Functional Area – Subordinations

The Subordinations functional area of the Utility Module allows a user to create assignments for both UAOs and FDOT staff to review Subordinations. Once Subordinations are ready for execution, assignments can be created for the UAO, DUA/E, Legal and Management to sign off. This includes returning Subordinations for corrections, and alerting a UAO that Subordinations have been recorded. This also includes being able to route Subordinations for review to multiple FDOT staff if applicable. 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 Subordinations functional area is accessible two ways. The first is at a Project Level which allows the user to view the Subordinations 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 Subordinations functional area for multiple project at once.

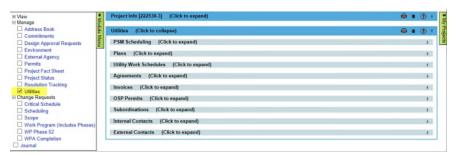
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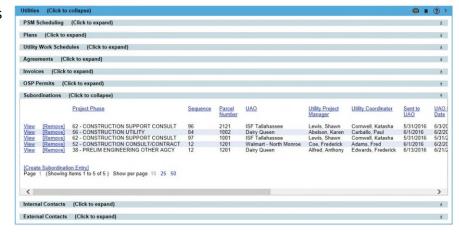
Project Level Access

All Subordinations 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



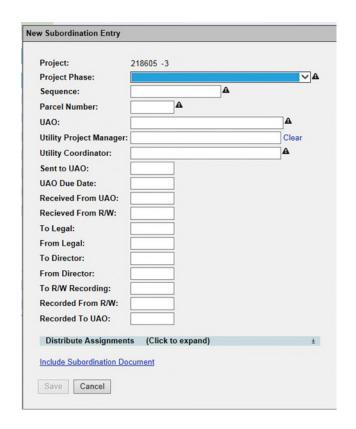
2. Click the Subordinations bar to expand.



Create Subordinations Entry

1. Click "Create Subordinations Entry" link.

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)

Parcel Number: The RW number assigned to identify the property.

UAO: The Utility Company for the Subordinations

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.

Sent to UAO: Date FDOT sent the document to the Utility Company for

review and signatures.

UAO Due Date: Date FDOT expects the document returned

Received from UAO Date FDOT actually receives the document from the Utility

Company

Received from R/W Date FDOT RW staff provides the document to the FDOT

Utility Staff.

To / From Legal: Tracks the time FDOT Legal reviews the document.

To / From Director: Tracks the time FDOT Director reviews the document. (This

time is sometimes included in the FDOT Legal review time.)

To R/W Recording Date FDOT send document to be officially recorded.

Recorded from R/W: Date FDOT Utility Staff receives a copy of the recorded

document

Recorded to UAO: Date FDOT Utility Staff send to recorded copy of the

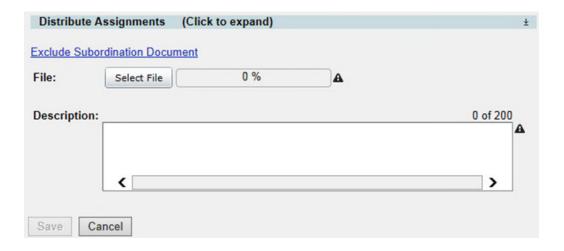
document to the Utility Company.

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

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

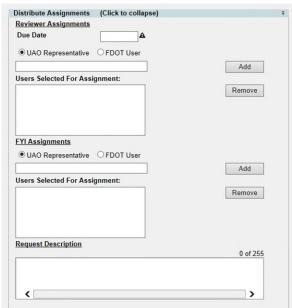


4. Click the "Select File" button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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.

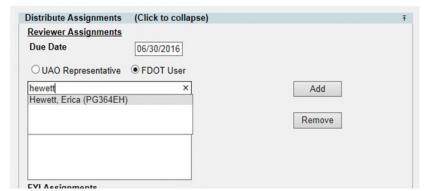


6. Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

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)

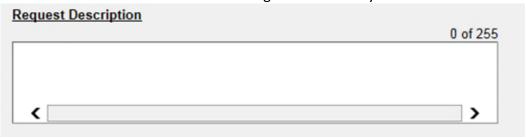


If adding a FDOT User – in the box type their name and select the appropriate user.

- 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.

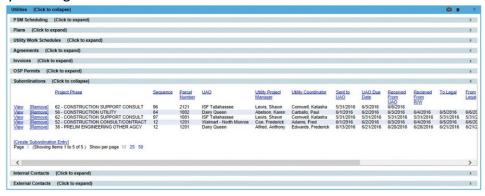


- 13. Click Save.
- 14. An email is sent to each reviewer assignment as well as any user who has subscribed for notification.

