Functional Area – Agreements

The Agreements functional area of the Utility Module allows a user to create assignments for both UAOs and FDOT staff to review Agreements. Once Agreements are ready for execution, assignments can be created for the UAO, DUA/E, Legal and Management to sign off. Users will be able to provide certifications through this functional area as well. UAOs will be able to respond to assignments by attaching a document. These assignments can be tracked by UAO until all responses are received.

NOTE: Ability to Create/Assign/Edit are privileges that must be granted.
Only Internal Users can access the Project Level view.

The Agreements functional area is accessible two ways. The first is at a Project Level which allows the user to view the Agreements functional area along with all the other functional areas for one specific project. This view is restricted to only internal users. The second is at a System Level which allows the user to view the Agreements functional area for multiple project at once.

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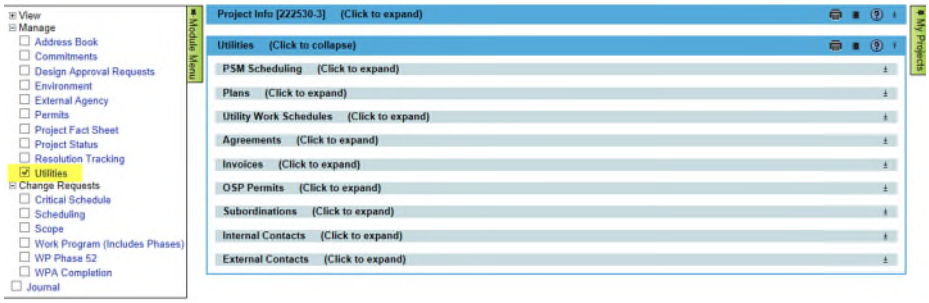
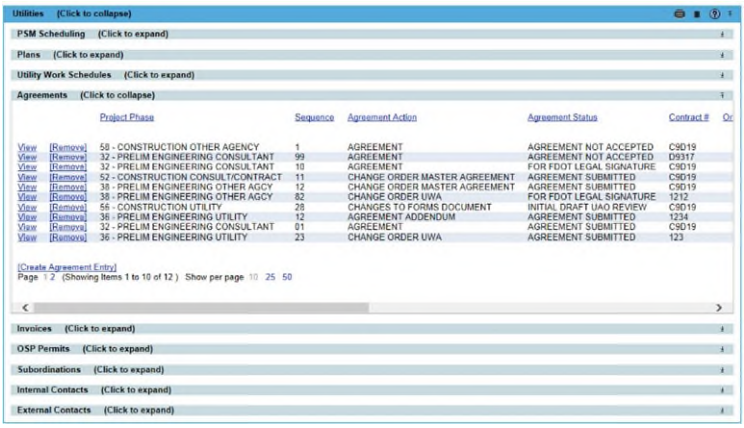
Project Level

All Agreements entries at this access level are for one specific project. The specific project is identified in the title bar for the Project Info module.

1. Select the Utility module from the Module Menu. Then Utility module will appear with all functional areas collapsed



2. Click the Agreements bar to expand.



Create Agreements Entry

1. Click “Create Agreements Entry” link.

2. Complete the entry form.
   ⚠ indicates the field entry is required for creation.

Project:	The 7 digit Item/Item Segment the entry is for
Project Phase:	The 2 digit Funding Phase (ex. 52 – Construction)
Sequence:	The 2 digit Funding Sequence (ex. 01)

NOTE: These three sets combined create the Financial Project Number (ex. 22253025201)

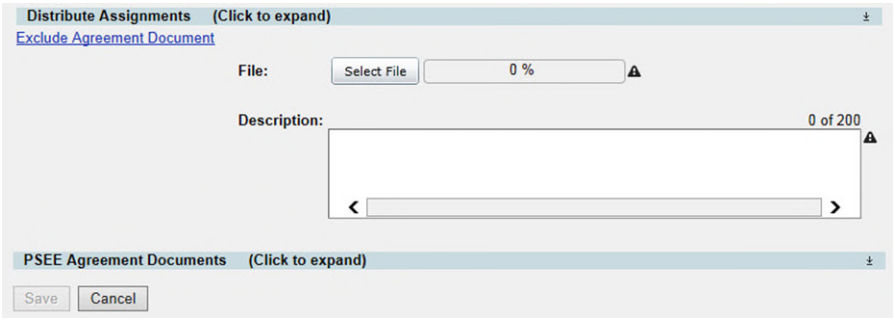
Agreements Action:	The action necessary at the time of the entry.
Agreements Status:	The status at the time of entry.
Contract #:	The number assigned to the agreement.
Original Contract Amount:	Will populate based on the valid Contract # added.
Current Contract Amount:	Will populate based on the valid Contract # added.
Execution Date:	Will populate based on the valid Contract # added.
Utility Notice to Proceed Date:	The date time/billing can be applied to the contract.
UAO:	The Utility Company for the Agreements
Utility Project Manager:	The person responsible to oversee the consultants who are performing utility coordination. (In some projects the Utility Project Manager and Utility Coordinator may be the same person).

Utility Coordinator: The person responsible for coordinating with Utility Company.
Operations Utility Coordinator: The FDOT construction contact for the project.

If the incorrect user is selected for Project Manager, Coordinator or Operations Utility Coordinator, click Clear to reset.

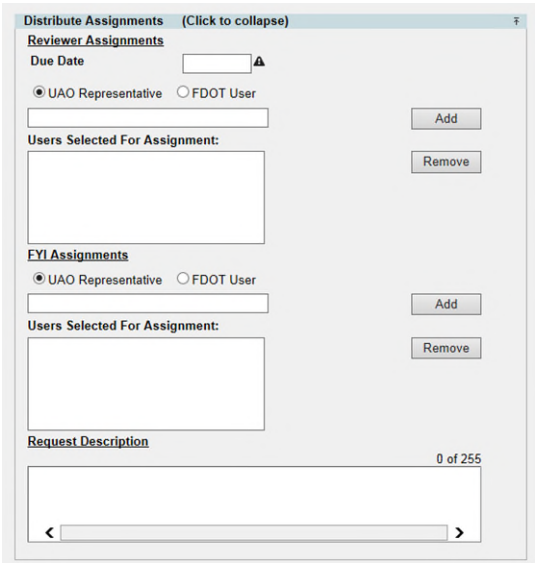
3. Click "Include Agreements Document" to upload related documents.

