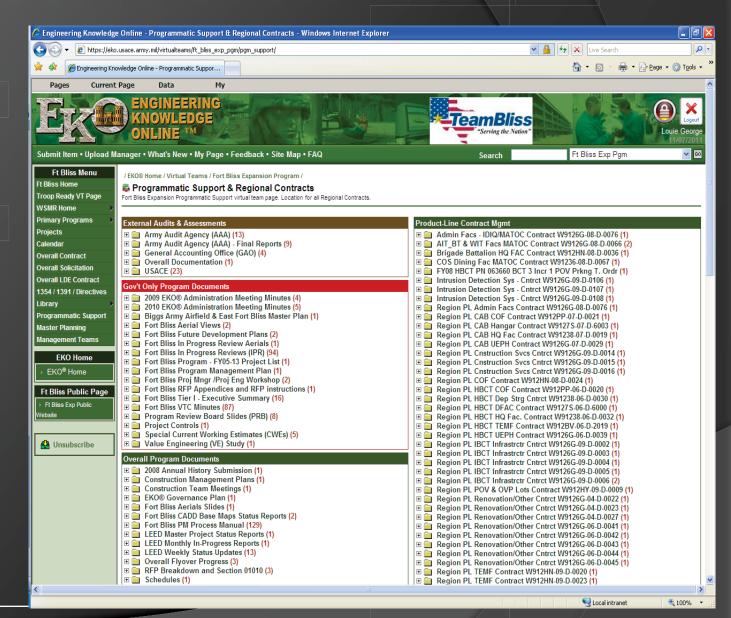


Regional Contract Documents

REGIONAL CONTRACTS
ALL REGIONAL CONTRACTS
WILL BE SUBMITTED TO THE FT
BLISS PROGRAMMATIC
SUPPORT & REGIONAL
CONTRACTS PAGE.

MULTIPLE AWARD TASK ORDER CONTRACTS (MATOCS)

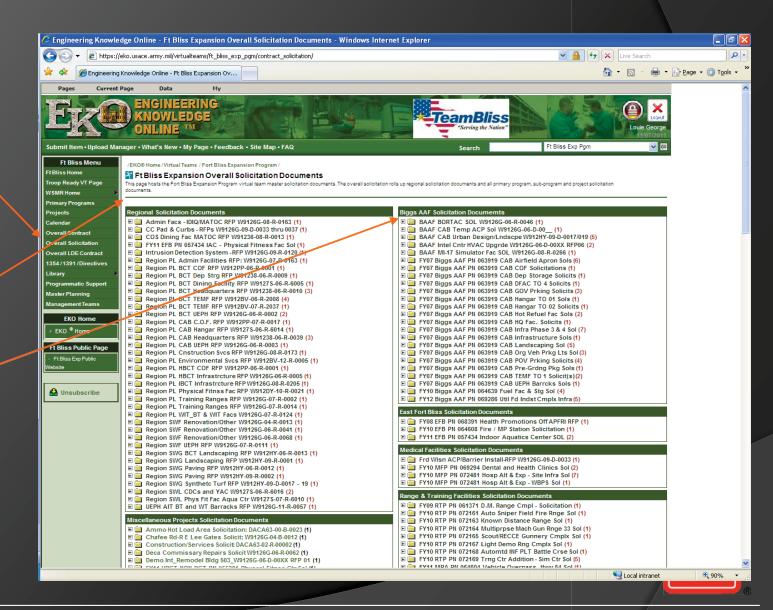
ALL MATOC CONTRACTS WILL BE SUBMITTED TO THE FT BLISS PROGRAMMATIC SUPPORT & REGIONAL CONTRACTS PAGE.