Edit Subordinations Entry

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

1. In the Subordinations submodule of the Utility Module, Select "View" next to existing Entry needing modifications.



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



- 3. The Edit Subordinations Entry box will open. Modify the areas necessary. Refer to the Create Subordinations 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.

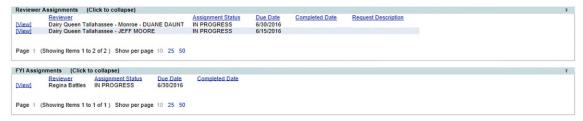


Update Reviewer / FYI Assignments Status

1. In the Subordinations 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.

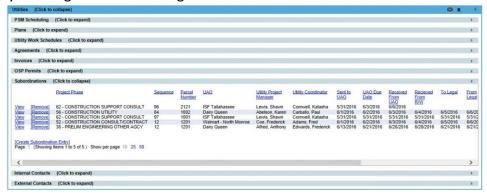
From the dropdown, select the assignment status to update.



- 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 Subordinations Entry

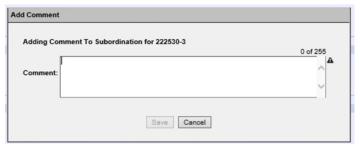
1. In the Subordinations submodule of the Utility Module, Select "View" next to existing Entry needing edits to the assignments.



Scroll to the Comments area and click Add Comment



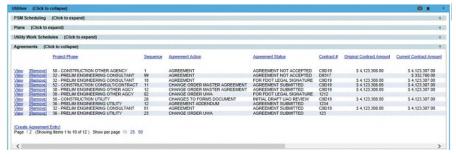
3. Type the comments in the box and click Save.



NOTE: Comments CAN NOT be edited or removed.

Remove Subordinations Entry

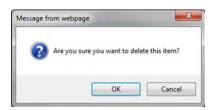
1. In the Subordinations submodule of the Utility Module, locate the existing Entry needing to be removed.



2. Click Remove.



3. Confirm the removal.



NOTE: This action CAN NOT be undone.

Remove Assignments from existing Subordinations Entry

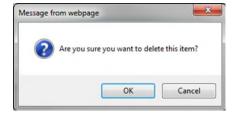
1. In the Subordinations submodule of the Utility Module, Select "View" next to existing Entry needing assignments removed.



2. Click Remove next the appropriate assignment.



3. Confirm the removal.



View Subordinations Entry

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

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

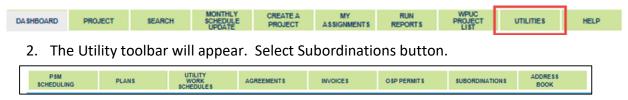


2. Scroll through to see the entire Subordinations Entry details in the functional areas.

System Level Access

Subordinations 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.



Create Subordinations Entry

1. Click "Create Subordinations 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)

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Recorded to UAO: Date FDOT Utility Staff send to recorded copy of the

document to the Utility Company.

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

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

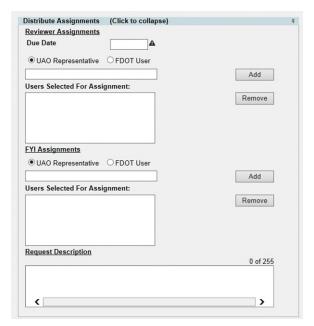


4. Click the "Select File" button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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.



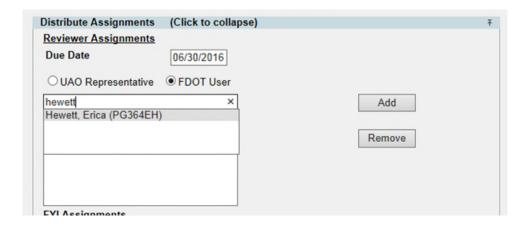
6. Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

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)

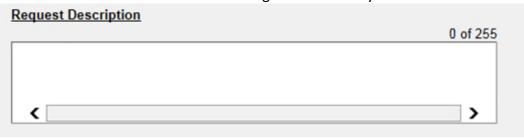
If adding a FDOT User – in the box type their name and select the appropriate user.



- 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.

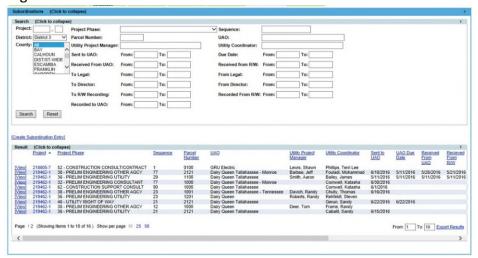


- 13. Click Save.
- 14. An email is sent to each reviewer assignment as well as any user who has subscribed for notification.