4. Click the "Select File" button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



NOTE: If uploading only 1 document to this entry, continue to the next step. If uploading 2 or more documents. Click Save. Repeat step 3 & 4. Continue to the step for adding assignments when the last document has been uploaded. This will limit the automated emails for the reviewers and assure all attachments are available when the review assignment is received.

5. Click the "Distribute Assignments" bar to expand to add assignments. There are 2 types of assignments. ***Reviewer Assignments*** are users who are expected to review the entry and/or attached documents and provide a response. ***FYI Assignments*** are just to make a user aware of an entry but no response will be received.



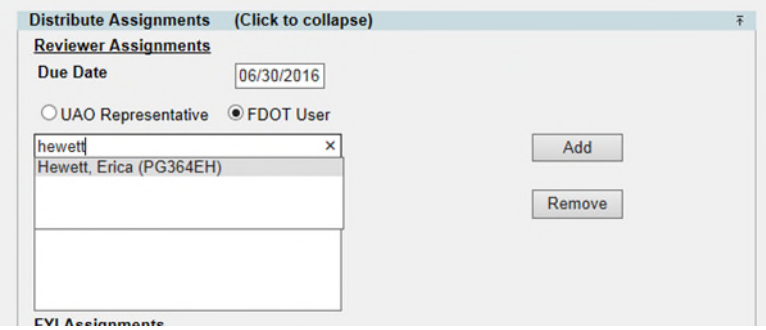
6. Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

NOTE: This due date is part of the automated emails generated by ProjectSuite. Reviewers with an uncompleted assignment will receive an email: 1 week prior to due date, on the due date, and a weekly past due email.

7. Select the appropriate button if the user is a UAO Representative or FDOT User.

If adding a UAO Representative – in the box type the company they represent and then select the appropriate Representative. (ex. AT&T – John Doe)

If adding a FDOT User – in the box type their name and select the appropriate user.

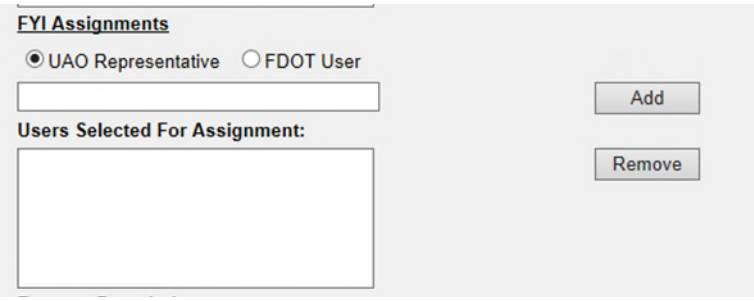


8. Click Add. This will add the user to the box "Users Selected for Assignment".

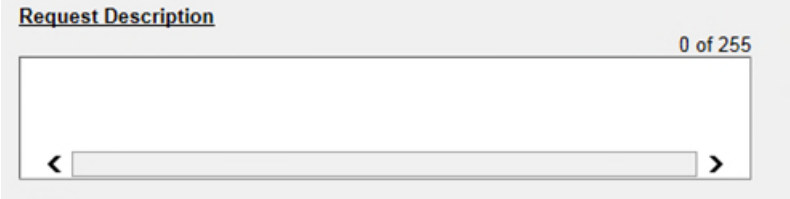
9. Repeat steps 7 & 8 until all reviewers have been added.

10. To remove a reviewer that was added in error, click the Remove button.

11. In the FYI assignments section, follow steps 7 – 10 to add as many FYI users as needed.



12. In the Request Description, add a message to the reviewers. This message would be similar to the instructions that would be given in the body of an email.



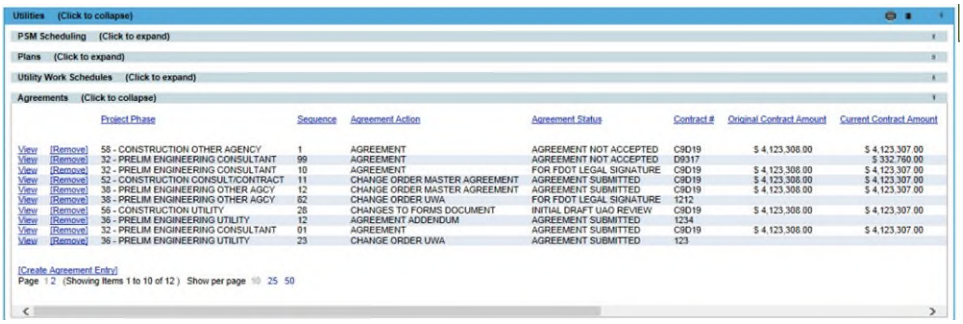
13. Click Save.

14. An email is sent to each reviewer assignment as well as any user who has subscribed for notification.

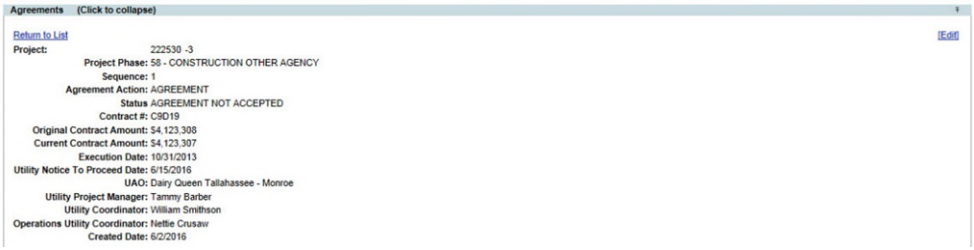
Edit Agreements Entry

This process would be used to make changes to informational fields, include related comments, add additional assignments or documents to existing Agreements Entry.

1. In the Agreements submodule of the Utility Module, Select “View” next to existing Entry needing modifications.



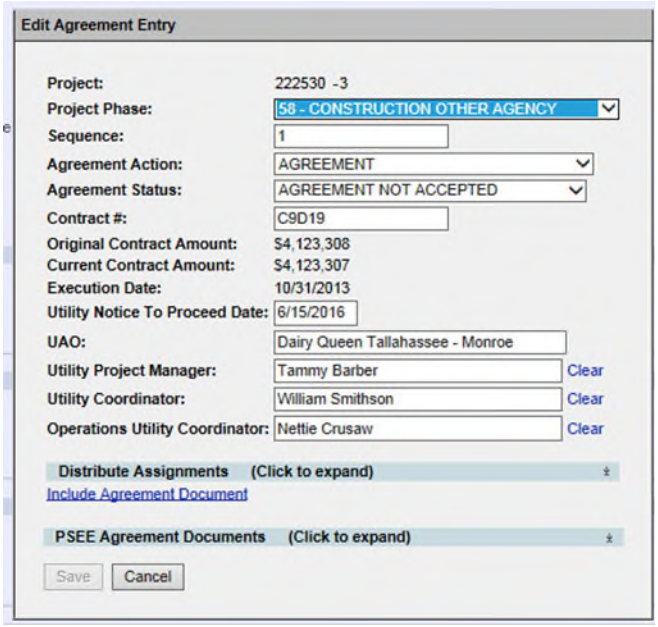
2. Click edit in the top right corner of the Agreements submodule.