Solicitation Documents

Solicitation
Documents
page section

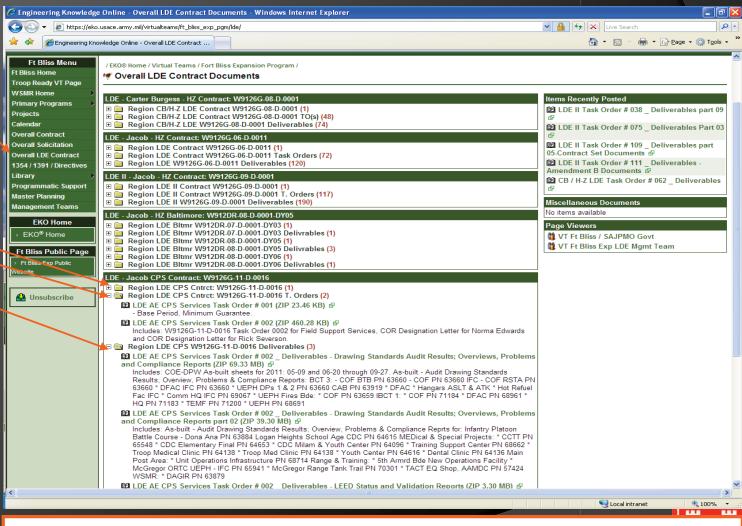
Regional
Solicitation
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Solicitation
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page
sections



Overall LDE Contracts and Deliverables Page

Overall LDE Page

This page includes the base contact, task orders and contract deliverables

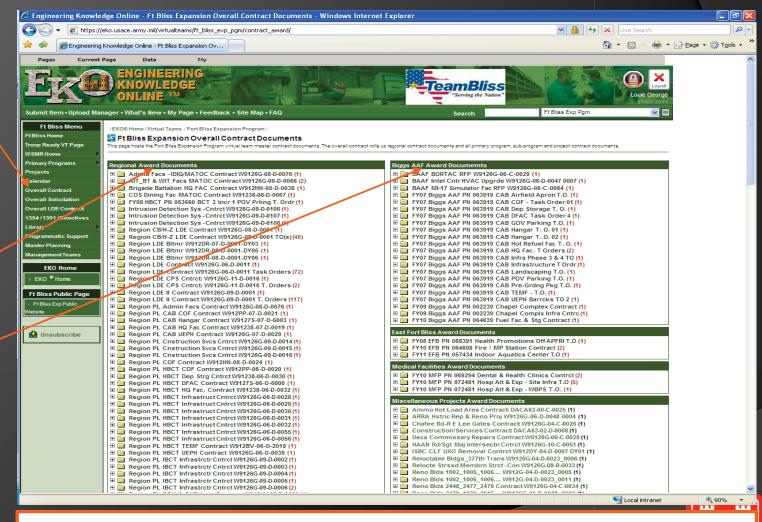


The LDE Contracts and Task Orders roll up from the other pages but the deliverables are posted directly to this page allowing auditors to access both the contracts and their deliverables on one page.

Overall Contract Documents

Contract
Documents
section

Regional
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Contract
Documents
page
sections



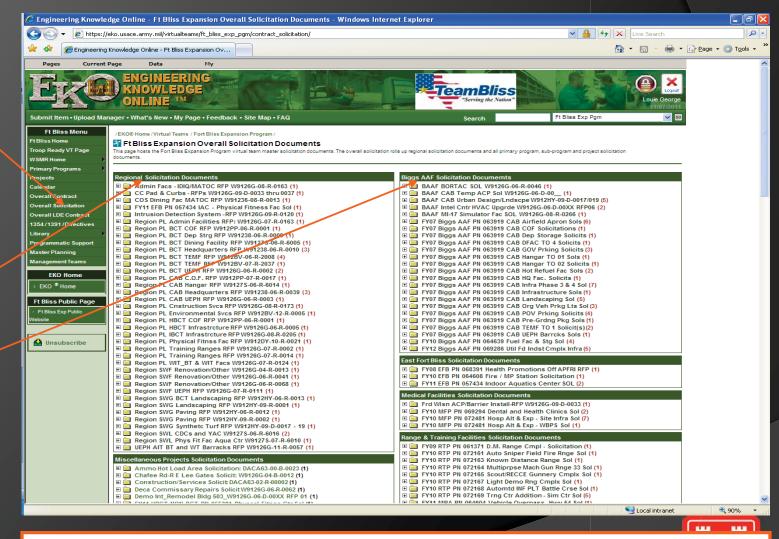
All Program Contract documents roll up on to a central page which provides a user instant access to all of the project contract documents.

