

# Document Exchange Task Force

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NEBRASKA

Good Life. Great Journey.

DEPARTMENT OF TRANSPORTATION

- **Background**

- March 19, 2021

- AGC/NDOT Liaison meeting

- Discussion of document management issues experienced by the industry

- NDOT agreed to develop a joint task force with AGC to look at issues and possible solutions

- Sponsors:

- Katie Wilson AGC-NE Exec Director

- Jim Knott, NDOT Construction Division Engineer

- Mick Syslo, M&R Engineer (now Roadway Design) Brandon Varilek is the new M&R Engineer

- Devin Townsend, NDOT Chief Technology Officer



## • **Task Force Charter – Key Points**

- ID business needs for document transfer
- Determine if technology in existing NDOT portfolio could resolve business needs identified, explore other technology if not.
- Project documents created starting at Award of contract and ending when project is released to NDOT Controller
- Not to select, implement, or test technologies
- Deliverables:
  - List of issues to be addressed
  - Prioritized needs
  - Recommend possible resolutions



- **Team Leaders**

- Tom Crockett, Hawkins Construction
- Lorraine Legg, NDOT Construction Division

- **Team Members**

- Chris Winkel, Knife River
- April Seamann, ME Collins Contracting
- Alex Micek, Hawkins Construction
- Mark Fischer, NDOT M&R
- Ty Carlson, NDOT BTSD
- Jason Lehn, NDOT D8 DCE
- Brent Long, NDOT D8 PM

- **Team Support**

- Rachel Kilcoin, NDOT Strategic Planning PIC



## • Approach

- Survey Contractors and NDOT (responsible for Project Management, Final Records)
  - Goal of the survey was to identify business needs for document transfer between NDOT and Contractors
  - Survey confirmed that both Contractors and NDOT personnel felt that there are issues regarding the management of project-related documents



- **Approach**

- Functional requirements
  - The team reviewed the survey responses and developed functional requirements
  - The team prioritized functional requirements
  - BTSD used functional requirements to develop technical requirements to assess technological solutions
  - The team approved technical requirements



## • **Functional requirements**

1. Documentation associated with Pay Items to be uploaded only once by vendor, prime, or subcontractor
2. Save time for both Contractor and NDOT – not increase processes
3. Single storage location for contractor and subcontractors to upload documents, need the ability to upload and view
4. Ability for subcontractor or supplier to upload certifications. Prime can manage their responsibilities by viewing uploaded documents.

## • **Functional requirements**

5. Transparency (accessibility) that can be configured based on document type, file folder type. (Stays in the folder and can only be viewed by those authorized)
6. Workflow capability for notifications when a document is either complete or needs to be addressed.
7. NDOT able to set access authority based on role – e.g., prime, subcontractor, vendor





# • Approach

- Technical requirements
- Demonstrations
  - Sharefile
  - Doc Express
  - OnBase
- Scoring – last week

## • **Next Steps**

- Team Recommendations - pending
- Develop team recommendations into a report to be delivered to the Task Force Sponsors.
- Sponsors will make recommendations to NDOT Administration

# Questions?