3. The Edit Agreements Entry box will open. Modify the areas necessary. Refer to the Create Agreements Entry for detailed instructions on adding Assignments and Documents.

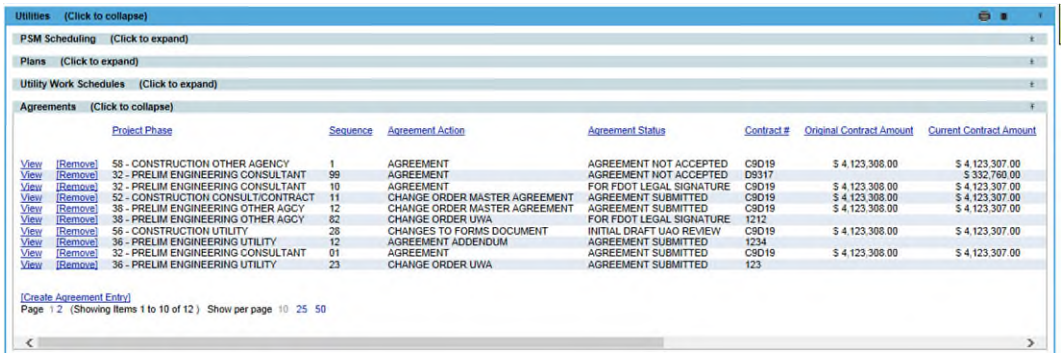
4. When all changes have been made, click save.

5. Email notifications will be sent to new assignments that were made and to any user who subscribed to the notification.

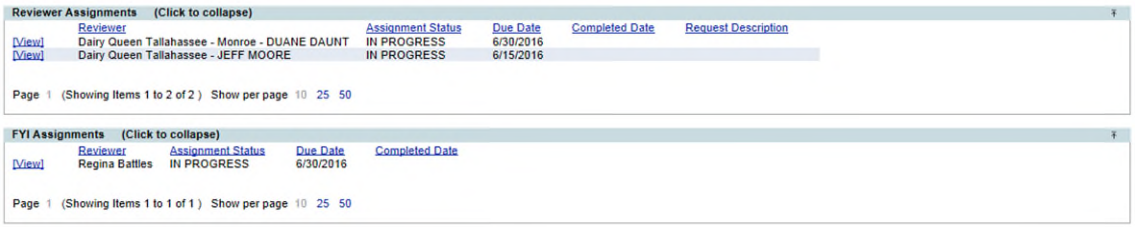


Update Reviewer / FYI Assignments Status

1. In the Agreements submodule of the Utility Module, Select “View” next to existing Entry needing edits to the assignments.

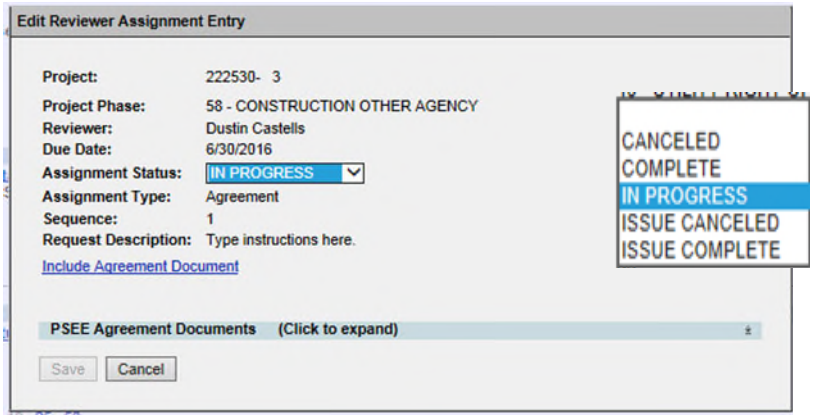


2. Click view next to the Assignment



3. The “Edit Reviewer Assignment Entry” box will appear.

   From the dropdown, select the assignment status to update.

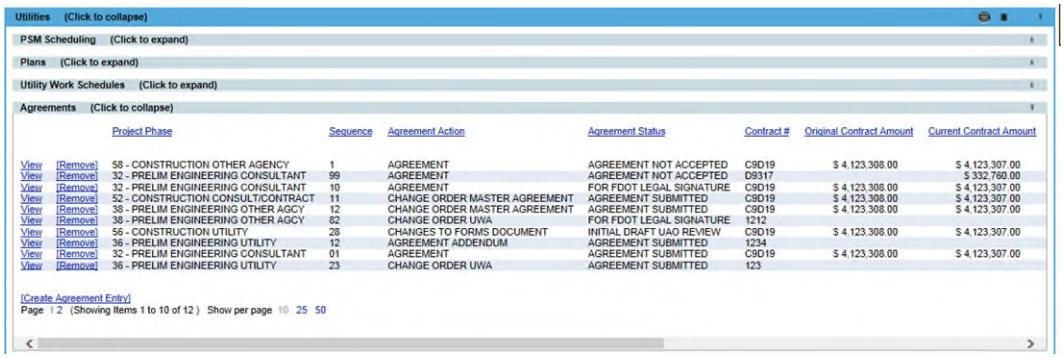


4. Click Save.

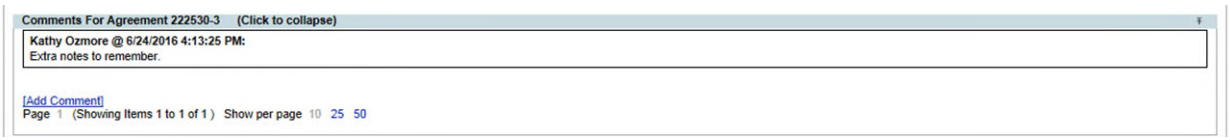
5. Email notification will be sent to the user whose assignment was updated and any user who subscribed to the notification.