Edit Subordinations Entry

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

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



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

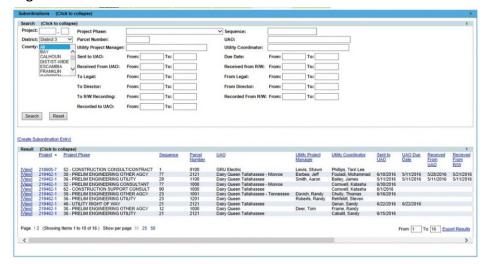


- 3. The Edit Subordinations Entry box will open. Modify the areas necessary. Refer to the Create Subordinations Entry for detailed instructions on adding Assignments and Documents.
- 4. When all changes have been made, click save.
- 5. Email notifications will be sent to new assignments that were made and to any user who subscribed to the notification.



Update Reviewer / FYI Assignments Status

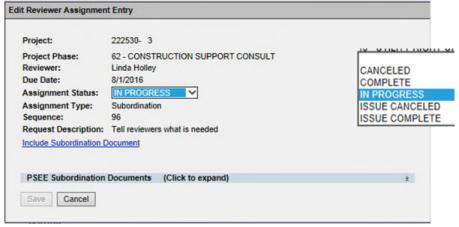
1. In the Results submodule of Subordinations section, Select "View" next to existing Entry needing modifications.



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.

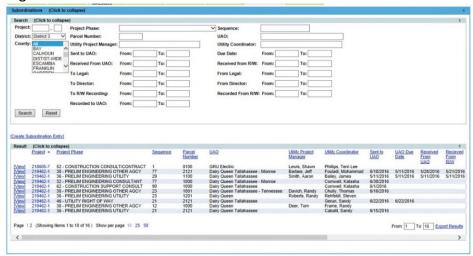


4. Click Save.

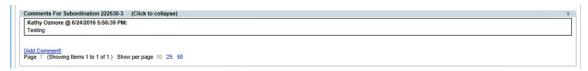
5. Email notification will be sent to the user whose assignment was updated and any user who subscribed to the notification.

Add Comments to Subordinations Entry

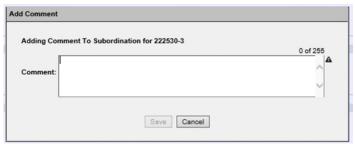
1. In the Results submodule of Subordinations section, Select "View" next to existing Entry needing modifications.



2. Scroll to the Comments area and click Add Comment



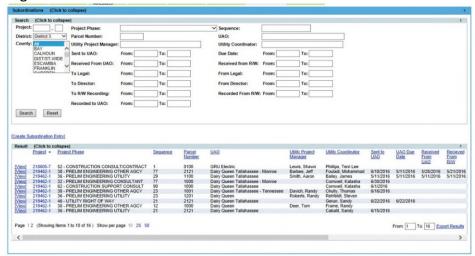
3. Type the comments in the box and click Save.



NOTE: Comments CAN NOT be edited or removed.

Remove Subordinations Entry

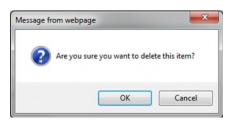
1. In the Results submodule of Subordinations section, Select "View" next to existing Entry needing modifications.



4. Click Remove.



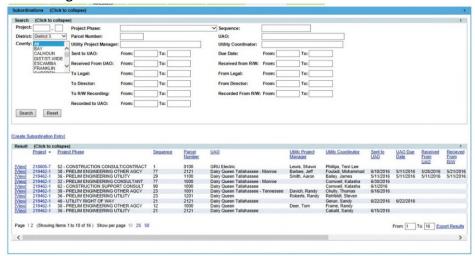
2. Confirm the removal.



NOTE: This action CAN NOT be undone.

Remove Assignments from existing Subordinations Entry

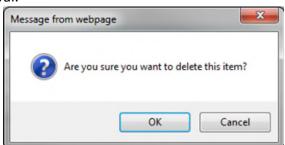
1. In the Results submodule of Subordinations section, Select "View" next to existing Entry that need assignments removed.



2. Click Remove next the appropriate assignment.



3. Confirm the removal.



View Subordinations 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.



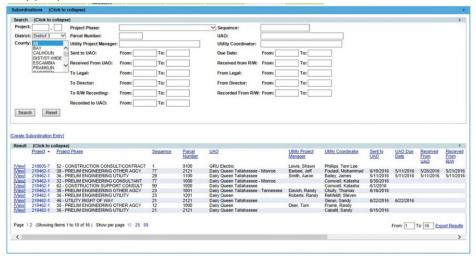
If the user is External, the system toolbar will only have Utilities and Help.



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



3. In the Results submodule of Subordinations section, Select "View" next to existing Entry that is appropriate.



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