



## FLORIDA'S TURNPIKE ENTERPRISE

**Revised**  
Jan 7, 2011



The Document Management tools provided by **ProjectSolve®** are configured to emulate the EDMS standards and functions required by **Hummingbird®**. This is the document management platform utilized by Florida's Turnpike Enterprise and FDOT.

Project related documents are scanned and attributed within **ProjectSolve®**. After a quality control review by Turnpike Enterprise Document Control, the files are ultimately batched and uploaded into **Hummingbird®**.

The enclosed orientation material is designed to facilitate this as a team process and provide the CEI staff with on-going support.

Turnpike Enterprise  
Document Control Team



## MEMORANDUM

**To:** CEI Staff  
**From:** Document Control: Peter Bodine (Pompano Beach); Debra Amann (Turkey Lake)  
**Subject:** Document Management Training – Turnpike Construction

This booklet contains a number of training and procedural documents to assist in bringing your office administrative functions on-line with Turnpike Enterprise.

Please feel free to contact us at any time for assistance or any kind of clarification. As operational requirements may create administrative change from time to time, we will ensure that you are brought up to date.

Submitted to you are the following:

- ❖ An Overview of Document Management
- ❖ Project Solve Sign-in Procedures
- ❖ Snapshot examples of your Project's Home Page
- ❖ The EDMS Project Solve Tutorial
- ❖ The most recent publication of the "Document Group" & "Document Type" Reference List
- ❖ An introduction to "Lane Closure Management"
- ❖ CEI and Contractor Emergency Contact List (Form to be submitted to Document Control)

We look forward to working with you.

**FLORIDA'S  
TURNPIKE ENTERPRISE  
Document Control**

**ProjectSolve<sup>2</sup>  
DOCUMENT MANAGEMENT**

**OVERVIEW**

The Document Management tools provided by **ProjectSolve<sup>2</sup>** are configured to emulate the standards and functions required by **Hummingbird®**. This is the electronic document management system (EDMS) utilized by Florida's Turnpike Enterprise and all of FDOT.

**AUTHORITY**

Chapter 119, Florida Statutes (F.S.)  
Sections 20.23(3)(a); 282.005(1),(2), and (6); 282.3032; 282.3055(2); and 334.048(3), F.S.  
Chapter 1B-26.003; and Rule Chapter 60DD-2; Florida Administrative Code (F.A.C.)