Add Comments to Agreements Entry

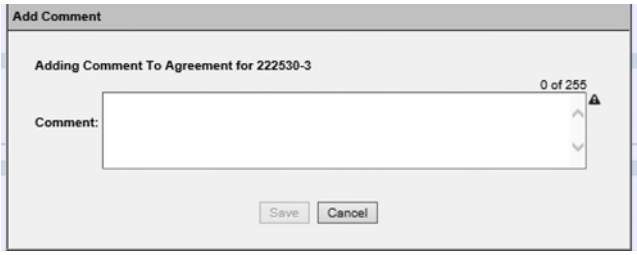
1. In the Agreements submodule of the Utility Module, Select “View” next to existing Entry needing edits to the assignments.



2. Scroll to the Comments area and click Add Comment



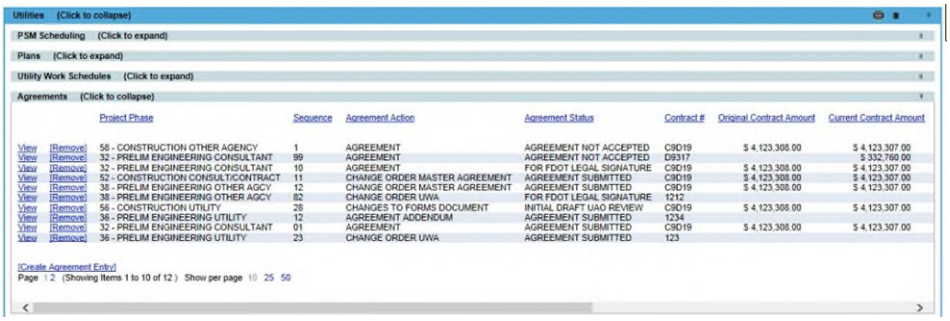
3. Type the comments in the box and click Save.



NOTE: Comments CAN NOT be edited or removed.

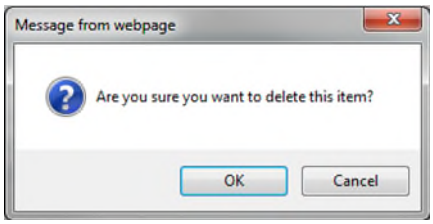
Remove Agreements Entry

1. In the Agreements submodule of the Utility Module, locate the existing Entry needing to be removed.



2. Click Remove.

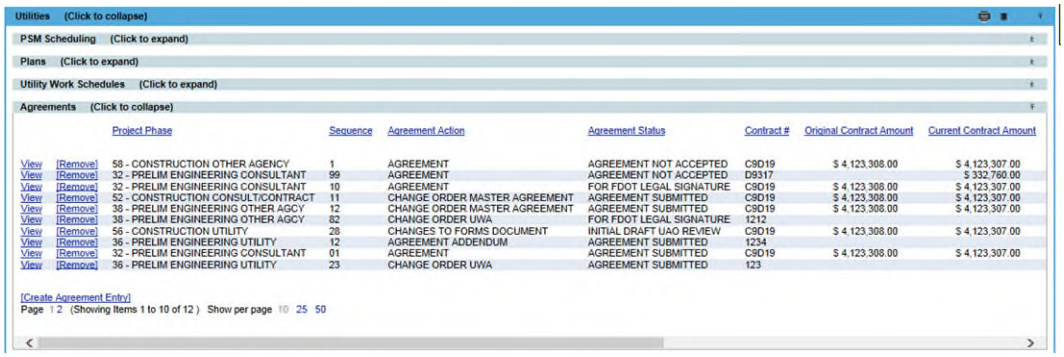
3. Confirm the removal.



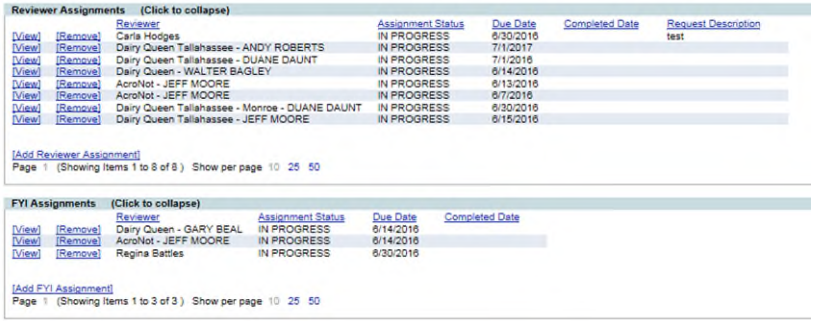
NOTE: This action CAN NOT be undone.

Remove Assignments from existing Agreements Entry

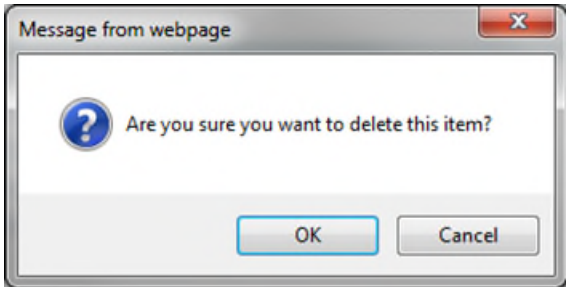
1. In the Agreements submodule of the Utility Module, Select "View" next to existing Entry needing assignments removed.



2. Click Remove next the appropriate assignment.



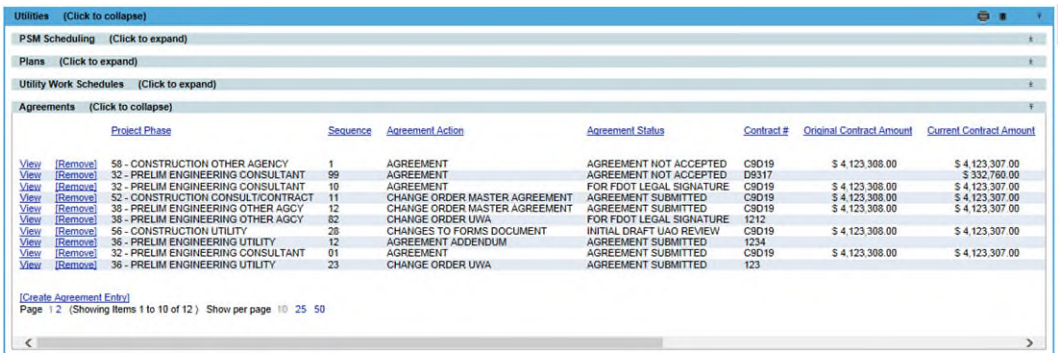
3. Confirm the removal.