G

Overall Solicitation Documents

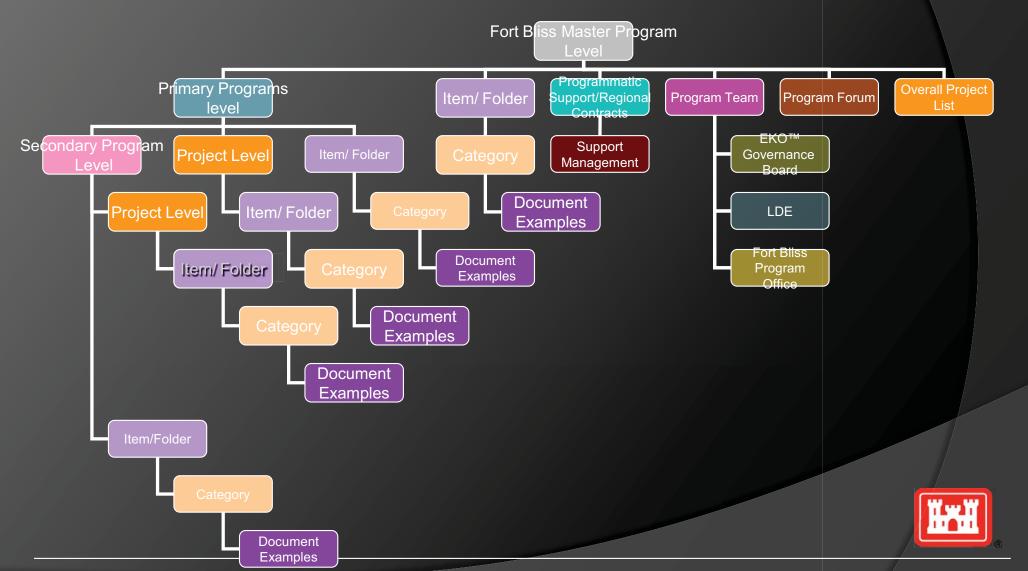
Solicitation
Documents
page section

Regional
Solicitation
and
Biggs AAF
Solicitation
Documents
page
sections



All Program Solicitation documents roll up on to a central page which provides a user instant access to all of the project solicitation documents.

Overall Fort Bliss Program EKO® Governance Structure



Fort Bliss Master Program Page **Fort Bliss** Fort Bliss Mater **Expansion Program Program** /irtual Team Pag **Public Page** Overall **Program Primary Programmatic Program Program Program Projects** Program Calendar essons Learned upport/Regiona Team Library **Programs** List Forum Page Page Page Page **Contracts Page** Page

Seven Primary Program Page

7 Primary Program Page

East Biggs Area Program Page

Program
Page

lain Post Area Program Page Range and Training Facilities Program Page

Reimbursable Program Page Non-USACE Projects Program Page Medical Facilities Program Pages



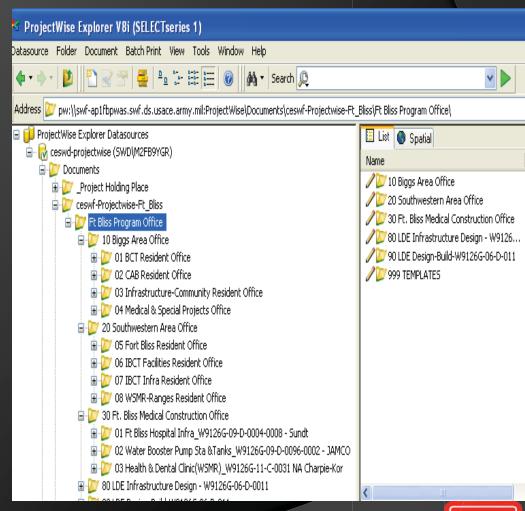
PROJECT WISE



Navigating to your Project

The ProjectWise Hierarchy:

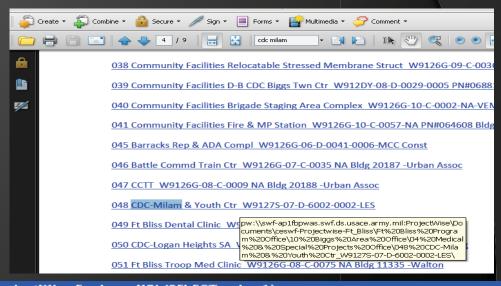
- ProjectWise Data sources are organized by area office.
- 2. Top level document folders represent Main Area.
- Folder Structure for Ft Bliss Program Office:
 - 01 ProjectWise Documentation
 - 10 Biggs Area Office
 - 20 Southwestern Area Office
 - 30 Ft. Bliss Medical Construction Office

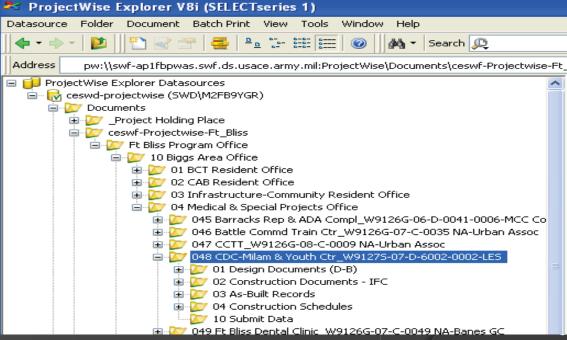




Searching for Projects in ProjectWise

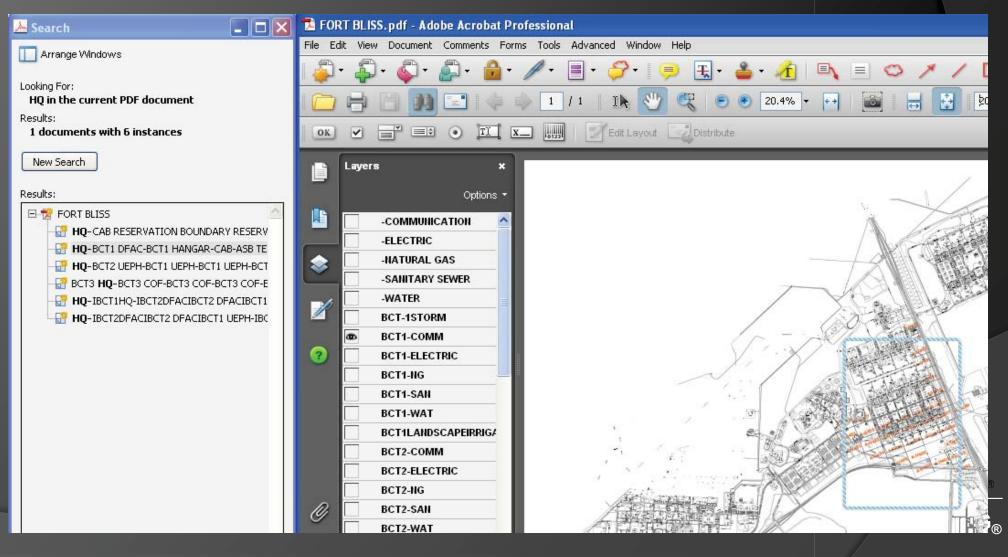
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Using Adobe Acrobat Pro to Search for Infrastructure Utilities

Step 1 - Searching for Infrastructure Utilities you can use the find box or Binoculars searching by Building Numbers, Building Types, and Brigades (I would use the Binoculars for Whole words only, this will generate a list. Example: if you search "HQ" you will get a list with HQ-BCT1, HQ-BCT2, HQ-BCT3, HQ-CAB, ETC.ETC...



What Worked Well?

- One full time person managing database
- Access anytime anywhere
- Share large files with Team
- Maintain version history
- Informed of document uploads
- Secure site
- Consistency in naming files
- Limiting roles to view, edit, load, submit
- Audits
- Track Program Execution



What Worked Well?

- Systems Administrators on Site
- Dedicated Knowledge Manager
- Develop Process for Capturing Docs
- More than Enough Server Space



Needed Improvement

- Training Program for Major Stakeholders
- Ensure entire Team knows Process
- Old School Process Prevailed at times



Recommendations

- Determine Requirements during the Planning Phase
- Dedicated person to Manage System
- Create a customized version that fits your team's needs



Questions?