**SCOPE**

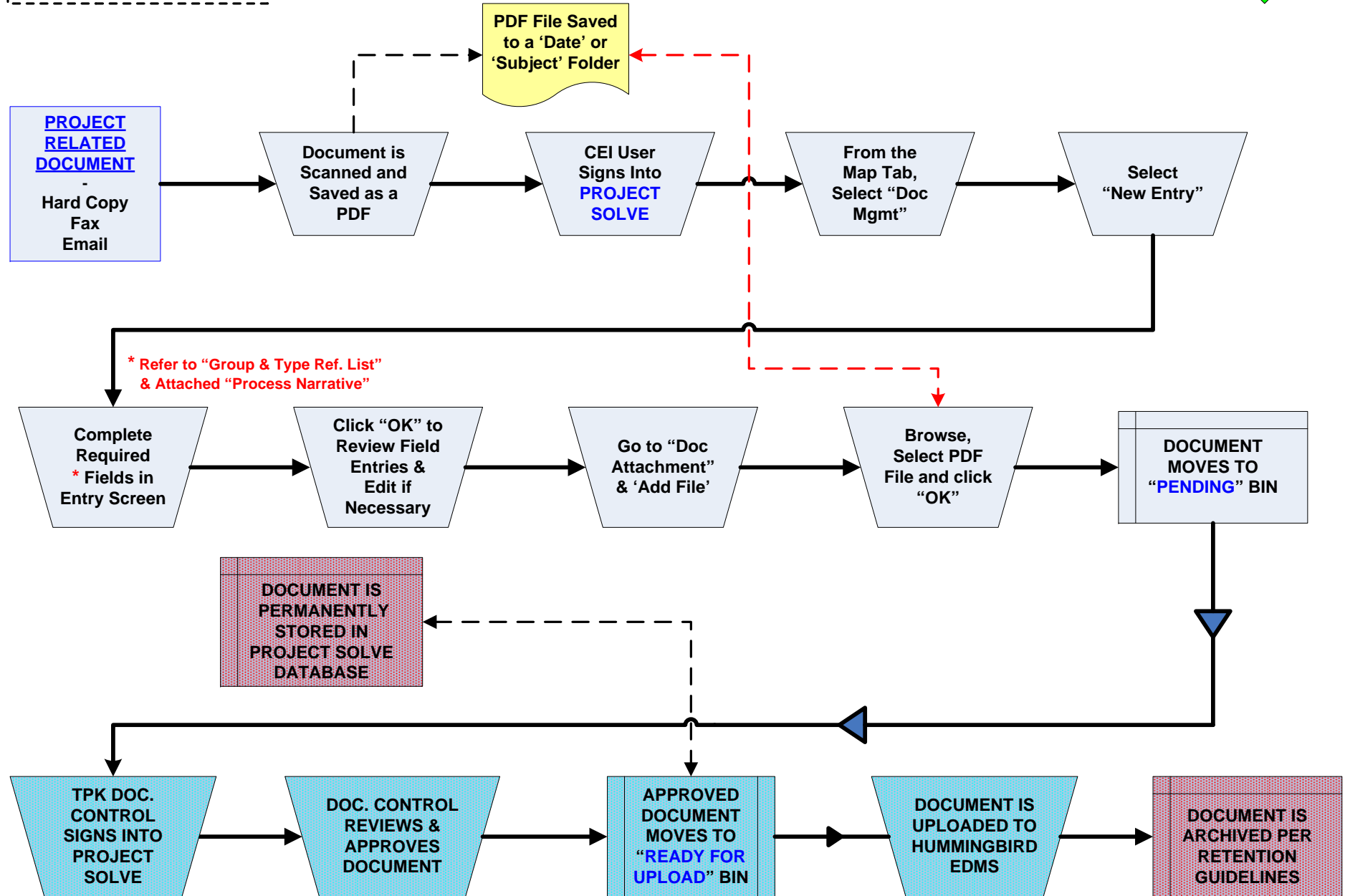
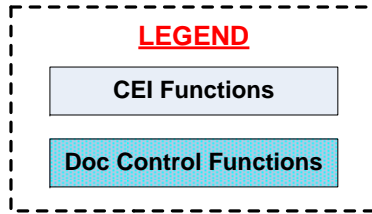
All project related documents (including all forms of hard copy and electronic correspondence) are scanned and attributed in **ProjectSolve<sup>2</sup>**.

- Any exceptions to this are clarified in the document **ProjectSolve<sup>2</sup>** **“Document Group” – “Document Type” Reference List**; located under Exhibit 5 of the Document Management Training Manual.
- Documents are expected to be entered into **ProjectSolve<sup>2</sup>** within five (5) working days of delivery or receipt.

- The Operator (the individual(s) responsible for scanning & attributing documents) is responsible for maintaining the “Quality Control Requirements for Document Legibility and Completeness”; as specified below.
  1. Scanners and copier/scanners must be set at a minimum of 300 dpi
  2. The Operator shall perform routine QA/QC by checking scanned documents to make sure that all pages have been scanned, the document image is legible, the pages are straight, all pages are oriented in the same direction, and all pages are the proper size, etc. If this is not the case, the document, or specific pages, shall be rescanned until the document is legible and complete.
  3. All office equipment used for scanning and document attribution purposes shall be maintained in working condition at all times; as to ensure that all quality control requirements are met.
  
- After a quality control review by Turnpike Enterprise Document Control, the files are ultimately batched and uploaded into **Hummingbird®**.

# Turnpike Enterprise Project Solve Doc. Mgmt - Process Flowchart

[ Revised 07APRIL2006 ]



**"85% of Project Management time is spent on communications."**



– Project Management Institute

Effective project collaboration is about communication and teamwork! ProjectSolve<sup>2</sup> streamlines planning and decision-making, enhances communication and preserves information.

ProjectSolve<sup>2</sup> is a flexible web collaboration tool designed for the AEC industry. ProjectSolve<sup>2</sup> facilitates the sharing of information with team members anytime, anywhere.

[Request Product Information](#)

*Helping You Manage...*



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[Features](#)

[Is PS<sup>2</sup> for You?](#)

[Value Calculator](#)

[Success Stories](#)

[Request Consultation](#)

*Empower your team!*

GO TO:

[ww2.ProjectSolve2.com](http://ww2.ProjectSolve2.com)

# login

Email Address

Password

Proceed

Save login info

[Contact Support](#)

[Forgot Your Password?](#)

[Logging into ProjectSolve2](#)

By logging in you agree to the [Terms of Use](#).  
Copyright © 1997-2009 PBC International, Inc. All rights reserved.