View Agreements Entry

For internal users who do not have permissions to create, edit or remove.

1. In the Agreements submodule of the Utility Module, Select “View” next to existing Entry needing edits to the assignments.

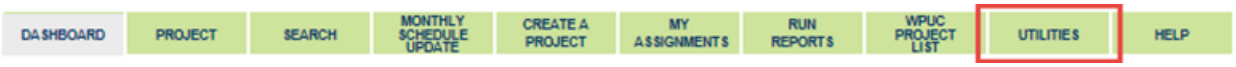


2. Scroll through to see the entire Agreements Entry details in the functional areas.

System Level

Agreements entries at this access level are grouped by functional area and can be for multiple projects. Both Internal and External users have access to this view within the Utility Module, with the exception that External Users can only see those entries for the UAO they are associated too.

1. Select Utilities button from the system toolbar.



2. The Utility toolbar will appear. Select Agreements button.

Create Agreements Entry

1. Click “Create Agreements Entry” link.

2. Complete the entry form.
   ⚠ indicates the field entry is required for creation.

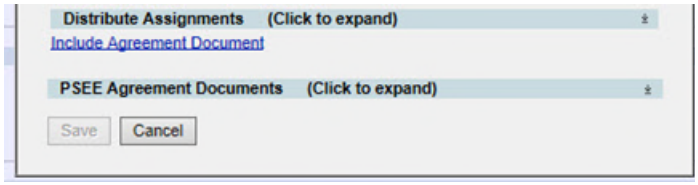
Project: The 7 digit Item/Item Segment the entry is for
Project Phase: The 2 digit Funding Phase (ex. 52 – Construction)
Sequence: The 2 digit Funding Sequence (ex. 01)

NOTE: These three sets combined create the Financial Project Number (ex. 22253025201)

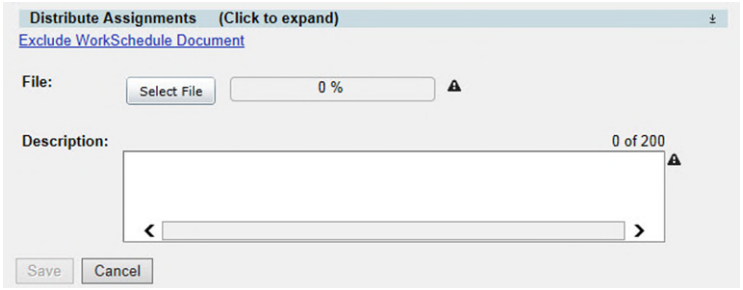
Agreements Action:	The action necessary at the time of the entry.
Agreements Status:	The status at the time of entry.
Contract #:	The number assigned to the agreement.
Original Contract Amount:	Will populate based on the valid Contract # added.
Current Contract Amount:	Will populate based on the valid Contract # added.
Execution Date:	Will populate based on the valid Contract # added.
Utility Notice to Proceed Date:	The date time/billing can be applied to the contract.
UAO:	The Utility Company for the Agreements
Utility Project Manager:	The person responsible to oversee the consultants who are performing utility coordination. (In some projects the Utility Project Manager and Utility Coordinator may be the same person).
Utility Coordinator:	The person responsible for coordinating with Utility Company.
Operations Utility Coordinator:	The FDOT construction contact for the project.

If the incorrect user is selected for Project Manager, Coordinator or Operations Utility Coordinator, click Clear to reset.

3. Click "Include Agreements Document" to upload related documents.

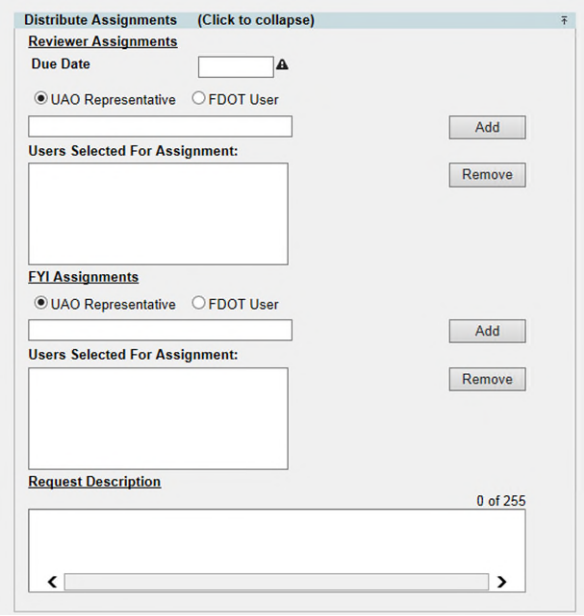


4. Click the "Select File" button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



NOTE: If uploading only 1 document to this entry, continue to the next step. If uploading 2 or more documents. Click Save. Repeat step 3 & 4. Continue to the step for adding assignments when the last document has been uploaded. This will limit the automated emails for the reviewers and assure all attachments are available when the review assignment is received.

5. Click the "Distribute Assignments" bar to expand to add assignments. There are 2 types of assignments. ***Reviewer Assignments*** are users who are expected to review the entry and/or attached documents and provide a response. ***FYI Assignments*** are just to make a user aware of an entry but no response will be received.



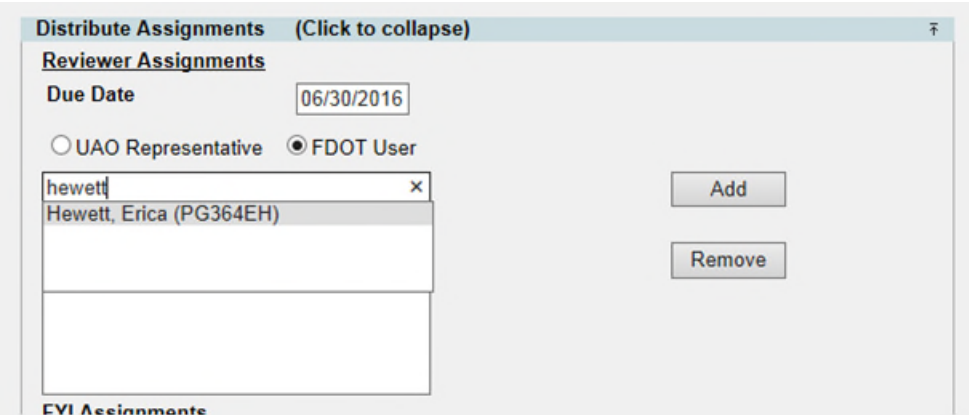
6. Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

   NOTE: This due date is part of the automated emails generated by ProjectSuite. Reviewers with an uncompleted assignment will receive an email: 1 week prior to due date, on the due date, and a weekly past due email.