- search sites
- my member info
- logout

Joshua Carter's Project Sites

-- Tools and Support Resources --

Community: Florida Turnpike Enterprise

- Lane Closure Management
- Polk Parkway/ Pace Road Interchange E8J79
- TPNotify\_All
- Turnpike Mainline



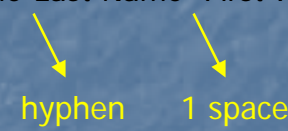
## Document Management

- The tools provided by ProjectSolve™ are configured to emulate the EDMS standards and functions required by Hummingbird DM™; the document management platform utilized by Florida's Turnpike Enterprise.
- Documents are first scanned and then attributed in ProjectSolve™. After a quality control review by Turnpike Enterprise Document Control, the files are uploaded and archived in Hummingbird DM™.
- Your document database in ProjectSolve™ can be a powerful resource for your organization. Using search tools, you will learn how to locate and share project information with team members.
- Please use this presentation for training and future reference. Our goal is to facilitate a quality process and provide CEI staff with on-going support.

# CREATING A DATABASE ENTRY

Each document must be indexed with required attributes. ProjectSolve™ is set up with the same attribute field labels as Hummingbird™. To facilitate the upload process and enable efficient document retrieval: it is important to use the following guidelines for each of the required field labels.

---




- ❖ Use "CAPS" throughout
- ❖ **Entry Date:** mm/dd/yyyy
- ❖ **Document Name:** Descriptive name of the document. Be specific
- ❖ **Financial ID:** Drop - down menu
- ❖ **Contract No.:** Set automatically
- ❖ **Document Group / Type:** Drop – down menu. Refer to "CEI Quick Reference Scan List"
- ❖ **Subject/Description:** Description of the document. Be specific: refer to letter No., Use "key words", relevant detail. Up to 200 characters
- ❖ **Document Date:** mm/dd/yyyy
- ❖ **Retention:** Set Automatically. All documents are 15 years, except EEO/AA, Payrolls, Training – 4 yrs.
- ❖ **Received Date:** mm/dd/yyyy
- ❖ **Addressed to:** This format only:  
Company Name-Last Name First Initial  


hyphen      1 space
- ❖ **Received From:** Same format as "Addressed to"
- ❖ All other fields are optional and not required by Hummingbird™

# Steps to Creating a Database Entry

1. Sign onto ProjectSolve™
2. In the left pane select the map tab
3. Select the "Doc Mgmt" icon
4. Click on "New Entry" in right pane
5. Complete the required fields →
6. Click on "OK" to review field entries
7. If necessary "edit" before next step
7. Go to "Doc Attachment" – 'Add File'
8. Browse, select file, and click "OK"
9. Return to "Doc Mgmt" for next entry

## Required Fields

Document Number	<input type="text" value="Set Automatically"/>
Entry Date	<input type="text"/> 
Document Name	<input type="text"/>
Financial ID	<input type="text"/>
Contract #	<input type="text"/>
Document Group/Type	<input type="text"/>
Subject/Description	<input type="text"/>
Document Date	<input type="text"/> 
Retention:	<input type="text"/>
Received Date	<input type="text"/> 
Addressed to	<input type="text"/>
Received From	<input type="text"/>

# Florida's Turnpike Enterprise

my ProjectSolve > SR 710 Interchange

- map search tasks X
- SR 710 Interchange
  - FTP Server
  - Issues
  - Meeting Minutes
  - Project Calendar
  - Project Reference Folder
  - RFI Management
  - Shared Files
  - Shop Drawing Logs
  - Shop Drawing Transmittals
  - SiteManager\LIMS
  - SR 710 Inbox
  - SR 710 Interchange Doc Mgmt
  - SR 710 Team Directory
  - Recycle Bin
- next unread
- send alert
- help

## SR 710 Interchange

a Project Site created on 4 Aug 04

create search meetings & events members

Welcome!



Select



*This secure website facilitates communication and collaboration for the SR 710 Interchange Project Team.*

*For assistance with any of the content found here, or to request account access for a new team member, please contact the Site Coordinator -- [Robert Laurence](#).*

*Please enjoy your stay!*

Shared Files	Project Reference Folder	Project Calendar	RFI Management	Meeting Minutes	Issues
SR 710 Inbox	SR 710 Team Directory	SiteManager\LIMS	Shop Drawing Transmittals	Shop Drawing Logs	FTP Server

- map search tasks X
- SR 710 Interchange**
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  - Shop Drawing Transmittals
  - SiteManager\LIMS
  - SR 710 Inbox
  - SR 710 Interchange Doc Mgmt**
  - SR 710 Team Directory
  - Recycle Bin

## SR 710 Interchange Doc Mgmt

an approval process created by Robert Laurence on 17 Nov 04

new entry  **Select**

### SR 710 Interchange Document Management E8F00



232074-2-52-01

page 1 of 3

#### Approval Steps

Step	Size
<input type="checkbox"/> Pending	1 entry
<input type="checkbox"/> Ready for Export	235 entries
<input type="checkbox"/> Exported to FDOT DMS	0 entries

new step access notification  
select all copy link delete mark read mark unread

#### All Entries

Group by		Document Group / Type					
	Document Number	Document Name	Document Group / Type	Document Date:	Received Date:	Addressed to:	Received
<b>COMPLIANCE - ADMINISTRATION/CORRESPONDENCE 1</b>							
<input type="checkbox"/>	2	Contractor Certification of EEO/AA and DBE Policy	COMPLIANCE - ADMINISTRATION/CORRESPONDENCE	20 Nov 2003	30 Jul 2004	FILE	Berger Develo

### SR 710 Interchange Doc Mgmt Create Database Entry

The following fields are required:

- Document Name
- Financial ID#
- Contract Number
- Document Group / Type

**Refer to: "Steps to Creating a Database Entry" for Required Fields**



Document Number	(set automatically)	
Entry Date	<input type="text"/>	
Document Name	<input type="text"/>	
Spec Section	<input type="text"/>	
Financial ID#	232074-2-52-01	<input type="text"/>
Contract #	E8F00	<input type="text"/>
Structure No.	<input type="text"/>	
Document Group / Type	<input type="text"/>	
Subject/Description:	<input type="text"/>	
Document Date:	<input type="text"/>	
Retention:	15	<input type="text"/>
Close out Date	<input type="text"/>	
Received Date:	<input type="text"/>	
Addressed to:	<input type="text"/>	
Received From:	<input type="text"/>	
Follow-up Action Required	No	<input type="text"/>
Action Description	<input type="text"/>	
Person Responsible	<input type="text"/>	
Action Due Date	<input type="text"/>	

- map search tasks X
- SR 710 Interchange**
  - FTP Server
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  - RFI Management
  - Shared Files
  - Shop Drawing Logs
  - Shop Drawing Transmittals
  - Site/Manager/LIMS
  - SR 710 Inbox
  - SR 710 Interchange Doc Mgmt
  - Pending
- Ready for Export
- Exported to FDOT DMS
- SR 710 Team Directory
- Recycle Bin
- next unread
- send alert
- help

edit

a database entry created by Peter Bodine on 26 Apr 05

summary

Document Number	237	
Entry Date		←
Document Name		←
Spec Section		
Financial ID#	232074-2-52-01	←
Contract #	E8F00	←
Structure No.		
Document Group / Type		←
Subject/Description:		←
Document Date:		←
Retention:	15	
Close out Date		
Received Date:		←
Addressed to:		←
Received From:		←
Follow-up Action Required	No	
Action Description		
Person Responsible		
Action Due Date		
Modified Date		
Modified by:		
Remarks		
Doc Attachment		

**Required Fields**



create add file mark read commands

Log	date	member	field	change
	26 Apr 05	Peter Bodine	Financial ID#	232074-2-52-01
	26 Apr 05	Peter Bodine	Contract #	E8F00
	26 Apr 05	Peter Bodine	Retention:	15
	26 Apr 05	Peter Bodine	Follow-up Action Required	No

Approve approve

OK

Cancel

## Add File

Pick the file you want to add.

- Track versions
- Upload, then add another
- Private draft

 For more information, see [Files](#).

# Florida's Turnpike Enterprise

my ProjectSolve > SR 710 Interchange > SR 710 Interchange Doc Mgmt > Pending >

- map
- search
- tasks
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edit

a database entry created by Peter Bodine on 26 Apr 05

summary

Document Number	237
Entry Date	
Document Name	
Spec Section	
Financial ID#	232074-2-52-01
Contract #	E8F00
Structure No.	
Document Group / Type	
Subject/Description:	
Document Date:	
Retention:	15
Close out Date	
Received Date:	
Addressed to:	
Received From:	
Follow-up Action Required	No
Action Description	
Person Responsible	
Action Due Date	
Modified Date	
Modified by:	
Remarks	

Doc Attachment


Project Solve pdf Demo.pdf


create add file mark read commands

Log	date	member	field	change
	26 Apr 05	Peter Bodine		added "Project Solve pdf Demo.pdf"
	26 Apr 05	Peter Bodine	Financial ID#	232074-2-52-01