7. Select the appropriate button if the user is a UAO Representative or FDOT User.

   If adding a UAO Representative – in the box type the company they represent and then select the appropriate Representative. (ex. AT&T – John Doe)

   If adding a FDOT User – in the box type their name and select the appropriate user.



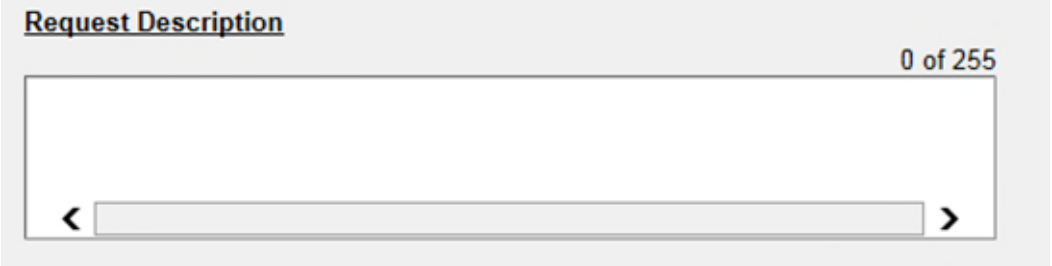
8. Click Add. This will add the user to the box "Users Selected for Assignment".

9. Repeat steps 7 & 8 until all reviewers have been added.

10. To remove a reviewer that was added in error, click the Remove button.

11. In the FYI assignments section, follow steps 7 – 10 to add as many FYI users as needed.

12. In the Request Description, add a message to the reviewers. This message would be similar to the instructions that would be given in the body of an email.



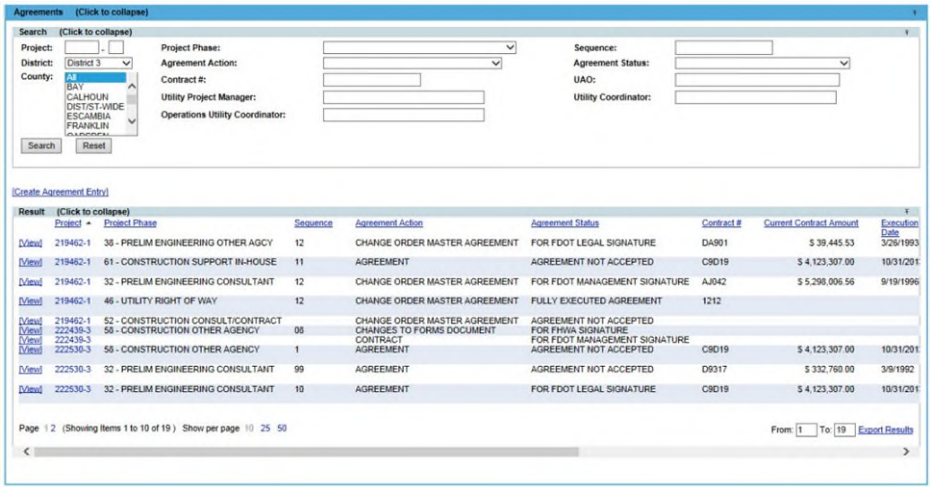
13. Click Save.

14. An email is sent to each reviewer assignment as well as any user who has subscribed for notification.

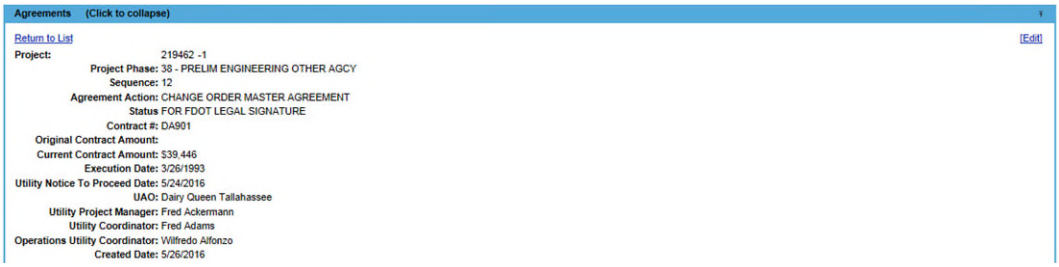
Edit Agreements Entry

This process would be used to make changes to informational fields, include related comments, add additional assignments or documents to existing Agreements Entry.

1. In the Results submodule of Agreements section, Select "View" next to existing Entry needing modifications.



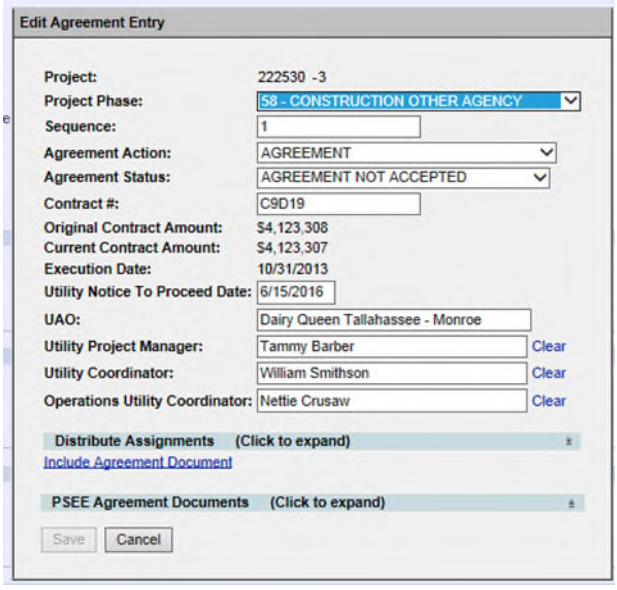
2. Click edit in the top right corner of the Agreements entry.



3. The Edit Agreements Entry box will open. Modify the areas necessary. Refer to the Create Agreements Entry for detailed instructions on adding Assignments and Documents.

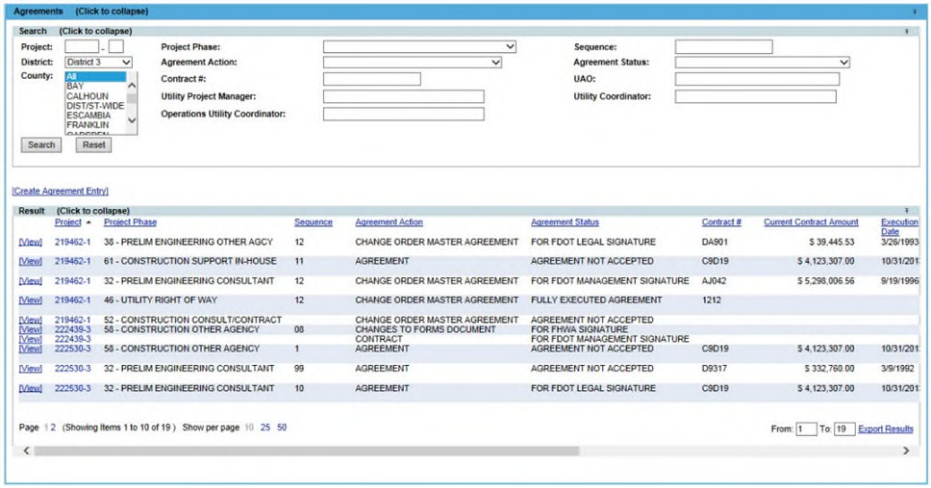
4. When all changes have been made, click save.

5. Email notifications will be sent to new assignments that were made and to any user who subscribed to the notification.

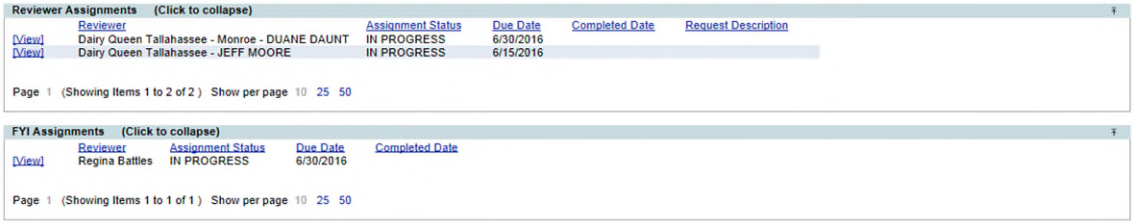


Update Reviewer / FYI Assignments Status

1. In the Results submodule of Agreements section, Select "View" next to existing Entry needing modifications.



2. Click view next to the Assignment



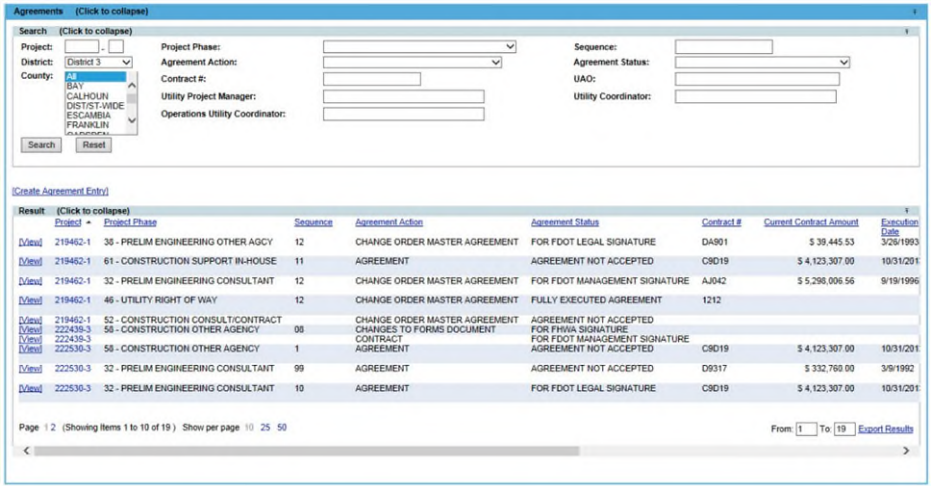
3. The "Edit Reviewer Assignment Entry" box will appear. From the dropdown, select the assignment status to update.

4. Click Save.

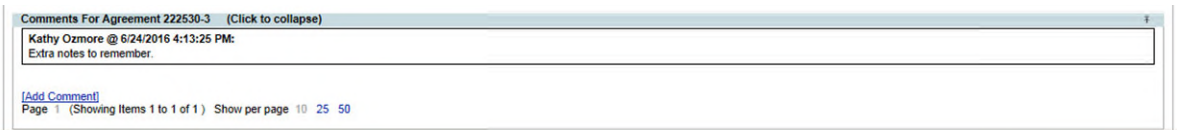
5. Email notification will be sent to the user whose assignment was updated and any user who subscribed to the notification.

Add Comments to Agreements Entry

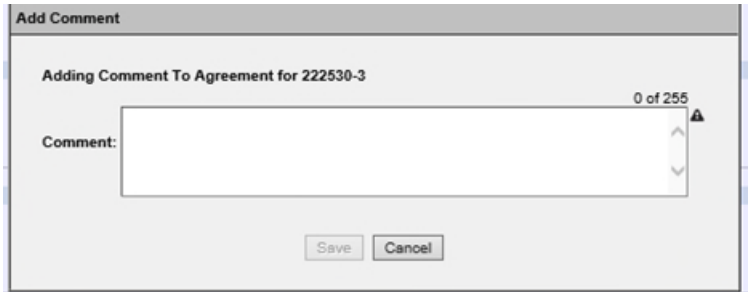
1. In the Results submodule of Agreements section, Select "View" next to existing Entry needing modifications.



2. Scroll to the Comments area and click Add Comment



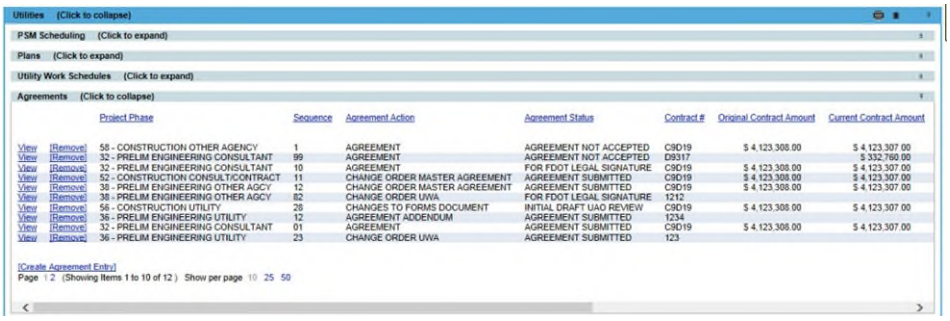
3. Type the comments in the box and click Save.



NOTE: Comments CAN NOT be edited or removed.

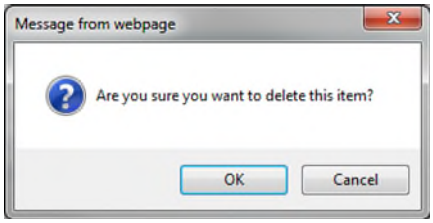
Remove Agreements Entry

1. In the Agreements submodule of the Utility Module, locate the existing Entry needing to be removed.



2. Click Remove.

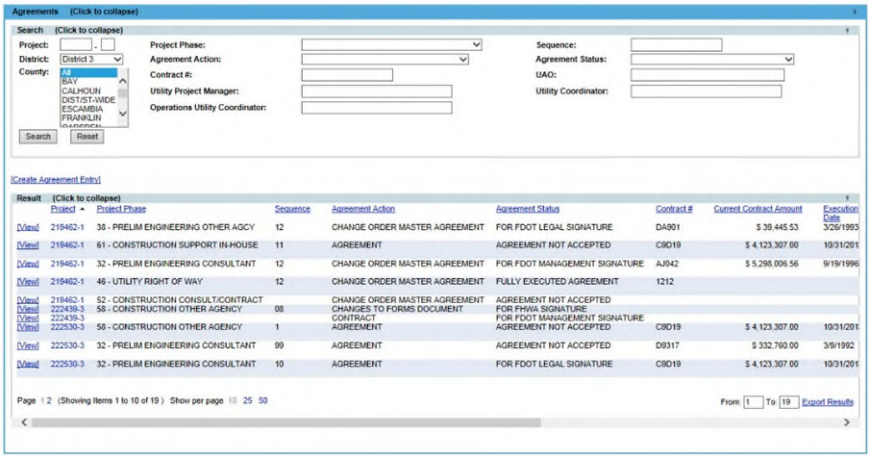
3. Confirm the removal.



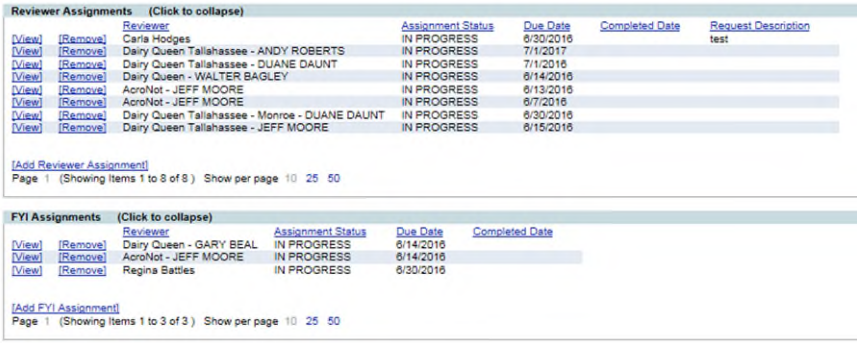
NOTE: This action CAN NOT be undone.

Remove Assignments from existing Agreements Entry

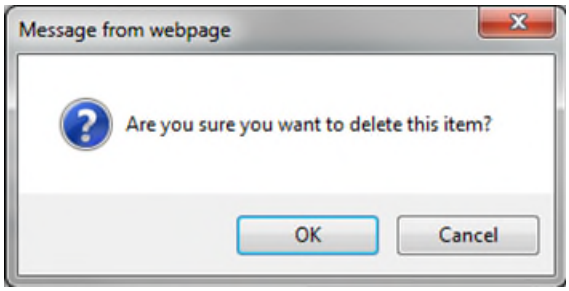
1. In the Results submodule of Agreements section, Select “View” next to existing Entry that need assignments removed.



2. Click Remove next the appropriate assignment.



3. Confirm the removal.

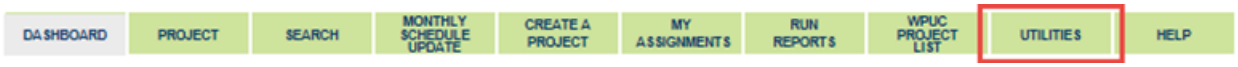


View Agreements Entry

For internal and external users who do not have permissions to create, edit or remove.

1. Select Utilities button from the system toolbar.

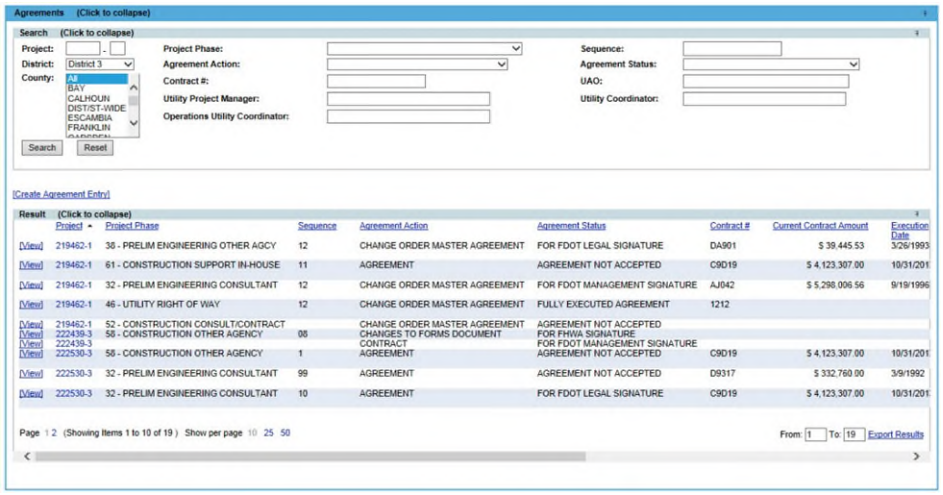
   If the user is Internal the Utility button on the right side of the toolbar.



   If the user is External, the system toolbar will only have Utilities and Help.

2. The Utility toolbar will appear. Select Agreements button.

3. In the Results submodule of Agreements section, Select “View” next to existing Entry that is appropriate.



4. Scroll through to see the entire Agreements Entry details.